DATASPELSBRANSCHEN
Swedish Games Industry

Swedish Games Industry **2024**

Game Developer Index

Perfect Random – Sulfur

Fifth Edition
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The Swedish Games Industry is the trade organisation for video game companies in Sweden. The organisation represents the industry as a whole through the industry associations Spelplan-ASGD (game developers, producers, education, academia and support members) and ANGI (publishers and distributors).

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Key Figures

Thunderful Gothenburg – SteamWorld Heist 2

Key Figures	2023	2022	2021	2020	2019
Number of companies	**1,010** (+8%)	**939** (+20%)	**785** (+18%)	**667** (+14%)	**586** (+14%)
Domestic Net Sales Swedish companies	**SEK 34,582** (+6%) **EUR 3,013** (-1.5%) **USD 3,259** (+1.5%)	**SEK 32,516** (+18%) **EUR 3,058** (+13%) **USD 3,212** (+0.1%)	**SEK 27,522** (+24%) **EUR 2,713** (+28%) **USD 3,207** (+33%)	**SEK 22,182** (+25%) **EUR 2,115** (+26%) **USD 2,410** (+28%)	**SEK 17,815** (+25%) **EUR 1,682** (+21%) **USD 1,883** (+15%)
Global Net sales MSEK Swedish companies	**90,429** (+5%)	**86,500** (+47%)	**58,887** (+70%)	**34,728** (+42%)	**24,551** (+28%)
Net sales per employee in Sweden TSEK	**3,805** (-1.2%)	**3,850** (+11%)	**3,465** (+3%)	**3,363** (+12%)	**3,007** (+12%)
Domestic Result Swedish companies MSEK	**1,128** (-94.2%)	**19,329** (+563%)	**2,917** (-56%)	**6,611** (+69%)	**3,903** (+39%)
Result in Swedish companies globally MSEK	**-11,395** (-158%)	**19,763**	**-1,246** (-117%)	**7,553** (+45%)	**5,225** (+52%)
Number of employees in Sweden	**9,089** (+8%)	**8,445** (+6%)	**7,944** (+20%)	**6,596** (+11%)	**5,925** (+11%)
Of which men	**6,888** (75.8%)	**6,429** (76.1%)	**6,169** (77.7%)	**5,186** (78.6%)	**4,699** (79%)
Of which women	**2,150** (23.7%)	**1,977** (23.4%)	**1,755** (22.1%)	**1,410** (21.4%)	**1,226** (21%)
Number of employees in Swedish companies abroad	**15,792** (-4%)	**16,494** (+48%)	**11,158** (+56%)	**7,177** (+121%)	**3,253** (+25%)

Key figures from the last five years. Change from previous years in brackets. We have used the aggregated annual exchange rate defined by the Riksbank, Sweden's central bank, for conversions from SEK.

Summary

Even in challenging economic times, the Swedish games industry stands strong. Despite reduced access to capital, more companies are starting up, more people are being hired and revenue is increasing.

2023 was a year of change in the Swedish games industry. Several game studios announced that they were closing down their operations, and the media reported on setbacks in the industry. Despite this, Swedish game industry remain stable. The industry is growing in terms of companies, revenue and employees.

At a local level, the challenges are greater, and for the individuals affected by redundancies and layoffs during the year, it is a situation they would rather have been without. There have been fewer investments and acquisitions, and there were more Swedish sellers than buyers. Access to capital is one of the industry's key challenges going forward.

At the same time, games are digital consumer services in a global market. There are few other products and services that are as global as games that sell directly to consumers. The players are the biggest and most important investors in the industry, purchasing games because they want the unique experience that only a good game can provide.

The *Game Developer Index 2024* compiles the Swedish companies' latest reported fiscal year (2023).

Sudden Snail – Esoteric Ebb

Key takeaways:

- The Swedish games industry's domestic revenue grew to SEK 34.6 billion in 2023, an increase of 6.4% in the Swedish companies. The growth is however dulled by the increasingly strong euro compared to SEK, converting to a slight decrease to EUR 3 billion. In total, including subsidiaries abroad, the Swedish industry had a revenue of SEK 90.4 billion (EUR 7.9B), an increase of 4.5%.

- More women work in the industry. In 2023, a total of 2,150 positions at game companies in the country were held by women, corresponding to 23.7% of the labour force.

- In Sweden, 644 new employees were hired in 2023, an increase of almost 8% of the industry total. Swedish game companies employed 9,089 people in 2023 in Sweden and 15,792 people abroad, globally it is a caused by divestments.

- 108 new companies were established in 2023, meaning there werea total of 1,010 game companies at the end of the year. Among these, 196 companies had five or more employees.

Mirage Game Studios – Space for Sale

- In 2023, seven investments and acquisitions reached our attention. In the first half of 2024, 16 investments and acquisitions were reported, two of which had a value of over SEK 1 billion. In twelve cases, Swedish companies were the sellers and in eleven cases the buyer was Swedish.

- Game companies paid SEK 1.8 billion in corporate tax on their profits and an additional SEK 1.9 billion in payroll taxes during the year. The players contributed SEK 1.7 billion in VAT through game purchases. In total, this translates to over EUR 470 million in domestic tax contributions from video games in Sweden.

- The industry is profitable, with a majority of the companies that generate revenue also making a profit.

- In 2023, total profits dropped to SEK 1.1 billion (EUR 98 million). This is mainly due to the performance of a few individual companies.

- 23 Swedish game companies are listed on the Swedish stock exchange. Their combined revenue was SEK 64 billion (EUR 5,6B) in 2023.

- Game development in Sweden accounted for an estimated 2,275 tCO_2e in 2022, equivalent to 0.015 percent of emissions from all Swedish industries.

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Morbid Games – Traum

Foreword

2023 Ought to Have Been a Really Bad Year for Swedish Game Companies

There was no shortage of crises in the headlines in 2023. Interest rates up, inflation skyrocketed, the Swedish currency down, share prices plummeted. Many redundancies and closures. There was also the breakthrough of so-called generative artificial intelligence, which some said would have major consequences for the labour market. War and unrest. 2023 ought to have been a really bad year for Swedish game companies.

The previous years had been unusually good. Low interest rates made it attractive for companies and owners to invest and take financial risk, for example bets on new projects. Many foreign investors came to the Swedish games industry. The shares of listed game companies rose and several made high-profile acquisitions abroad. Many games were sales hits. The pandemic lockdowns meant that many players around the world played more, as they had little else to do. The games brought joy and community – and sales increased. In addition, many countries – albeit not Sweden – had introduced ambitious subsidies to give their game companies an edge in the international competition. In short, many poured more fuel on the fire.

After the good years came the hangover. Many major game projects had been delayed due to the pandemic. Global game sales declined for the first time in many years. Several global players engaged in consolidation, leading to redundancies, partly because many roles were duplicated. Russia's war on Ukraine caused many international investors to withdraw from Europe. Inflation put pressure on wages and profits. Credit cost rose with interest rates and companies often struggled with their margins. Many owners opted for profit over growth, and investment declined. 2023 ought to have been a really bad year for Swedish game companies.

The debate on artificial intelligence took off. Would human labour be replaced by machines also in creative professions? Capital replacing labour? Some argued so. Others pointed out that all the previous technological leaps in game development had been realised in more games. Bigger and better. It used to be that all game developers wrote their own graphics engines, these days a few standardised dominate the market. Shared graphics repositories – ‘asset libraries’ – save a lot of work for game artists who modify existing 3D models and textures instead of building their own from scratch. Motion capture has streamlined animation. And so on. Each such technological leap meant an increase in productivity, which in theory could have been turned into increased profits, reduced labour costs or something else. But in reality, the productivity gains have been realised in more games. Bigger and better. Same story this time around.

2023 ought to have been a really bad year for Swedish game companies. But it turned out to be a new record year. Employment increased. So did revenue. And the number of women. The increases weren't as big as some previous years, but nonetheless: all time high. It wasn't all sunshine and soda popin' 2023, though. Investments decreased, due to the factors above (but investments have increased again in 2024). The number of Swedish companies' employees abroad also decreased due to divestment of foreign subsidiaries (but total revenue increased).

Why is it that Swedish game companies are going against the tide of the economic crisis? The best answer is that we make good games. And we make many different kinds of games that reach many different kinds of players. From simple puzzles to almost infinitely detailed strategy games. Children's games and games for adults. Big and small. Technologically groundbreaking or ingenious in their simplicity. Swedish game companies have all kinds. That's the best recipe for the future too.

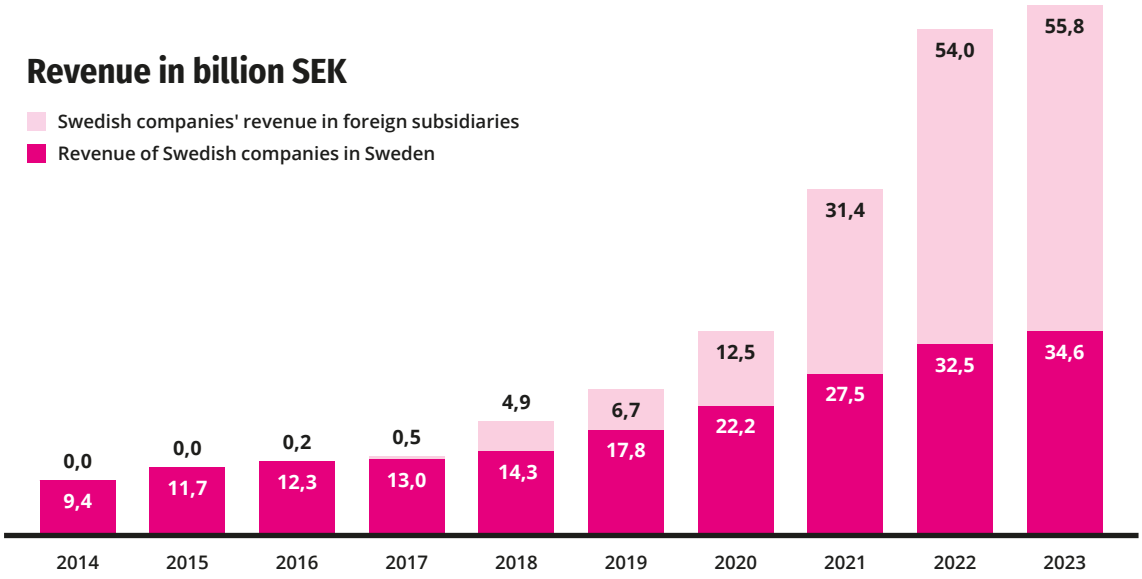
Stockholm, November 2024

Per Strömbäck
Managing Director, Swedish Games Industry

Star Wars Outlaws –
Ubisoft Massive

Revenue and Results

Swedish game companies continued to grow in 2023, increasing their revenue by 6% to SEK 34.6 billion. This is an increase of almost SEK 2 billion and nearly a doubling in the last five years.



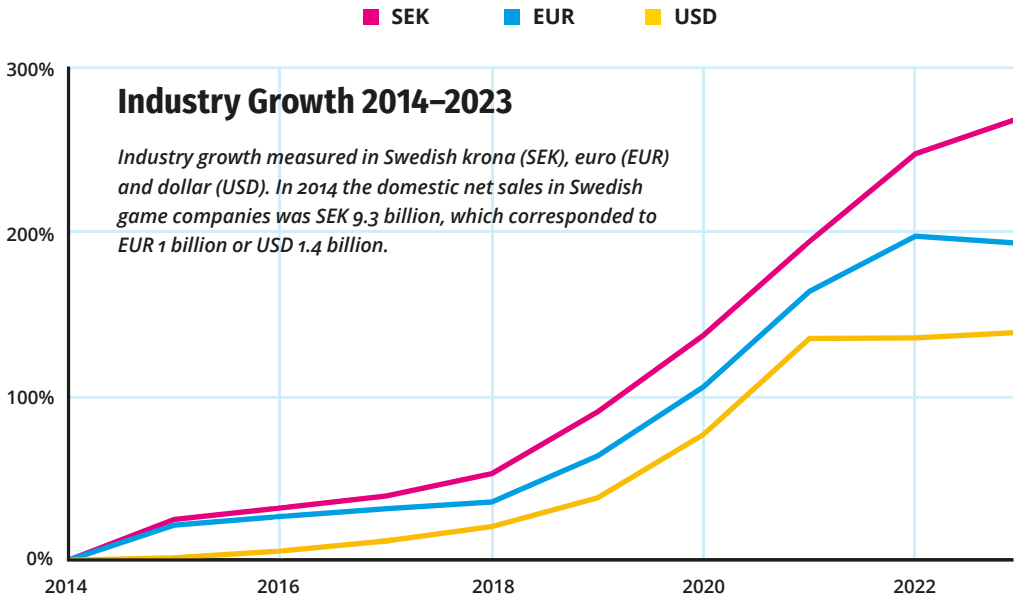
In recent years, a couple of large groups have grown larger, partly through investments and acquisitions, and a significant proportion of the acquisitions have taken place outside Sweden. In total, Swedish companies and groups generated a revenue of almost SEK 56 billion in subsidiaries outside Sweden, and the total global net revenue of Swedish companies in 2023 was just over SEK 90 billion. Not to be confused with the total value of sales to consumers at the distribution level.

On a global scale, Swedish companies have successfully taken market shares, attracted expertise and, not least, created entertainment for several hundred million players worldwide. However, the weak Swedish krona affects the comparative revenue internationally and can be interpreted as virtually unchanged. In euros, domestic revenue decreases slightly to EUR 3 billion, while in dollars it increases marginally and is measured at USD 3.2 billion. Revenue including Swedish-owned companies abroad decreases to EUR 7.9 billion, and remains stable in dollars at USD 8.5 billion.

With 108 new companies, the Swedish industry is growing steadily and has increased its revenue over the past decade from just over SEK 9 billion in 2014 to SEK 34.6 billion in Swedish companies and SEK 90.4 billion when foreign subsidiaries are included. In 2023, the revenue of the Swedish-owned foreign subsidiaries was higher than the revenue of the Swedish-registered companies for the third consecutive year, an effect of the many large acquisitions that have taken place outside Sweden.

Nine Swedish companies had a revenue of over SEK 1 billion during the year and the ten largest companies account for two-thirds of the total revenue. More companies are getting bigger and in 2023, 43 companies had a revenue of over SEK 100 million – 12 more than in 2022. During the year, total industry profits dropped to SEK 1.1

Thunderful Gothenburg – SteamWorld Heist 2



Industry Growth 2014–2023

Industry growth measured in Swedish krona (SEK), euro (EUR) and dollar (USD). In 2014 the domestic net sales in Swedish game companies was SEK 9.3 billion, which corresponded to EUR 1 billion or USD 1.4 billion.

billion. This can be attributed to the fact that 2022 was a record year in terms of profitability, which was due to a couple of large dividends, and that Embracer Group reported a loss of SEK 7 billion in its Swedish parent company. In the same year, King reported a profit of 5.2 billion. Without these two outliers, the industry's profit would be SEK 2.7 billion in 2023. In total, the companies have paid 1.8 billion in corporate tax and over 1.9 billion in social security contributions.

A few companies stand out in terms of increased revenue, including *Beyond Frames*, *The Gang* and *Snowprint Studios*, all which increased significantly during the year.

Global Revenue

In 2023, the revenue of Swedish-owned foreign subsidiaries continued to increase. It's a minor increase compared to previous years, but noteworthy considering the major restructuring that has taken place in several of the Swedish global groups.

Embracer Group remains the largest with a consolidated revenue of SEK 42.2 billion, which means that the Karlstad company continues to be the country's largest group in game development, and one of the largest game company groups in Europe. *Stillfront Group* and *MTG* also account for a significant share of the global revenue. In 2025, this value is expected to decrease slightly as *Embracer Group* is split into three groups, one of which, the board game division *Asmodee*, will fall outside the scope of this industry report. *Embracer Group's* revenue in Sweden is not affected by this as the subsidiaries with primary operations outside game development are not included in the data.

Highlights

The number of games launched by Swedish studios varies from year to year, but the industry is big enough that individual titles are no longer decisive for the annual performance. Below is a summary of some of the major events in 2023 and most of 2024.

In February 2024, **Arrowhead Game Studios** released *Helldivers 2*, the sequel to *Helldivers* from 2015. The game reached one million copies sold in just three days, and by early May the figure was 12 million, making it the publisher Sony's most successful PC title.

In 2024, **Avalanche Studios Group** was hard at work on adding new features and content to its self-published titles. *theHunter: Call of the Wild* saw the release of seven DLCs and surpassed 1.6 million MAU. Four DLCs were added to *Call of the Wild: The Angler*.

Gothenburg-based retro game studio **Bitwave** released the game *Gimmick! 2* in September 2024, a sequel of the 1992 *Gimmick!* created by Sunsoft. In addition, Bitwave has released a number of classic titles from distinguished Japanese game developer Toaplan on Steam over the past year.

After eight years of persistent development, **Coffee Stain Studio**'s factory simulator *Satisfactory* was released in version 1.0. With six million copies sold since its Early Access launch five years ago, players finally had access to the full game experience. A console version of the game was also announced.

In December 2023, **Embark Studios** released *The Finals* and the studio continued their work on the upcoming *ARC Raiders*, which is scheduled for release in 2025.

Embracer Group has had a year characterised by organisational restructuring and the upcoming group split. Several of their Swedish subsidiary studios have released successful games during the year through, for example, Amplifier Game Invest and Coffee Stain. Globally, Embracer Group continued to develop its reputable brands, such as *Tomb Raider* and *Lord of the Rings*, reaching millions of players worldwide.

Since Russia's invasion of Ukraine, **G5 Entertainment's** operations have been affected as the company has had offices in the war-torn countries. Employees from Russia have been evacuated and the company has been dealing with the effects of the war in Ukraine. Despite the difficulties, the company has delivered impressive results.

King's journey of success continues. In 2023, the Swedish company reported an increase in revenue, more employees and contributed almost a billion SEK to the Swedish treasury in corporate tax. In October 2023, Microsoft's purchase of Activision Blizzard, which includes King, went through. When the deal was announced, the price tag was over SEK 620 billion at the exchange rate at the time. In 2024 *Farm Heroes Saga* and *Candy Crush Soda Saga* celebrated ten years since their first launch. In Malmö, King expanded and moved to a new spacious central office. In 2024, a two-month international *Candy Crush Saga* competition took place, with Stockholm resident Suzanne making it to the final round in Los Angeles. Suzanne came in second place and won around SEK 2.6 million.

On April 1st 2024, **Landfall** released its new game *Content Warning* for free for one day on Steam. As a result, over six million people acquired the game for free, and two months after the release, the game had almost nine million players worldwide.

Uppsala-based **MachineGames** opened another office in Sundsvall in 2024. During the year, the studio continued development of the upcoming title *Indiana Jones and the Great Circle*, which will be launched at the end of 2024.

Mojang celebrated 15 years in 2024. *Minecraft* is the world's best-selling game title with over 300 million copies sold. The anniversary was celebrated with new content in the game in the form of a major summer update. In August 2024, Jens 'Jeb' Bergensten made a radio feature in *Sommar i P1*, talking about his time at Mojang and his thirteen-year journey as head of design for *Minecraft*. The film, *A Minecraft Movie,* will premiere in April 2025.

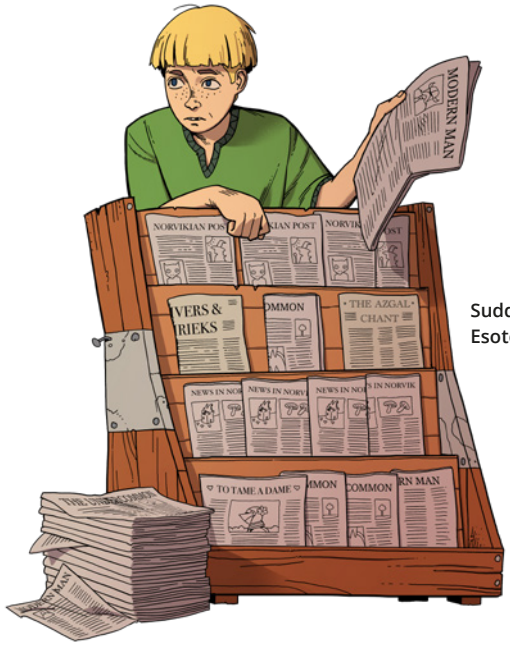
In 2023, **Resolution Games** was recognised by the World Economic Forum as a 'Technology Pioneer 2023' alongside hundreds of other promising tech companies worldwide. In late 2023, the studio released the VR game *Racket Club* and in early 2024 announced a partnership with US game studio Wizards of the Coast to create the first officially licensed *Dungeons & Dragons* game exclusively for VR.

Thunderful Games, with studios in Gothenburg, Malmö, Karlshamn and Skövde, launched S*teamWorld Build* in December 2023 and *SteamWorld Heist II* in 2024, making it the seventh addition to the popular *SteamWorld* series.

In August 2024, Ubisoft studio **Massive Entertainment** launched its highly anticipated game *Star Wars Outlaws* in partnership with Lucasfilm Games. In December 2023, *Avatar: Frontiers of Pandora,* developed with Lightstorm Entertainment and FoxNext Games, was released. The Malmö studio continues its work on *Tom Clancy's The Division 3*. The *Division* series has a total of almost 40 million players worldwide.

Stunlock Studios in Skövde is the developer of *V Rising*, which on May 8th 2024 left Early Access and was released in full version for PC. On June 11, the game was also released for PlayStation 5 and, by September, had over 4.7 million players worldwide.

Blue Scarab Entertainment, a new Stockholm-based MMORPG developer led by Colin Cragg and Enno Rehling, announced its opening in July 2024. The studio is funded by an investment of over SEK 74 million from Chinese Netease and Swedish Behold Ventures, along with a group of private investors.



Sudden Snail – Esoteric Ebb

At the end of 2023, the bankrupt Kinda Brave Publishing group was acquired to form the new **Kinda Brave Entertainment Group** together with **Windup Games**, which was listed on the stock exchange on June 3 2024. During Gamescom 2024, Windup announced its new title *Hela*.

On September 26th 2024, the doors opened to a new exhibition, *The Romantic Eye*, at the Nationalmuseum in Stockholm. The exhibition explores how we manage the issues and ideas of the period on a daily basis, and how it is conveyed today through, for example, social media and games. The exhibition features the game *Unravel* by **Coldwood Interactive** as an example of how games were influenced by Romantic philosophy.

At the Museum of World Culture in Gothenburg, Sweden, the exhibition *A World of Games* is on display until May 2026 and features a large collection of games spanning different times and places – from 4,000-year-old board games to today's computer games. It also raises questions about games of money and power, and tells the story of games that have been banned for various reasons. The exhibition highlights the significant role that games have played in people's lives over thousands of years.

Swedish Game Awards 2024

Wishfully Studios – Planet of Lana

Winner in the Professional category

GAME OF THE YEAR
Helldivers 2
by Arrowhead Game Studios

BEST DEBUT
Planet of Lana
by Wishfully Studios

Winner in the New Talent category

GAME OF THE YEAR
Traum
by Morbid Games
(The Game Assembly)

BEST TECHNOLOGY
Schrödinger
by Singularity Studios
(Uppsala University – Campus Gotland)

BEST MOBILE GAME
Between Life and Death
by Cult Classic Creations
(The Game Assembly)

BEST DESIGN
FleshBound
by Splatterpunk
(Futuregames)

BEST AUDIO
FleshBound
by Splatterpunk
(Futuregames)

BEST DIVERSITY EFFORT
Traum
by Morbid Games
(The Game Assembly)

BEST ART
Stage Fright
by Smoggers
(The Game Assembly)

BEST NARRATIVE
Traum
by Morbid Games
(The Game Assembly)

GAMER'S CHOICE
Sonder
by Finally Games
(Stockholm University)

The annual *Swedish Game Awards*, organised by the Swedish Games Industry in Stockholm, celebrates new talent, students, and hobbyists. There are also two awards in a professional category dedicated to established game developers.

A jury of senior game industry experts reviews and evaluates all applications, nominates their top picks in each category and votes on the winners.

The *Professional* category awards are nominated and selected directly by the jury without an application process. The winner of the Gamer's Choice award is decided through voting by participants at the Swedish Game Awards Showcase.

To participate in the Swedish Game Awards, *New Talent* category, submit your game on the website. Applications open in spring and close in mid-summer. Rules and formalities are updated annually and can be found at: *www.gameawards.se*

Other Notable Achievements and Awards

Campground Interactive – Steel Effigy

At the 2024 NYX Game Awards, **Fast Travel** Games' *Vampire: The Masquerade* – Justice was the winner in several categories, including Meta Quest VR Game – Best Gameplay and Meta Quest VR Game – Best Art Direction. **Starbreeze Entertainment** won the Game Video – Movie/Film and Game Strategic Campaign categories for *PAYDAY 3*.

Midjiwan, the studio behind *The Battle of Polytopia*, won Best Indie Developer at the Pocket Gamer Mobile Games Awards 2024.

At the 2024 Nordic Game Awards, **Embark Studios**' *The Finals* won Best Technology and the award for Best Debut went to **Dimfrost Studios** and their game *Bramble: The Mountain King*.

The award-winning game *Passpartout 2: The Lost Artist* by **Flamebait Games** won the Swedish Design Award 2023 in the 3D/VR/AR category.

Arrowhead Game Studios and their game *Helldivers 2* won Best Game Design at the Develop:Star Awards 2024.

The Outsiders rhythm-FPS *Metal: Hellsinger* won the Tin Pan Alley Award for Best Music in a Game at the 12th annual New York Game Awards 2023.

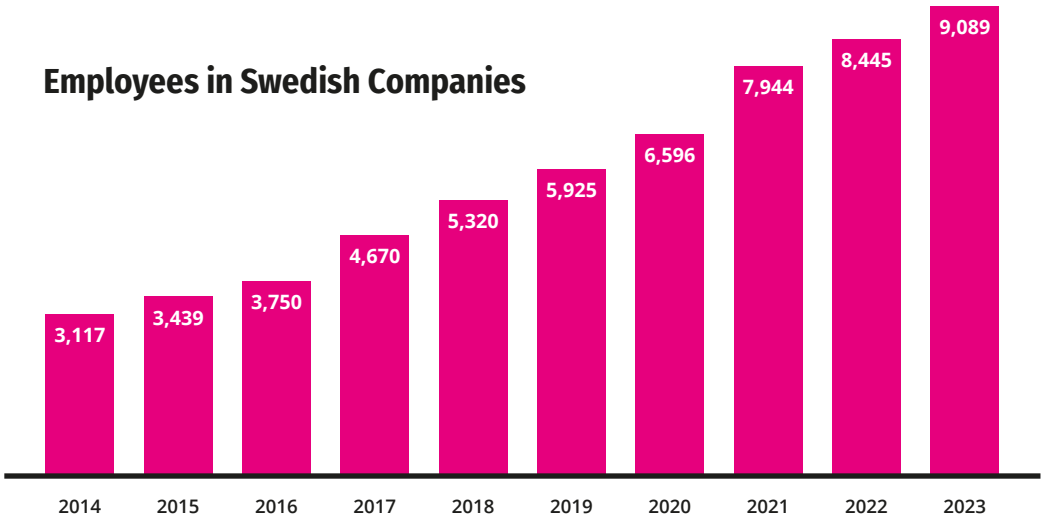
The game *Planet of Lana* by **Wishfully Studios** was named one of the best Xbox games of 2023 at the Xbox Excellence Award.

Gothenburg-based **Oddiko** won first prize with their upcoming game *Meadgard* at The Very Big Indie Pitch in London in early 2024.

The above list is not exhaustive, there are many more examples of successes for Swedish companies in the past year.

Number of Employees

The number of employees in the Swedish games industry is increasing and several companies are hiring. In 2023, the number of employees increased by almost 8% to 9,089 people in the industry.



The number of people employed in the games industry in Sweden increased by just under 8% in 2023 to 9,089 people. This corresponds to 644 new full-time positions. The largest employer in Sweden is Ubisoft Entertainment, which employs over 750 people. 19 companies have more than 100 employees in Sweden. 123 companies have ten or more employees.

In addition to employees in Sweden, Swedish-owned companies employed around 15,800 people around the world outside Sweden. This means that a total of 25,000 people were employed by a Swedish-owned game development company during the year. More about this in the chapter *Swedish Game Companies Around the Globe*.

The number of employees is based on the annual accounts' average full-time employment for the entire financial year. This means that the actual number of people working in the industry is often higher, as many companies that have expanded had more employees at the end of the year than at the beginning. The data does not include hired consultants from agencies outside the industry, interns, or people employed in newly founded companies that have yet to turn in their annual reports. Considering these hidden figures, the actual number of people working in the industry is higher.

In the survey *The South Swedish Game Development Industry 2024* (Game Habitat), 89% of respondents stated that they had a permanent full-time job. Almost no one works part-time.

In 2023, several game companies reported financial challenges, with both layoffs and closed studios around the country. To some extent, this reflects the recession and the global market, which has affected listed companies in particular. Despite this, new hires have increased by almost 30% compared to 2022.

Reviewing the major companies in the industry, taking reported closures and layoffs into account, shows

Resolution Games – Demeo Battles

an employment increase in 2024, and in October there were over 9,350 employees in the industry in Sweden. In the long term, the supply of skills remains a major challenge, along with providing good conditions for small businesses to grow.

Artificial Intelligence as a Tool for Game Development

Few phenomena have been as thoroughly debated in recent years as the use of AI in game development. Concerns that increased AI use would lead to layoffs have been raised, but are not reflected in the statistics. It is clear that generative AI services are steadily improving and, according to a survey conducted by Unity, 62% of companies surveyed use AI in some way during the development process. Overall, AI is used for a wide variety of purposes such as art production, programming and testing, as well as in operations like moderating chats.

Generative AI brings inherent risks of infringing on the rights of game developers and reducing the ability to protect their IP. In the spring of 2024, the Swedish Patent and Registration Office (PRV), in collaboration with the Swedish Games Industry, presented a guide with information and advice specifically regarding intellectual property, copyright and trademark protection for creators of digital games. It can be found at: www.prv.se/en/game-development

Work Permits

Swedish game companies remain attractive employers for foreign talent. From January 2021 to August 2024, around 1,500 work permits were granted to non-EU/EEA/EFTA nationals in the occupational codes used for game development. During the same period, approximately 180 applications were rejected, and it appears that the proportion of granted applications has dropped slightly in 2023 and 2024 compared to previous years, according to statistics from the Swedish Migration Agency. The figures include first-time applicants and applications for extensions of previous permits, with the proportion of unsuccessful applications being significantly higher for work permit extensions than for new applications.

Of the applications, 34% were for programming staff, 28% for art, animation and VFX, 16% for design and the remaining 22% for other professional categories such as sound design, QA, producer, analytics and marketing. The single largest occupational categories were *Gameplay Programmer* and *Engine Programmer* with around 14% each.

Looking at age and experience, 72% of the applications regarded people aged 30 or older, of which 39% were over 35 years old, and 55% were categorised as Senior, Expert, Lead/Manager and Director/Renowned Expert. Almost 80% of the applications were for male staff, a proportion that is boosted by the large proportion of programmers and people over 35 and the

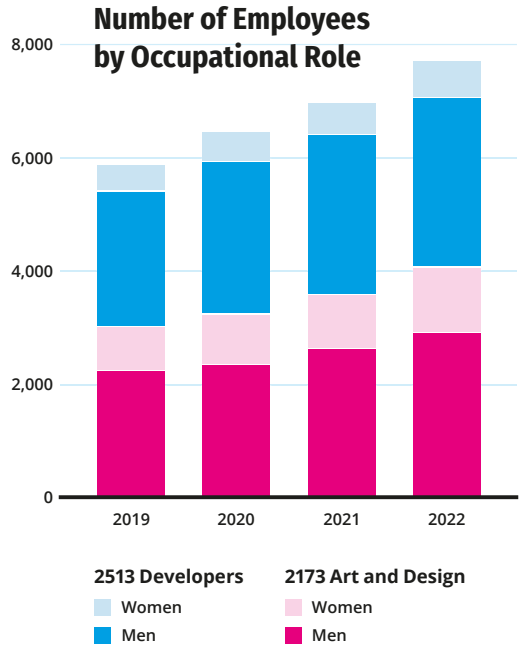
Iron Gate – Valheim (from trailer by Brikk)

fact that relatively few women are yet to be found in the more senior roles. Looking at the age range 24–34, women make up 26% of applicants, and in some art and design roles the distribution of applicants can be virtually even.

In the survey, *The South Swedish Game Development Industry 2024* (Game Habitat), 59% of employees stated that they were Swedish citizens, 14% of these also had citizenship in another country. 40% of respondents had their degree from a country other than Sweden.

Number of Employees by Occupation

In the employment statistics compiled by Statistics Sweden (SCB), most occupational roles in the games industry are grouped into one of two occupational codes (SSYK), which are code *2173 Designer in games and digital media*, which covers several occupations in art and design, and *2513 Developer in games and digital media*, which covers occupations in game programming. In addition to these, game developers of various specialisations are found under other occupational codes, and employees in the occupational codes may also work for companies in industries other than game development. For example, web designers, film artists and animators are classified under code 2173, regardless of which industry they work in. Similarly, some game development roles fall under other classifications and therefore do not appear in the statistics. The sample gives an indication of the number of employees in the country within various occupational roles as well as the growth of the labour market.



In the addressed occupational codes, the share of women has increased from 21.5% to 22.9% between 2021 and 2022, which is the latest year with updated statistics. This increase may seem small, but looking at the growth in occupations, the number of men increased by 8.6% and the number of women by 17.8%. This proportional increase of women was also reflected in the *Swedish Games Industry 2023 – Game Developer Index* data, where 44% of new hires in 2022 were women.

INDUSTRY VOICE KONRAD TOLLMAR

Research Director at Electronic Arts

'Although AI research has made significant progress, there is still a long way to go before the new technology is usable'

Hi Konrad, you are Research Director at Electronic Arts. Why does a game studio have its own research lab?

Both today's and tomorrow's AAA games are developed with the latest technology, and to stay ahead and understand how to build the best games, we need our own research. One such example is training AI agents in the games to handle new unexpected situations, where we have used data augmentation to improve how we train AI agents who otherwise mainly imitate in their learning process.

What is the biggest challenge in AI (in the games industry) right now?

There are many challenges. Although AI research has made significant progress, there is still a long way to go before the new technology is usable. We are often told that AI is like a black box that you cannot influence. Therefore, we need more experience and interfaces that make AI tools effective in more areas than generating images and text.

How does AI improve games, and what can generative AI actually do for games?

This is a question that remains to be answered. Today, very little AI is used in games, but technologies such as GenAI show new possibilities to enhance the experience in games with bigger worlds and more content. AI can also be used to test games more effectively and thus improve the experience for the player. One of our research areas has been using AI to create different test personalities as part of preparing games for an ever-growing audience of players at launch.

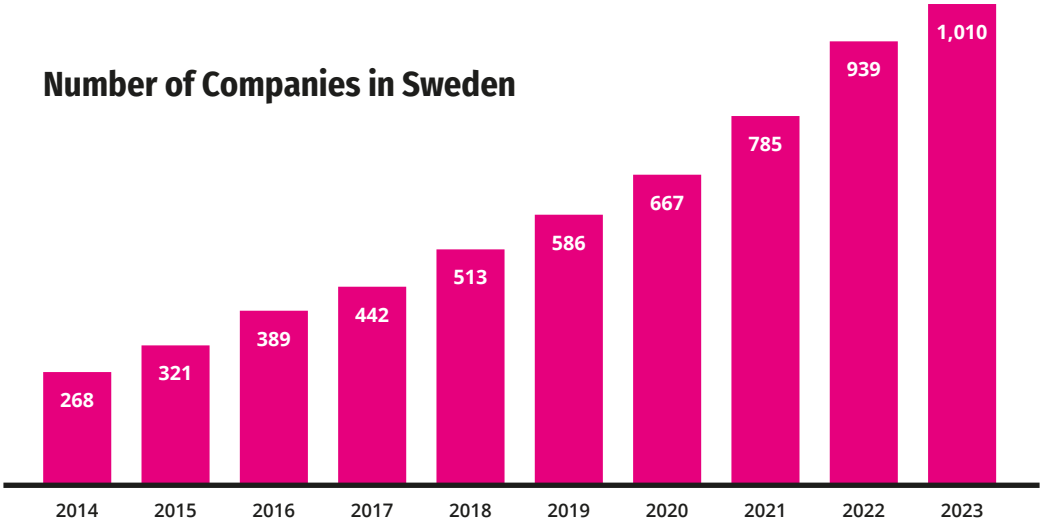
What AI-related developments will we take for granted in games in 5–10 years that we are not doing today?

AI will improve our ability to build complex systems. Computer games are an example where we want to both simulate and visualise advanced worlds in real time. However, programming with AI, i.e. data, is not that easy. Partly the technology is still undeveloped, and it is also a new way of programming that takes years to learn. We see AI as an essential area that needs more expertise and research to become useful in games.

Doublecap – Liftlands

Number of Companies

In 2023, 108 new game companies were registered in Sweden. The number of limited companies in the Swedish games industry totalled 1,010 at the end of 2023, a net increase of just under 8% compared with the previous year. 196 companies had five or more employees.



By the first half of 2024, more than 60 new companies had been registered, some of which can be found in the chapter *Game Developer Map – Global* later in the report. 37 companies have either closed down or switched the majority of their activities to non-game related in 2023.

Despite the relatively high number of closures, the increasing number of new companies is a positive signal that shows a high level of activity in the industry even under challenging economic circumstances. The entrepreneurial spirit is strong in Sweden, an argument reinforced by the high number of micro companies compared to other European countries. When larger companies restructure or, experience and expertise are often transferred to new, smaller companies.

The so-called micro companies with fewer than ten employees make up 87.5% of the entire games industry. Micro companies generated a combined revenue of SEK 6 billion in 2023. 96 companies, almost 10%, are classified as small enterprises, having at least ten but fewer than fifty employees. These companies generated SEK 5.7 billion in revenue and employed around 2,000 people. There were 24 medium-sized enterprises with between 50 and 249 employees, around 2.4% of all companies, which accounted for SEK 11 billion in revenue and just over 2,800 employees.

The largest companies with over 250 employees together employed just under 3,300 people and generated SEK 11.8 billion in revenue in 2023.

The average revenue per employee is relatively even across all size classes of companies, between SEK 3 and 4 million per employee a year, with larger companies generally at the higher end of the range. Swedish game

Midjiwan – The Battle of Polytopia

companies are thus commercially successful under different conditions, but still comparable in relation to costs regardless of the size of the company. There are good reasons to invest in both large and small game developers.

Sole Traders, Consultants and Holding Companies

Two-fifths of all the companies have no employees. 241 companies have only a single employee. These are often sole traders, consultants or holding companies.

Many freelancers and consultants run their own companies. While it is common for contractors to set up a sole proprietorship to carry out smaller commissions or even develop and release games, more people are using limited companies (aktiebolag), which provide greater financial control. In 2023, there were 207 sole proprietorships registered with *SNI 58.210 – publishing of digital games* as their main industry code.

Some consultants work full-time through their limited companies, while others manage them alongside their employment to keep side projects separate from their regular job.

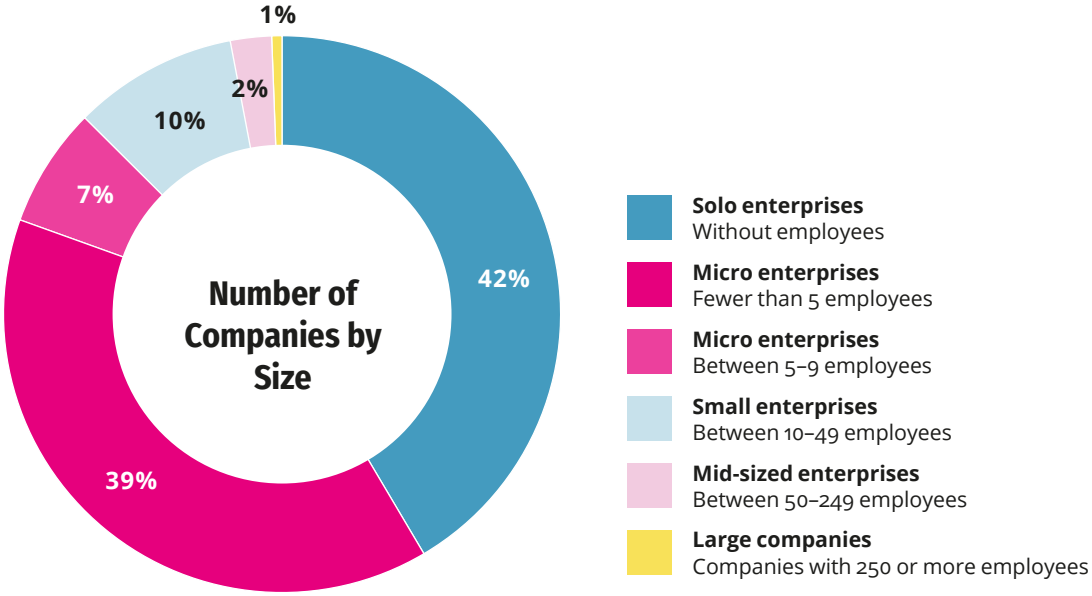
A number of the limited companies included in the statistics are so-called holding companies, i.e. limited companies set up primarily to manage ownership of one or more other companies. In principle, any limited company can conduct holding activities, making it difficult to distinguish the proportion of Swedish game companies run exclusively as holding companies.

Holding activities may occur for purely economic or technical reasons, but also as part of investments where the shareholding is concentrated in the holding company. This does not preclude the company from also carrying out assignments for customers or developing its own solutions, which further blurs the line between pure holding companies and conventional games companies.

Studio Closures and Bankruptcies

During the past year, 37 companies were removed from the database. This generally means the company has been liquidated, acquired by another company or changed its main activity to something irrelevant to the games industry.

It is not always clear what has happened to a company with no operations, as game companies are often left dormant instead of being liquidated, as there may be passive revenue from previously launched games. Acquisitions do not always take the form of a complete



takeover, but are sometimes carried out through acquisition of assets and liabilities that leave a completely or partially empty company behind.

Among the businesses that have closed down in the past year, either through redundancy or bankruptcy, is Toadman Interactive, whose offices in Stockholm, Visby and Oslo have been closed down, while the remaining Berlin office has lost some staff.

In May 2024, Fall Damage was declared bankrupt by its parent company Fragbite Group, which acquired the studio in October 2023. As part of Embracer Group's restructuring, it was decided, among other things, that Pieces Interactive in Skövde would be closed down three months after the launch of the game *Alone in the Dark*.

In June 2024, Sideline Labs, with Gold Town Games as the largest owner, was declared bankrupt. Flamebait Games in Skövde, after ten years of game development and the successful launch of *Passpartout 2: The Lost Artist*, decided to close the studio for good.

In July 2023, Kinda Brave Publishing with its subsidiary studios went bankrupt. The bankruptcy estate was later acquired by new owners to form the now publicly listed Kinda Brave Entertainment Group.

Paving Ways to the Games Industry

At the beginning of 2024, the Swedish Games Industry launched the report *Paving Ways to the Games Industry*. The report identifies three overarching challenges that can arise on the path into the Swedish games industry. The three main areas are categorised as:

Skills – The need to validate, match and complement the existing skills of people with experience from other countries and industries.

Barriers – Includes visible and invisible barriers such as lack of language skills, cultural clashes, lack of networks, discrimination and various bureaucratic obstacles such as rules on residence permits, social security numbers and work permits.

Awareness – Many people are unaware of the game industry as a potential career opportunity. This includes individuals and organisations that support people on their journey to work.

An example from the report is when the Malmö-based studio Sharkmob offered staff from their Ukrainian partner company employment in Sweden after the full-scale Russian invasion in 2022. Through the Temporary Protection Directive, the newly arrived and newly employed Ukrainians were able to start working immediately, but faced several other bureaucratic obstacles, such as problems acquiring social security numbers and work permits. The full report is available at:

dataspelsbranschen.se/hllbarhetsrapporter

Largest Companies

More companies are growing. Nine companies reported revenues over SEK 1 billion (EUR 87 million), and 19 companies had more than 100 employees. 43 companies had a revenue of more than SEK 10 million.

Mana Brigade – Blackforge: A Smithing Adventure

A majority of the companies showed positive results, 60 companies reported a profit of more than a million SEK and 126 companies had ten or more employees. Only the net sales of companies registered in Sweden are included below. The chapter *Swedish Game Companies Around the Globe* provides a list of the global revenue of the largest Swedish companies.

Swedish Revenue in M EUR

	Company Net Sales M EUR	Net Sales M EUR 2023/2024
1	King	665
2	Mojang	351
3	Paradox Interactive	231
4	Toca Boca	140
5	EA DICE	138
6	G5 Entertainment	115
7	Exertis Ztorm	98
8	Avalanche Studios Group	92
9	Embracer Group	90
10	Ubisoft Entertainment	84

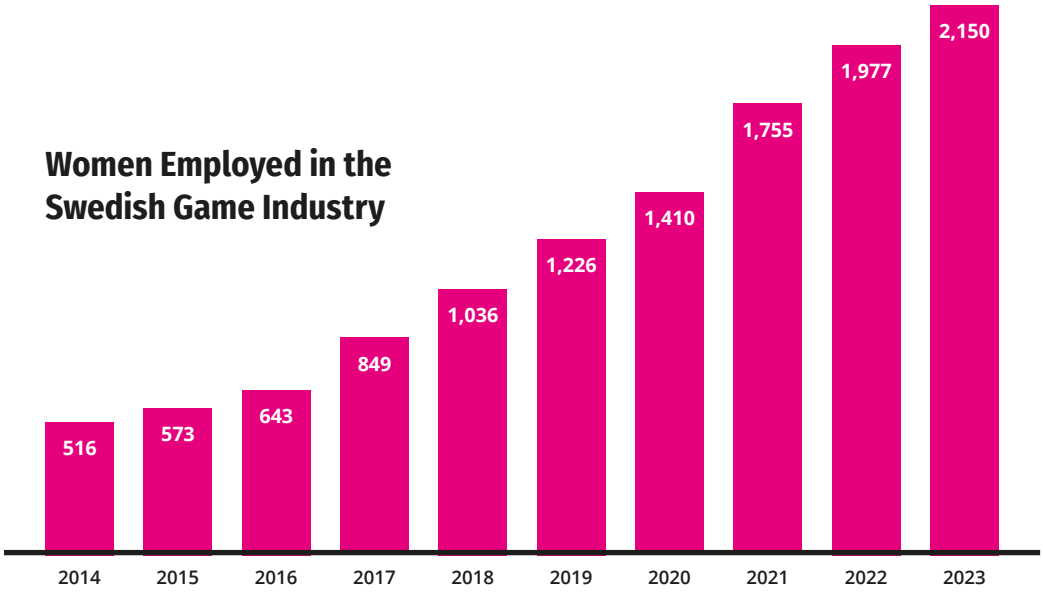
Employees in Sweden

	Company	Employees working in Sweden 2023/2024
1	Ubisoft Entertainment	765
2	King	714
3	EA DICE	677
4	Embracer Group	538
5	Avalanche Studios Group	476
6	Paradox Interactive	454
7	Sharkmob	357
8	Embark Studios	297
9	Mojang	210
10	Toca Boca	188

**The key figures for revenue are from the last reported fiscal year starting in 2023. The key figures for employees from Embracer Group, EA DICE, King, Toca Boca and Paradox Interactive are from their last reporting period. Others were confirmed with the respective companies in September and October 2024. All are reported at group level in Sweden.*

Inclusion and Gender Distribution

In 2023, the Swedish games industry grew in terms of the number of employees, including the number of women. In total, 2,150 women were employed in Swedish game companies in 2023, representing 23.7% of all employees. This is an increase of 173 women, 9%, compared to 2022.



In 2023, there were more women working with games than men in the industry ten years prior. Of the 644 people who joined the industry during the year, 27% were women, a year-on-year growth of 9% from 2022. Despite the increase in numbers, continued active recruitment efforts are needed to achieve a more gender-equal industry in an otherwise male-dominated sector. Most of the women work at the larger companies in the industry.

This year's data shows a minor increase in the proportion of women compared to previous years. In the margins, there is a decrease in the share of men and an increase in the share of people in a third category.

Analysing gender diversity in Swedish companies involves several challenges. Listed companies, which have a higher obligation to provide transparent statistics, represent only a minority proportion of employees in Sweden. For smaller companies, there is no requirement to report gender distribution in the annual report. In these cases, data relies on the companies' communication or data from previous years. This means that the proportion of men in the sector is probably slightly over-reported. To the extent that data has been available, gender distribution is based on identity according to how each company reports their data.

Some companies report a third category in their gender breakdown in their annual reports, sometimes as explicitly non-binary, and sometimes under another designation. Among the Swedish companies that reported this figure, the share that did not indicate gender as

Initiatives in the Industry

Speldosa Interactive – Project Shoreline

- **All In** was a project that ran from May 2023 to June 2024 led by Science Park Skövde and funded by Vinnova's investment in development projects in incubators. Together with other game incubators in the country, the project mapped obstacles and challenges faced by non-binary and female game entrepreneurs. The project resulted in a toolkit with concrete methods that are expected to contribute to an increased influx of female and non-binary entrepreneurs as well as increased well-being and perseverance of those who have already begun their startup journey.

- **DONNA** is an interest group based at the University of Skövde that has been working on gender equality issues in game development and game education since 2011. In conjunction with the Sweden Game Conference 2024, the DONNA DAY mini-conference was held for the eighth consecutive year, and approximately a hundred women and transgender people from game education programmes were able to meet peers and mentors from the industry.

- **Equal Play** is a network with roots in East Sweden Game that promotes diversity and inclusion in the regional games industry. This is done by spreading knowledge and organising separatist and open events for everyone interested in game development. In 2024, co-founder Magdalena Annell won a prize for her initiative and was awarded ESG's annual scholarship for inclusion in the games industry.

- In the autumn of 2023, the first edition of Arctic Game Dev was held in Umeå where **Female Meetup** was on the agenda. The meetup in Umeå was the sixth in the series and focused on creating a safe and inclusive platform for underrepresented groups in the games industry. Participants were given the opportunity to share their experiences, make their voices heard and discuss successes and challenges in the games industry.

- **Game Dev Force** was founded in early 2019 to unite different initiatives within Sweden that aim to create a more inclusive and diverse game industry. In July 2024, the fifth edition of Valkyrie Game Jam, a gender-separatist game developer event, was organised in northern Sweden.

- **The Game Empowerment Movement** (GEM) is a local initiative that aims to support a gender-equal and inclusive game industry in Skåne and Blekinge. The initiative organises an annual GEM Week in conjunction with the International Women's Day, focusing on DEI (diversity, equality and inclusion) topics in the games industry. For the second consecutive year, GEM also organised a mentoring programme for women and transgender people.

- In the summer of 2024, **PlaygroundSquad** organised its Game Developer Camp for the second year in a row for girls, transgender and non-binary people aged 13–17 with an interest in game development. At the camp, young people get a basic overview of what artists, designers and programmers do. In addition, participants had the opportunity to develop their own game ideas with lecturers and tutors from the games industry.

- **Women in Games** is an international non-profit organisation with the goal of combating discrimination in the game industry and gaming community. The organisation has grassroots around the world and consists of companies, members and ambassadors, several of which in Sweden. The global virtual one-day conference Women in Games celebrated its 20th anniversary during the autumn of 2024.

- Founded in 2018, **WINGS** invests in indie games developed by companies where women and people of marginalised gender identities hold key positions. In 2024, WINGS partnered with a number of game developer awards to recognise and celebrate games created by women and transgender people. At the end of May 2024 in Malmö, WINGS organised a mentors' fika where several inspiring guests from the game industry were invited, creating a meeting spot for underrepresented groups.

King – Candy Crush Saga

King & Swedish Games Industry Scholarship

In 2024, King and The Swedish Games Industry ran a nine-month mentorship programme with activities for women and non-binary people interested in a career in game development. The group consists of 27 people aged between 18 and 29, half of whom have previous experience in game development and half of whom have no experience. The participants were given an opportunity to deepen their knowledge and broaden their network within the Swedish games industry through mentoring, masterclasses and events. The programme started with an introductory course in game development in collaboration with **FCV Sweden** for the mentees with no previous experience, and offered trips to the Nordic Game Conference in Malmö, Gamescom in Cologne and For Devs in Stockholm. The focus has been on networking with the aim of participants starting or continuing their journeys in the games industry after the end of the programme.

male or female was 2% in 2023, a slight increase compared to previous years. However, this is a comparative figure that is probably still underreported. In the survey *The South Swedish Game Development Industry 2024* (Game Habitat) 3% of respondents indicated that they are non-binary when asked about gender, and 2.8% did not want to answer the question.

While the figures can never be interpreted as exact, they paint a clearer picture of the evolving industry. The work of administering underrepresented groups and providing space in education and at work continues. This is largely thanks to non-profit initiatives and movements working to promote inclusion, gender equality, diversity and tolerance in educational institutions, game culture and workplaces. Information on such initiatives can be found on the previous page.

Some Key Figures

- **52 companies have equal gender distribution or consist of more women than men, compared to 51 the previous year. Most are micro-companies, but Raw Fury and Frame Break stand out in this group.**
- **135 companies have a higher percentage of women than average, with at least 23% women employed. Together they have a revenue of almost SEK 25 billion.**
- **112 companies with more than one employee consist only of men; the largest of these companies has 17 employees.**

Wishfully Studios – Planet of Lana

INDUSTRY VOICE PAULA INGVAR

General Manager of Candy Crush Saga at King

'As a mentor, you are your mentee's biggest supporter, but at the same time you need to be realistic and prepare them for the working life.'

Hi Paula, tell us about your role at King and your path into the games industry?

As General Manager of *Candy Crush Saga*, I oversee the game team for *Candy Crush Saga* across King. I've been at King for almost ten years, in a variety of roles. I first joined King in a central business performance role and then had the opportunity to move to finance and then into product. Before joining King, I was working as a traffic engineer and had been a big fan of *Candy Crush*, playing *Candy Crush Soda Saga* on my way to work. What I didn't realise was that there was so much opportunity within the games industry and that a hobby could evolve into a professional pathway. A big reason behind my happiness at work is that I feel connected to King through the people I work with and our shared values.

What does good mentorship look like? How can one be a good mentor to someone who is new to the games industry?

When becoming a mentor, you are building a relationship with your mentee. Your focus as a mentor should be on fulfilling your mentee's goals. As a mentor, your primary role is to provide guidance, offering your experience, insights, and sometimes your specific skills to support their development. To be able to manage that you should be curious and be a good listener. Sometimes that also means to read between the lines and see beyond what the mentee is telling you. It is important to set the right expectations. As a mentor, you are your mentee's biggest supporter, but at the same time you need to be realistic and prepare them for the working life. Several King mentors have said that mentoring is as much of a learning experience for them as they often start reflecting on how they can develop their own role in the industry.

You run the 'King & Swedish Games Industry Scholarship' where 27 mentees spend a year learning more about the games industry. Tell us about the background of this project.

Yes, while our players are on a mission to top the leaderboard, King is on its own mission to improve the representation of historically underrepresented groups in STEAM (science, technology, engineering, arts and mathematics) careers, within the tech and games industries in particular. We're doing this through supporting charitable organisations and helping them engage with local communities. Together with the Swedish Games Industry, we are offering scholarships for women and non-binary people who want to start a career in game development. The scholars will complete a bespoke nine-month program which includes mentoring from King experts, access to events, and masterclasses from employees at King.

Company Groups and the Stock Exchange

Despite challenges in the global economy and on the stock market, Sweden remains a strong country for listed game companies, many of which report a high level of expertise in game development.

Frame Break – Lightyear Frontier

Among the Swedish listed companies in game development, a large part of the assets are in foreign companies controlled through a Swedish group parent. This is the case with Embracer Group, Stillfront Group and Enad Global 7, which together consisted of over 200 companies through their groups, the majority of which were based outside Sweden. Examples of game studios owned by a Swedish listed group parent include Warhorse Studios (Embracer through Plaion), Ninja Kiwi (Modern Times Group) and Singularity 6 (Enad Global 7 through Daybreak Games). More on this in the chapter Swedish Game Companies Around the World.

Restructuring and the Hunt for Profitability

In November 2024, 23 Swedish game companies were listed on the Swedish stock market. The latest addition, Kinda Brave Entertainment, was listed on 3 June 2024. Wicket Gaming changed its name to edyoutec in November 2023.

Within the listed companies and groups, a number of restructurings have taken place over the past year in line with the strategies communicated in 2022 and early 2023. Paradox Interactive has reorganised to focus on developing its core business. In 2024, Thunderful Group divested parts of its games, toys and distribution businesses to Bergsala NDP and sold the German publisher Headup Games, which was acquired in early 2021.

Goodbye Kansas, which produces visual effects for film and digital games, among other things, restructured large parts of its operations during the year. Adventure Box announced in 2024 that it had agreed to a reverse takeover of the gambling company Lion Gaming Group, and has thus been removed from the list of game companies. In order to stabilise the group's finances and to phase out operations in Russia, Embracer Group divested a number of companies, including selling parts

Glowfish Games – Foxo

Swedish Listed Companies

Company	Year of (first) listing	Listed on	Revenue 2023, MEUR
Beyond Frames Entertainment AB	2018	Spotlight Stock Market	12
Edyoutec AB	2021	Spotlight Stock Market	2
Embracer Group AB	2016	OMX Stockholm Large Cap	3,678
Enad Global 7 AB	2017	Nasdaq Stockholm Small Cap	178
Fragbite Group AB	2021	Nasdaq First North Growth Market	21
G5 Entertainment AB	2006	OMX Stockholm Mid Cap	115
Game Chest Group AB	2021	Nordic SME	1
Gold Town Games AB	2016	Nordic SME	1
Goodbye Kansas Group AB	2017	Nasdaq First North Growth Market	4
Jumpgate AB	2016	Nordic SME	5
Kinda Brave Entertainment	2024	Nasdaq First North Growth Market	0
MAG Interactive AB	2017	Nasdaq First North Growth Market	32
Maximum Entertainment AB	2018	Nasdaq First North Growth Market	100
MindArk PE AB	2023	Spotlight Stock Market	11
Modern Times Group MTG AB	1999	Nasdaq Stockholm Large Cap	508
Paradox Interactive AB	2016	Nasdaq First North Growth Market	230
Qiiwi Games AB	2017	Nasdaq First North Growth Market	2
Safe Lane Gaming AB	2010	Nordic SME	3
Sozap AB	2021	Nasdaq First North Growth Market	1
Star Vault AB	2007	Nordic SME	1
Starbreeze AB	2000	Nasdaq Stockholm Small Cap	55
Stillfront Group AB	2015	OMX Stockholm Mid Cap	608
Thunderful Group AB	2020	Nasdaq First North Growth Market	35

of Saber Interactive back to one of the founders. Gearbox Entertainment was sold to Take-Two Interactive and Shiver Entertainment was sold to Nintendo.

In 2023, the total revenue of the listed companies amounted to SEK 64.3 billion (EUR 5.6B), an increase of SEK 3.5 billion from the previous year. Since 2019, revenue has increased six-fold. Seven of the 23 companies had a revenue of over SEK 1 billion, with Embracer Group single-handedly accounting for two-thirds of the total revenue of listed companies with SEK 42.2 billion.

The total market capitalisation in December 2023 was SEK 79.3 billion (EUR 6,9B), significantly lower than the previous year (just under SEK 123.7 billion). With the exception of Beyond Frames, which made a strong recovery to its previous year, all listed game companies saw only a marginal increase or a decrease in market capitalisation during 2023.

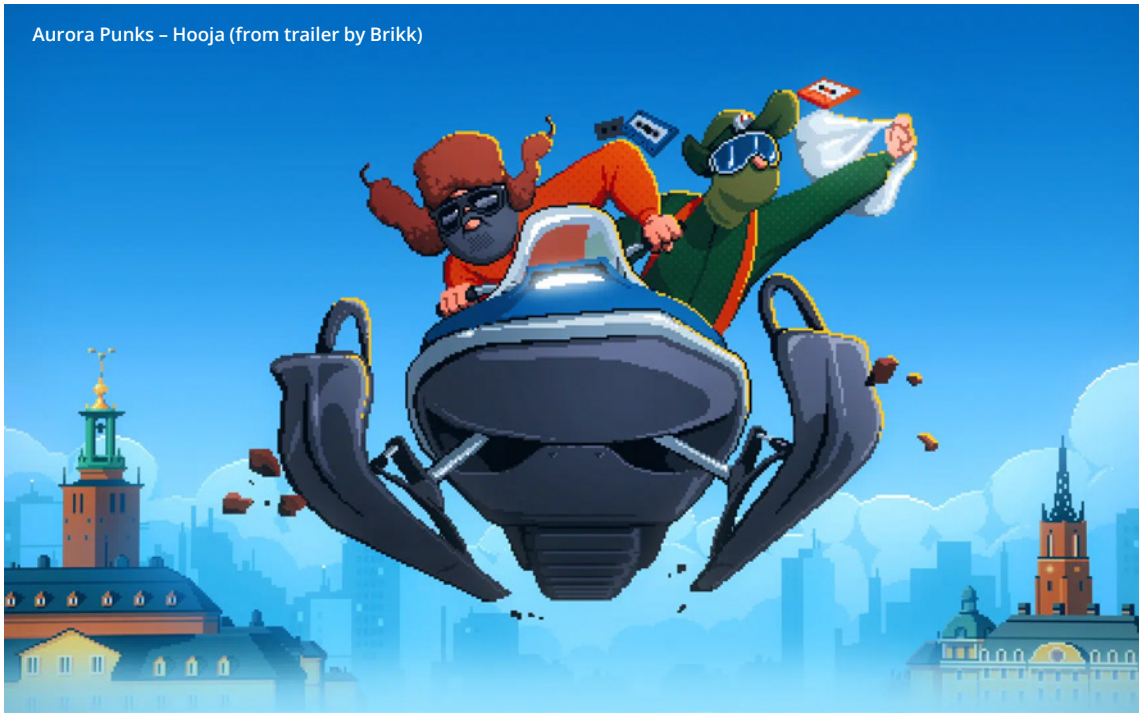
Prioritising Sustainability

The publicly traded Swedish companies conduct active sustainability work under the ESG framework (Environmental, Social & Governance) and report their work on sustainability issues annually. The sustainability reports published in 2024 show a commitment to diversity, gender equality, consumer protection and climate. More and more companies are measuring the climate impact of their entire value chain, including the user stage, with science-based emission reduction targets. Both Embracer Group and Stillfront Group have also had their targets approved by the Science Based Targets initiative (SBTi).

In addition to the largest companies, several medium-sized companies report on their sustainability efforts, and many are working in different ways to reduce their carbon footprint internally while participating in various broader industry-wide sustainability initiatives.

Adjacent Industry

In addition to the companies with activities in game development, the Swedish stock exchange also lists M.O.B.A. Network, a service provider to the gaming and e-sports industry, Verve Group (formerly Media and Games Invest), which has been headquartered in Sweden since 2023 and has a background in the games industry, and Fractal Gaming, which manufactures hardware with a focus on gaming computers. Finnish game developer Nitro Games is also listed on the Swedish stock exchange.


Aurora Punks – Hooja (from trailer by Brikk)

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Game Developer Map – Sweden

Game studios can be found in all Swedish regions, from Skåne to Norrbotten.

Stockholm is still by far the largest region in terms of the number of companies and employees, but most companies are evenly distributed across the rest of the country in proportion to the population, with a clear bias towards cities with some form of incubator or cluster offering support or business development.

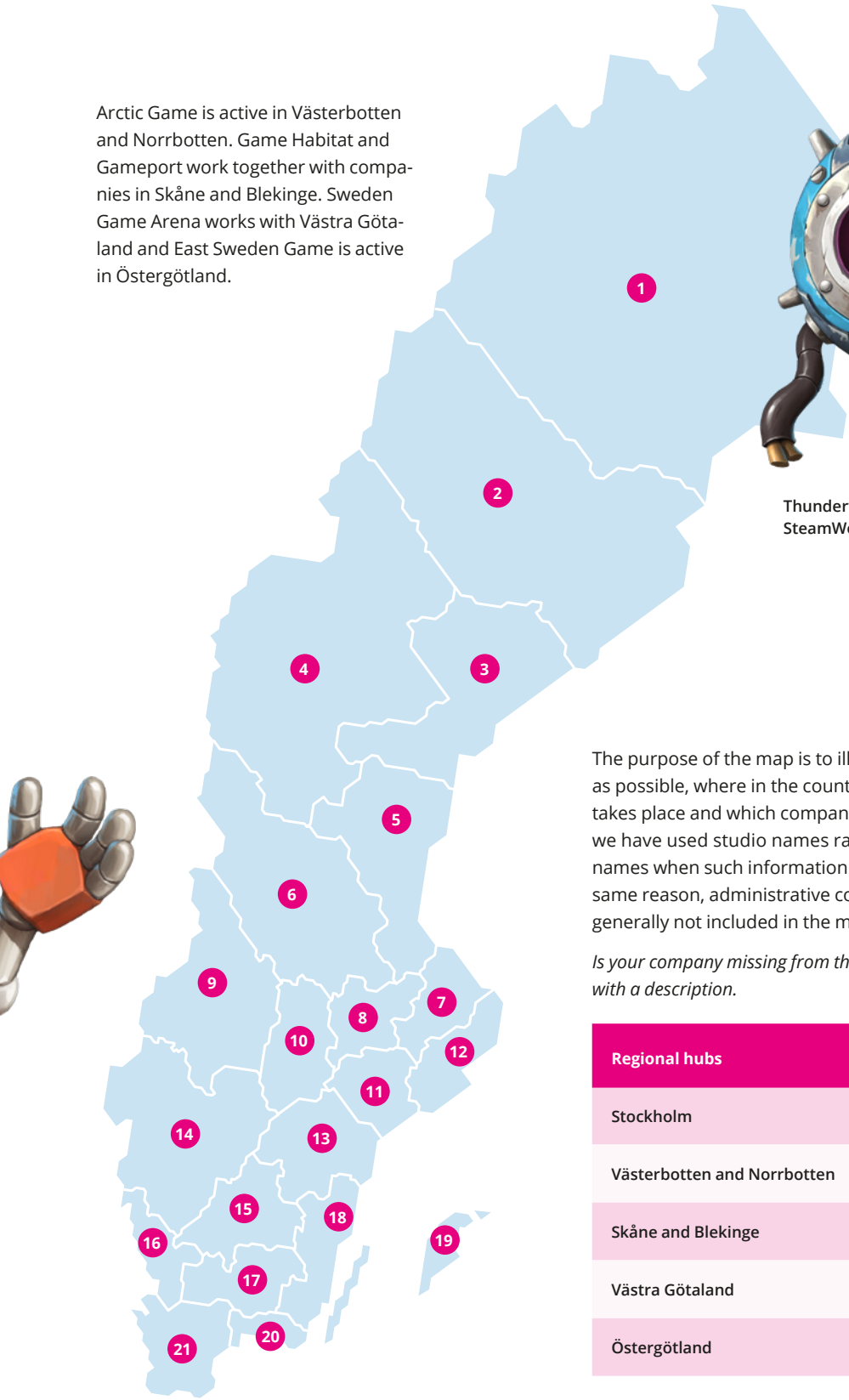
The majority of companies located in clusters are generally relatively small and newly started, resulting in lower turnover and fewer employees. Five regions with larger and established clusters are listed in the table. All of the hubs have seen an increase in the number of companies. In some newly started companies there are more employees than listed, as their key figures have yet to be reported and registered.

The game developer map primarily lists the Swedish limited companies that are active in the game industry and where in the country they are located, but some active companies in other corporate forms are also included in the list. Most of the companies in the list are small (87,5%) with less than 10 employees.

Note that the statistics are based on the number of full-time positions reported in the companies' annual reports. The total number of people working with game development in each location should be considered to be significantly higher. In addition, the figures for employees in locations other than the head office have been adjusted as far as possible.

Thunderful – SteamWorld Build

Arctic Game is active in Västerbotten and Norrbotten. Game Habitat and Gameport work together with companies in Skåne and Blekinge. Sweden Game Arena works with Västra Götaland and East Sweden Game is active in Östergötland.



Thunderful – SteamWorld Build

The purpose of the map is to illustrate, as accurately as possible, where in the country game development takes place and which companies are behind it. Thus we have used studio names rather than company names when such information was available. For the same reason, administrative company divisions are generally not included in the map.

Is your company missing from the map? Please contact us with a description.

Regional hubs	No. Companies	No. Employees
Stockholm	439	5,816
Västerbotten and Norrbotten	85	270
Skåne and Blekinge	168	1,767
Västra Götaland	155	779
Östergötland	59	111

NORRBOTTEN 1

Boden
5 Fortress AB
921 Studios AB
CF Digital AB
FCV Sverige AB
House of How Games Sweden AB
Less is More
Miracle Bread AB
Northify AB
October8 AB
Previous AB
Raincoat Republic
Shima Solutions AB
Sparrowland Aktiebolag
Synical Studios AB
The Notlanders AB
TNTX in Boden AB
Tyrant Films AB
ViktorArt AB
Wanderword i Sverige AB

Kalix
eelDev AB

Kiruna
SetShape Studio AB

Luleå
Blamorama Games AB
Saltlight studio
Volatile Frameworks AB

Piteå
Baldheads Creative AB
Digital Awakening AB
Frozen North Studios AB
Lazer Wolf Studios AB

VÄSTERBOTTEN 2

Skellefteå
Albin Björklund
Ballistic Pork AB
Cold Sector AB
Creative Crowd AB
DANIEL LEHTO AB
Giantsbane AB
Gold Town Games
Gold Town Games AB
Grand Pike AB
Gumlin Games AB
Izanami Workshop
Jordi Creations AB
Metropolis AB
Mind Detonator AB
Nordsken Handlingskraft AB
NORTH KINGDOM DESIGN & COMMUNICATION AB
Polysoup
Pregame AB
RNI Games AB
Silent Factory AB
Some Giants North AB
Spinoff Games AB
Streiff Studio AB
Tarvalley
Throw away company AB
Tricky Wispers AB
Triolith Games AB
Vavel Games AB
Yalts AB

Umeå
Acino AB
Allscope AB
Arctic Game Developers Alliance AB
Blast Bit Enterprises AB
Bmetrix Sweden AB
Cassius Creative AB
Contentasoft AB
Crypto Rouge Games
David Marquardt Studios AB
Friendly Mountain AB
Frostspektrum Interactive AB
Game Boost Sweden AB
Greyling Invest AB
JPR Ventures AB
Kibix AB
Mattias Wiking Development AB
Morningdew Media AB
Moxville AB
nostop horses AB
Oddgames Umeå
ORYX SIMULATIONS VERKLIGHETS-MODELLERI SVERIGE A
OTC studio AB
Parrexion Games AB
RankOne Global AB
Rusty Pug Entertainment AB
Sam & Frida AB
Shaggy Dog Studios AB
The Fine Arc Nordic AB
Turborilla AB
TWO 58 PRODUCTIONS AB
Wayfinder Games AB
Windup Games AB

Vindeln
Twoorb Studios AB

VÄSTERNORRLAND 3

Kramfors
Duck Tape AB
Grey Tower AB
White Warlock AB

Örnsköldsvik
Northern Ice Handelsbolag
WHYMAC AB

Sundsvall
A bit ago AB
AtomicElbow AB
Caeiro AB
Corncrow Games AB
Datacraft Holding AB
Good Decision AB
Gr IT AB
KONUNGER GAMES AB
Mixxus Studio
Molntuss Spel AB
Moolecaps AB
Neozoo Creative
Romeo Invest AB
Saber Interactive Sweden
SideQuest Sweden AB
Simtarget

Timrå
Edym Pixels

JÄMTLAND 4

Åre
Hindelid Development AB

Östersund
GleeMill AB
JN Programutveckling AB

GÄVLEBORG 5

Bollnäs
FulKult

Gävle
Early Morning Studio AB
Scuttled Tech AB

Ljusdal
Moon Flame Games

DALARNA 6

Borlänge
Good Old Pixel AB
Quiz Anytime AB
Zoikum Games Aktiebolag

Falun
Aktiebolaget Adit Studios
Campground Interactive AB
Giron Software AB
Kolesterol Cät Interactive AB
North Concept ArtStudio AB
TENSION technology AB
The New Branch AB
Wogglawooh Entertainment AB

Gagnef
Virtual Beasts AB

Hedemora
Clifftop Games AB
Killmonday Games AB

Malung-Sälen
North Modding Company AB

REGION UPPSALA 7

Enköping
Rennert Games AB
Yoger Games AB

Håbo
aMASE AB
Tiny Nomads AB

Knivsta
Outlean AB
Studio Knick-Knack AB

Sala
Everlight Studio AB

Uppsala
Aegik AB
BigMood AB
Bitfix AB
Chizu AB
Dinomite Games
Doctor Entertainment AB
edyoutec AB
Ember Trail
Epic Games
Frojo Apps AB
GraphN AB
Javxa
Kinda Brave Entertainment Group AB
Knifes AB
Lialum AB
Lost Sock Studio AB
MachineGames Sweden AB
Matematikspel i Uppsala Aktiebolag
Nena Innovation AB
Neon Giant AB
Nexile AB
Odens Mind Games AB
Playtank
Red Cabin Games AB
Semiwork Studios AB
Shanyar Studio AB
Think First AB
Tretton Adam AB
Vendel Studios AB
VisualDreams AB
Vorto Gaming AB
YemSoft AB

VÄSTMANLAND 8

Köping
LS Entertainment AB

Skinnskatteberg
Bumble Byte AB

Surahammar
Walrus Game Studios AB

Västerås
Brotir AB
BulletHell Studios AB

VÄRMLAND 9

Forshaga
Insanto Studios AB

Hammarö
Mystik AB

Karlstad
Agera Games AB
Clear River Games AB
Embracer Group AB
Firma Noah Molteberg Lundén
Forgebyte Studio AB
Frostglade AB
Mirage Game Studios AB
NetherMoon Game Studio AB
NFG Nordic Forest Games AB
Nimble Giant Sweden
Nine Lives Game Studio
Nuttery Entertainment AB

Omniscapes Interactive AB
Rainbow Road AB
Somatoform AB
Studio Malosi AB
Team Velocita AB

Kil
Philosophic Games

Sunne
Shaping Games AB

REGION ÖREBRO 10

Degerfors
ORBMIT Productions AB

Hallsberg
vibynary Aktiebolag

Lindesberg
AC GAMES AB

Nora
Toasty Leaf AB

Örebro
DANJO CREATIVE AB
Elder Grounds AB
LOYD Studios AB
NBrigade Music AB
Senior Studios AB
Shemshem Design AB

SÖDERMANLAND 11

Eskilstuna
AL Spelutveckling AB
anananas studio AB
AppsAlliance AB
DVapps AB
MythoLogic Interactive AB
Todys Games AB

Nyköping
SOZAP
Sysiac games AB

Strängnäs
Hati Hati Games AB
Motvind Studios AB
Unordinal AB
Vanilla Sky Productions AB

REGION STOCKHOLM 12

Botkyrka
Beadhead Games AB
Crackshell AB
ngine technologies AB
Orion Eunix AB
Stringent Ljud AB

Danderyd
bNosy AB
Planeshift Interactive AB
Solvarg AB
Tinto Consulting AB

Ekerö
chillbro studios AB
Hypr10 AB
Infinite Entertainment Stockholm AB
Playstack AB

Haninge
Counterspell AB
Gamatron AB
Odensity Games AB
Pretty Fly Games AB
Rain of Reflections AB

Huddinge
Bright Gambit AB
Holmgång AB
Inzanity AB
Johra AB
Moon Mode AB
Razzleberries AB
Strawberry Hill AB
Typosaurus AB

Järfälla
Ashkan Namousi AB
Cresthelm studios AB
Merrybrain AB
Smojo AB
Unleash the Giraffe AB

Lidingö
Bjuret AB
Mount West Music AB
My Left Head Entertainment AB
PIXEL TALES AB
The Froghouse AB
Wildlife Studios Sweden AB

Nacka
2Play Studios AB
Colin Lane Games AB
Dejan Dimic AB
Domoore AB
Game Advisor Sweden AB
Insert Coin AB
Kroonatus AB
LeadTurn Gaming AB
Liquid Swords AB
LootLocker AB
Paperplay Games AB
Polygongruvan AB
Puzzlebox Studios AB
Re-koup AB
Shellander Games AB
Valiant Game Studio AB

Norrtälje
Argent Realms AB
Dovora Interactive AB
Space Plunge AB

Sigtuna
25Hours Games
Svantech Studios AB
Usurpator AB

Södertälje
Diffident Games AB
JN Interactive AB

Sollentuna
Almost Fantastic AB
Bluell AB
Short Infinity AB
Ullbors Illustrations AB
Vishindo AB

Solna
BBS Games AB
BitBear AB
Black Voyage Games AB
Christian Nordgren AB
Fargo Games AB
FunGI AB
Ilbiz Studio AB
Jona Marklund AB
LERP AB
Lilla Fezen AB
Manaii World
Ringtail Interactive
Sharcoal Studios AB
Sleipner Games AB
Solutions Skövde AB
ToeDev AB
TRB Studio AB

Stockholm
10 Chambers AB
A Small Game AB
Abrahamsson Flamm AB
Acegikmo AB
ActFirst Games AB
Advenimus AB
Aktiebolaget Fula Fisken
Amplifier Game Invest
Antler Interactive AB
anton.games AB
Aonic AB
Archipelago Games AB
Arcmill AB
Arrowhead Games
art by rens AB
Ashes & Diamonds Entertainment AB
Atlantic Games AB
Atlantika Interactive AB
Aurora Punks
Aurora Punks AB
Avalanche Studios Group
Axolot Games AB
Barnacles Studio AB
Battlecamp AB
Bewildermill AB
Beyond Frames Entertainment AB (publ)
Björkman Consulting Group AB
Blackfox Studios AB
Blastronaut AB
BloodMoon Studios
Bodbacka:Boom AB
Book of travel AB
Brikk Animation AB
Brillianton AB
Burning Planet Digital AB
Caketown Interactive AB
Challenge GG AB
Chessiverse AB
Chief Rebel AB
Code Club AB
Coffee Stain North AB
Cold Pixel AB
Collecting Smiles AB
Conifer Games Sweden filial
Cortopia AB
Cosmico AB
Coulianos Studio AB
Creation Zero Point Holding AB
Cult of the North AB
Dagg AI AB
Daltitten AB
Dark Riviera AB
Dashy Studios AB
Decaying Games AB
Define Reality AB
Defold Foundation
Delit AB
Denove Service AB
Devm Games AB
Diax Game AB
Digiai AB
Digital Exception Sthlm AB
DIVR Sweden AB
DorDor AB
DualNorth AB
EA Dice
Effsee AB
Ekvall Games Sweden AB
Elda Entertainment AB
Eldring Games AB
Elemental Games AB
Embark Studios AB
Enad Global 7 AB
Enember Studios AB
Envar Games AB
Epic Games
Evergreen IT AB
Exertis Ztorm AB
ExoCorp AB
Expansive Worlds AB
Experiment 101 AB
Expertise Games Group Stockholm AB
Fablebit AB
Fast Travel Games AB
Fatshark
FeWes AB
Filimundus AB
Filmic Studios AB
FJRD Interactive
Flarie AB
Flashe Gaming Group AB
Fragbite Group AB
Fredtob Games AB
Frever AB
Friendly Foe Games AB
FunRock Development AB
Fury Studios AB
Fuyu Games AB
G5 Entertainment AB
Gambit Technologies AB
Game Chest group AB
GAME-HOSTING GH AB
Gamersgate AB
Gamescan Stockholm Studios AB
GeoGuessr AB
Ghetto Blaster AB
Glorious Games Group AB
Go Maddox Interactive AB
Goals AB
Goodbye Kansas
Grindstone Interactive AB
Gro Play Digital AB
GURATRON Industries AB

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Massive Entertainment – Avatar; Frontiers of Pandora

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Hamlab AB
Hängagubbe studio AB
Haraflax AB
Hatrabbit AB
Hazelight
Hitbox Games AB
HVNT Entertainment AB
Hyperspeed Entertainment AB
Ichigoichie AB
IdaP Studios AB
Idun Interactive AB
IG Consulting AB
Ilo Games AB
Infima Games
IORAMA AB
Jämmerdal Games AB
Jhony Ljungstedt AB
JO Johansson Film & L Lindbom AB
Jonas Levin AB
Jopter Interactive AB
Karl Johannisson AB
Kavalri Games AB
Keepsake Games AB
Kickflip Digital AB
King
Landfall Games AB
Legendo Entertainment AB
Lejongrejer AB
Lekis AB
Level Stars AB
Lionbite AB
LIQUID MEDIA AB
Maadwalk Games AB
MAG Interactive
Maximum Entertainment AB
Med Svärd AB
Megadib AB
Mentalytics AB
Mibi Games AB
Midjiwan AB
Might and Delight AB
Millionth Line AB
Minoan Studios AB
Miso Games AB
Modoyo AB
Mojang AB
Moon Rover AB
Moreish Games AB
MTG
MuddyPixel AB
Mudpike AB
Nampa Design AB
Neat Corporation
Neon Artery AB
Neuston AB
New Galaxy Games Sweden AB
Nibiru Software AB
NL Productions AB
NMBRS Production AB
Noid Games AB
Nørdlight Games AB
Northerner Games AB
Nr89 Studios AB
Odd Raven Studios AB
Off-Leash Interactive AB
Omino Games AB
Osivvi AB
Oxeye Game Studio AB
P Studios AB
Palabit AB
Paradox Interactive
Perfect Random AB
Petter Bergmar AB
PLAYCOM GAME DESIGN AB
Pley AB
Plotagon Production AB
Polarbit AB
Polarcade AB
POLE POSITION PRODUCTION AKTIEBOLAG
Portningsbolaget Sverige Aktiebolag
POTEMKIN AB
Pounce Light AB
Pusselbit Games AB
Puzzle Mill AB
QDE Studio AB
Quel Solaar AB
Rabbits Foot Studios
RAKETSPEL INTERAKTIVA PRODUKTIONER AB
Rapix Games AB
Raw Fury AB
Really Interactive AB
Red Cup Games AB
Refold AB
Regius Group AB
Remedy Entertainment Sweden AB
Reset Media AB
Resolution Games
Rift Consulting AB
Rightsized Games AB
RimeLime AB
Rock A Role Games AB
Roro AB
Rovio Sweden AB
Rowil AB
Rymdfall AB
Safe Lane Gaming AB
Sagoverse AB
Schmugan AB
Scion Studios AB
Search And Grow
Sequel Games AB
Shelter Games AB
Short Circuit Studios AB
Sidres AB
Simway AB
Sleeper Cell AB
Snowprint Studios AB
Solid Studios Creative Lab AB
Source Empire AB
Spelcell AB
Spelkraft Sthlm AB

Spellscaper AB
Square Dreams AB
STAR STABLE ENTERTAINMENT AB
Starbreeze AB
Sticky Games STHLM AB
Stillfront Group AB
Stockholm VR Center AB
Stroboskop AB
Sutur AB
Svartskägg AB
Systemic Reaction AB
Tale Maker Productions STHLM AB
Tappily AB
Ternios AB
The Gang Sweden AB
The Outsiders
Thriving Ventures AB
Tiger & Kiwi AB
Toca Boca AB
Tomorroworld AB
Toppluva AB
TROISDIM AKTIEBOLAG
Trollheim Tveir AB
True Ending AB
TTK Games AB
Ubisoft
Unity Technologies Sweden AB
Varia Entertainment AB
Vidunder Games AB
Villa Gorilla AB
Vinternatt Studio AB
Vobling AB
Warm Kitten AB
Wayfare Studio AB
Westre Games AB
Wild Games AB
Wilnyl Games AB
Wings
Woodhill Interactive AB
wrlds technologies AB
Wrong Organ AB
Xpert Eleven AB
YanDesign AB
Ztar Games AB

Sundbyberg
Cognisim AB
Grannkampen AB
Green Leap Games AB
Novamitech AB
Pointless Games AB
Simple Magic Studios AB
White Imp Games AB

Täby
Aktiebolaget Seatribe
Frojo Investment AB
Kalla frestelser AB
NIALBE AB
Polyregular Studios AB
QA Design AB
Qanyou AB
Roden Games AB
Soundkids AB
Synthetic Mind AB
Tealbit AB
Warpzone Studios AB
Yangmei Studios AB

Tyresö
Lilla Bas AB
Oort Cloud AB
Sista Potatis AB
Spelagon AB
Wynne Technology AB

Upplands Väsby
Fredaikis AB
RobTop Games AB

Upplands-Bro
Bambino Games AB

Vallentuna
Delayed Again AB
Pixeldiet Entertainment AB

Värmdö
Blue Scarab Entertainment AB
Elias Software
Good Night Brave Warrior AB
IMGNRY International AB
Knowledgegrind Sweden AB
Massive Shapes AB
Spelkultur i Sverige AB

Österåker
Frozen Dev AB
SLS Global AB

ÖSTERGÖTLAND 13

Boxholm
IONEO AB

Linköping
Adly AB
Aftnareld AB
Another Game Sweden AB
Avokodo Studios AB
Beartwigs AB
BridgeCo AB
Catalope Games AB
Doublecap AB
Graewolv AB
Hihat Studios Aktiebolag
Holmcom AB
Incredible Concepts of Sweden AB
Irrbloss AB
Laxbeam AB
Liopep AB
Lurkit AB
Lutra Interactive AB
Magneticlake AB
Majewski Holding AB
Martin Magni AB
Mighty Magpie AB
Miltonic Games AB
My Virtual Classroom AB
Pixleon AB
Power Challenge AB
Pugstorm AB
Red Nerv AB
Resolution Games
Screenput AB
Simplygon studios
SocAli Socialpeda-
gogiska Verktyg AB

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Kavalri Games – Equestrian the Game

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Strategy Mill AB
Therese Kristoffer Publishing AB
VISIARC Inclusive Design AB

Mjölby
Jidindi AB

Motala
Campcreation AB

Norrköping
AmberWing AB
Ark Island Studio AB
Borrowed Soul Studio AB
Caspian Interactive
Correcture Games AB
Endjui Productions AB
Gamesclub International AB
GOES International AB
Molndust Interactive AB
One Potato Kingdom AB
Perpetuum Media Sverige AB
Silkworm
Skyfox Interactive AB
SONDIM
Stonetech Games
TOMLIN STUDIO AB

Vadstena
Palebits AB

VÄSTRA GÖTALAND 14

Ale
1337 Game Design AB

Alingsås
Qiiwi Games AB
Stuck Studios AB
Whale Peak Games AB

Bollebygd
Rockheart Studios AB

Borås
Gigantic Duck AB
Manavind AB

Gothenburg
A Creative Endeavor AB
AB Cx3
Ampd AB
An Otter Team AB
Apskeppet AB
Atvis AB
Beardybird AB
Bitwave AB
Box Dragon AB
Bulbsort AB
Choofun Games AB
Coffee Stain Gbg AB
Craft Animations and Entertainment AB
Creative Vault AB
Curiosa AB
Dennaton Games
Devkittens AB
EA Gothenburg
El Huervo AB
Elden Pixels AB
FanLad AB
Feeble Minds AB
Friendbase AB
Fully Multiplayer AB
Game in Game AB
Glowfish Games AB
Greenblade Studios AB
Hello There
Hiber AB
Humla Games AB
inDirection Games AB
Insert Coin AB
int3 software AB
Itatake AB
ius innovation AB
just some games AB
Lavapotion AB
Lician Games AB
Lingon Studios AB
Lxip Games AB
MindArk
Mindforce Game Lab AB
Mistwave Interactive AB
Neckbolt AB
Oscar Makes Games AB
Outbreak Studios AB
Pax6 Games AB
Playcentric Studios AB
Radgivery AB
Räven Aktiebolag
Redbeet Interactive AB
River End Games AB
SkyGoblin AB
Soupmasters AB
South North Games AB
SteelRaven7 AB
Studio Far Out Games AB
Studio Northshade AB
The Fully Arcade AB
Thunderful Group AB
TinyHill AB
To the Sky AB
Uncloudy Labs AB
Warcry Interactive AB
Wereviz AB
Winteractive AB
Wishful Whale AB
Wishfully Studios AB
YCJY Games AB
Zcooly AB

Götene
Pronoia AB

Härryda
Electric Succubi AB
Mambo Jambo Studios AB

Kungälv
Brimstone Games AB
Dreamon Studios AB
Skill2Win Studios AB
Swarm Creations AB

Lidköping
Pixel Pointer Studios AB

Mellerud
Vovoid Media Technologies AB

Mölndal
Ball Lightning AB
E Games Invest Nordic AB
GSP golf AB
Heyman Atelje & Verkstad AB
nornware AB
Oddiko AB
Pathos Interactive AB

Munkedal
Coilworks AB

Partille
Ciscal Holding AB
Moonhood AB

Skara
Alega & Qiiwi Learning AB
VaragtP Studios AB

Skövde
Agnar Thor Oskarsson Berglund
Angry Demon Studio AB
Aurora Arts AB
Coffee Stain Publishing AB
Coffee Stain Studios AB
Designlayout EGU AB
DoubleMoose Games AB
Draw Three Cards AB
Elmseld Interactive AB
Ember Paw Games AB
FRAME BREAK AB
Frostcore AB
GIBBET GAMES AB
Green Tile Digital AB
Iron Gate AB
JETEBRA Games
Knackelibang Productions AB
Let it roll AB
Ludosity AB
Nattland Interactive AB
Nuggets Entertainment AB
Palindrome Interactive AB
Pieces Interactive AB
Piktiv AB
Sandspire Interactive AB
Sonigon AB
Speldosa Interactive AB
Studio Downstairs
Stunlock Studios AB
Subfrost Interactive AB
Three Friends AB
Thunderful Group AB
Whirlybird Games AB
Windmill Game Invest

Stenungsund
Ace Maddox AB
Zapray Games AB

Strömstad
Creative AI Nordic AB
Tanum
Tenstar

Tibro
Pretty Broken Code AB

Trollhättan
ActiveQuiz Europe AB
Easy Trigger AB
Odenity

Vänersborg
INI AB
Virtuverse AB

REGION JÖNKÖPING 15

Jönköping
Brandywise AB
Cuddle Monster AB
Hatokuma Games AB
Pigs Will Fly Studios AB
PrettyByte AB
Radical Sunset AB

Tranås
Head Coach Games AB

HALLAND 16

Falkenberg
Gellyberry Studios AB

Halmstad
Deadghost Interactive AB
Eagle games Sweden AB
Erik Svedäng AB
Striped Panda AB

Kungsbacka
Breaker Interactive AB
Nifly Apps AB
Oganon interactive AB
Snojken AB

KRONOBERG 17

Alvesta
Wadonk AB

Ljungby
Bläckfisk Förlag AB

Markaryd
Reality Park AB

Tingsryd
Spelkollektivet Sweden AB

Växjö
Arcade Mixtape AB
Mabozo AB
Triple Hex AB
Wildcore AB

Älmhult
Inntq AB
Visiontrick Media AB

REGION KALMAR 18

Hultsfred
Plink&Plonk Studio AB

Kalmar
Straw hat games AB

Nybro
Deadly Serious Media Sweden AB

GOTLAND 19

Eat Create Sleep AB
Glass Rock Gathering AB
Iterative Studios AB
Jumpgate AB
Photon Forge AB
Pixel Ferrets AB
Studio F15 AB
Tableflip Entertainment AB
Wognum Studios

BLEKINGE 20

Karlshamn
Black Tundra Productions AB
Dreamwalker Studios AB
Mana Brigade AB
Noumenon Games AB
Pretty Ugly AB
Slugware AB
Something We Made AB
Thunderful Group AB
Virtual Tree Design AB

Karlskrona
Blackdrop Interactive AB
Shatterplay Studio AB
Svavelstickan AB
Whacky Mole Studio AB

Ronneby
Activout AB
Kernel Iron AB
Nodbrim Interactive AB
Powersnake AB

SKÅNE 21

Burlöv
Happi Papi AB
Llama Lane AB
Pfanne AB
Spiddekauga Games AB

Eslöv
Digital kittens AB
MistByte AB
Pastille AB

Helsingborg
Aldgard Studio AB
BTR Goose AB
Decemberborn AB
Duckpond Interactive AB
HARBOURS MOON AB
Localize Direct AB
Monsuta AB
Pixelbite AB
Shapefarm AB
Sjöberg Game Consulting AB

Hässleholm
Grenaa Games AB
KoniWorx Animation AB

Höganäs
KEP Games AB

Hörby
CroolBright AB

Höör
On Pixel Graphics AB

Kristianstad
JE Software Aktiebolag
Nordic Software for Entertainment

Landskrona
KFH Graphics AB
Urban Binary AB

Lund
Aroko Game Studio AB
Blackdoor AB
Bridgestars Technologies Sweden AB
DAVID DARABIAN
Desperate Measures AB
Exiom's Corner
Illwinter Game Design AB
Imagine Games
Jitesoft AB
Junno Labs AB
Kakigori
Pengu Studios AB
Venturous
Wing It Games

Malmö
A Million Flies AB
Apog Labs
Art in Heart AB
Avalanche Studios Group
Behold Ventures
Bloom & Gloom Games AB
Broadside Games AB
Carry Castle AB
Chamo Games AB
Chimera Garden Games AB
Chromatic ink AB
Codeborn AB
Coffee Stain
Coherence Sweden AB
Cross Reality International AB
Cult of the North Malmö
Dead Astronauts AB
DeadToast Entertainment AB
Dengu AB
Diatomic AB
Divine Robot AB
Dunderbit AB
EB Studio
Echo Entertainment AB
EXTRALIVES AB
Folded Fox
Frictional Games AB
Frogsong Studios AB
Gameflame
Gotterdammerung AB
Grapefrukt
Haderajan AB
Haenir Studio AB
Hazel Interval AB
Icehelm AB
Illusion Labs
Illusion Labs AB
Imaginative Ones AB
Infinite Mana Games AB
IO Interactive AB
Jacklin Game Consultancy AB
King
Learning Loop Sweden AB
LERIPA AB
Linbasta AB
Longhand Electric AB
Magnetic Games AB
Massive Entertainment – a Ubisoft Studio
Mediocre AB
Ming Media AB
Monsoon Bit AB
MU Studios AB
Multiscription AB
Neon Noroshi AB
Neuron Burner AB
nevsram AB
Ninmark Soundworks AB
Nordic Game Resources AB
Nordic Game Ventures i Malmö AB
Nordic Stone Studio AB
Not My Jeans AB
On the Outskirts AB
Oskar Stålberg AB
Pixel Shade
ProCloud Media Invest AB
Psychic Sidekick AB
Rashidi Interactive AB
Rau Studios AB
Rennsport Sweden AB
Rubycone AB
Section 9 Interactive AB
Sharkmob AB
She Was Such a Good Horse AB
Simogo AB
Snapbreak Games AB
Southend Interactive AB
Star Vault AB
Studio Hamlin AB
SWEDISH GAME DEVELOPMENT AB
Sydow Production AB
Tales & Dice AB
Tarsier Studios AB
The Sleeping Machine AB
Thunderful Group AB
Transmuted Games AB
Tuxedo Labs AB
Two Foot Productions AB
Undone Games AB
Velodrom AB
Vova Games AB
Vreski AB
WhatAreBirds AB
Work with Kuba AB

Simrishamn
Videocult Sweden AB

Sjöbo
AENY AB

Skurup
Spelmakare Jens Nilsson AB

Staffanstorp
VoDoo Studios
WhyKev AB

Svedala
Binary Peak AB

Tomelilla
Pixilated Production AB
Redgrim AB
Trancenders Media AB

Vellinge
Astelsie AB
Impact Unified AB
Primary Hive AB

Ystad
VisionPunk AB

Ängelholm
PMAbit AB

Sparrowland – The Tragedy at Deer Creek

Swedish Game Companies Around the Globe

Since 2018, the number of Swedish-owned companies abroad has increased exponentially as Swedish companies have invested in and acquired studios, publishers and service providers around the world.

Largest Swedish Companies Globally

The largest Swedish registered companies with net sales from subsidiaries. Employees in companies that are part of foreign-based groups are not part of the statistics.

	Company	Group Revenue MEUR	Employees outside Sweden 2023/24
1	Embracer Group	3,678	10,966
2	King	665	–
3	Stillfront Group	608	1,234
4	Modern Times Group MTG	508	1,010
5	Mojang	351	–
6	Paradox Interactive	230	177
7	Enad Global 7	178	635
8	Toca Boca	140	–
9	EA DICE	138	–
10	G5 Entertainment	115	913

Agera Games – TOSS

In autumn 2024, there were a total of 218 Swedish-owned game companies around the world, compared with 197 in October 2022. In 2023, total ownership was higher, but over the past year, several large companies, especially the listed game companies, have restructured their groups and concentrated operations, including by divesting parts of their portfolios.

At mid-year 2024, Embracer Group had divested just over 100 companies from the group. A large number of these were administrative entities, and a smaller number were studios in and outside Sweden. This type of restructuring is not a limited phenomenon, but a pattern that can be seen in several companies over the past year that have closed down or sold off various international enterprises.

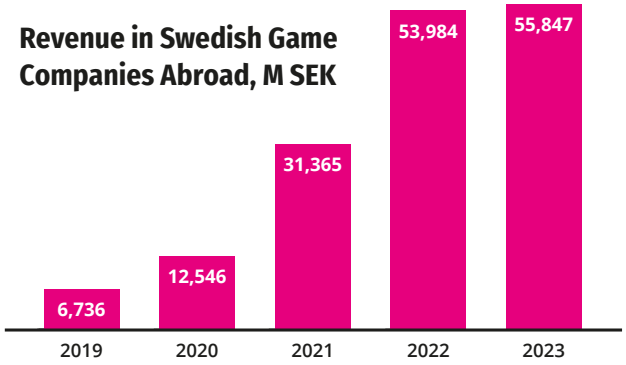
The largest of the groups with foreign operations is still Embracer Group with more than 60 game companies, excluding the subsidiary groups in Asmodee, which develops and distributes physical games, and Dark Horse, which publishes comics.

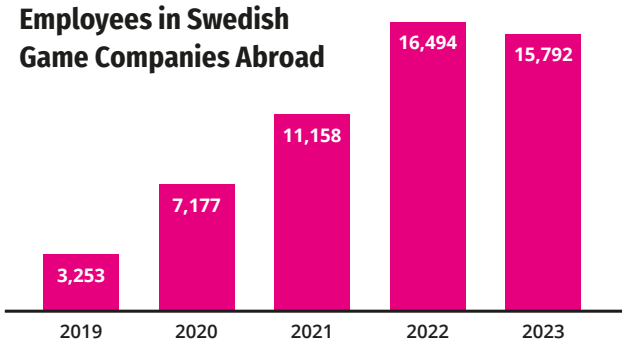
Game companies that are wholly or majority owned by a Swedish parent company are present in at least

54 countries on five continents, a sign of the Swedish industry's palpable influence on the global games market.

Together, Swedish-owned game companies employed 15,792 people in other countries in 2023. Of these employees, around 29.5% were women.

As is typical of the statistics we present in this report, the increase in the number of studios and employees in Sweden is largely driven by organic growth, while the increase abroad is mainly due to the acquisitions made by Swedish investors and groups. This year we see a clear reduction in the number of companies and thus also the figures for the number of employees. Revenue in international operations is increasing in SEK but is stagnant in EUR and USD, a result of several structural reorganisations over the past year. It is difficult to clearly represent the growth of international operations, but among those unaffected by the reorganisations, both operations and profitability appear to be stable.





Agera Games – TOSS

Sweden Strong in Europe

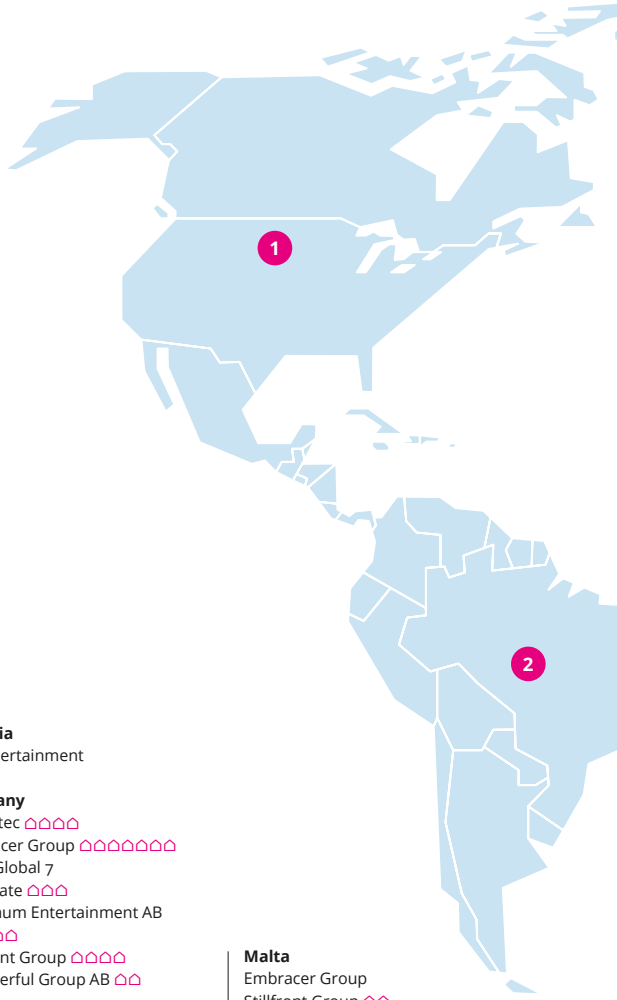
The European Game Developers Federation (EGDF) and Video Games Europe conduct an annual joint report on game development in Europe. The 2022 *European Video Games Industry Insight Report*, published in the summer of 2024, is a compilation of the 2022 industry reports of the different countries, with some reports based on surveys and some on data collected from official registers.

In 2022, there were 5,300 game development companies in the EU. Sweden topped the list with 939 companies, ahead of Germany (750 companies) and France (577 companies). Sweden was ranked fifth in terms of number of employees, behind much more populous countries such as France, Poland, Germany and Spain. In terms of gender distribution, Sweden was well below the EU average of 24.4% women in 2022.

Swedish game companies also have a great economic impact. In 2022, the Swedish games industry ranked fourth in total revenue with EUR 3.1 billion, after Germany (EUR 3.8 billion), France (EUR 3.75 billion) and Finland (EUR 3.2 billion). Including international subsidiaries, Swedish-owned companies are the largest in the EU with a global revenue of just over EUR 8 billion, close to that of the United Kingdom.

Game Developer Map – Global

Swedish game companies grow stronger through extensive acquisitions and investments abroad.



Below is a list of game studios around the world that are subsidiaries of Swedish game companies. The list is consolidated at group level and each ⌂ represents a corporate entity in the country.

NORTH AMERICA 1

Canada
Embracer Group ⌂⌂⌂
Enad Global 7 ⌂⌂
Stillfront Group

USA
Embracer Group
⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂
Enad Global 7
G5 Entertainment
Maximum Entertainment AB ⌂⌂
MTG
Paradox ⌂⌂
Resolution Games
Starbreeze ⌂⌂
Stillfront Group
⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂
⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂⌂

SOUTH AMERICA 2

Brazil
Maximum Entertainment AB

BVI
Stillfront Group

EUROPE 3

Austria
Embracer Group
Belarus
Embracer Group

Belgium
Embracer Group

Bosnia and Herzegovina
Embracer Group

Bulgaria
Embracer Group ⌂⌂
G5 Entertainment
Stillfront Group

Croatia
Raw Fury
Stillfront Group

Cyprus
G5 Entertainment
Qiiwi Games

Czech Republic
Embracer Group ⌂⌂

Denmark
Embracer Group ⌂⌂⌂
Thunderful Group AB ⌂⌂

Finland
Embracer Group
Paradox
Thunderful Group AB

France
Embracer Group ⌂⌂⌂
Fragbite Group
Maximum Entertainment AB
Paradox
Starbreeze AB
Enad Global 7

Georgia
G5 Entertainment

Germany
Edyoutec ⌂⌂⌂⌂
Embracer Group ⌂⌂⌂⌂⌂⌂
Enad Global 7
Jumpgate ⌂⌂⌂
Maximum Entertainment AB
MTG ⌂⌂
Stillfront Group ⌂⌂⌂⌂
Thunderful Group AB ⌂⌂

Gibraltar
Fragbite Group

Hungary
Embracer Group
Maximum Entertainment AB

Ireland
Maximum Entertainment AB
Stillfront Group

Italy
Embracer Group ⌂⌂⌂

Luxembourg
Starbreeze AB

Macedonia
Embracer Group

Malta
Embracer Group
Stillfront Group ⌂⌂

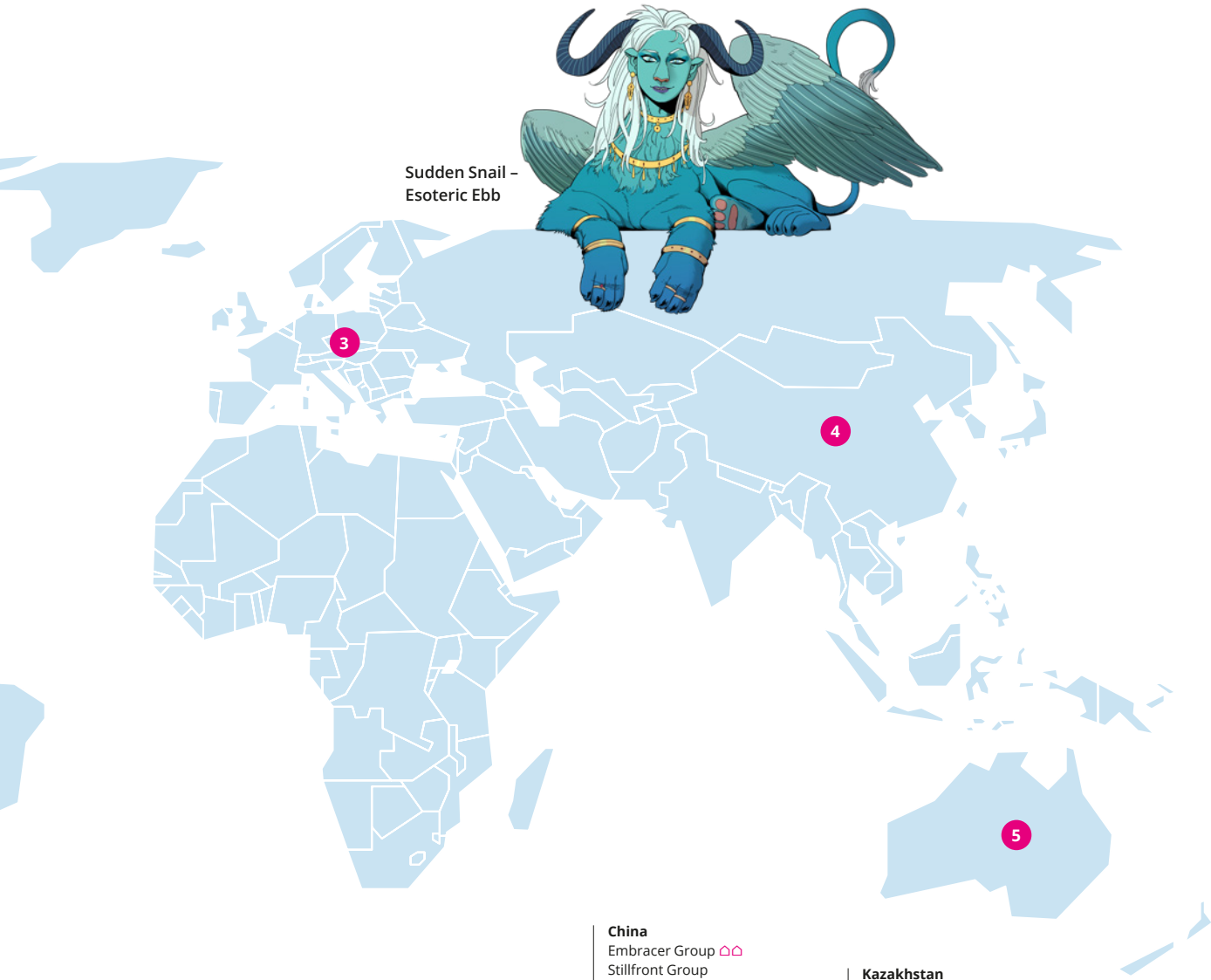
Montenegro
G5 Entertainment

Netherlands
Embracer Group ⌂⌂
Fragbite Group
Paradox

Norway
Embracer Group
Thunderful Group AB

Poland
Embracer Group ⌂⌂⌂⌂

Romania
Maximum Entertainment AB
Stillfront Group



Russia
G5 Entertainment

Serbia
Enad Global 7
Goodbye Kansas Group
Sozap

Slovakia
Embracer Group

Spain
Embracer Group
Paradox
Starbreeze AB
Stillfront Group
Thunderful Group AB

Ukraine
Embracer Group
G5 Entertainment
Stillfront Group

United Kingdom
Avalanche Studios Group
Embracer Group ⌂⌂
Enad Global 7 ⌂⌂
Goodbye Kansas Group
MAG Interactive
Maximum Entertainment AB
MTG ⌂⌂
Sharkmob
Starbreeze ⌂⌂
Stillfront Group ⌂⌂
Thunderful Group AB ⌂⌂⌂⌂

ASIA 4

Armenia
G5 Entertainment

Bangladesh
Stillfront Group

China
Embracer Group ⌂⌂
Stillfront Group

Georgien
G5 Entertainment

Hong Kong
Stillfront Group ⌂⌂
Thunderful Group AB

India
Embracer Group
MTG
Stillfront Group

Israel
Embracer Group

Japan
Embracer Group
Stillfront Group ⌂⌂

Jordan
Stillfront Group ⌂⌂

Kazakhstan
G5 Entertainment

Singapore
Stillfront Group ⌂⌂

Taiwan
Stillfront Group

UAE
Stillfront Group ⌂⌂

Vietnam
Stillfront Group

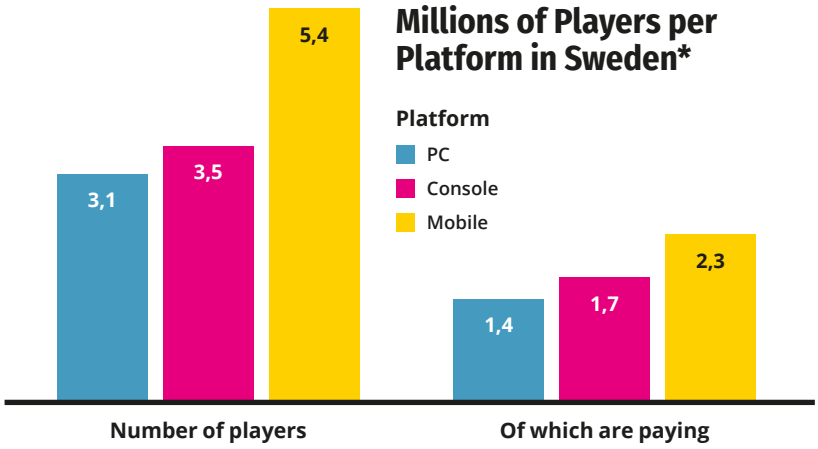
OCEANIA 5

Australia
Stillfront Group ⌂⌂

New Zealand
MTG

The World Market

Our estimate based on download data is that at least one in four people in the world has played a game created in Sweden.



In total, Swedish-developed games have been downloaded almost seven billion times, and major Swedish games regularly top the download and sales charts. Globally, it is estimated that more than three billion people play some form of digital game.

The European market is described in Video Games *Europe's Key Facts Report* 2023. The European consumer market is doing well, with a turnover of EUR 25.7 billion in 2023. The market is mostly digital, but 15% of sales still comes from the sale of physical games. A majority of the population, 53%, between 6–64 years old play video games and the average gamer is 31 years old. 43.5% of all gamers are women and women play mostly on mobile devices (45%) closely followed by consoles (39%) and PC (38%).

The Swedish Players

According to data provider Newzoo, the Swedish consumer market is estimated to be worth USD 786.2 million in 2024. This equals approximately SEK 8.3 billion which would generate SEK 1.7 billion in value-added tax from Swedish players alone.

From an international perspective, the Swedish consumer market is small in size but strong in purchasing power. The average revenue per user (ARPU) in Sweden is USD 185.9 compared to the global average of USD 118.3.

In Sweden, an estimated 6.9 million people play video games on various platforms, of which 4.2 million are paying users.

**Source: Newzoo* Global Games Market Report

Arrowhead Game Studios – Helldivers 2

Swedish Games on Steam

The lists show the performance of Swedish games released in 2024 as well as the best-selling Swedish-developed games over the past 12 months. The data comes from Video Game Insights and was retrieved on November 12th, 2024.

Games Released in 2024

1. **Helldivers 2** *(Arrowhead Game Studios)*
2. **V Rising** *(Stunlock Studios)*
3. **Core Keeper** *(Pugstorm)*
4. **Content Warning** *(Landfall Games)*
5. **Alone in the Dark** *(Pieces Interactive)*
6. **Tiny Glade** *(Pounce Light)*
7. **Goat Simulator 3** *(Coffee Stain Studio)*
8. **Mouthwashing** *(Wrong Organ)*
9. **Avatar: Frontiers of Pandora** *(Ubisoft Massive)*
10. **Lightyear Frontier** *(Frame Break)*

Top sales 2024

1. **Helldivers 2** *(Arrowhead Game Studios)*
2. **The Finals** *(Embark Studios)*
3. **Satisfactory** *(Coffee Stain Studio)*
4. **Battlefield V** *(EA DICE)*
5. **V Rising** *(Stunlock Studios)*
6. **Battlefield 2042** *(EA DICE)*
7. **It Takes Two** *(Hazelight)*
8. **Core Keeper** *(Pugstorm)*
9. **Hearts of Iron IV** *(Paradox Interactive)*
10. **Crusader Kings III** *(Paradox Interactive)*

Includes both Early Access and full releases during 2024.
Data from Vic Bassey, Video Game Insights.

Data from: Lurkit Market Data October 2024

21

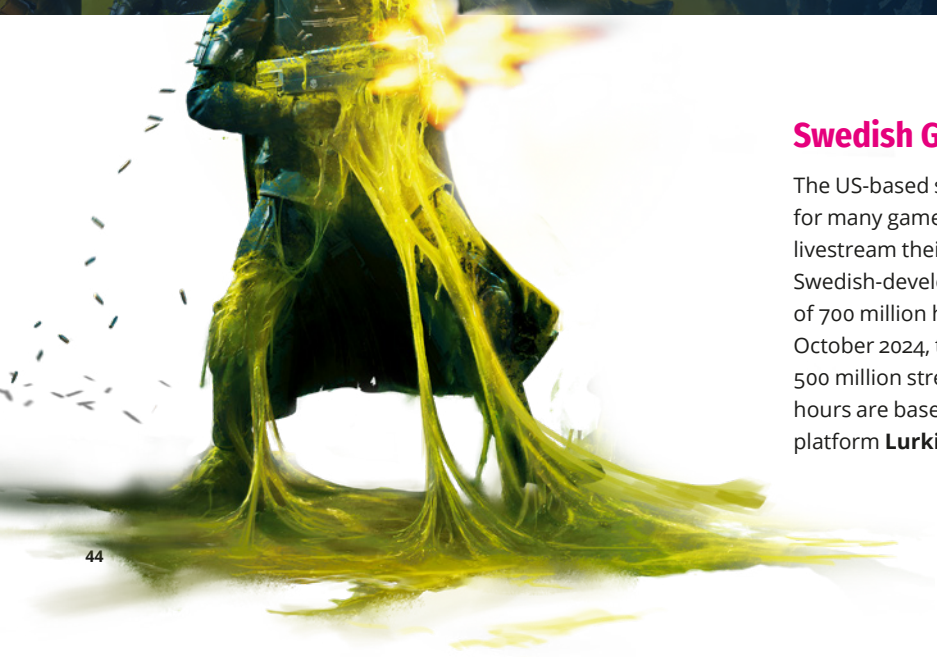
billion hours streamed on Twitch 2023

Top Views 2023

1. **Minecraft** *(Mojang Studios)*
2. **The Finals** *(Embark Studios)*
3. **Valheim** *(Iron Gate)*
4. **Payday 3** *(Starbreeze)*
5. **Raft** *(Redbeet Interactive)*
6. **GeoGuessr** *(GeoGuessr)*
7. **Tom Clancy's The Division** *(Ubisoft Massive)*
8. **Satisfactory** *(Coffee Stain Studio)*
9. **It Takes Two** *(Hazelight)*
10. **Hearts of Iron IV** *(Paradox Interactive)*
11. **V Rising** *(Stunlock Studios)*
12. **Europa Universalis IV** *(Paradox Interactive)*
13. **Amnesia: The Bunker** *(Frictional Games)*
14. **Geometry Dash** *(Robtop Games)*
15. **Crusader Kings III** *(Paradox Interactive)*
16. **Avatar: Frontiers of Pandora** *(Ubisoft Massive)*

Top Views 2024

1. **Minecraft** *(Mojang Studios)*
2. **Helldivers 2** *(Arrowhead Game Studios)*
3. **Satisfactory** *(Coffee Stain Studio)*
4. **The Finals** *(Embark Studios)*
5. **Content Warning** *(Landfall Games)*
6. **GeoGuessr** *(Geo Guessr)*
7. **V Rising** *(Stunlock Studios)*
8. **Valheim** *(Iron Gate)*
9. **Star Wars: Outlaws** *(Ubisoft Massive)*
10. **Dale & Dawson Stationery Supplies** *(Striped Panda Studios)*
11. **Core Keeper** *(Pugstorm)*
12. **Hearts of Iron IV** *(Paradox Interactive)*
13. **Raft** *(Redbeet Interactive)*
14. **Tom Clancy's The Division 2** *(Ubisoft Massive)*
15. **Geometry Dash** *(Robtop Games)*
16. **It Takes Two** *(Hazelight)*



Arrowhead Game Studios – Helldivers 2

Swedish Games on Twitch

The US-based streaming service Twitch is important for many game developers as it allows players to livestream their playing. In total, the 15 most popular Swedish-developed games were streamed upwards of 700 million hours in 2023. Between January and October 2024, the corresponding top list had almost 500 million streamed hours. The top lists of watched hours are based on insight data from the Swedish platform **Lurkit.**

A Treasure Trove of Games

In December 2023, the government announced the creation of a Swedish cultural canon. The Swedish Games Industry wants to ensure that Sweden's great video games are recognised in art and culture, and in 2024 took the initiative to create its own list of digital games that have made a powerful impact on Swedish culture.

The process mirrored the directives of the government inquiry, and in the spring of 2024, several hundred games had been nominated by the public. An expert jury has since selected the 15 games included in the final list, which should be seen as a living document of Sweden's treasure of Video Games. The jury was chaired by video game historian Martin Lindell.

The Jury's Motivation

The list contains games from various genres, platforms and time periods that collectively represent the world of Swedish games. It has been a difficult job to make the selection. Many more games would fit on an expanded list. The *Gary Gadget* games have held a special place in the hearts of many players and game creators. The *SteamWorld* games by west coast studio Image & Form to *Unravel* by Coldwood in the north are proof that game development has been successful across the country. *Rymdkapsel* by Grapefrukt shows that even solo developers can be successful. The jury liked *Valheim* by Iron Gate, but the game has not yet been released in full version. *Helldivers 2* is another newly made game that needs to be considered for an updated list in the future. All these games hereby receive an honourable mention.

The games are presented below in chronological release order. The list spans over six decades and contains games for various platforms in a wide range of genres. The games have had an impact over time, were created by both men and women for adult and children audiences alike. The goal of this list is to raise the public's general knowledge about games and to be a relevant and accessible asset. All the listed titles were released as games before any other format, and have made their breakthrough as such.

Kavalri – Equestrian the Game

The Expert Jury

MARTIN LINDELL
Video game historian and Senior Advisor at Embracer Group

ÅSA ROOS
Senior UX Designer at IO Interactive and Honorary Ph.D. at the University of Skövde

TOMMY PALM
Founder and CEO at Resolution Games

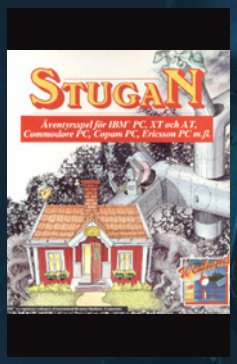
OSKAR BURMAN
Founder and CEO of Fast Travel Games

JENNY BRUSK
Ph.D. Innovation Manager and Business Coach at Sweden Game Arena

BOBBI SAND
Game Developer and Board member at Dataspelscentrum

JOHANNA NYLANDER
Head of Analytics and Deputy CEO at Swedish Games Industry

The List of Sweden's Game



STUGAN

Kimmo Eriksson, Viggo Kann, Olle E Johansson, **1978** *(terminal)* **1986** *(PC)*

One of Sweden's early PC games where the player, in text form, explores a mysterious and peculiar cottage in Småland. The game was developed by three teenagers on a mainframe computer. It has inspired many and remains a source of joy with its humorous story.

BATTLEFIELD 1942

DICE (Digital Illusions CE), **2002**

Back in 1992, DICE's first game *Pinball Dreams* showed how vivid pinball machines could be enjoyed on a computer. The game laid the foundation for what would become one of Sweden's most successful game studios. *Battlefield 1942* made the world open its eyes to Sweden as a game nation, and the game series has been praised ever since.

BACKPACKER

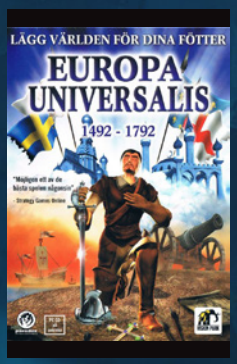
Tati Mixedia, **1995**

BackPacker embodies the phenomena that made computer games a popular activity in Sweden in the 90s. Everyone could understand and appreciate the concept of travelling around the globe with quizzes along the destinations. *BackPacker* became the start of something big with newfound audiences and a growing domestic industry.

AMNESIA – THE DARK DESCENT

Frictional Games, **2010**

A well-made horror game with clever game mechanics and a remarkable narrative. The game maintains a high level of visual fidelity and soundscape and skillfully uses the entire game medium, embracing terror and emotions in a way that stuck with all who dared to play.



EUROPA UNIVERSALIS

Paradox Interactive, **2000**

Paradox Interactive's historical strategy game, spanning from the Renaissance to the Enlightenment, offers great depth and demands a lot from the player. By daring to make such an advanced game, they effectively defined the Grand Strategy sub-genre. The positive reception led to several sequels and other successful series from Paradox, such as *Hearts of Iron* and *Victoria*.

MINECRAFT

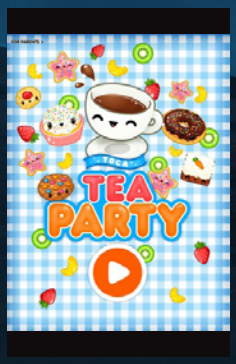
Mojang, **2011**

Initially developed by solo programmer Markus Persson, *Minecraft* revolutionised the world of games with its open-world sandbox concept, fostering creativity and community building on a massive scale. It's a testament to Sweden's impact on the games industry, showcasing the country's ability to produce innovative and globally influential titles.

GROUND CONTROL

Massive Entertainment, **2000**

Massive Entertainment was a pioneer studio thanks to this ambitious 3D real-time strategy game which focused more on tactical combat than resource management, in a bleak future where mega-corporations struggle for control over colonised planets. *Ground Control* paved the way for Massive, which went on to create games such as *World in Conflict* and *The Division*.



TOCA TEA PARTY

Toca Boca, **2011**

With its playful design for tablets and mobile, *Toca Boca* showed new possibilities for creating games for the very youngest as they broke new ground for what a children's game could look like. Subsequently, the developer has released a long series of innovative games and apps that have been loved by new generations of children, now brought together in *Toca Boca World*.

Culture Treasures 2024

CANDY CRUSH SAGA

King, **2012**

Candy Crush Saga got the entire world to match candies and level up. The game took on new target groups that otherwise did not see themselves as gamers, and with its enormous impact inspired countless sequels and strengthened puzzle games as a genre to be reckoned with. It has veritably been an essential building block for establishing Swedish mobile games.

BUDGET CUTS

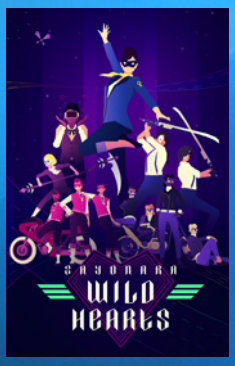
Neat Corporation, **2018**

For its unique locomotion mechanics as well as fully utilising VR motion controllers for maximum 'fun factor' as the player interacts with objects around them. Budget Cuts broke new ground in VR when it was released, spurring a generation of game makers to venture into this new game medium.

STAR STABLE ONLINE

Star Stable Entertainment, **2012**

Star Stable Online gave enthusiastic horse girls their very own MMORPG built around community and well-designed adventures. By listening to their audience and releasing new content every week, they have created a beloved game that has maintained a high level of quality over time.



SAYONARA WILD HEARTS

Simogo, **2019**

A condensed game experience that lives up to the description of being a pop album in game form. With subtle Malmö inspirations such as falafel shacks, it has won cultural recognition at home, while the rhythmic and energetic gameplay has captured audiences globally.

GOAT SIMULATOR

Coffee Stain Studios, **2014**

A humorous game that became a success story for the games industry in Skövde and made an impression on the world. *Goat Simulator* challenges game design, entertains the player, and makes a statement that it can also be fun to watch people play wacky games.

IT TAKES TWO

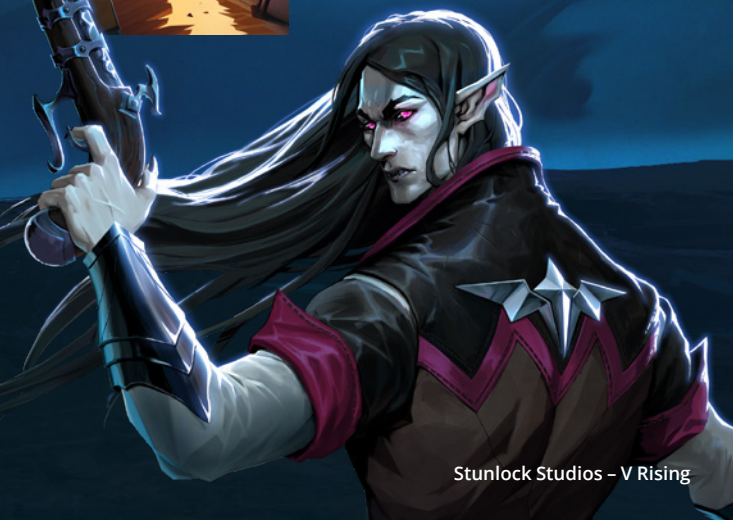
Hazelight, **2021**

The story about a divorcing couple has brought the love of playing games to even the most game-sceptical families. With an amazing level of detail and flair in everything from mini-games to storytelling, it's a modern classic that tells a story through the interplay between the players.

THE BATTLE OF POLYTOPIA

Midjiwan, **2016**

The Battle of Polytopia's strategic depth and accessibility have earned it a dedicated following worldwide. Its innovative inclusion as a pre-installed game in certain car entertainment systems showcases its broad appeal, offering engaging entertainment for both solo players and groups.



Stunlock Studios – V Rising

Play Safe

PEGI is the industry's labelling system for age and content recommendations. The system has been in place since 2003 and is both a tool for children and parents, but also a Code of Conduct for games companies, which was updated in 2023.

The PEGI labels with age recommendations and content declarations are well known among parents of children playing digital games. PEGI's 2023 data showed that the vast majority think they work well, are familiar with them and use them as a tool. 2% think the labels are unclear and 21% of all parents of children playing games are not familiar with the labelling system. In summer 2024, Video Games Europe presented the fifth edition of the *Children's in-game spending* survey conducted by the research company Ipsos on parental control and children's spending on game content. It showed, among other things, that children's in-game spending has decreased while parental involvement in children's play is increasing. In April 2024, the PEGI Code of Conduct was updated regarding in-game purchases and the handling of illegal activities by players.

#SeizeTheControls

The *Seize The Controls* digital resource walks you through parental settings, how to use the games and platforms' reporting tools, and creating a safe game environment for the whole family. Find out more at *seizethecontrols.eu*

Games in School

European Schoolnet, on behalf of Video Games Europe, ran a project in 2023 to train teachers and educators across Europe on how to use computer games as pedagogical support in the classroom. The Games in Schools project started with a six-week Massive Online Open Course (MOOC) for teachers, of which more than 90% indicated afterwards that they would use the suggested approaches in their classroom work. European Schoolnet has also released a handbook on the topic, *Using Video Games In School*.

Did you Know That Games are the Safest Place for Children Online?

When the UK regulator Ofcom and the ICO surveyed around 4,000 adults and children aged 12 to 15 in 2020, many had experienced harmful content and unwanted contact in the past year. But games stood out, with only a couple of per cent of adults and three per cent of children experiencing this in games. This was confirmed in the 2021 CyberTipline report, which found that grooming and exploitation of children was most uncommon in games and most common on platforms whose main purpose is communication and where photos and videos can be shared. Work to further develop protection for players is ongoing.

Game Development can Lead to a Nobel Prize

One of the 2024 Nobel Prize winners in Chemistry, AI researcher Demis Hassabis, started his career as a game developer in the UK. Hassabis co-created the game *Theme Park* and later founded the studio Elixir Studios.

INDUSTRY VOICE KRISTIAN LUNDQUIST

Co-founder and CEO, Gro Play

'There are many great examples of children's games from Sweden that encourage free play, exploration and creation'

Hi Kristian, tell us about your games and what inspired you to start developing children's games?
I have a background in communication and as a teacher and realised early on how interactive experiences can engage students. Combining this led to the vision of offering games that can impact both the individual and the world in a positive way. At Gro Play, we aim to do this by creating entertaining games that also encourage learning and collaboration. We develop our own IPs and have also been entrusted with creating games for Swedish children's classics such as *Bamse*, *Alfie Atkins* and *The JerryMaya Detective Agency*. Our titles are specifically designed for children and their families, with a clear aim to combine play with supporting children to develop important skills such as creativity, problem solving and social interaction.

What is most important when making games for children and what characterises a good children's game?
Children have always discovered the world by trying things out. We believe in children's abilities and we encourage discovery and experimentation according to the Nordic model. One thing games are great at is giving the player the opportunity to play around and try things out in a safe and encouraging environment. We avoid dictating how to play and often give the opportunity to influence the experience as much as possible. Creativity, role-playing, social interaction are key elements. Role-playing is a feature in many of our apps, and there is a lot of research showing the positive effects of this in children's early development. Exploring roles and identity in the digital world often offers a flexibility that is not always possible in the physical world. There are many great examples of children's games from Sweden that encourage free play, exploration and creation. A fine tradition that we should cherish.

How does the development and business modelling of children's games differ compared to an adult audience? What are the main challenges?
Our games are often perceived as entertainment, but they are designed to foster curiosity and exploration through play. Finding the right balance between fun and education, without losing children's interest, requires careful game testing and adjustment of difficulty and content. For children's games with high standards, profitability can be a challenge. You don't want to incentivise purchases in the same way as in an adult experience. The fact that the player (the child) and the buyer (the parent) are different people and audiences makes things even more complex. We have different revenue models for different types of games and apps. For example, subscription models that provide access to a safe and controlled game environment for the whole family, with the possibility to share game experiences on multiple devices and across generations. One thing they all have in common is that we have to create an experience that the buyer is prepared to pay for.

Alarmism Then and Now

INDUSTRY VOICE MARTIN SIRC

Head of Brand Partnerships, DreamHack

Photo: Helena Kristiansson

Hi Martin, when and how did you start working with games?

I ended up in the industry by chance by selling computer discs at Maxell in 1987 with the whole of Sweden as a region, so I spent many miles in the car. Since then I've had time to work as a sales manager at Commodore with C64 and Amiga. Started up Infograme's (today Bandai Namco) office in the Nordic region where I was also CEO for four years. Spent a few years at Paradox, started up Koch Media's (now Plaion) office in the Nordic region. Worked with PR and Influencer marketing for games at Mi5 Communications for a number of years and now I work with partnerships at DreamHack.

What has the evolution looked like?

So much has happened. Games went from being something for children, to something weird and nerdy for teenage boys to being fully socially accepted today. The first social acceptance came with PlayStation, which got a spot in the living room. Football and music games, among others, became a hit with older kids, and playing together became very popular. Either during a pure game night or when meeting up before going out on a Saturday evening. The final boom came with mobile games, when more adult women also started playing. Since then, it has only continued to grow with playing online versus others, free-to-play and everything else. Business models have evolved in line with other industries and products, but the biggest development has of course been technology. It has constantly created the conditions for new ideas, new creativity and new experiences. So it's no coincidence that our industry today generates more revenue than both film and music combined. Quite simply, we offer great entertainment!

You have launched and brought several games and consumer hardware to Sweden, how has it been received?

The Amiga was a fantastic product, technology that was far ahead of everything else. I think the demoscene of the 90s partly contributed to Sweden's success in the games industry. Many people became interested in programming, graphics and music on the Amiga. Over the years, I've had the privilege of helping to launch over 200 AAA titles from various publishers. Some of the more memorable ones are *Warcraft II*, *Unreal*, *Civilization*, *Diablo*, *Elder Scrolls*, *Fallout* and of course *Barbie*. *Barbie* was not a AAA title but a fun and educational project since it was translated into Swedish in the mid-90s. With the help of an in-game tool that constantly crashed, I struggled with the translation. I sat more or less around the clock for a number of weeks and **in the end I even dreamt about Barbie**. Another funny memory was the launch of *Diablo 1*. After the success of *Warcraft II*, which constantly sold out, we ordered a lot of Diablo 1. At that time, the games were packed in a 'Sierra Box' 28 x 18 x 5 cm with printed manual and everything. Of course, we didn't think about how much space all the games would take up. As a result, we had *Diablo 1* everywhere before the launch. In the

SPELCENSUR INFÖRS REDAN I FEBRUARI

"Det spelar ingen roll om de är skadliga eller ej"

Från radiodebatt om dataväldet

”FYRA AV TIO SPEL STOPPAS”

warehouse, in the offices, in the conference room, in the kitchen, in the lunch room, even in one of the bathrooms. Did we sell them all? Of course, after four weeks we ordered more.

What differences/similarities do you see between the moral panic of the past and the current screen time debate?

In the past, a debate about violent games or addiction popped up from time to time. Often staged by someone who wanted to get into the limelight or score political points for their own gain. There was no research to show that the games had a bad effect on those who played them. Those who pushed for it didn't know much about digital games and didn't realise, for example, that games created social networks where people could hang out with each other, as the pushers usually didn't play themselves. They simply thought it was strange that someone could sit in front of a computer for so long. But the media tagged along anyway because it generated exciting headlines. I particularly remember a front page in *Expressen* that showed passport photos of the CEOs of six of the companies with the headline ‘These are the men behind the violent computer games’, lined up like a gang of criminals. Today's debate on screen time feels much more nuanced because screen time consists of so much more than just games. It is also far less heated than the moral panic of those days.

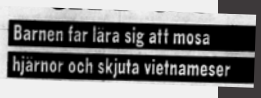
av våldstittande

Jörgen Axelsson. Peter Levin. Christer Hagström. Lars Molander. Agne Pettersson. Johan Laring.

Cheferna om våldsspelen de säljer

IQ MEDIA NORDIC	BONNIER MULTIMEDIA AB	WENDROS AB	FUNSOFT AB	EGMONT ENTERTAINMENT AB	BERGSALA AB
Verksamhet: Distribuerar ”Grand Theft Auto”, ”Quake”. **Omsättning 1997:** 66 miljoner kr. **Resultat 1997:** –793 000. **VD:** Jörgen Axelsson, 35. **VD:s inkomst:** 1 246 800 kr (tax 1997). **VD:s inkomst av kapital:** 762 854 kr (tax 1997). **Övrigt:** Jörgen Axelsson har två barn, 3 och 4 år gamla.	**Verksamhet:** Distribuerar ”Die by the Sword”. **Omsättning 1997:** 19 miljoner kr. **Resultat 1997:** – 15 miljoner kr. **VD:** Peter Levin, 37. **VD:s inkomst:** 711 300 kr (tax 1998). **Övrigt:** Peter Levin har två barn, 4 och 7 år gamla.	**Verksamhet:** Distribuerar ”Blood” och ”Mortal Kombat”. **Omsättning 1997:** 56 milj. **Resultat 1997:** – 205 000. **Ex-VD:** Christer Hagström, 45 (avgick i somras). **VD:s inkomst:** 398 000 kr (tax 1997). **VD:s förmögenhet:** 1 440 758 kr (tax 1997). **Övrigt:** Christer Hagström har inga barn.	**Verksamhet:** Distribuerar ”Carmageddon” och ”Postal”. **Omsättning 1997:** 22 milj. **Resultat 1997:** 12 000 kr. **VD:** Lars Molander, 39. **VD:s inkomst:** 736 100 kr (tax 1997). **VD:s inkomst av kapital:** 126 379 kr (tax 1997). **VD:s förmögenhet:** 1 103 156 kr (tax 1997). **Övrigt:** Lars Molander har fyra barn, 13, 15, 17 och 22 år gamla.	**Verksamhet:** Distribuerar ”Rival School”, ”Street Fighter” och ”Tekken”. **Omsättning 1997:** 335 miljoner kr. **Resultat 1997:** –21 milj kr. **VD:** Agne Pettersson, 45. **VD:s inkomst:** 1 807 000 kr (tax 1997). **Övrigt:** Agne Pettersson har tre barn, 11, 12 och 14 år gamla.	**Verksamhet:** Distribuerar Nintendospel. **Omsättning 1997:** 433 miljoner kr. **Resultat 1997:** 23 miljoner kr. **VD:** Johan Laring, 48. **VD:s inkomst:** 0 kr (tax 1997). **Övrigt:** Johan Laring har tre barn, 7, 8 och 22 år gamla.

Här handlar det om att döda eller dödas



Barnen får lära sig att mosa hjärnor och skjuta vietnameser

Five Historical Moments in the Swedish Debate on Violent Video Games

Fact checker; *Martin Lindell, game historian*

July 1988

Expressen publishes an article with the headline ‘New Video Game: 6-year-olds Playing Serial Killers’. Although the game was made up by a thirteen-year-old interviewed by the newspaper, it was elevated to a truth that was quoted by other newspapers as well as radio and TV debates. As a result, the then National Child Environment Council proposed censorship of digital games. The chairman of the Council called age limits irrelevant because ‘Society simply cannot tolerate games that glorify violence’.

April 1990

One of the country's largest importers of games at the time, HK Electronics, refuses to sign the ‘voluntary’ agreement to stop the import of violent games to Sweden, a proposal from the National Child Environment Council. The then CEO, Heikki Karbing, argued that it would stop the majority of games, something he could not accept.

January 1992

The then Screen Violence Council publishes a report stating that ‘there are not many extreme violence games of this nature circulating on the market, as has often been claimed in the debate’. The Council concluded that ‘the debate around digital games has been based on unsubstantiated rumours and myths’. Instead, it emphasised that there are indeed playful and exciting games, which makes the tone of the debate more factual.

January 2005

The Chancellor of Justice prosecuted a Swedish importer of the game *Postal 2* for unauthorised depiction of violence. In December 2006, the charges were dismissed as the jury acquitted and the judgement cannot be appealed. *Postal 2* was recommended for ages 18 and over by PEGI, the industry's labelling system, which was introduced in 2003.

October 2012

The Swedish Agency for the Media publishes the research review *Violent computer games and aggression* and concludes that the games do not cause aggression. The studies that claimed otherwise were poorly substantiated and simply did not have reliable results.

Acquisitions and Investments

The global economy impacted the games industry the most in 2023 with few completed acquisitions and investments in the industry. In 2024, investors have found their way back to video games with more and larger deals completed.

Norway-based remote studio Red Rover Interactive raised a total of SEK 53 million in mid-2023 to fund the development of new games in the survival genre. The investment was led by Swedish Behold Ventures and international The Games Fund. In April 2024, the same investors participated in another round of SEK 159 million led by South Korean Krafton, which acquired Uppsala studio Neon Giant in 2022.

In October 2023, Modern Times Group acquired the Swedish game studio Snowprint Studios, developer of the mobile game *Warhammer 40,000: Tacticus*, among others. Through its wholly owned New Zealand subsidiary Ninja Kiwi, Modern Times Group also acquired the American studio AutoAttack Games, best known for its game *Legion TD 2*, in April 2024.

Embracer Group was responsible for several deals in 2024 with the sale of Borderlands developer Gearbox Entertainment to Take-Two Interactive Software for a purchase price of SEK 4.9 billion, and the sale of parts of Saber Interactive to Beacon Interactive, owned by one of Saber's co-founders, for just over SEK 2.5 billion. 4A Games and Zen Studios remained part of Embracer Group.

In early 2024, Thunderful Group sold the German publishing business Headup Gmbh to Headup's founders through the company Microcuts Holding. Later that year, Thunderful Group also sold parts of its games, toys and distribution business to Bergsala NDP for a purchase price of SEK 634 million.

In January 2024, RoRo, a studio founded by veterans of Mojang Studios and Toca Boca, raised SEK 17 million from Node Ventures and others to develop a digital dollhouse.

The Irish game group Keywords Studios was acquired in June 2024 in a deal worth SEK 28.7 billion, with Swedish venture capital firm EQT taking a 51% stake with Canadian CPP and Singaporean Temasek as equal minority shareholders.

Enad Global 7-owned Daybreak Game Company acquired US studio Singularity 6 in July 2024, whose multiplayer life-sim Palia saw great success when it was released in March that year.

In Skövde, a number of smaller investments took place from local players, including Redbeet Interactive co-founder Ellen Mellåker's SEK 5 million investment in incubator company Aurora Arts and appointment as CSO at the studio. Oddiko with co-op game *Meadgard* secured funding of SEK 6 million from Behold Ventures and locally based investor Windmill Game Invest.

Speldosa Interactive – Project Shoreline

Acquisitions and Investments 2023–2024

Seller	Country	Buyer/Investor	Country
2023			
Fall Damage	Sweden	Fragbite Group	Sweden
FUN Labs	Romania	Maximum Entertainment	Sweden
Nukklear Gmbh	Germany	Jumpgate AB	Sweden
Paradox Interactive	Sweden	Keywords Studios plc	Ireland
Red Rover	Norway	Behold Ventures	Sweden
Seidr / Cult of the North	Sweden	Andresseen Horowitz	USA
Snowprint Studios	Sweden	MTG	Sweden
2024			
Aurora Arts	Sweden	Ellaria Invest	Sweden
AutoAttack Games	USA	Ninja Kiwi (MTG AB)	Sweden
Blue Scarab Entertainment	Sweden	Behold Ventures	Sweden
Embracer Group	Sweden	Nintendo	Japan
Embracer Group	Sweden	Take-Two Interactive Software, Inc.	USA
Gibbet Games	Sweden	Windmill Game Invest	Sweden
Goodbye Kansas Group	Sweden	Erisbeg	Ireland
Keywords Studios	United Kingdom	EQT	Sweden
Oddiko	Sweden	Windmill Game Invest & Behold Ventures	Sweden
Roro	Sweden	node.vc mfl	Sweden et al.
Saber Interactive (Embracer Group)	Sweden	Beacon Interactive	USA
Sideline Labs	Sweden	Gold Town Games AB	Sweden
Singularity 6	USA	Daybreak Game Company (EG7)	Sweden
Thunderful Group	Sweden	Microcuts Holding GmbH	Germany
Thunderful Group	Sweden	Bergsala NDP	Sweden

Windup Games – Hela

Game Developer Educations

Training to become a game developer can be done in different ways. Some are completely self-taught while some start developing games as early as in secondary school. The vast majority, however, have studied art, programming or game design at one of the country's academic or vocational universities.

Many universities around the country have made a name for themselves by investing heavily in games education, where students from different programmes often work together across disciplines to develop games together as part of the curriculum.

The University of Skövde offers a wide range of game educations. Several hundred students are divided into eight bachelor's and four advanced-level programmes, offering courses in programming, design, game writing, sound and music. The new programme starting in autumn 2024, *Game Development – Graphics*, replaces the previous three art programmes: Animation, 3D and 2D Art. At the advanced level, there are three one-year and one two-year master's programmes, all taught in English and open to international students. The programmes cover *Games User Experience*, *Serious Games*, *Digital Narration: Game and Cultural Heritage*, and Game Development with optional specialisations.The University of Skövde also offers a Master's programme in *Business Development and Marketing* where students can opt to focus on games, providing the tools needed to start their own game studio.

Blekinge Institute of Technology (BTH) has had game programmes in Karlshamn for 20 years and in Karlskrona there are game technology programmes. In 2023, a *Bachelor of Engineering in Technical Game Graphics* was started. Karlskrona offers a *Master of Science in Game Technology* programme, which received an updated curriculum for the 2024 autumn semester, meaning the five-year programme is divided according to BTH's new 3+2 structure for engineering programmes. In 2025, the *Computer Science for Game Development* programme at undergraduate level will split into two different formats, a three-year programme in Karlskrona and a two-year remote education. The game programmes at BTH collaborate closely with **Blekinge Business Incubator** and its game division Gameport, which has operated since 2003.

Stockholm University offers a bachelor programme in computer and systems science with a focus on game development. The programme is aimed at both experienced game developers and students with no prior knowledge of game development. During their education, students have the opportunity to add optional advanced courses in programming, design, art and audio.

Mirage Game Studios – Space for Sale

Students also get to develop games and test them in both major and minor student projects. The programme concludes with the opportunity to do an internship and a degree project related to the research conducted at the department, often in collaboration with companies and organisations. There are around 1,000 applicants to the programme each year, which accepts around 100 students.

For about 20 years, **Chalmers University of Technology** in Gothenburg has offered game-oriented educations in various forms. In the international master's programme *Interaction Design and Technologies*, students can choose to profile themselves in areas such as games. They offer several game-related courses that include game theory, game design and technical game development as part of their longer Engineering and Computer Science programmes.

Luleå University of Technology runs several programmes related to game development. Since 2024, the university offers a *Master of Science in Engineering in Computer Technology*, with a focus on interactive systems. In Skellefteå, the bachelor programmes *Computer Game Development* and *Programming*, which replaced the previous *Bachelor Programme in Computer Game Programming*, and *Computer Graphics for Games and Film* are offered.

At the **University of Gothenburg**, the master's programme *Game Design & Technology* has been running for around seven years. The university works with companies in and outside Gothenburg to ensure that the students receive the education that is in demand by the labour market. The programme is broad and includes a range of courses such as *Introduction to Game Research*, *Gameplay Design*, *Game Engine Architecture* and *Game Development Project*. Students are also given the opportunity to choose optional courses to tailor their education based on their areas of interest.

Uppsala University runs four undergraduate and two graduate game design programmes at its Campus Gotland in Visby, running since 2001. All undergraduate programmes focus on game design with different specialisations and lead to a bachelor's degree in game design.

Mojang Studios – Minecraft

At the advanced level, two master's programmes in game design are offered, one of which is conducted fully remote. The Department of Game Design welcomed over 500 game design students to Campus Gotland in Visby, where almost half are students with international backgrounds. In autumn 2024, the international *Master's Programme in Transformative Game Design* started.

Futuregames is an international vocational school that has run game programmes for over 20 years. They have campuses in Malmö, Stockholm, Karlstad, Umeå, Skellefteå and Boden, as well as in Warsaw, Poland. They offer the *Game Programmer* education with elective subjects in Boden, Skellefteå, Umeå, Stockholm and Malmö. The *Game Designer* programme is offered in Boden, Umeå, Stockholm and in Skellefteå – where *Game & UX Designer* is also offered. The art programme *Game Artist* is available in Karlstad and the *Game Artist Specialisation* programme in Malmö. In addition, the *Immersive Experience Creator* programme is offered in Stockholm and the *QA/Game Tester* programme in Boden, as well as the *Animator and VFX Artist* programme in both Boden and Stockholm.

The Game Assembly (TGA) has existed in Malmö since 2008 and in Stockholm since 2019. They offer three main programmes in game development: *Game Programmer*, *Level Designer* and *Game Artist* who together create game projects during the training. In addition, the Malmö school also offers the programmes *Game Animator*, *Technical Artist* and *Procedural Artist*. All programmes are taught in Swedish and in close collaboration with the local industry. In 2024, TGA broke its record when receiving over a thousand applications for its programmes, with 200 being accepted.

PlaygroundSquad (PSQ) has been running game education programmes since 2000 and currently offers three different courses in Falun – *Game Programmer*, *Game Artist* and *Game Designer*. PSQ is also part of a collaboration with Sony, PlayStation First, which gives students unique access to develop games for both Sony hardware and PC during their education. Since 2024 all programmes have been extended to three years and students will also learn how to start a company and form indie studios via an incubator. Former students from PSQ have started the company Campground Interactive with support from an incubator, and are working on their first game *Steel Effigy*. The incubator operations are currently being built up in collaboration with the Spelkultur Foundation to provide space for more creative student initiatives.

Yrgo is a vocational university in Gothenburg offering game programmes since 2017. The school provides an education for programmers, *Game Creator Programmer*, and artists, *Game Creator Artist*. The programmes had a large number of applicants in 2024, almost 350 people

competing for a total of 50 places. Several former Yrgo students have moved on to found their own game studios, such as Far Out Games and Oddiko.

Since 2023, **Nackademin** in Solna offers a course in art, *Technical 3D Artist in Game*s, and in the autumn of 2024 the new course *Game Animator* was started. A programme in *VR development* is also offered. All programmes are run as vocational educations and are either 2 or 2.5 years long.

Since autumn 2024, the **Audio Production Academy** in Stockholm has been running a two-year vocational education programme training the next generation of sound designers in the games industry, *Game Audio Producent & Sound Designer*.

Several folk high schools offer courses in games at both upper secondary and post-secondary level. **Ädelfors Folkhögskola** has offered courses in game development since 2009. They offer two game development courses where *Computer Game Development*, which is divided into Art, Design and Programming, is intended for both beginners and those who want to further deepen their knowledge. The post-secondary programme *Indie Game Studio* has over the years shaped into a personalised course for people with previous experience and knowledge in game development, many of which are working in parallel to develop a business plan to start their own studios. Since the start, the courses have been adapted to meet the needs of people with neuropsychiatric disabilities.

Hola Folkhögskola in Kramfors offers a two-year post-secondary programme in *Indie Game Development*, as well as a one-year programme *Game Music – Game Audio Design*, which works closely with the *Computer Game Development* course at Ädelfors Folkhögskola. For the third year in a row, the school, in collaboration with **FCV Sweden**, organised the basic summer course, *Summercamp Spelutveckling*. In 2024, the course was held in Kramfors and all 13 participants who completed the programme went on to study or work. Almost all participants were motivated to continue their studies or employment immediately after the programme and all previous participants remained in studies or employment after one year.

Sunderby Folkhögskola in close cooperation with game companies from across the region has developed a post-secondary vocational education, *Indie Game Developer* in Luleå. They also offer a general course at upper secondary level with a focus on game development, *Unity distans*.

Bona Folkhögskola in Motala, in collaboration with the Female Legends association, has been offering the one-year remote course *Digital Games and Community*

Mojang Studios – Minecraft

Management since 2021. The course covers information about the Swedish games industry, community management, social media management and project management. The course can be combined with a general course for those who need to supplement their qualifications for possible studies at university. **Valla Folkhögskola** in Linköping offers a two-year programme at post-secondary level, *Valla Game Education*. Participants can choose whether to specialise in programming, design or art. The education collaborates with East Sweden Game, where participants automatically become members.

Östra Grevie Folkhögskola outside Skurup offers the post-secondary course *Virtual Composer and Sound Designer* with a focus on games, film and television. **Kristinehamn Folkhögskola** in Värmland, together with the game hub The Great Journey, offers the course *Indie Game Developer* at post-secondary level in Kristinehamn. **Framnäs Folkhögskola** in Öjebyn and **Solviks Folkhögskola** in Kåge are linked to the Arctic Game cluster and offer courses in game music and game development respectively.

There are also a number of upper secondary school programmes that profile themselves in game development. Among them are **LBS Kreativa Gymnasiet**, which offers courses in games at 17 different schools in the country. There are two different upper secondary programmes with a game focus – one focusing on game art and a technology programme with a special focus on game development. Students from both programmes create games together in their second and third years. The school works closely with industry leaders such as TGA and Futuregames, and ensures that the games programmes are in line with industry needs. **Björknäsgymnasiet** in Boden offers the *GameDev* programme, which is an arts programme specialising in game development. The programme is run in close cooperation with **Boden Game Camp** and accepts applicants from across the country.

A longer review of game programmes in folk high schools and upper secondary schools can be found in the report *Talent, Education and the Art of Making Games* (2023) and at spelutbildningar.se

Mana Brigade – Blackforge: A Smithing Adventure

Higher Game Educations 2024

Longer CSN-eligible game education at post-secondary level commencing in autumn 2024.

NORRBOTTEN 1

Boden

Futuregames
Animator and VFX Artist
Game Designer
Game Programmer
QA / Game Tester

Sunderby folkhögskola
Indiespelutvecklare

Luleå

Luleå University of Technology
Civilingenjör Datateknik, inriktning interaktiva system

VÄSTERBOTTEN 2

Skellefteå

Luleå University of Technology
Bachelor's Programme in Computer Graphics for Games and Film

Futuregames
Game Programmer
Game Designer
Game & UX Designer

Visual Magic
VFX-artist: 3D-visualisering och digital compositing

Umeå

Futuregames
Game Programmer
Game Designer

VÄSTERNORRLAND 3

Kramfors

Hola folkhögskola
Indiespelutveckling

DALARNA 4

Falun

Tension Education AB
PlaygroundSquad Game Designer
PlaygroundSquad Game Artist
PlaygroundSquad Game Programmer

VÄRMLAND 5

Karlstad

Futuregames
Game Artist

Kristinehamns folkhögskola
Indiespelutvecklare

REGION STOCKHOLM 6

Huddinge

Södertörns högskola
Spelprogrammet – inriktning speldesign och scripting
Spelprogrammet – inriktning grafik

Stockholm

Stockholm University
Kandidatprogram i datorspelsutveckling

Futuregames
Immersive Experience Creator
Animator and VFX Artist
Game Designer
Game Programmer

The Game Assembly
Spelprogrammerare
Leveldesigner
Spelgrafiker
Procedural Artist

Audio Production Academy
Game Audio Producent & Sound Designer

Forsbergs
Game Programming

Botkyrka

Xenter Yrkeshögskola
Vfx-Artist

Solna

Nackademin
Teknisk 3D-artist inom spel
VR-utvecklare
Spelanimatör

ÖSTERGÖTLAND 7

Linköping

Linköping University
Bachelor of Science in Computer Engineering
Master of Science in Computer Science and Engineering
Master of Science in Computer Science and Software Engineering
Master of Science in Information Technology
Bachelor's Programme in Programming

Valla folkhögskola
Valla Game Education

VÄSTRA GÖTALAND 8

Gothenburg

Chalmers University of Technology
Interaction Design and Technologies – Master's Programme
Informationsteknik – civilingenjör
Datateknik – civilingenjör
Datateknik – högskoleingenjör

University of Gothenburg
Game Design & Technology – Master's Programme

Yrgo
Game Creator Programmer
Game Creator Artist

Skövde

University of Skövde
Dataspelsutveckling – Grafik
Dataspelsutveckling – Game Writing
Dataspelsutveckling – Ljud
Dataspelsutveckling – Musik
Dataspelsutveckling – Design
Dataspelsutveckling – Programmering
Digital Narration: Game and Cultural Heritage – Master's Programme
Games User Experience – Master's Programme
Serious Games – Master's Programme
Game Development – Master's Programme
Business Development and Marketing – Master's Programme

REGION JÖNKÖPING 9

Jönköping

Ädelfors folkhögskola
Indie Game Studio

GOTLAND 10

Visby

Uppsala University
Bachelor's Programme in Game Design and Programming
Bachelor's Programme in Game Design and Project Management
Bachelor's Programme in Game Design and Graphics
Bachelor's Programme in Game Design
Master's Programme in Game Design (1 year)
Master's Programme in Game Design (2 years)

BLEKINGE 11

Karlskrona

Blekinge Institute of Technology
Civilingenjör i Spelteknik
Högskoleingenjör i teknisk spelgrafik

SKÅNE 12

Vellinge

Östra Grevie Folkhögskola
Virtuell kompositör och ljuddesigner

Malmö

Malmö University
Spelutveckling

The Game Assembly
Spelanimatör
Spelprogrammerare
Technical Artist
Leveldesigner
Spelgrafiker

Futuregames
Game Programmer
Game Artist Specialization

REMOTE

The Game Assembly
Linear Algebra for Artist

Sudden Snail – Esoteric Ebb

Entrepreneurship and National Collaborations

There are several initiatives around the country that support new and established game developers. Local initiatives such as incubators, networks and accelerators are important to provide game developers with valuable guidance and support, while contributing to regional growth.

Arctic Game is a game cluster working for a thriving industry in northern Sweden. In collaboration with several municipalities, Arctic Game supports new and existing game companies with business development and networking, promotes collaboration between industry and academia, and organises events that put northern Sweden's game companies on the map. In 2017, the region's first game incubator, Boden Game Camp, opened its doors, which in 2024 supports about fifteen local studios. Arctic Game is one of three project partners in the Creative Europe project together with Spielfabrique in Germany and Polo Digital in Spain. The project runs the European Videogame Accelerator (EVA), which supports European indie studios with mentorship and networks.

In May 2024, **Blekinge Business Incubator** (BBI) together with Blekinge Institute of Technology organised the annual Creative Coast Festival. The festival is open to anyone interested in game development, media and technology. Among other things, students from various programmes and schools in Blekinge and the surrounding area participate. The festival features speakers, exhibitions, workshops and the annual Game Concept Challenge competition.

East Sweden Game is a community and incubator for game developers in Östergötland, with headquarters in Linköping and a satellite office in Norrköping. Their premises in Linköping cover over 400 square metres and they offer, among other things, offices, a coworking space and advisory. In September 2024, the fifth round of the ESG Accelerator start-up programme was launched. The game studio Pugstorm in Linköping, founded in the East Sweden Game community, has enjoyed great success with their game Core Keeper, which has sold more than three million copies and become an important driver of growth in the region.

Game Habitat is a community organisation that since 2013 has worked for the growth and sustainability of the games industry in southern Sweden through a wide range of projects, collaborations, conferences and events. Game Habitat is based in Malmö and operates within the regions of Skåne and Blekinge. In the autumn of 2023, Game Habitat decided to put even more focus on its work for increased equality, diversity and inclusion. This resulted, among other things, in the Haven programme, launched in 2024 in collaboration with the incubator Minc. It is a tailor-made programme where

Frame Break– Lightyear Frontier

selected early stage game studios receive meaningful tools from experts and established industry figures to create a sustainable future for their studio. At its Dev-Hub office space, Game Habitat organises an annual GEM Week event with several activities spread over a week around March 8th.

Notable changes took place in the **Mid Sweden Games** cluster during 2024, which previously worked to gather and strengthen the ecosystem for game developers, companies, game education programmes and the public sector in Västernorrland. The local game companies have joined together to take over the Mid Sweden Games brand and drive the industry's development. non-profit organisation was formed, open to all people and companies interested in games. The BizMaker organisation, owned and funded by Region Västernorrland and all seven municipalities in the county, has been tasked with supporting the development of the regional industry. Between 2023 and 2026, Mid Sweden Games is collaborating with Film Västernorrland as part of the Mid Nordic Visual Lab project. Since the start of the project, two events have been organised around film and games, attracting around a hundred people. The cluster has also organised Show & Tell events where game companies showcased their games to locals, politicians and the business community.

Spelkollektivet is a project involving collective living, education, game development, publishing and events. It was started without external funding and is located in Väckelsång in the middle of the Småland countryside. In 2024, the collective expanded with more houses and released the documentary film *To Build a Castle*, premiering on August 23rd 2024. The film gave viewers an insight into the formation and daily activities of Spelkollektivet.

Sweden Game Arena is a platform offering a unique game development ecosystem in Sweden, the Västra Götaland region and Skövde. The platform and brand brings together game education, research, entrepreneurship and community with the goal of creating a growing and prosperous Swedish game industry. The majority of the participants have made similar journeys – from game students at the University of Skövde to starting a business through the Sweden Game Startup programme run by **Science Park Skövde**. Science Park Skövde has successfully led incubator activities for game companies in Skövde since 2004 and has also been active in Gothenburg since 2016. Coffee Stain Studios, Stunlock Studios, Iron Gate, Wishfully, Redbeet Interactive and Ludosity are just some of the successful game companies in the Sweden Game Arena community. Sweden Game Arena runs the projects Level Up,

All In and Game Tech Academy, and organises the annual Sweden Game Conference. In October 2024, Sweden's first 'Walk of Game' was inaugurated with bronze plaques commemorating successful games along Rådhusgatan in central Skövde.

The Great Journey has been the heart of the games industry in Värmland since 2016. The hub is based in Karlstad, where a number of game companies have both started and gathered to take part in activities, meetups, game jams, counselling and business development with a focus on sustainability, inclusion and leadership. Between 2023 and 2026, The Great Journey is running the EU project Gamechanger with the aim of building a strong ecosystem for game developers. Participants are offered, among other things, an accelerator programme with business development support to help them start sustainable game companies. Between autumn 2023 and autumn 2024, 17 new teams and three new companies joined the accelerator programme. In May 2024, the annual Great Summer Pitch event, where local teams compete for the chance to win SEK 100,000 to fund their future game development, had a record number of participants with 150 people joining from all over Sweden. In 2024, The Great Journey launched a 12-month acceleration programme for indie studios, offering resources to get their games to market, ranging from free workspaces and equipment loans, to counselling with experienced consultants and lawyers in the games industry.

BSG-Go! is an EU-funded project run through the Interreg Baltic Sea Region with the aim of developing models and methods to create strong networks and increased conditions for young game developers and entrepreneurs in the Baltic Sea region for the long-term benefit of the participants' game industries. The project, which has so far been granted EUR 3.33 million, is run by various innovation actors in Sweden, Denmark, Finland, Germany, Poland, Estonia and Lithuania. In Sweden, Invest Stockholm, Arctic Game, East Sweden Game and Game Habitat are participating, with each actor responsible for different project packages that, after completion, will be made available to the industry to solve various needs or challenges in the industry.

In early 2024, the doors opened to **Game Town**, a new coworking office for game developers in Stockholm, which shortly thereafter hosted the 28th edition of the **Indie Game Dungeon**. At the event, indie game developers, publishers and game enthusiasts meet to try out each other's games in a relaxed environment and provide valuable feedback. The event is popular and plays an important role in the community of game developers in Stockholm.

In November 2024, **For Devs** was organised for the second year in a row at Södra Teatern in Stockholm. The one-day event is aimed at game developers and employees at the member companies of the Swedish Games Industry. The conference gathers a wide range of attendees from junior to experienced game developers to share knowledge, ideas and experiences with each other.

In 2024, the popular event for game developers **Link in Bar** reached its tenth running year. To celebrate, a special edition of the event was organised; *Link in Bar: The Decade Party*, which included a trip through the Stock-holm archipelago on MS Teaterskeppet and ended with a party in Slaktkyrkan together with Indie Game Dungeon. The Link in Bar events are organised voluntarily by Anna Jenelius, Liam O'neill and Tobias Rudin.

In October 2024, the four-hour streaming event **The Spill** premiered, with the purpose of gathering players to celebrate their favourite indie games together with the developers. The event is a collaboration between several successful game developers behind some of the world's most popular indie games. These include Iron Gate Studio, Coffee Stain Studios, Coffee Stain North, Lavapotion, Box Dragon, Invisible Walls, Ghost Ship Publishing, Guidelight Games, Bitfire Games, Northplay and DESTINYbit. During the event, viewers and players could ask questions, partake in exclusive updates on new games and in-depth information on released titles.

One of Sweden's oldest game conferences, **Gotland Game Conference**, is organised by Uppsala University – Campus Gotland in Visby. The conference features more than forty student projects and a jury consisting of some thirty industry experts who play, provide feedback and judge the games. On the last day of the conference, a grandiose award ceremony is held where the jury's choices for the best game in each category is announced. In 2024, the conference was expanded with a career and recruitment fair.

INDUSTRY VOICE JENNY ÖSTERLUND

CEO and Founder, Game Boost

'I view the fact that we have staffing companies specialising in game development as an extremely important part of the ecosystem in unstable times [...]'

Hi Jenny, you run a staffing agency in the games industry, does it really still need people?
Yes, it really does. Studios always need seniors and specialists. We have many studios that are in the ramp-up phase and the requests have increased significantly after the summer.

What changes in the market have you seen since you started Game Boost?
When I started Game Boost in 2021, it wasn't very common to bring in consultants. It was mainly as reinforcement during extra time-pressured periods. Now, most studios have started to incorporate more consultants into their staffing and recruitment strategy. Many of the new studios founded by veterans of our largest studios aim to keep the core team at the studio small and back up with external help when needed.

What role do staffing agencies play in the games industry during periods of economic instability?
When there is economic instability, two camps often form: those who cut back on consultants to reduce the direct cost and those who bring in consultants to minimise long-term risks and costs. I view the fact that we have staffing companies specialising in game development as an extremely important part of the ecosystem in unstable times as it gives studios a tool to be able to access the specialists they need for shorter periods so they can publish their game.

What roles are most in demand and what kind of experience do you need?
It varies. A couple of years ago it was almost all Unreal programmers. Now it's a lot of animators, producers and UI/UX designers. If you want to work as a consultant, it's important to get experience in your field first, since most people who hire consultants want someone who can hit the ground running and help them solve a tricky problem or meet a deadline. You need to be self-motivated, a good team player and not be afraid to ask questions to understand the task or if you get stuck along the way. You also need to be good at English. A good consultant is both productive and shares their knowledge so that the team is stronger when they leave.

No Games on a Dead Planet

Securing a liveable and sustainable future requires rapid and substantial emission reductions across all sectors. In game development, creativity is the primary ingredient, the value is intangible and the product is digital, which means the industry has a comparatively low carbon footprint. There is also great potential for positive impacts and innovations in games.

Emission Data

In a similar calculation of the Swedish industry's emissions, based on the Swedish listed companies' latest reports and their respective business activities, the corresponding comparative figures are between 0.1 and 1 tCO2e per MEUR turnover for Scope 1 and 2 depending on the activity and accuracy of measurement points, with an average of 0.74 tCO2e which would mean 2,275 tCO2e from the Swedish games industry in 2022[1]. This corresponds to 0.015% of the emissions from Swedish industry. This can be compared with the fact that games account for almost 0.3% of jobs in the private sector and 1% of Swedish exports.

90–99% of emissions occur in the so-called Scope 3 category, i.e. emissions upstream and downstream in the value chain. The emissions caused by playing the games are particularly challenging to obtain concrete data on, not least because the games have a global audience with different hardware and energy supply conditions.

A few Swedish companies have begun to estimate and report Scope 3, some only upstream while others have also produced data for emissions at the user stage. In these cases, the latter account for 40–99% of the companies' total reported emissions. The large variation can be explained by different calculation models, the scope of the calculation and the fact that energy consumption in the user phase varies greatly depending on the type of game, the country in which the player is located and the device on which the game is played. The sample is small, the calculations are made differently and the companies have varying products and activities, making it difficult to draw any general conclusions from a calculation of the average. A guess based on the available figures2 is that Swedish companies on average end up with around 99 tCO2e per MEUR turnover, or 302,250 tCO2e in total, including Scope 1, 2 and 3.

The most essential actions to reduce emissions from game development are choosing fossil-free energy and reviewing purchases of electronics, server services and travel. Efficiency improvements and eco-modes in games can also reduce the player's resource needs and hugely impact total emissions.

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[1] *Based on 2022 data from: Embracer Group AB, Stillfront Group, Paradox Interactive and MAG Interactive*

[2] *Based on 2023 sustainability reports from MAG Interactive, Embracer Group and Stillfront Group*

Campground Interactive – Steel Effigy

Code, Climate and Creativity

In October, the first climate report of the games industry was released: *Code, Climate, Creativity – Game Development and the Green Transition*. The report outlines existing initiatives and highlights the climate impact of the games industry from three perspectives:

Footprint: Negative impacts such as carbon emissions

Handprint: Positive impacts such as community and innovation

Voice: The opportunity to contribute to the public debate by evoking emotion, creating dialogue or capturing engagement

The report concludes that with the right conditions, the games industry can be a leader in the transition towards global sustainable development.

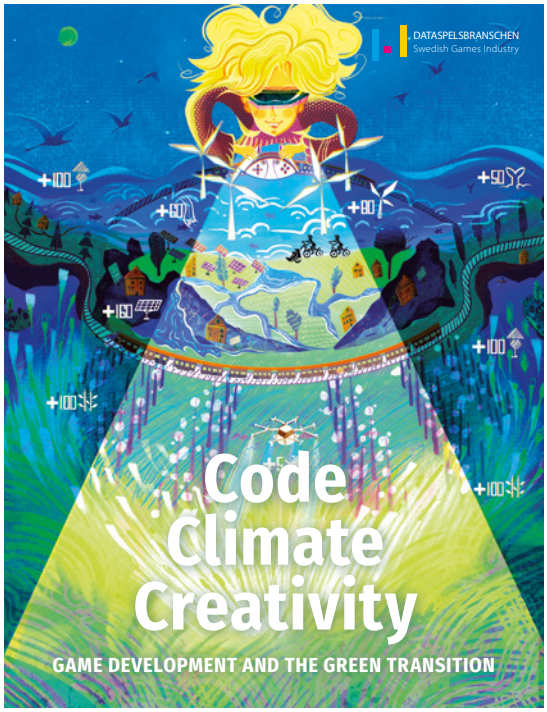
Learn more and download the report at
dataspelsbranschen.se/hllbarhetsrapporter

A New Toolbox for Calculating Emissions

Play, Create, Calculate is a toolbox for calculating greenhouse gas emissions from game development. It was developed by the Swedish Games Industry together with sustainability experts from U&We within the framework of the SUSINDI project.

The toolbox consists of an Excel-based climate calculator and a guide with recommendations on how to assess GHG emissions from game development. The target group is small and medium-sized game companies operating in Sweden or internationally. The toolbox is based on the Greenhouse Gas Protocol Corporate Standard and the Scope 3 Value Chain Standard to ensure a systematic approach that is in line with established methodologies.

More information on the guide and calculator:
dataspelsbranschen.se/playcreatecalculate



Windup Games – Hela

EXPERT VOICE ANNA LARSSON CORCORAN

Sustainability consultant and partner at U&We

'By getting a figure on your climate impact and insights about what is big and small, you have a good basis for taking the next step towards reducing emissions'

Hi Anna, what is *Play, Create, Calculate* and how does it work?

Play, Create, Calculate consists of a climate calculator and a guide to make it easier for small and medium-sized enterprises to calculate their climate impact. The climate calculator is customised for game development studios and focuses on the emissions most relevant to the industry. The guide provides tips on what data to collect, how to carry out your climate calculation and what actions to take to reduce your emissions based on three different levels of ambition – from 'Beginner' to 'Expert'.

How will the toolbox help game studios improve their climate impact?

Firstly, it will make it easy to start evaluating without having to be a climate expert or have a lot of resources. We believe that what you evaluate you can influence. By getting a figure on your climate impact and insights about what is big and small, you have a good basis for taking the next step towards reducing emissions. The guide also includes a number of suggestions for actions you can take to reduce emissions both upstream and downstream in the value chain.

So what can game studios do to reduce their carbon footprint?

For our sustainability report *Code, Climate, Creativity* (2024), we have developed a long list of actions, both for our own operations, the purchases we make and how we develop our games. The five most important are:

- Ensure your office has renewable electricity
- Take care of your hardware so that it lasts a long time and if possible buy reconditioned products
- Choose suppliers with an active climate and sustainability policy and set requirements, for example that data centre suppliers should have 100% renewable electricity
- Optimise games, for the best possible experience for the players while minimising energy consumption
- Ensure that games have a long lifespan and can be played on older consoles and computers

How does the games industry differ from other industries in terms of climate impact?

The emissions that occur in our own operations and from the purchases we make do not differ much from other service companies. The big difference is the emissions that occur when games are played. In many cases, playing games accounts for 90 per cent or more of the total climate impact of game companies. These emissions are also more difficult for a game company to influence and require more effort, such as optimising games to reduce energy consumption and collaborating across the industry on these issues.

Threats and Challenges

Swedish game companies have continued to grow during the year, increasing both revenue and the number of employees, and as an industry proved resilient to several external threats. However, there are several challenges that the industry needs to address in order for growth to continue.

Morbid Games – Traum

Financing Capital

Access to capital has been greatly affected by the macroeconomic situation. The number of investments has decreased and, as in previous years, a clear majority of the investments made in the Swedish market are from companies that are already established in the industry. The inflow of new capital needs improvement, as it is still remarkably difficult to find financing, especially in the early stages. This particularly affects companies that do not have an existing strong network of contacts, and risks becoming a long-term obstacle to innovation and diversity in the industry. One consequence of this in 2023 is an increase in the number of companies that have closed down instead of finding a home with another owner, and a more difficult situation for laid-off staff to to become entrepreneurs and start new studios start as an alternative to changing jobs.

In competing countries such as the US, Canada, the UK and Finland, there are long since established financing structures, tax breaks and other forms of support to give start-ups an edge on international competition. For Swedish companies, the lack of a national equivalent creates a trade barrier to the rest of the world. There is also a need for improved business expertise in the sector, not least in small and new companies.

Long Term Skills Supply

In 2023, there were 644 new hires in Sweden. This is a higher number than the year before and there is still a significant skills shortage, especially in the long term. Few game developers have reached retirement age, but that number will increase over the next decade. Comparatively few game developers graduate from the country's game education programmes and employers recruit heavily from other countries.

It is estimated that at least a third of the employees in the industry have migrated to Sweden to work here, and in several of the larger companies it is up to half of the staff. At the same time, it is difficult for newcomers to find accommodation and obtain work permits, and the rules concerning short authorisation periods for probationary employment affect many employees. Despite the government's insistence on the importance of a highly skilled labour force, the number of refusals when applying for permits has increased drastically.

Efforts in the sector to promote diversity and gender equality have, among other things, resulted in more women being employed and a broadening of the overall recruitment base. This work, as well as skills development for existing staff, needs further improvement for the industry to continue to grow.

Screen Time and Safe Play

The WHO and Public Health Agency of Sweden's recommendations on screen time for children do not take into account what children actually do in front of the screen. It is a starting point that assumes that all screen time should be limited in the same way, because all screen time is equally bad. This makes it difficult for game developers to address these issues constructively, as the recommendations don't differentiate between

content or promote improved digital experiences. At the same time, the recommendations have been widely criticised and research clearly shows that the types of screen time can vastly differ and that the main risk is displacement of other important activities, not the screen itself. There are also several studies that highlight the positive effects of games, some of which are summarised in the report *Power of Play from Video Games Europe*, 2023.

Without the perspective of screen content instead of screen time, games risk being blamed for problems they do not cause, which in turn can weaken the conditions for, among other things, long-term skills provision and games as a cultural expression.

Artificial Intelligence

Artificial intelligence (AI) is a broad concept, and some types of implementations have existed in games since the beginning of the industry – from self-playing chess to reactive behaviours in game characters. The latest wave of generative AI, with the ability to create text, images, video, music and other content based on the interpretation of data, presents both a challenge and an opportunity for the industry. One such challenge is how the legal rights and obligations surrounding AI-generated material and the technology behind it are handled by regulators. It is important for game developers to be able to control how generated material is used. There is also a need to clarify how copyright and trade mark protection can be ensured in the future and how training data in the form of reference material can be used. At the same time, AI as a technology can contribute to new game experiences and increased productivity, for example by being able to expand and extrapolate new variations of existing digital material.

Radicalisation and Online Hate

Managing problematic player behaviour is an ongoing challenge. Methods used in the industry include warning or blocking misbehaving players, limiting communication between players and using AI to identify which players may pose a risk. Other measures include the cultivation of a good culture in the player community and the presence of moderators and editors. Apart from in-game communication and self-run forums, there are third-party channels where companies do not have a mandate and where the games industry faces the same challenges as any other actor in society.

Radicalisation differs from online hate and bad behaviour in the intention to influence players' opinions and actions. The actors who engage in radicalisation can have different motives and ideologies, such as Islamism, misogyny, disinformation or right-wing extremism. The method is usually to contact players in-game and then move to a closed forum where the radicalisation itself takes place. These forums generally also include more opportunities to share material, such as links, images and videos than in-game communications.

Counteracting radicalisation requires cooperation, not least internationally as games reach a global audience. The secretariat of the Swedish Games Industry works actively on the issue of radicalisation together with authorities, researchers, organisations, member companies, international industry associations and others.

Work Environment

One long-term challenge is the work environment. The industry as a whole is constantly working to improve working conditions, but it does not always get all the way there. The game industry is not exempt from occasional poor leadership, corporate culture and problems in the workplace. At the same time, there are challenges with many young new employees, culture clashes with employees from different backgrounds in an international environment, and creative projects where many strong wills need to come together. Discouraging problematic behaviour, actively managing the workplace and detecting potential problems early are some of the measures to create attractive workplaces. After the pandemic, the industry has largely moved back to offices, but hybrid solutions and remote work are more common, bringing their own set of challenges.

Wrong Organ – Mouthwashing

Methodology

This report is a compilation of annual reports from the Swedish Companies Registration Office's Trade and Industry Register and data from Statistics Sweden's Statistical Business Register. It includes limited companies that have game development, publishing or specialised subcontracting functions as a significant part of their business.

Examples of subcontractors include companies offering game-specific services in translation, motion capture, programming or music production. Companies specialising in gambling activities such as poker or casino games are not included in the sample.

Company Groups are reported at the highest appropriate level, with Swedish parent companies and relevant Swedish subsidiaries. The total group revenue including foreign subsidiaries is reported separately in the global revenue.

Part of the data collection is done using Statistics Sweden's data, mainly for limited companies with registered activities under *NACE 58.210 – Publishing of computer games*. In October 2024, there were 1,184 active companies registered under this code, but after manual review, 387 companies have been removed from the list as they had their main activities in other industries, mostly casino games or other software development. Some game companies choose instead to use *NACE code 62.010 – Computer programming*, for example EA DICE. In total, 273 manually included companies from this year's report have been registered under other SNI codes.

The main part of the report concerns limited companies, since that's where the vast majority of the industry's activities are found. A few companies in other forms are found on the Game Developer Map.

Several companies have split financial years. For these, the latest available annual report has been used, and for companies with previously reported revenue above SEK 100 million, we have requested submitted documents from the Swedish Companies Registration Office.

Data from Statistics Sweden's business register was obtained on 8th of August 2024 and includes key figures from 2023. Additional information regarding annual reports was obtained from UC on October 28th 2024.

The chapter *Number of companies* presents a summary of the number of companies categorised by size. This type of summary is typical in the EU context and is therefore based to some extent on the EU's definition of company size, which traditionally takes into account the number of employees and the company's revenue. As in previous years, we have chosen to drop the revenue criterion from the definition and instead rely solely on the number of employees, as game studios can differ enormously in terms of revenue – especially small studios. This is believed to marginally affect distribution among small and micro enterprises. In addition, we have separated the number of companies with more than five employees to better illustrate the proportion of the industry that is run as smaller studios. To be counted as an employee of a company, a person must receive a salary or other employment benefit. The

Silent Factory – Red Metal

number of employees is calculated as an average of the number of months an employee has received a salary. Many companies have no employees at all. This may be because the person or persons running the company are not yet receiving a salary or are only receiving remuneration in the form of share dividends.

Some companies are run primarily as holding companies or as an entrepreneurial endeavour alongside employment. Companies that are no longer active but used to release games or other services are often left behind so that the games can continue to be played and generate passive revenue.

The approach as a whole has several shortcomings. There may be more companies that should be included in the report but are not because we are not aware of them. The manual selection opens up for mistakes, and there is a grey area with companies that are difficult to categorise. The strength of the method is that the data is audited and public through the agency's publication. The manual selection allows us to ensure that all major companies are included and the industry gets a more representative data set regardless of SNI code.

In some cases, the annual report was submitted late in the year, a recurring pattern which, combined with the authorities' processing times, means that we do not receive all reports on time. In these cases, the annual report is presented for the most recent year. The total revenue for these companies in 2022 corresponds to 0.8% of this year's revenue, which means a minor margin of error. The largest company this applies to this year is Niburu Software AB.

The market capitalisation of public game companies in 2022 was stated in the 2023 edition to total SEK 144 billion. New calculations of market capitalisation in 2022 adjust this to SEK 124 billion. This difference may be due to new calculations as a result of company reorganisations or to averages being calculated over different time periods. In this report, both accounted and compared statistics are based on the estimated market capitalisation during the last quarter of the year in question.

When collecting information from incubators, networks, accelerators and game training programmes, forms with questions were sent out to the relevant parties. The responses were then used as the basis for the texts under the chapters '*Entrepreneurship and National Collaborations*' and '*Game Developer Educations*'.

Swedish companies report in Swedish Krona, SEK. In some cases euro or dollar are used for comparison. When currencies have been converted, we have used the aggregated annual exchange rate defined by the Riksbank, Sweden's central bank. In 2023, EUR 1 was SEK 11,47652, an increase of 7,36% compared to 2022 and USD 1 was SEK 10,61284, an increase of 4,6% compared to 2022.

More details on the selection and methodology of the KPIs can be found in the respective chapters.

Become a Member of the Swedish Games Industry

The Swedish Games Industry is the trade organisation for video game companies in Sweden. The organisation represents the industry as a whole through the industry associations Spelplan-ASGD (game developers, producers, education, academia and support members) and ANGI (publishers and distributors).

We represent our members to policy makers, authorities, media, academia, civil society, other organisations, related industries, the public and other stakeholders.

Our work is guided by our members' interests through

- Boards of Directors
- Annual General Meeting and member meetings
- Specialised working groups on specific issues
- Ongoing dialogue with member companies and their staff

The Swedish Games Industry monitors, collates and communicates the industry's key issues through

- Our reports
- Representing the industry in the media and participating in seminars and conferences in Sweden and worldwide
- Following and communicating the most important industry issues in our own channels
- Contributing knowledge to authorities, public institutions, researchers, etc.
- Disseminating knowledge about how laws and regulations affect our members
- Consultation responses and participation in public inquiries

The Swedish Games Industry brings together the people in the industry in different ways, both for business and pleasure. We organise conferences such as For Devs, Invest in Games, the Swedish Game Awards, Indie Game Dungeon, labour market days, seminars and social meeting places.

We carry out projects based on the concrete needs of member companies, often with external funding. Examples of projects are

- Nordic collection booths at trade fairs (Gamescom, GDC)
- Incubator collaborations
- Collaborations with colleges, universities and research institutes
- Joint events with indies, students and hobbyists
- Activities and projects that increase diversity and gender equality
- Business development resources for start-ups
- Staff supply by offering secondary and higher education institutions support membership, which means support in quality improvements and guest lecturers, among other things

Games is a global industry and many of our member companies have international interests, which is why we are also active in the rest of the world. The Swedish

Games Industry is involved in international events, EU projects, international networks and co-operation, contacts with Swedish authorities abroad and other activities. In addition, we are members of or cooperate with international organisations such as:

Video Games Europe (VGE)
European Games Developer Federation (EGDF)
Nordic Game Institute (NGI)
Global Video Game Coalition (GVGC)

In addition to this, our members also get access to

- Discounts on various services such as business counselling, legal and patent issues
- Invitations to conferences and trade fairs in Sweden and internationally
- Member services
- Events, discounts, knowledge, meeting places, statistics, contacts with advisors

The Various Memberships

As a member of the Swedish Games Industry, you are involved in developing and improving conditions for game developers in Sweden. You are involved in both influencing and supporting our work to promote the conditions for the industry. Everything so that you as an entrepreneur can succeed in your business.

In addition, you receive various membership benefits such as services, discounts, access to networks and invitations to activities.

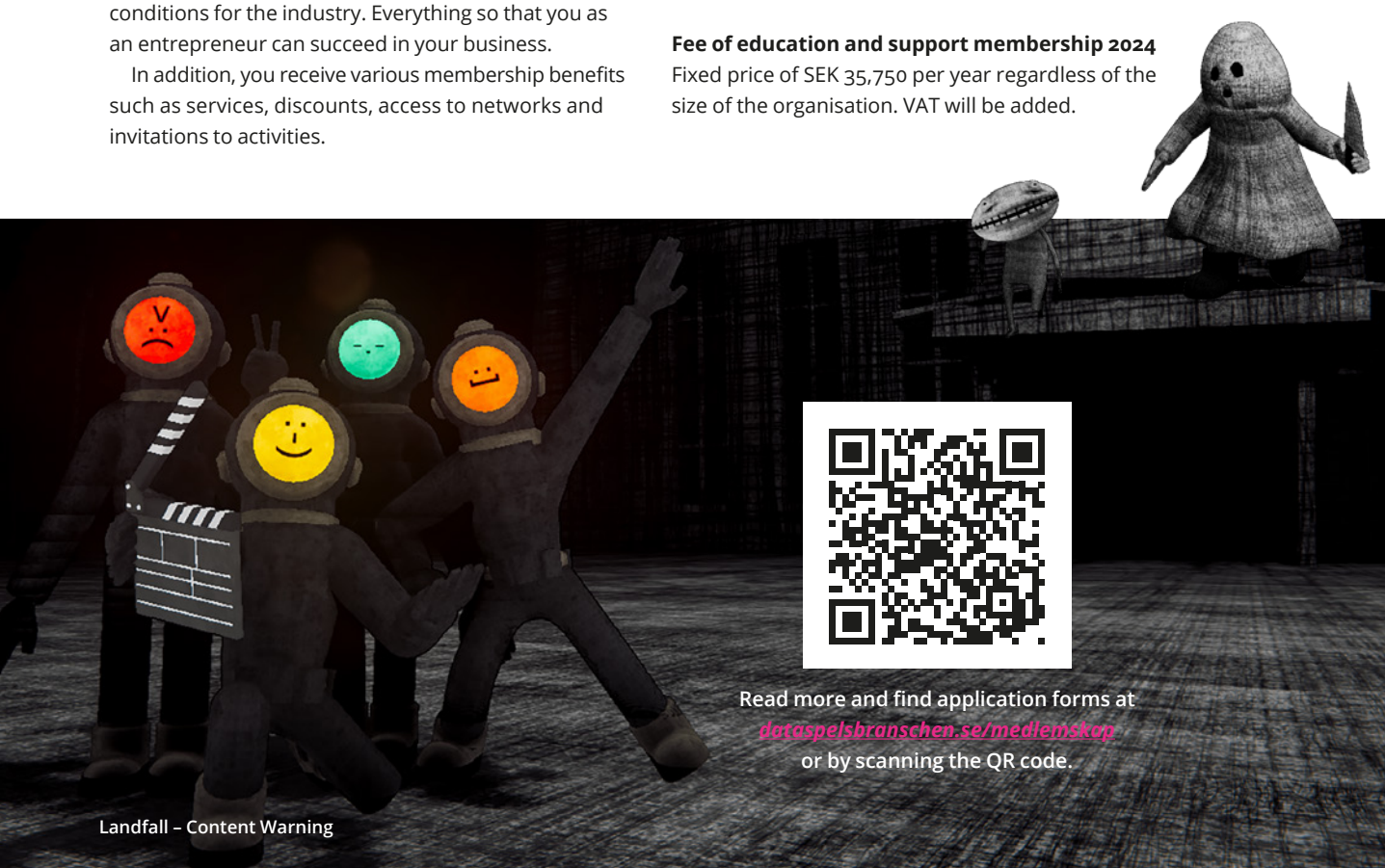
Ordinary Membership
Our regular members are game developers, producers, publishers and distributors and represent everything from solo to multinational companies as well as developers and publishers working with all types of digital games for console, mobile, PC, online and e-sports.

Educational Membership
Our educational members are the game training centres, incubators, academies or similar. Educational members have the same rights as full members, except for voting rights at annual meetings.

Supporting Memberships
Our supporting members are organisations or companies that do not operate purely in the field of game development, but are still involved in some way. For example, selling services to game companies or sharing a target audience. Supporting members have the same rights as ordinary members, with the exception of voting rights at annual meetings.

Fee of full membership 2024
SEK 13,750 per year for companies with up to ten employees. If you have more than ten employees, an additional SEK 1,375 per employee is charged up to 110 employees. VAT will be added.

Fee of education and support membership 2024
Fixed price of SEK 35,750 per year regardless of the size of the organisation. VAT will be added.



Read more and find application forms at
dataspelsbranschen.se/medlemskap
or by scanning the QR code.

Landfall – Content Warning

Glossary

AAA: Reads "Triple A". Popular term for bigger games with large budgets and staff. Typically published by the industry's largest publishers.

AI: Artificial Intelligence. A traditional term for autonomous agents in games that make their own decisions or navigate the game world. Machine learning is used to develop new tools in game design. Generative AI refers to algorithms that use instructions and computer learning to create new versions of material.

Alpha: The phase in software development where key systems and features are implemented and ready for software testing.

AR/Augmented Reality: Direct or indirect viewing of a physical environment whose elements are enhanced (or supplemented) by computer-generated sensory input (audio, video, graphics or GPS data).

Beta: Takes place after alpha. At this point the product is largely complete, but may contain bugs or require polishing. In some cases the game is made available for closed or public software testing by so-called beta testers.

Casual games: Simpler games, typically with minimal storylines, shorter learning curves and designed to be played for short periods of time.

Cloud gaming: Also known as gaming on demand, is a type of online game that allows the streaming of a game to a computer stored on the operator's or game company's server without the need for a console or advanced computer performance.

Co-development/Co-dev: Subcontracting production work from other game development studios, often for limited parts of a project as a complete team. See *outsourcing*.

Core: Term used to describe games made for a dedicated, self-identified gamer audience.

CPM: Cost Per Mille; cost of a thousand ad impressions.

Crossplay: Making it possible to play the same game together on different platforms.

Crowdfunding: Financing a project through crowdsourcing. In recent years, this has been popularly expressed in various web platforms that collect funding support for various projects from interested individuals or companies.

DAU: Daily Active Users; The number of unique users per day.

Digital distribution: Sales of digital software through digital channels.

DLC: Downloadable Content; downloadable additions to video games, oftentimes with less content than classic "expansions".

Early Access: games released for sale in an early development phase before official release.

Freemium: Collective name for business models where a product or service is offered for free but where the player can unlock additional content through microtransactions such as buying virtual items or skip waiting times.

Free-to-play/free2play: Games that offer users to play the game for free in their basic version monetisation occurs through other means, such as ads or additional paid content.

Game Jam: Shorter events where game developers meet and create games together for a limited time, often with a specific purpose or theme.

Gold master: A traditional term for the final and finished version of a software, ready for wide distribution.

Hyper casual: Games under the casual category with an even greater focus on stripped-down interfaces to allow spontaneous game for very short moments, such as in public transport.

IAP: In-App Purchases, directly accessible in the app/game, rather than through external payment systems. The goods purchased can consist of additional levels, equipment, experience points or subscription services.

Indie: From "independent". A prefix that characterises games by independent developers, usually smaller games with small development teams.

IP: Intellectual Property, a type of intangible asset, often referring to game concepts, brands, trademarks and other assets.

MARPPU: Monthly Average Revenue Per Paying User.

MARPU: Monthly Average Revenue Per User.

MAU: Monthly Active Users; the number of unique users over a 30 day period.

Middleware: Software used to develop games. Middleware acts as a "glue" between two already existing software components.

Micro Transactions: A small online transaction. The term is used to describe transactions that pay, among other things, DLCs and in-app purchases.

MMORPG: Massively Multiplayer Online Role-Playing Game, a type of role-playing game where thousands of players exist in the same digital world, such as *World of Warcraft*.

MR/Mixed Reality: A type of game that combines the real-world environment with digital elements, for example (but not necessarily) using a headset with a built-in camera.

Multiplayer: Games that can be played by multiple people at the same time, online or on the same device.

Outsourcing: General term for hiring external human resources and specific skills from other companies and delegating production assignments to other companies. See *co-development*.

Premium: Revenue model where a digital product is purchased for a fixed price, unlike, for example, free-to-play where the game is free to acquire.

Retail: Games sold in physical stores.

Roguelike/Roguelite: Collective term for a genre of games characterised by procedurally generated levels, turn-based decisions, grid movements, and/or permanent endings if the game character dies, meaning that the game is played over from the start.

Serious games: Games with a primary purpose other than entertainment. It can be simulators, exercise games, games for learning, games for rehabilitation, or advertising games.

Singleplayer: Games played by only one person at a time.

Social games: Collective name for games on social networks, such as Mobage and Facebook.

Soft Launch: Releasing a game in limited markets to evaluate engagement.

Streaming: Direct playback of digital content while transmitting it over the internet.

Studio: Game development company or division of a game development company, for example, in a specific location.

UGC: User Generated Content. Used as a concept in games and social media where users themselves create or contribute to the content of the experience, such as customised courses in a game.

VFX: Visual Effects in digital media, including particle effects, animations, motion capture and physics simulations.

Virtual goods/items: Term referring to digital objects that exist in games in the form of, for example, puzzle pieces, weapons, or other items.

VR/Virtual Reality: A way to visually immerse yourself in a game experience using some kind of headset (or "Head-mounted Display").

XR/Extended Reality: Collective term for all technologies that extend/change the user's perception of their surroundings, such as AR and VR.

Perfect Random – Sulfur

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