

SGA



stands for
Serbian Games Association



SGA je osnovana u martu 2018.
godine u Beogradu.

Bili smo inspirisani sličnim
udruženjima u svetu, posvećenim
podršci razvoja gejming industrija u
najrazvijenijim ekonomijama sveta

Naši osnivači:

3Lateral

cofaGame



Ko je deo naše
kreativne
zajednice?



Od osnivača do članova

Proizvodnja
igara +
usluge

Mart 2018:

8

osnivača

September 2022:

120+

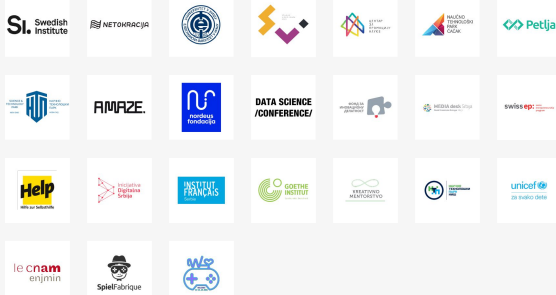
članova

Od entuzijazma do jake mreže partnera i prijatelja

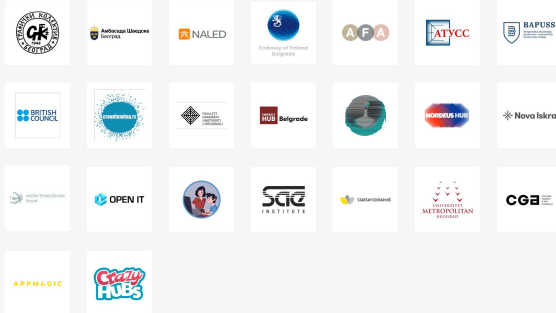
partneri



Programski partneri



prijatelji



Postali smo članovi evropskih federacija



European
Games Developer
Federation



EUROPE'S
VIDEO GAMES
INDUSTRY

Kako merimo promene i rast?

2020



2021



2018



2019

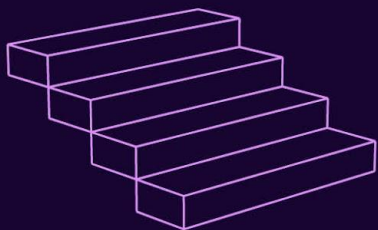


SERBIAN GAMING INDUSTRY REPORT

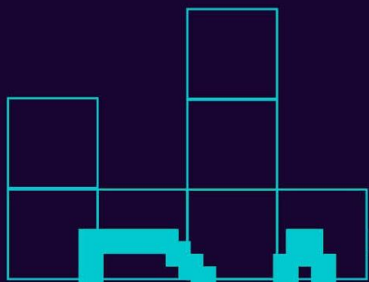
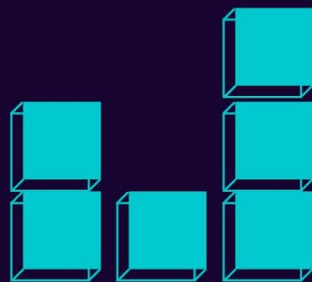


SGA

2021



No



DATA



...



...

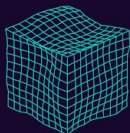


1



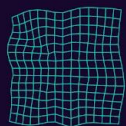
There hasn't been a significant increase in the number of LLCs

2



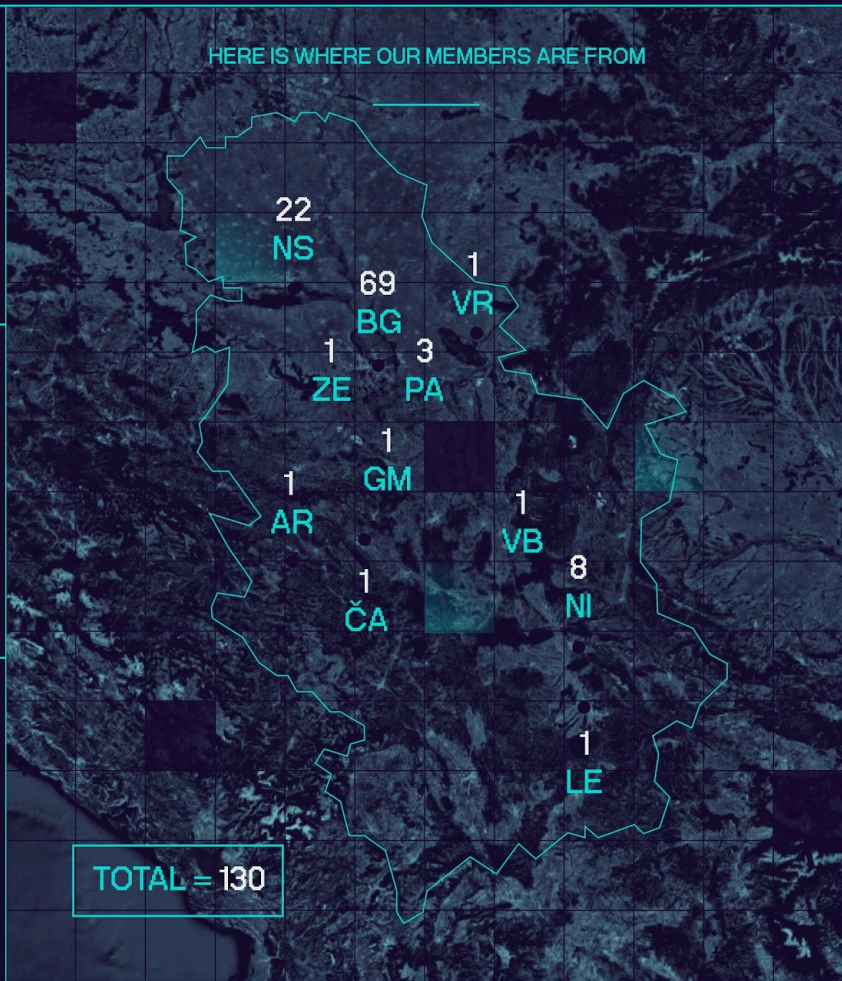
Belgrade, Novi Sad and Niš remain the main hubs

3



20% of our members have offices outside of Serbia in addition to the local ones

HERE IS WHERE OUR MEMBERS ARE FROM



COMPANY ACTIVITY

57%

Work on original IPs



11%

Art and video production

8%

Outsourcing

6%

Developing tools and technologies

5%

Service provider

3%

Education

7%

Other

BUSINESS TYPE ENTITY

63%

LLC

24%

Flat-rate taxpayer

13%

No entity

For the past year, we've seen more teams from all over Serbia, and more specialised studios offering services related to the gaming industry. We're happy our ecosystem is maturing



Estimated number of companies, studios and indie teams:

130



THE GOOD

COMPANY ACTIVITY



Work on original IPs

TO IMPROVE >>>>



REVENUE

With the coming of new big studios, major acquisitions and some of the best periods when it comes to revenue reported by our members, we predict a steady growth that will continue for years to come. Check out the TRENDS page for a more detailed view.



More than 2/3 of respondents generate 75%-100% of revenue outside of Serbia

Even though 30% of respondents stated they will actively pursue an investment in the previous report, only 16% actually received an investment

Only 30% of respondents raised funds is Serbia

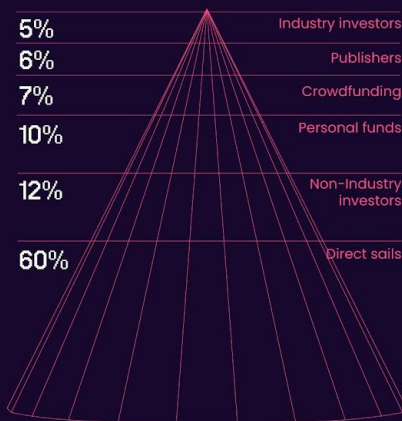
A record 45% of teams will actively pursue investments in 2022 - most of them would like to raise 500k eur

ESTIMATED TOTAL REVENUE 125 MIL EUR

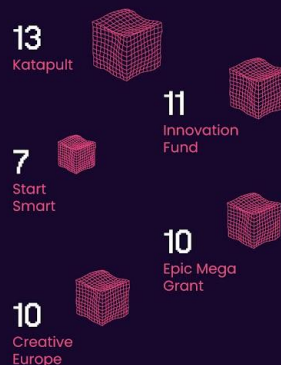
INCOME PER PLATFORM



MAIN FINANCING SOURCE



NUMBER OF TEAMS PLANNING TO APPLY FOR THESE FUNDS:



TOP 3 MARKETS PER REVENUE



THE GOOD

ESTIMATED
TOTAL
REVENUE
125 MIL EUR

TO IMPROVE

Even though 30% of respondents stated they will actively pursue an investment in the previous report, only 16% actually received an investment

Only 30% of respondents raised funds in Serbia

A record 45% of teams will actively pursue investments in 2022 - most of them would like to raise 500k eur

TRENDS

More and more talented professionals are sought after. Combining education and internship opportunities with various initiatives aimed at helping them develop further is key to ensuring the scalability of some of the fastest growing teams and companies.



1548 employed by our members

30% women

112 foreigners

19% lead positions

= 50



TOP 3 TALENT HARDEST TO HIRE

PRODUCERS

MONETIZATION SPECIALISTS

GAME DESIGNERS

A RECORD OF 70% RESPONDENTS PLAN TO EXPAND TEAMS IN 2022

35% OF OUR MEMBERS EMPLOYED GRADUATES. HERE'S WHAT THEY SAY ABOUT THEM:

22% We're completely satisfied

26% They know theory, but lack practice

10% They lack both theory and practice

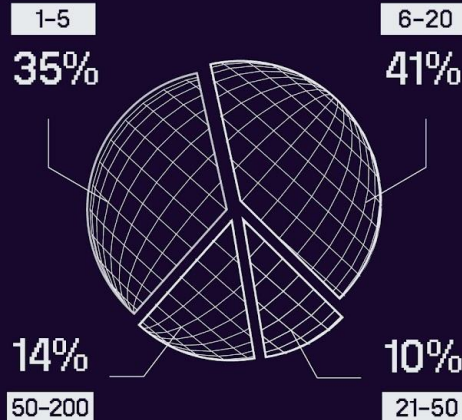
9% They expect high salaries

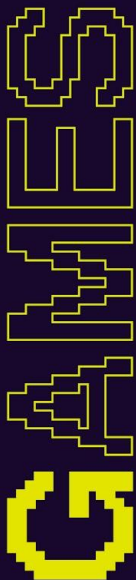
23% They've never worked on their own projects

10% They bring a fresh perspective

ROUGHLY 450 POSITIONS WILL BE OPEN

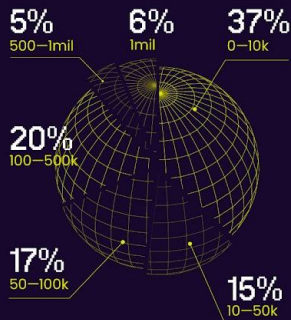
STUDIO SIZE





A typical Serbian game made in 2021: a casual or RPG mobile F2P title with ads monetization, developed in 12 months by a team of around 10 people, using Unity.

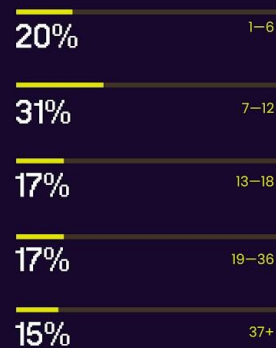
AVERAGE BUDGET FOR A GAME



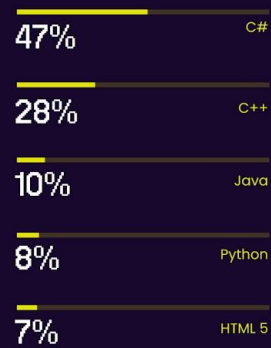
AVERAGE TEAM SIZE WORKING ON A GAME



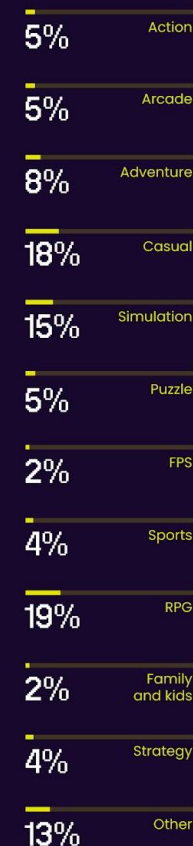
AVERAGE MONTHS SPENT IN DEVELOPMENT



PROGRAMMING LANGUAGES



GENRE



1

Games published 35
Currently in development 41

2

64% of games were
self-published

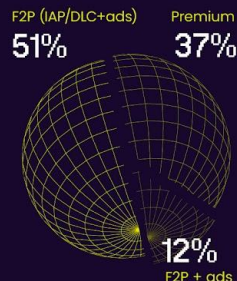
3

Most studios are currently
developing one or two games

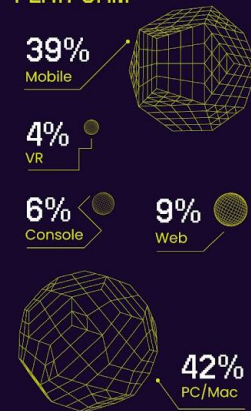
ENGINES



MONETIZATION MODEL



PLATFORM



SERBIAN GAMES HAVE BEEN DOWNLOADED/PURCHASED MORE THAN 370 MILLION TIMES

THE GOOD

SERBIAN GAMES
HAVE BEEN
DOWNLOADED
/PURCHASED
MORE THAN
370 MILLION TIMES

TO IMPROVE

1

Games published 35
Currently in development 41

2

64% of games were
self-published

3

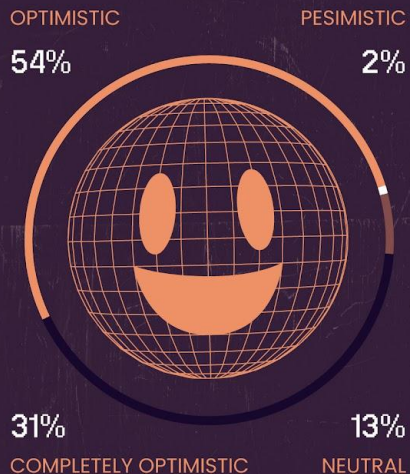
Most studios are currently
developing one or two games

ECOSYSTEM

Similar hurdles seem to be in place this year as well. Decision makers should combine this info with the experience and best practices of other successful gaming industries in order to improve conditions in Serbia



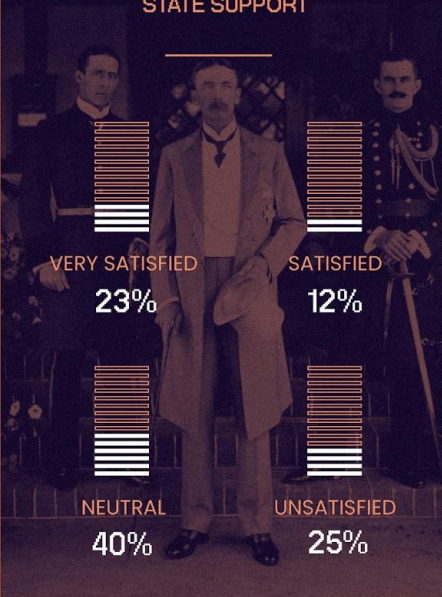
HOW OUR RESPONDENTS FEEL ABOUT THE FUTURE OF THE SERBIAN GAMING INDUSTRY



MAIN FACTORS THAT NEGATIVELY IMPACTED COMPANY GROWTH



LEVEL OF CURRENT STATE SUPPORT



EXPECTED STATE SUPPORT



35%

OF RESPONDENTS STILL DON'T OFFER EMPLOYEES FULL-TIME CONTRACTS DUE TO 'EXTREMELY HIGH TAXES'

25%

HAD TO OPEN PO BOXES OUTSIDE OF SERBIA

85% OF TEAMS ARE OPTIMISTIC ABOUT THE FUTURE

EXPECTED STATE SUPPORT

TAX INCENTIVES 60%

FUNDS FOR INTERNATIONAL PROMOTION 33%

COFINANCING 33%

EDUCATION UPGRARDE 46%

NO EXPECTATIONS 21%

MAIN FACTORS THAT NEGATIVELY IMPACTED COMPANY GROWTH

HIGH TAXES 46%

FINDING APPROPRIATE TALENT 48%

LACK OF FUNDS 30%

COMPLEX RED TAPE 25%

HIGH LLC EXPENSES 21%

INAPPROPRIATE TAX INCENTIVES 36%

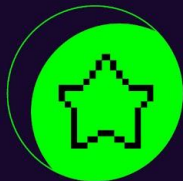
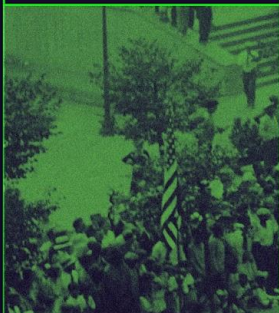
CUSTOMS (DEV-KIT IMPORT VIRTUALLY IMPOSSIBLE) 20%

TRENDS

Here's a handy comparison of some of the main data over the years. Keeping track of the YoY changes is crucial to navigate future growth



	0 - 20k	20k - 50k	50k - 100k	100k - 1m	1m - 5m	5m - 25m	25m - 50m	50m +
2021	19	4	4	17	3	5	2	1
2020	26	6	5	18	2	2	2	1
2019	19	6	8	18	4	4	n/a	n/a
2018	25	2	1	3	6	3	n/a	n/a
2017	24	3	4	2	5	2	n/a	n/a



EMPLOYEES

2021	1548	+
2020	1431	+
2019	1325	+
2018	1281	+
2017	n/a	/



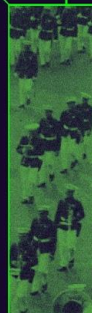
COMPANIES + TEAMS + STUDIOS

2021	130	+
2020	120	+
2019	100	+
2018	60	+
2017	30	/



ESTIMATED TOTAL REVENUE

2021	125	+
2020	120	+
2019	80-120	+
2018	80	/
2017	n/a	/

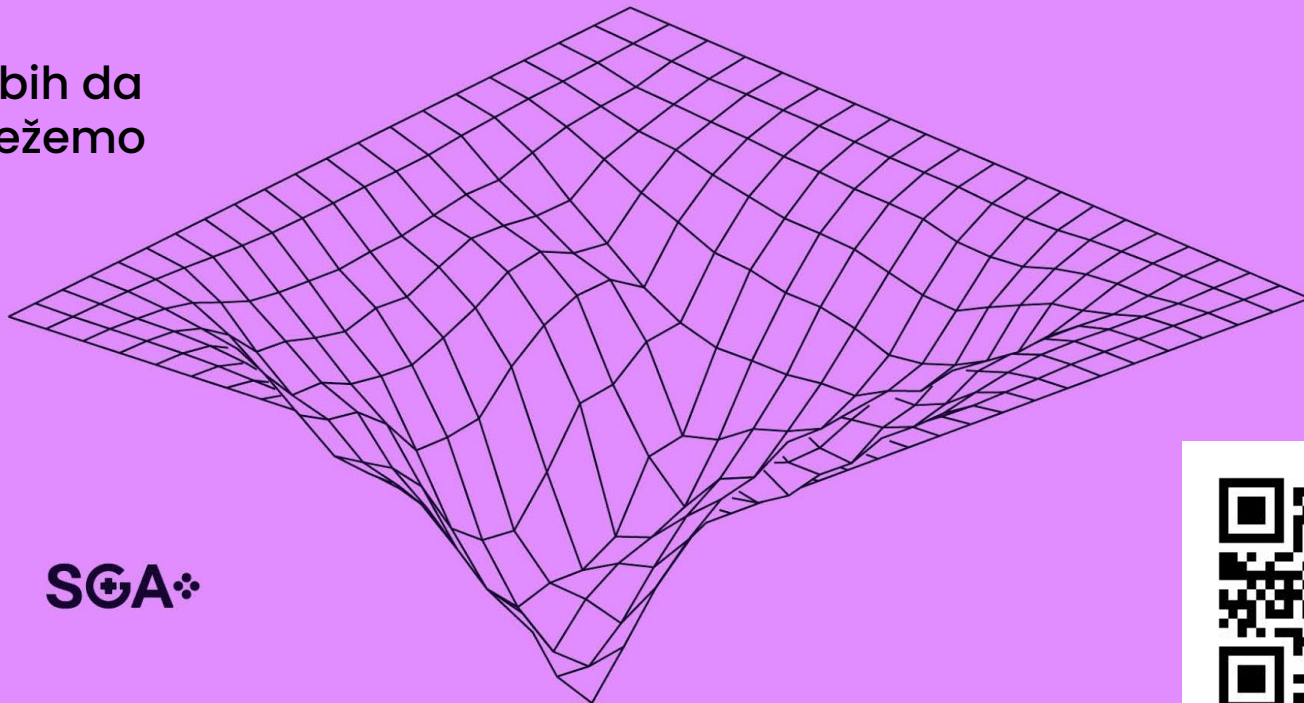


GAMES PUBLISHED

2021	35	-
2020	41	-
2019	46	-
2018	70	-
2017	89	/

Hvala!

Volela bih da
se povežemo



SGA❖



sga.rs