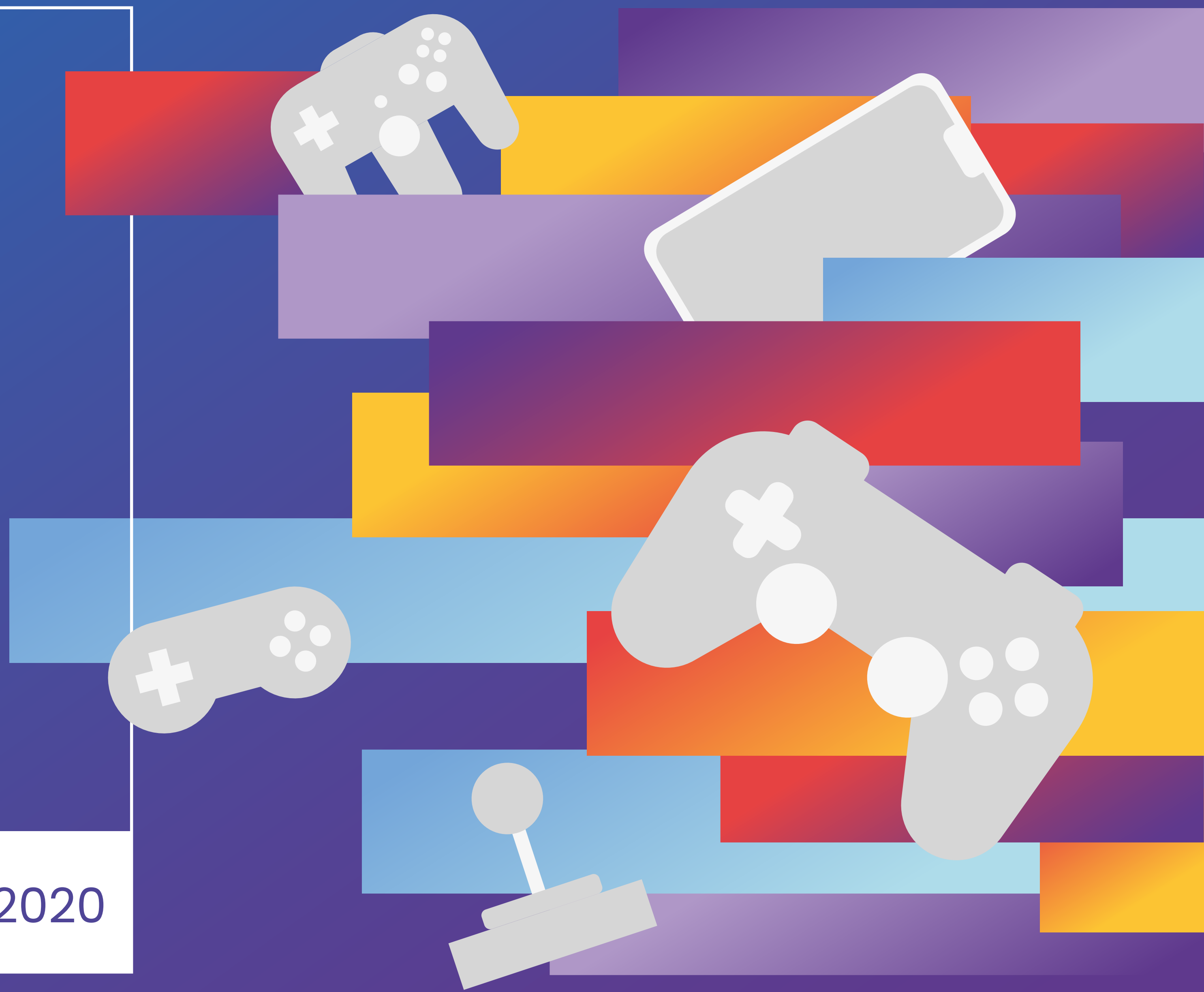


SERBIAN GAMING INDUSTRY REPORT

SGA*

2020



04

DATA

13

STUDIOS

37

ECOSYSTEM

49

TALENT

55

EDUCATION

INTRO



Nikola Čavić
SGA President

As I write this, it is exactly three years since the SGA was founded, in March 2018, and it is remarkable what was accomplished in those three short years. SGA went from a name on the paper to an organization that is supported by almost 100 member companies, with dozens of partners and friends of the organization, both in Serbia and abroad. Most importantly, SGA became a hub and a go to place for everyone interested in starting or building a career in the video games industry in Serbia.

Besides the SGA, the whole video games ecosystem in Serbia also experienced a remarkable growth in that period, and year 2020 was special in that regard in many ways. As the whole world was dealing with the consequences of the pandemic, more people turned towards video games as a form of entertainment, but also as a lucrative opportunity for capital investments or career prospects. As a result, the industry has experienced a surge in activity on all fronts during the year 2020, and we felt those impacts here in Serbia too.

Thanks to the SGA Jobs platform, new master programs dedicated to game development and various programs we have organized, more people than ever before are working in our industry or seeking an opportunity to join it and we couldn't be more proud of that fact.

Also, as you will see in our annual report, our members are reporting record revenues for the year 2020, pushing us above the 100m in annual revenue threshold for the whole sector, and strengthening our position as one of the best performing hubs for game development in this part of the world.

Besides those record breaking numbers, there are many other accomplishments that have happened over the last 12 months, and I invite you all to read about the amazing work that we are all doing in the report. However, when I consider it all, what stands out clearly is how much we have matured. Wherever I turn, I see evidence of progress, development and growth. We are individually and collectively doing amazing things and I am incredibly proud to be part of the change that is taking place.

As we look towards the future, new and exciting things are on the horizon, both within our industry but also in the way SGA operates and engages with the members, the ecosystem and the public in general. I believe there was never a better time to be involved in the video games industry and the SGA team, together with our members and partners is in a unique position to make a significant and a lasting impact on the whole ecosystem. To all the amazing people who have contributed and have supported us in this journey – thank you.

DATA



Year at a Glance

Here is a short overview of the most important numbers that marked 2020 for the Serbian gaming industry

REVENUE



ESTIMATED
120
MILLION EUROS
IN REVENUE

TEAMS



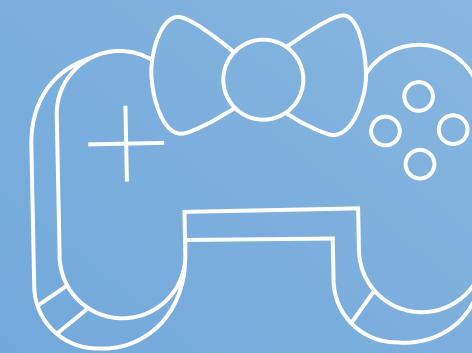
ESTIMATED
120
TEAMS AND
COMPANIES

EMPLOYEES



APPROXIMATELY
2100+
PROFESSIONALS IN
THE INDUSTRY

WOMEN



ROUGHLY
1/3
OF ALL EMPLOYEES
ARE WOMEN

PLATFORM



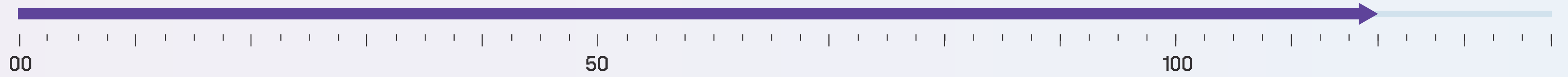
MOBILE
IS THE PRIMARY
PLATFORM

NEW GAMES



41
GAMES
PUBLISHED

120

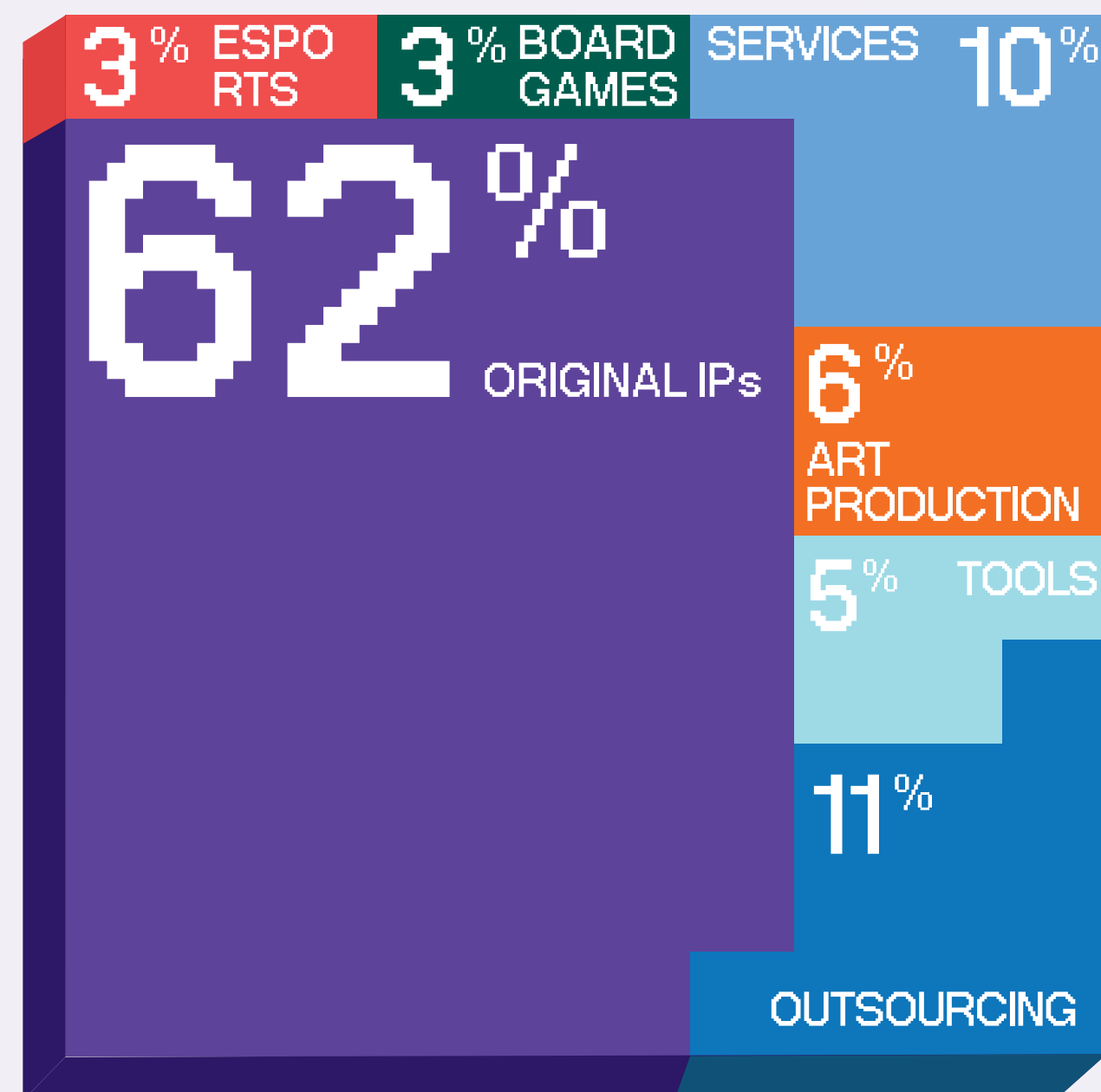


Estimated number of companies, studios and indie teams

Companies

We're very proud that the majority of our members work on original IPs. Games made across all Serbia are being played all over the world.

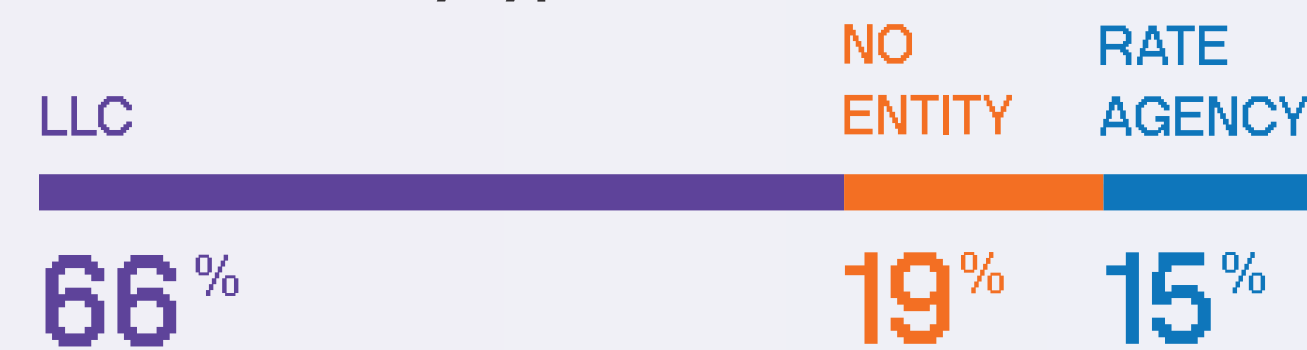
Company activity



Offices



Business entity type



Map



1431



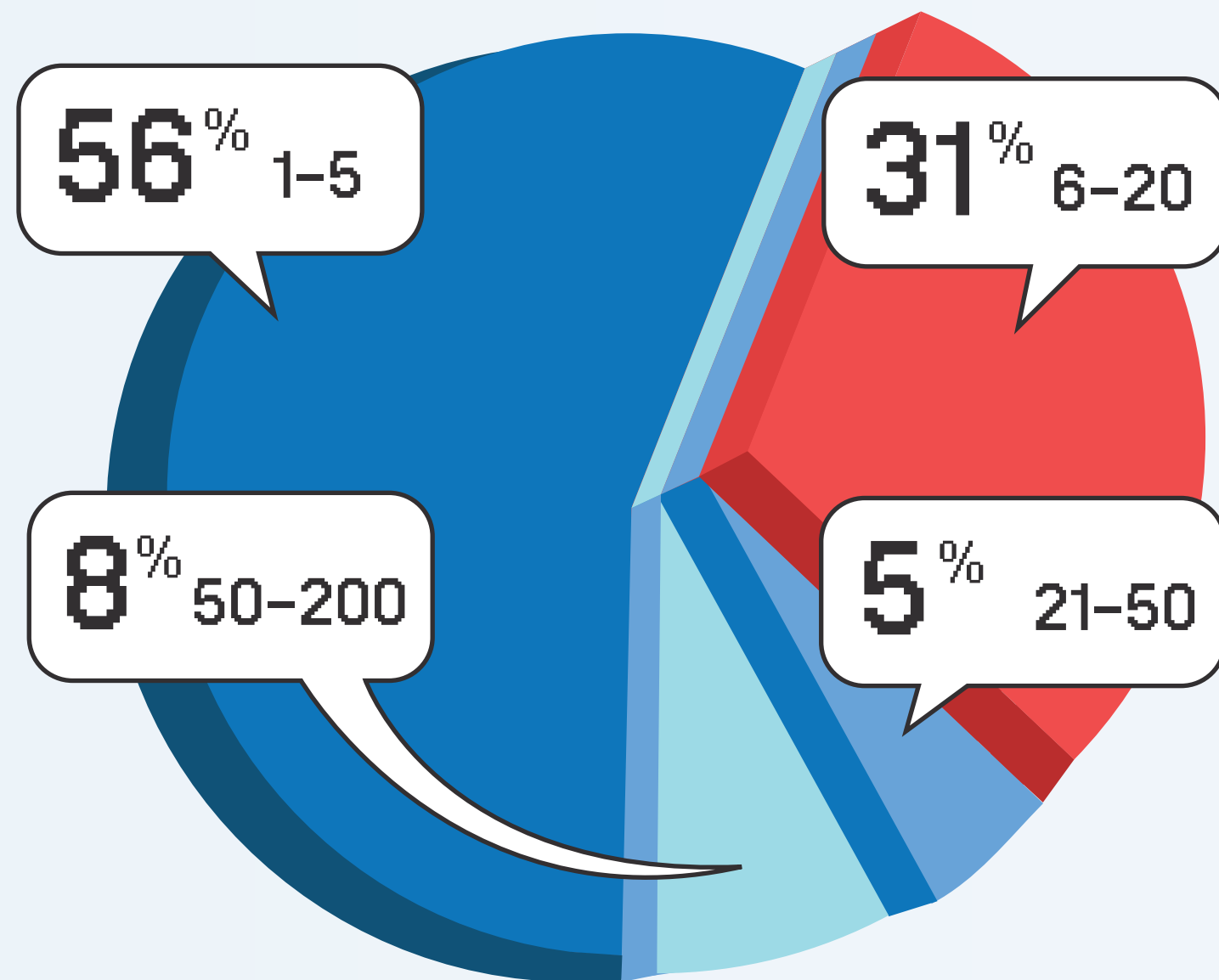
Employees

= 50

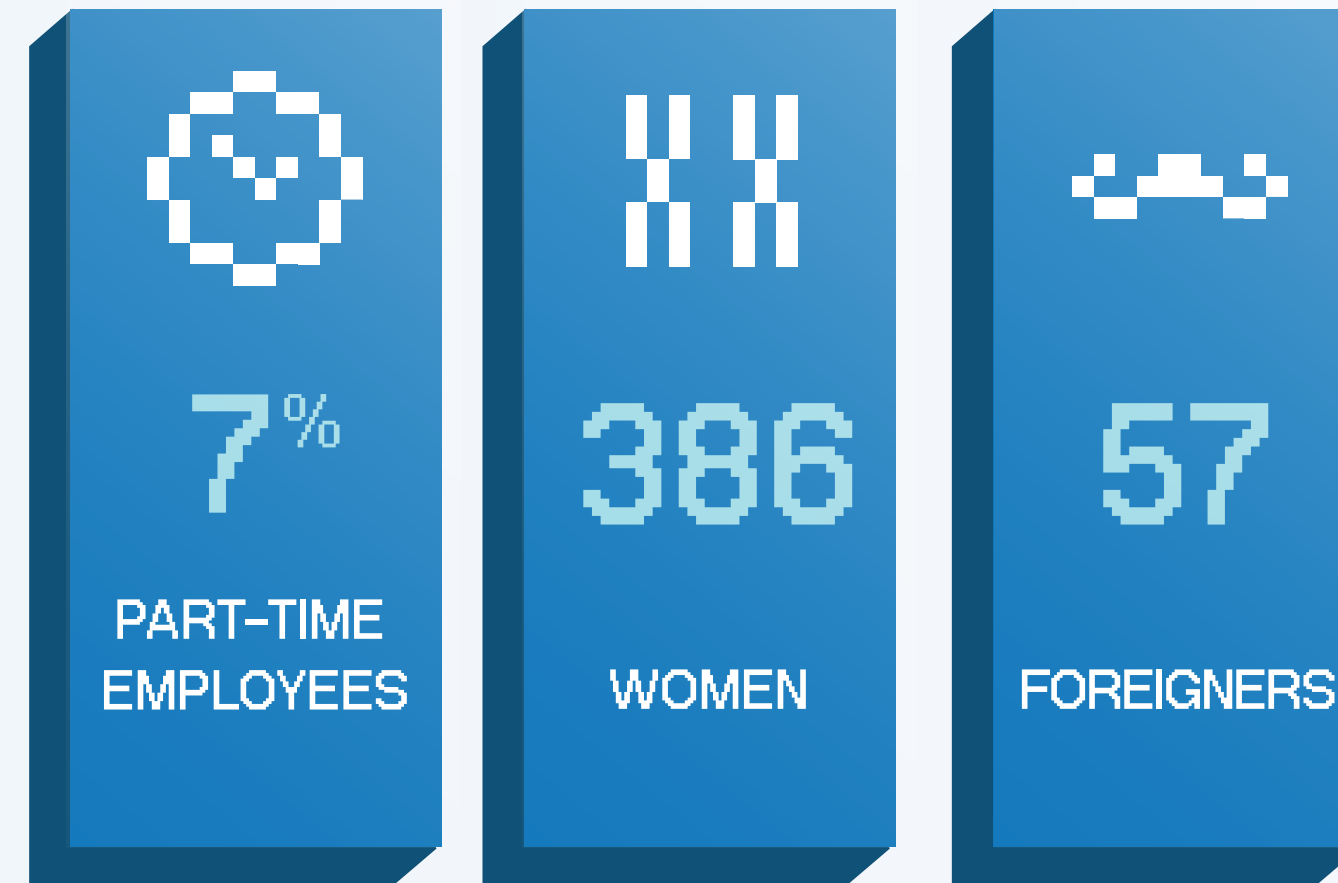
Talent

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.

Studio size



Diversity



66% OF COMPANIES PLAN TO EMPLOY MORE IN 2021



AROUND 34% OF OUR MEMBERS EMPLOYED STUDENTS IN 2019, AND WERE MOSTLY SATISFIED WITH THE QUALITY OF THEIR WORK



THE MAJORITY OF STUDENTS CAME FROM BOTH TECHNICAL AND ART UNIVERSITY PROGRAMS ALIKE



PROGRAMERS AND ARTISTS REMAIN THE HARDEST POSITIONS TO FILL



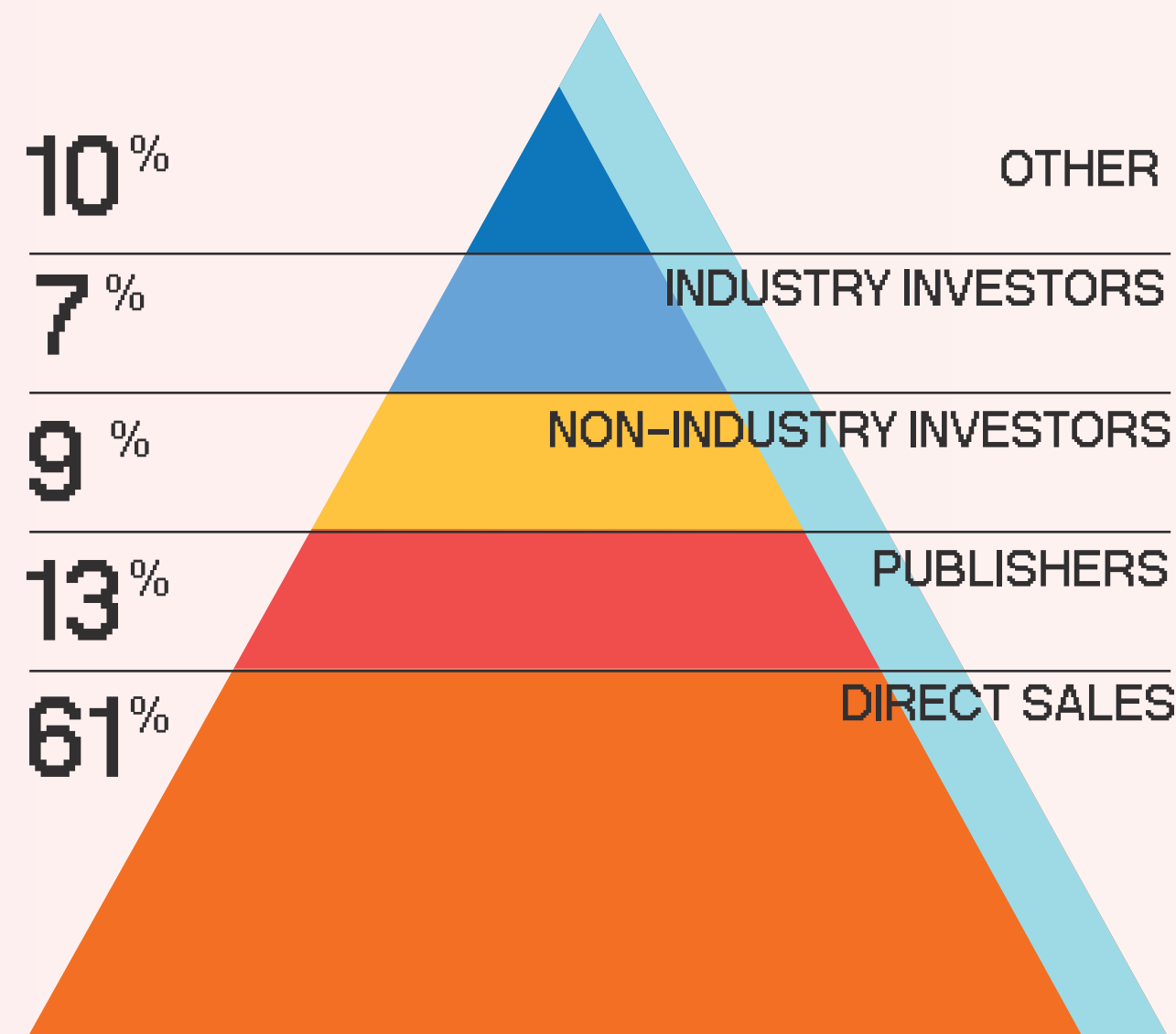
120 YoY GROWTH 20%
MIL EUR

Estimated total revenue

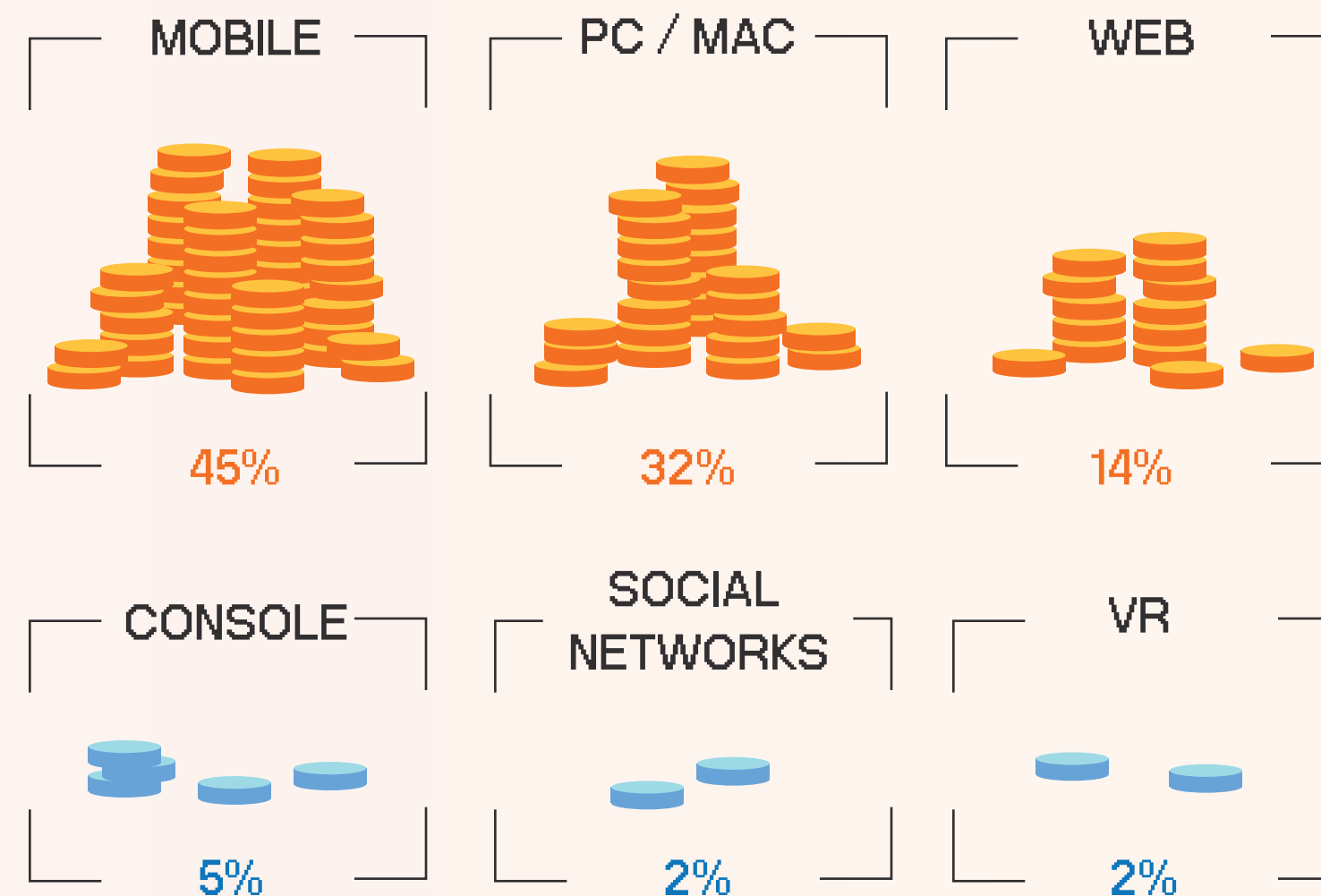
Revenue

Year after year the Serbian gaming industry is showing a steady growth - if we look at revenue as a crucial metric to support this claim. Check out the [TRENDS](#) page for a more detailed info.

Main financing source



Income per platform



Investments

EVEN THOUGH 32% OF OUR MEMBERS STATED THEY WILL ACTIVELY PURSUE INVESTMENTS IN THE PREVIOUS REPORT, ONLY 13% ACTUALLY RECEIVED AN INVESTMENT IN 2019

MOST OF THESE INVESTMENTS CAME FROM ANGEL INVESTORS AND STATE FUNDS

90% OF RESPONDENTS THINK IT'S NOT EASIER TO RAISE FUNDS THAN LAST YEAR

MORE THAN 2/3 OF RESPONDENTS GENERATE **75-100%** OF REVENUE OUTSIDE OF SERBIA

MOBILE REMAINS THE MOST IMPORTANT PLATFORM FOR OUR STUDIOS WHEN IT COMES TO REVENUE

30% OF TEAMS WILL ACTIVELY PURSUE INVESTMENTS IN 2021, MOSTLY 100-500K EUROS

Games published



Monetisation model

FREEMIUM ●●●●● 20%

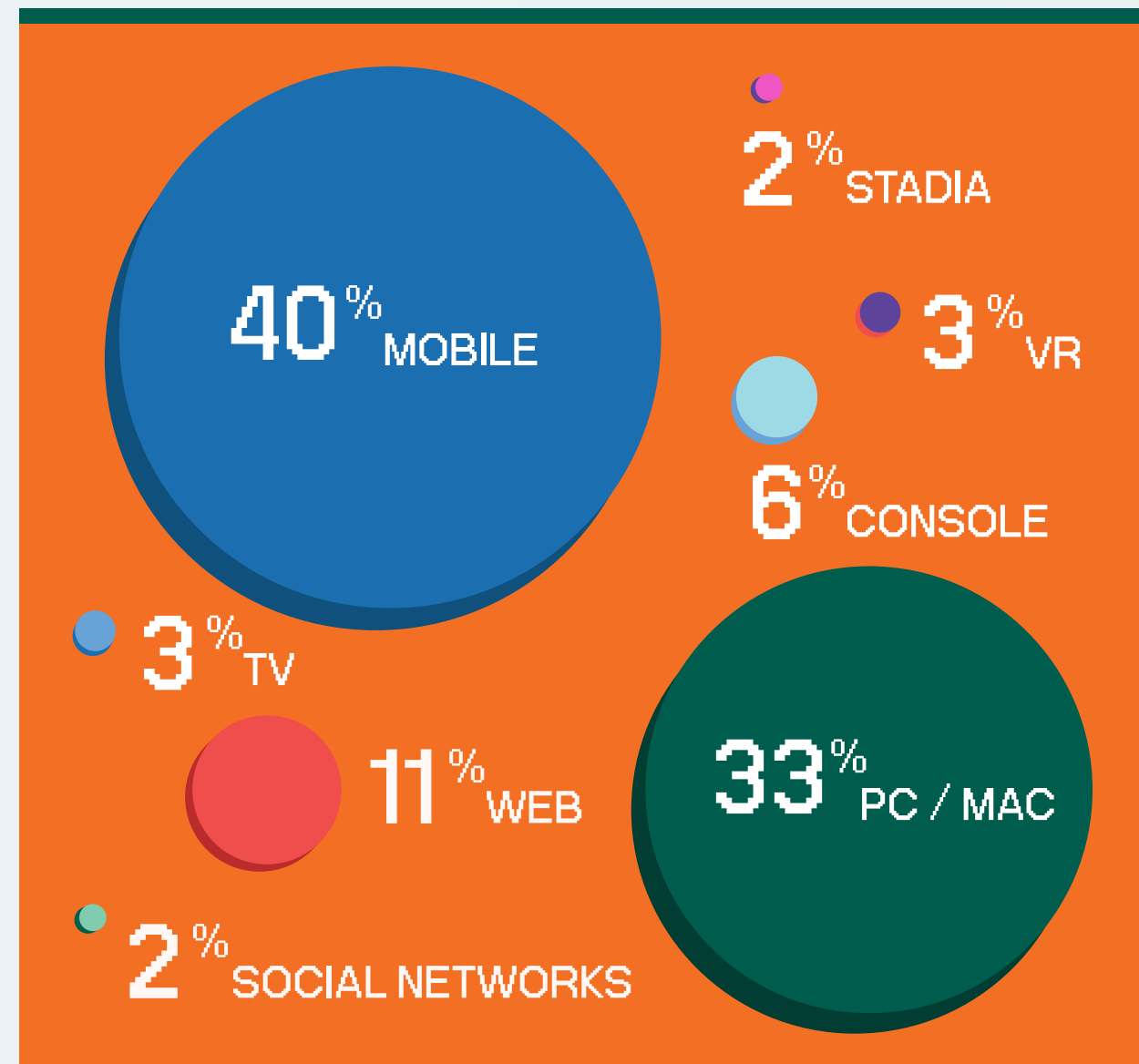
F2P+ADS ●●●●●●●●●● 40%

PREMIUM ●●●●●●●●●● 40%

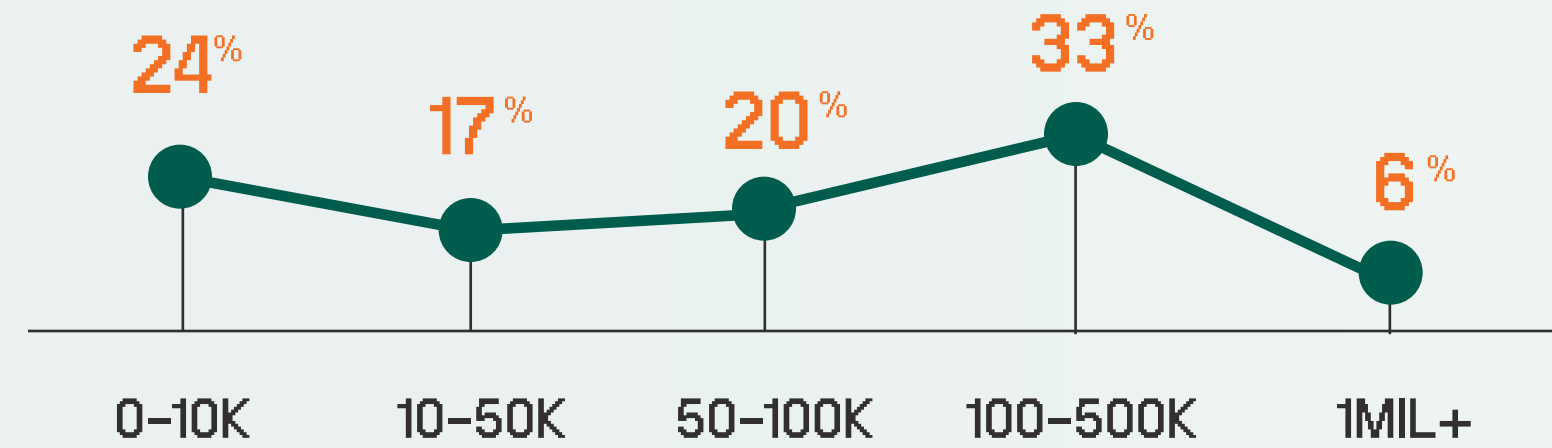
Games

A typical Serbian game made in 2020: a mobile F2P title with ads monetization, developed in 12 months by a team of around 10 people, with a max budget of 500k eur, using Unity and C# or C++.

Platforms



Average budget for a game



41 GAMES PUBLISHED IN 2020

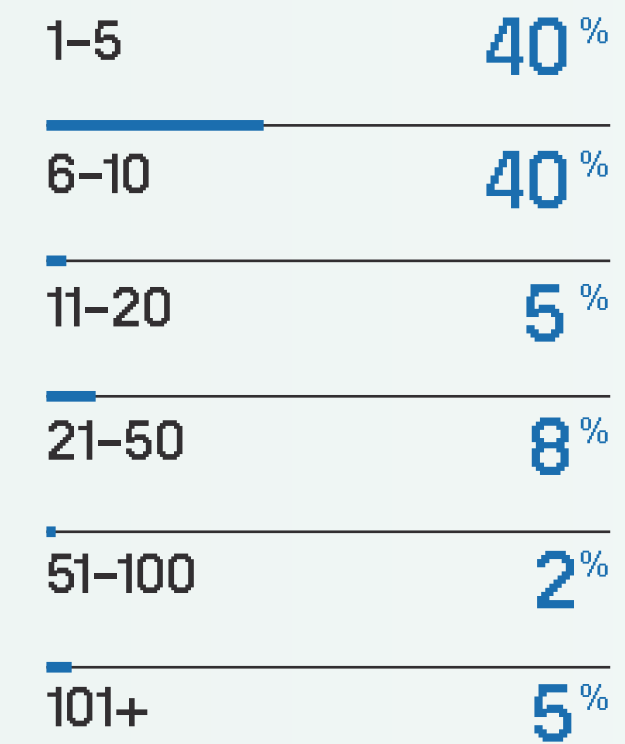
18 TEAMS PUBLISHED NEW GAMES

NUMBER OF GAMES CURRENTLY IN DEVELOPMENT 51

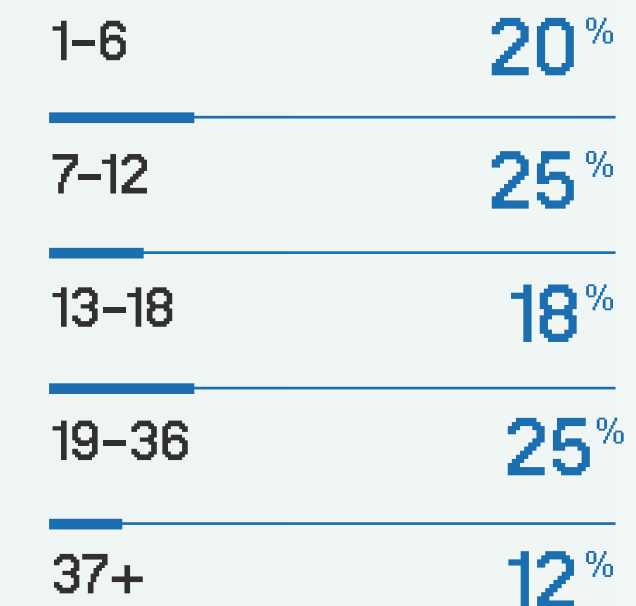
65% OF GAMES WERE SELF-PUBLISHED

SERBIAN GAMES HAVE BEEN DOWNLOADED /PURCHASED MORE THAN 350 MILLION TIMES

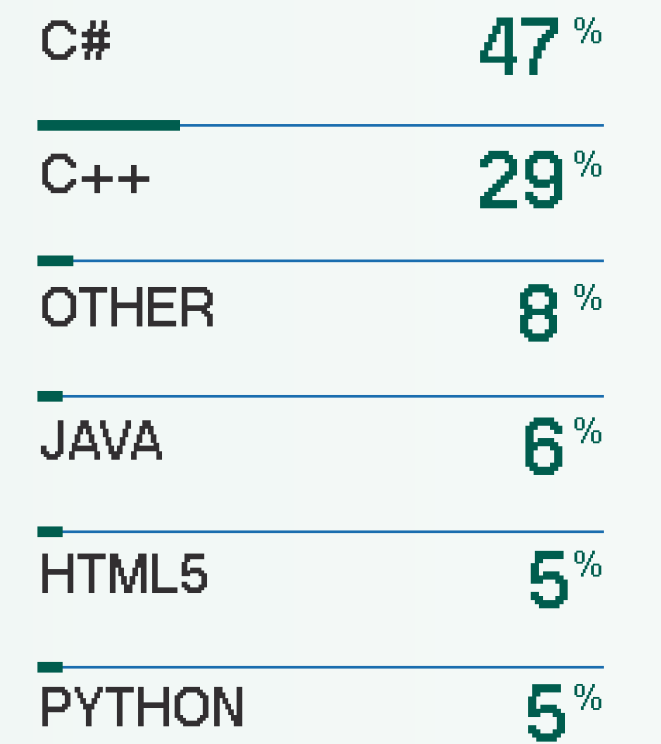
Average team size working on a game



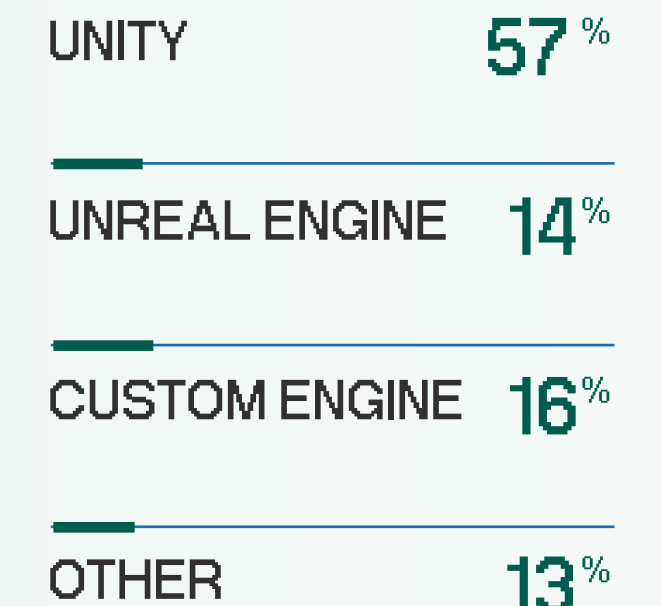
Average months spent on game development



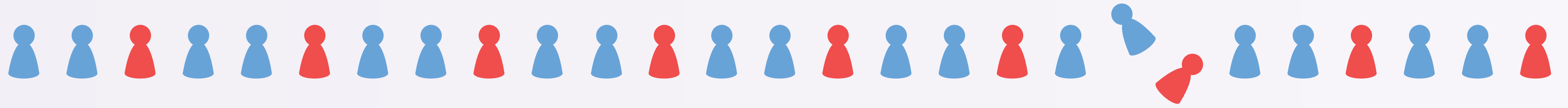
Programming languages



Engines



2/3



of our respondents have a positive outlook about the future of the Serbian gaming industry

Ecosystem

One of our respondents said: "Things are definitely easier for game developers, but a lot of things still need to change fundamentally in order for this industry to grow as much as we all know it could."

Expected state support



Biggest challenges

RED TAPE x

LACK OF FUNDING x

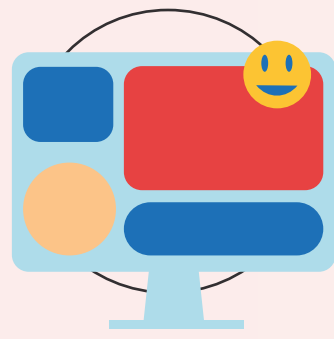
DOUBLE TAXATION WITH THE USA x

Other obstacles

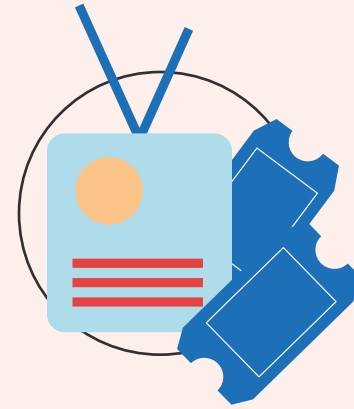
NO CONSOLE SUPPORT FOR SERBIA x

LEGAL OBSTACLES x

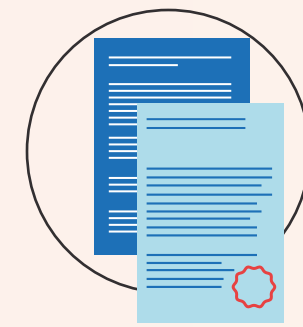
TAX AND LEGISLATION UNFIT FOR THE GAMING INDUSTRY x



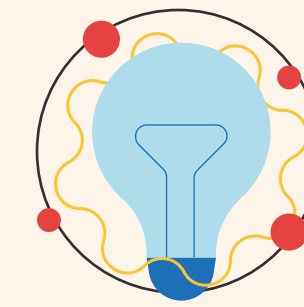
Majority of teams are looking forward to working from their offices again



On average, every studio visited 5 online gaming conferences a year



1/3 of studios opened remote positions, which for the first time enabled people from different cities to apply

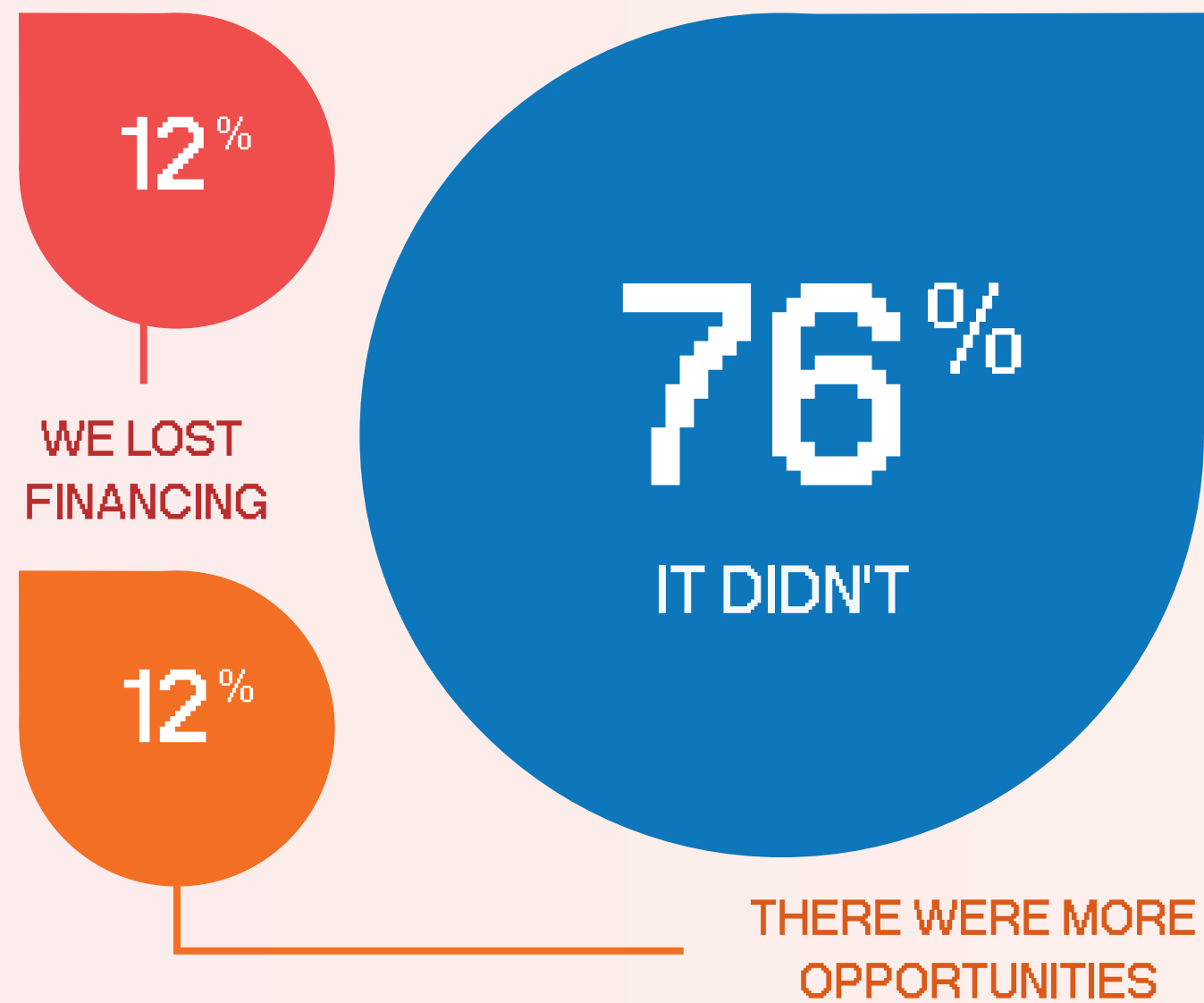


In addition to every-day work, bigger companies had to fundamentally change team-building and other group activities

Pandemic

Most of our respondents reported that the pandemic didn't influence their financing. Almost half of the teams retained productivity, but their output was slowed down.

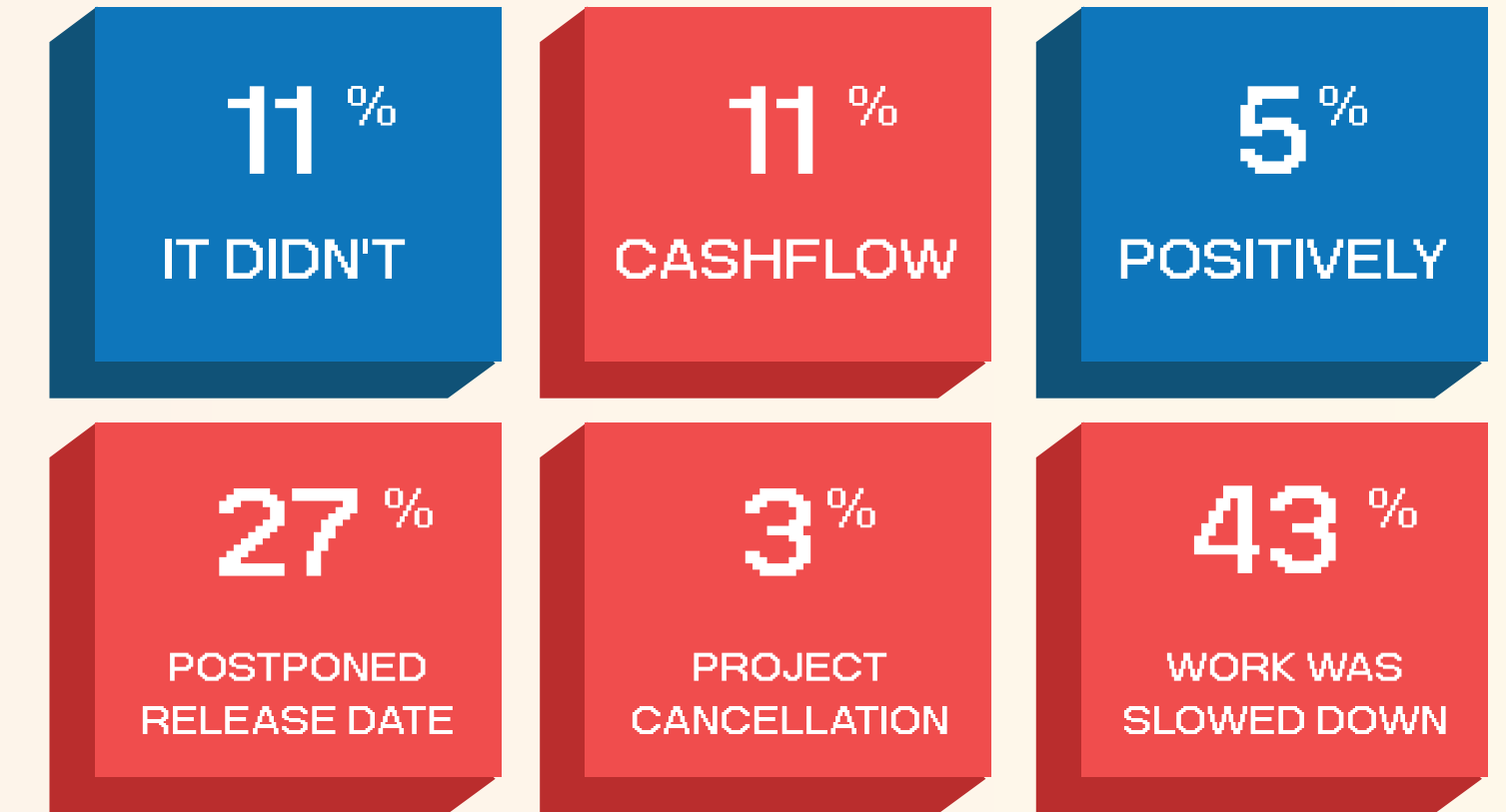
How the pandemic affected financing



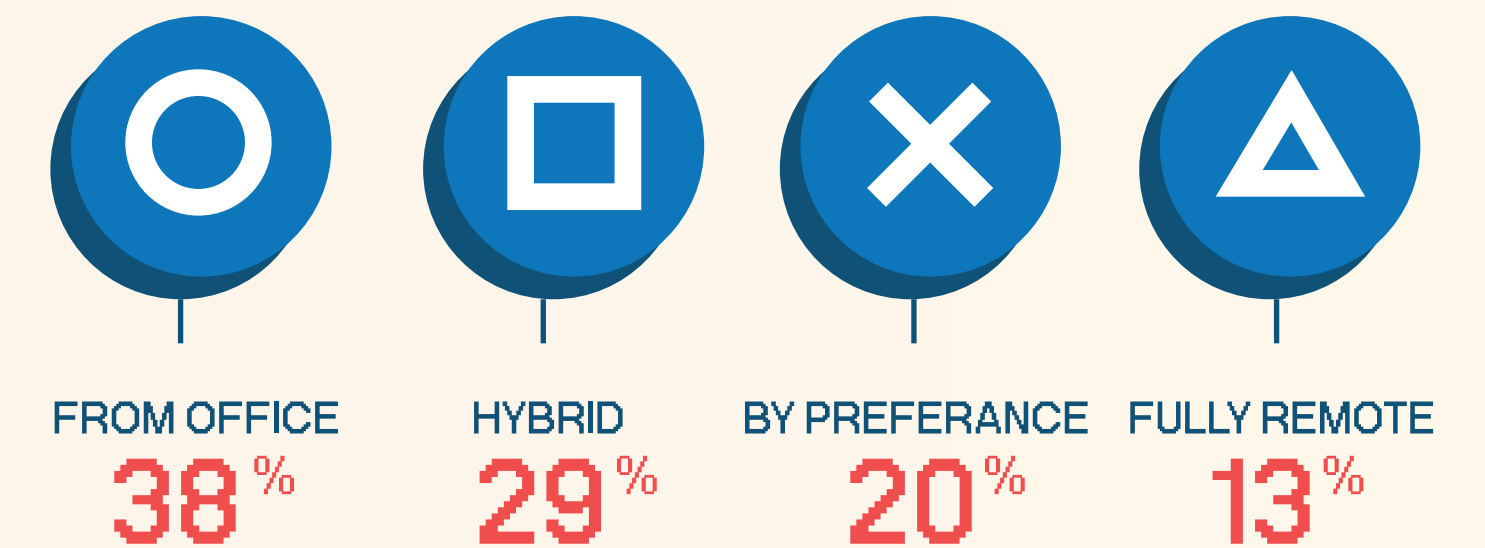
How did remote work affect the output?



How the pandemic affected our members



Post-pandemic work



Trends

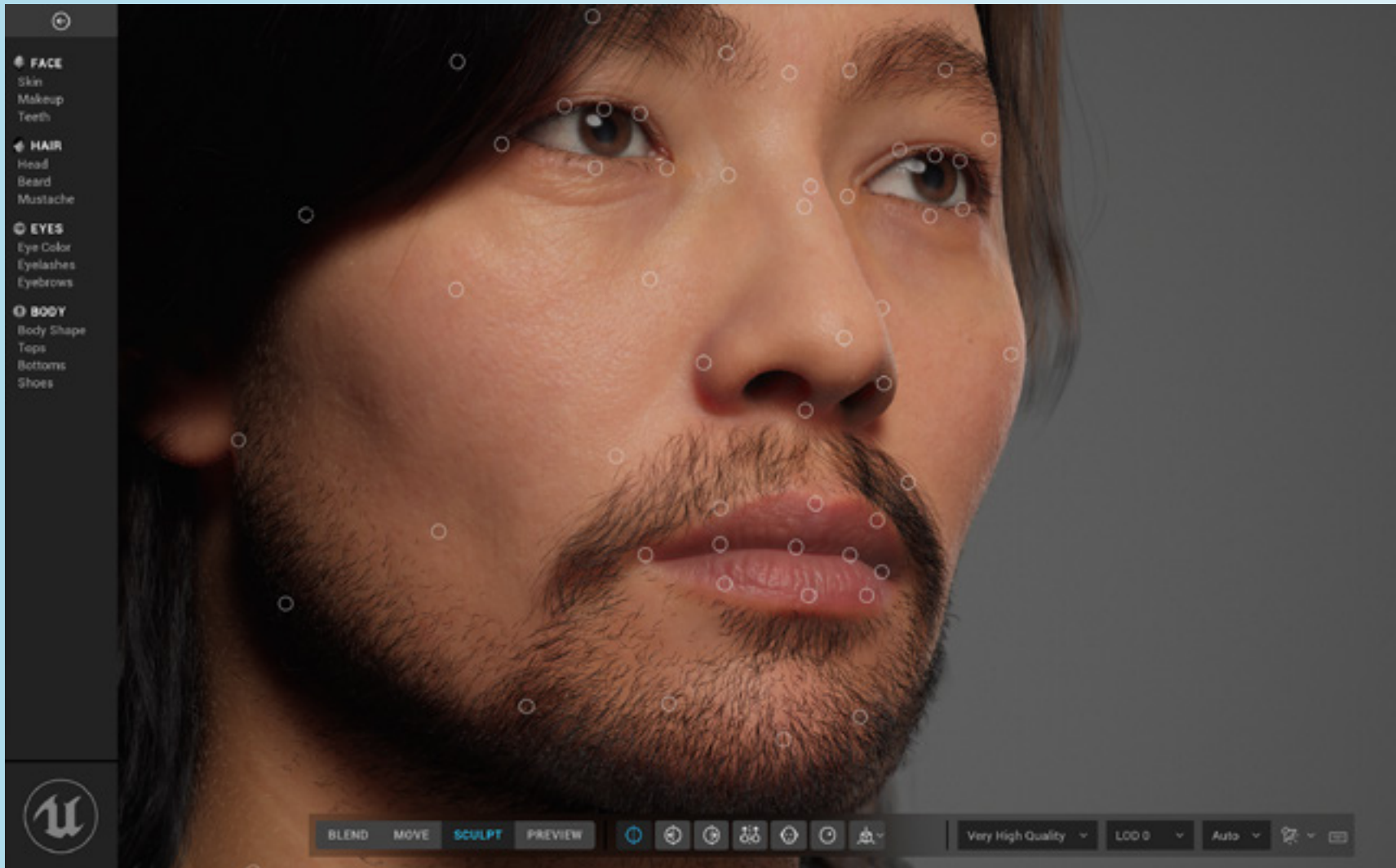
Here's our first ever comparison of some of the main data over the years. Keeping track of the YoY changes is crucial to navigate future growth.

	EMPLOYEES	COMPANIES+ TEAMS+STUDIOS	ESTIMATED TOTAL REVENUE	GAMES PUBLISHED
2020	1431 ^	120 ^	120 ^	41 v
2019	1325 ^	100 ^	80-120 ^	46 v
2018	1281 ^	60 ^	80 ^	70 v
2017	N/A	30	N/A	89

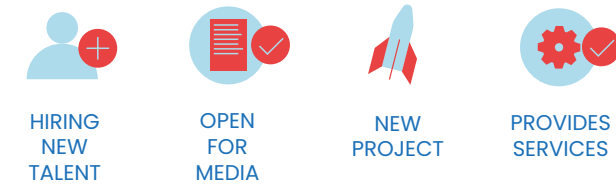
Total income per category	0 - 20.000	20.000 - 50.000	50.000 - 100.000	100.000 - 1.000.000	1.000.000 - 5.000.000	5.000.000 - 25.000.000	25.000.000 - 50.000.000	50.000.000+
2020	26	6	5	18	2	2	2	1
2019	18	6	8	18	4	4	N/A	N/A
2018	25	2	1	3	6	3	N/A	N/A
2017	24	3	4	2	5	2	N/A	N/A

STUDIOS





3LATERAL



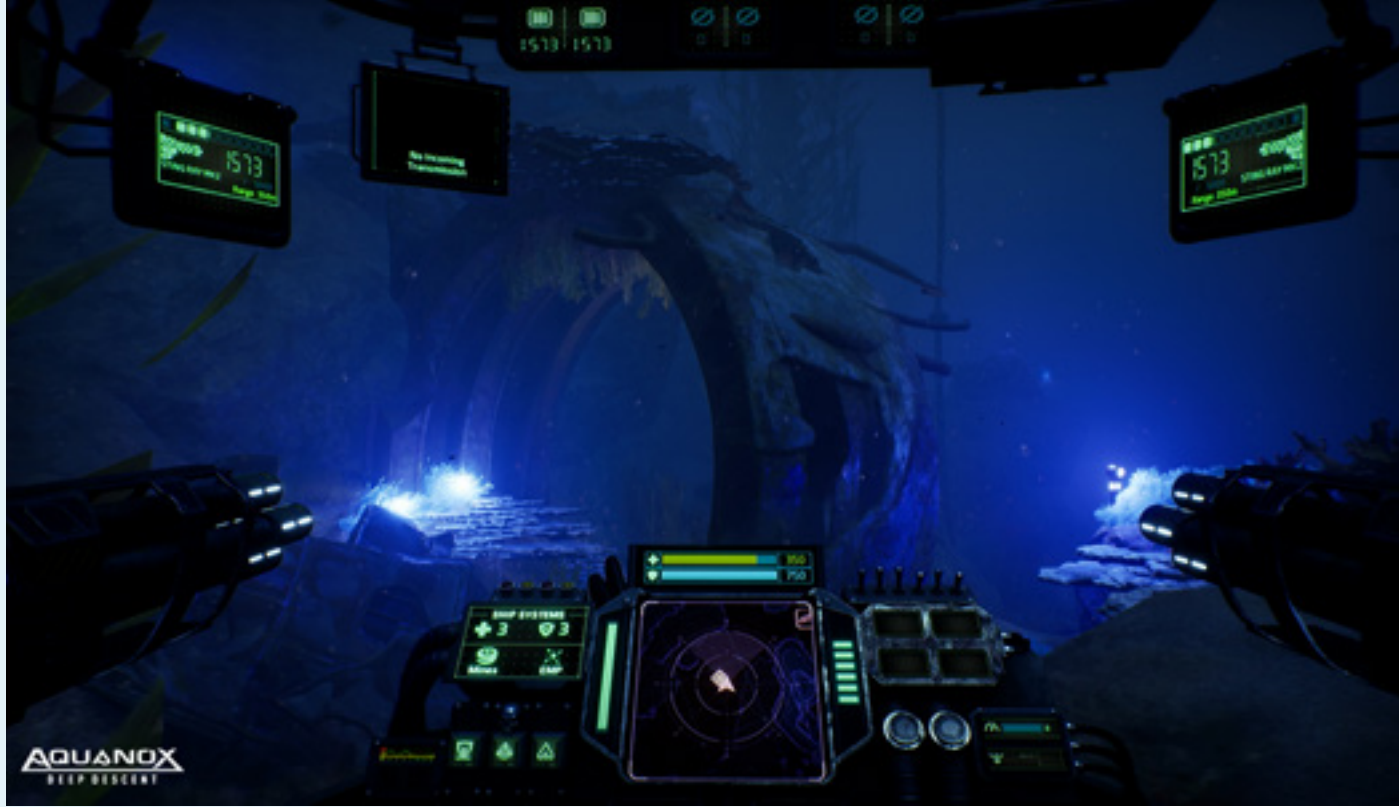
3lateral.com
team of: 120+

3Lateral develops innovative technologies that enable digitization of human appearance and motion at an unprecedented level of realism. 3Lateral covers a full set of solutions for human digitalization - from 3D and 4D face and body data capture infrastructure, data processing and compression algorithms to recreate realistic facial and body deformations, PBR data extraction to define how skin interacts with the light, and articulation through user friendly bio-kinetic models of humans in a digital form. Their well-balanced multidisciplinary team with artistic and technological expertise is focused on bringing to life characters across all digital mediums.






In January 2019, 3Lateral became a part of the Unreal Engine team within Epic Games. Creation of realistic digital humans remains a key goal for filmmakers, content creators, and game developers, with additional applications across simulation, research, and more. Epic Games remains committed to mastering this process through real-time rendering, and democratization of the tools via Unreal Engine.

In February 2021, the team announced MetaHuman Creator, a technology that enables anyone to create state-of-the-art, fully rigged characters that are free to use in Unreal Engine. MetaHuman Creator is a cloud-streamed app that takes real-time digital human creation from weeks or even months to less than an hour—at an unprecedented standard of quality, fidelity, and realism. We anticipate launching an Early Access program for MetaHuman Creator in April 2021 to a limited number of people.





DIGITAL ARROW

 PC
 SEARCHING FOR PUBLISHER
 HIRING NEW TALENT
 OPEN FOR MEDIA
 NEW PROJECT

digital-arrow.com
 team of: 30

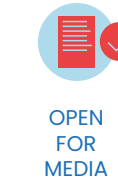
Digital Arrow was founded in 2015 by two passionate gamers, who wanted to focus on video game production and software development of the highest quality, with special attention turned to result-analysis and quality, and especially the VFM.

Digital Arrow studio has a team of 29 talented and ambitious people who give their best to transform their love of video games into something new and unique. The projects they are most proud of are InMomentum and Aquanox: Deep Descent.





FORTUNA ESPORTS



OPEN
FOR
MEDIA



PROVIDES
SERVICES

fortunaesports.com

team of: 12

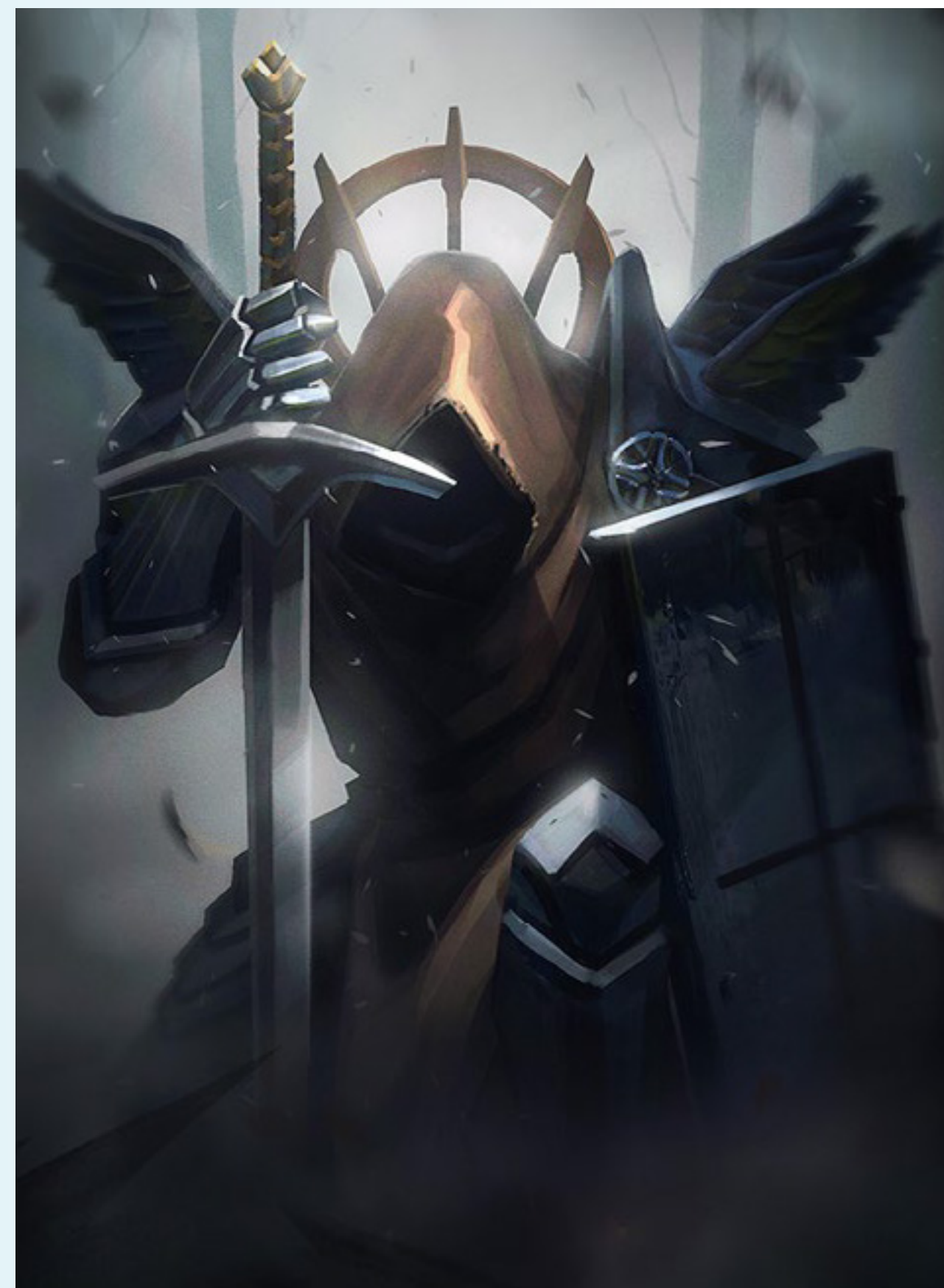
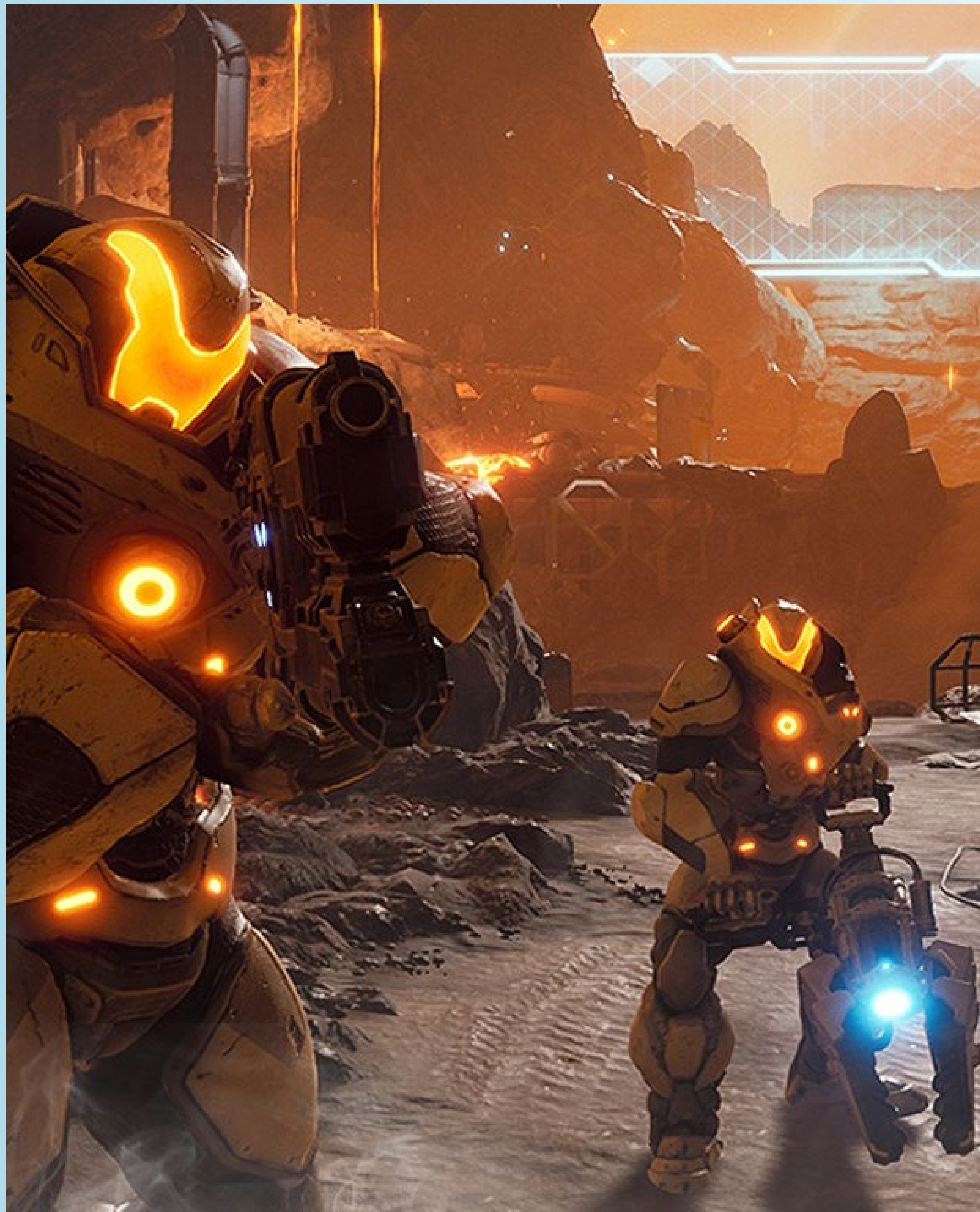
Fortuna Esports is the regional leader when it comes to esports. It handles event organization, studio and video production as well as TV and online streaming for international tournaments. Fortuna is the first regional broadcaster to acquire rights for premium esports content with the Riot Games' LoL Esports tournament circuit, Dota 2 The International and CS:GO Majors.

Along with premium esports programming, Fortuna's portfolio includes unique entertainment shows created for local audience as well as the biggest regional esports league – Esports Balkan League (EBL).

So far EBL has distributed over 180.000 EUR in prizes, featured three game titles (League of Legends, CS:GO and Dota 2) and through partnership with Riot Games provided our teams with an official path to international tournaments in Europe. Most importantly, EBL broadcasts gather an audience of around 300.000 esports fans every year.

Since June 2019, Fortuna is operating SK Esports – a brand new 24/7 Sport Klub TV channel created through partnership with United Media. Its programming includes live broadcasts from the world's and region's largest tournaments, news from the world of gaming, game reviews, popular streamer's gameplay and entertainment shows. We are extremely proud that our studio yearly produces more than 200 live broadcasts, with over 1.000 hours of content.





MAD HEAD GAMES



PC



HIRING
NEW
TALENT



OPEN
FOR
MEDIA



NEW
PROJECT

madheadgames.com
team of: 130

Mad Head Games is a local bootstrapped developer from Belgrade and Novi Sad made up of hard working, passionate, dedicated dreamers who strongly believe that games have the power to make anyone's day a little bit more fun and imaginative. Its story began when it was founded in 2011 by a group of experienced developers and friends, which makes the team one of the first ones on the national game dev scene.

They, just like the team that grew around them, continue to be committed and passionate about making games, united around a singular vision of creating immersive, atmospheric, and fun titles. Their first big successes came with HOPA titles published by Big Fish Games. Now, years later, the studio is working and focusing on several core projects in Unreal Engine.

In November 2020 Mad Head Games has become a part of a larger gaming family - Embracer group, where they will continue to develop their own projects as an independent studio. This Serbian game dev pioneer plans to use its hard earned knowledge and experience to, one day, lead Serbian core game development and put the country on the world map of AA+ games.

That is why, no matter what the future of the gaming industry brings, Mad Heads will be right there to give their best shot at creating amazing games!





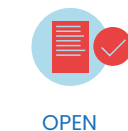
NORDEUS



MOBILE



HIRING
NEW
TALENT



OPEN
FOR
MEDIA

nordeus.com
team of: 180

Nordeus started in 2010, and is an independent gaming company based in Belgrade. Today, it employs 180 people from across 20 countries and is best known for Top Eleven – the world’s most successful mobile sports game with over 230 million registered users. Since then Nordeus has successfully launched Golden Boot, a free-kick flick game, and Heroic – Magic Duel, a fast-paced PvP.

Nordeus is one of the founding members of the SGA and Digital Serbia Initiative, both of which help create a stimulating environment for creating video games and the development of other digital industries.

Since its launch in 2019, Nordeus Hub has supported 27 independent game teams through the flagship Booster program helping them create their games, delivered more than 70 online and off-line events, and welcomed international industry professionals and co-operation from the likes of UKIE and the British Council.

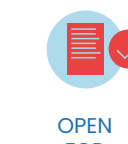




PEAKSEL



MOBILE



OPEN FOR MEDIA



NEW PROJECT

peaksel.com
team of: 60

Peaksel is a mobile games and apps development and publishing company, based in Nis, southern Serbia. Since its beginnings in 2012, the company has grown to over 60 employees and has published over 300 mobile apps and games with no external funding up to date.

Their portfolio of games includes various casual, virtual pet, and logic puzzle games. In addition, the company has published a variety of music, entertainment, and utility apps.





PLAYRIX RS



MOBILE



HIRING
NEW
TALENT



OPEN
FOR
MEDIA



NEW
PROJECT

playrix.rs
team of: 160

Playrix RS is a casual F2P mobile games development studio from Novi Sad, Serbia. Playrix RS is a part of the global Playrix group – one of the world’s largest casual mobile gaming companies and creators of Gardenscapes, Homescapes, as well as Township, Fishdom, Wildscapes, and Manor Matters. Playrix games have been in the Top 50 Grossing Apps on Google Play and App Store platforms since their appearance on the market.

The total number of monthly active users exceeds 100 million! Playrix RS team employs more than 160 professionals who, with the support and knowledge of the most excellent experts in the gaming industry, top-industry tools and technologies, work every day to develop new and unique projects – mobile games of the highest quality.

The value shared by all team members and an imperative in every segment of our work is quality. That is why Playrix RS nurtures team spirit, creativity, transparency, trust, professional and personal development, and responsibility.





TWO DESPERADOS



twodesperados.com
team of: 60

For this studio, year 2021 marks the second decade of existence and a launch of their third game. Player-centric, led by innovation and focused on creating entertaining moments and memorable experiences, Two Desperados is developing its AI research department at a fast pace.

The team is where the innovation happens, therefore their knowledge base is what powers the changes and makes the studio stand out.

Well known for creating #1 marble shooter games – Woka Woka and Viola's Quest – they've hit the number of 30 million players worldwide.





UBISOFT



PC



HIRING
NEW
TALENT



OPEN
FOR
MEDIA



NEW
PROJECT

[ubisoft.com](https://www.ubisoft.com)
team of: 200

Ubisoft is one of the leaders in entertainment, with a rich portfolio of well-known brands worldwide. We are committed to enriching players' lives with original & memorable entertainment experiences.

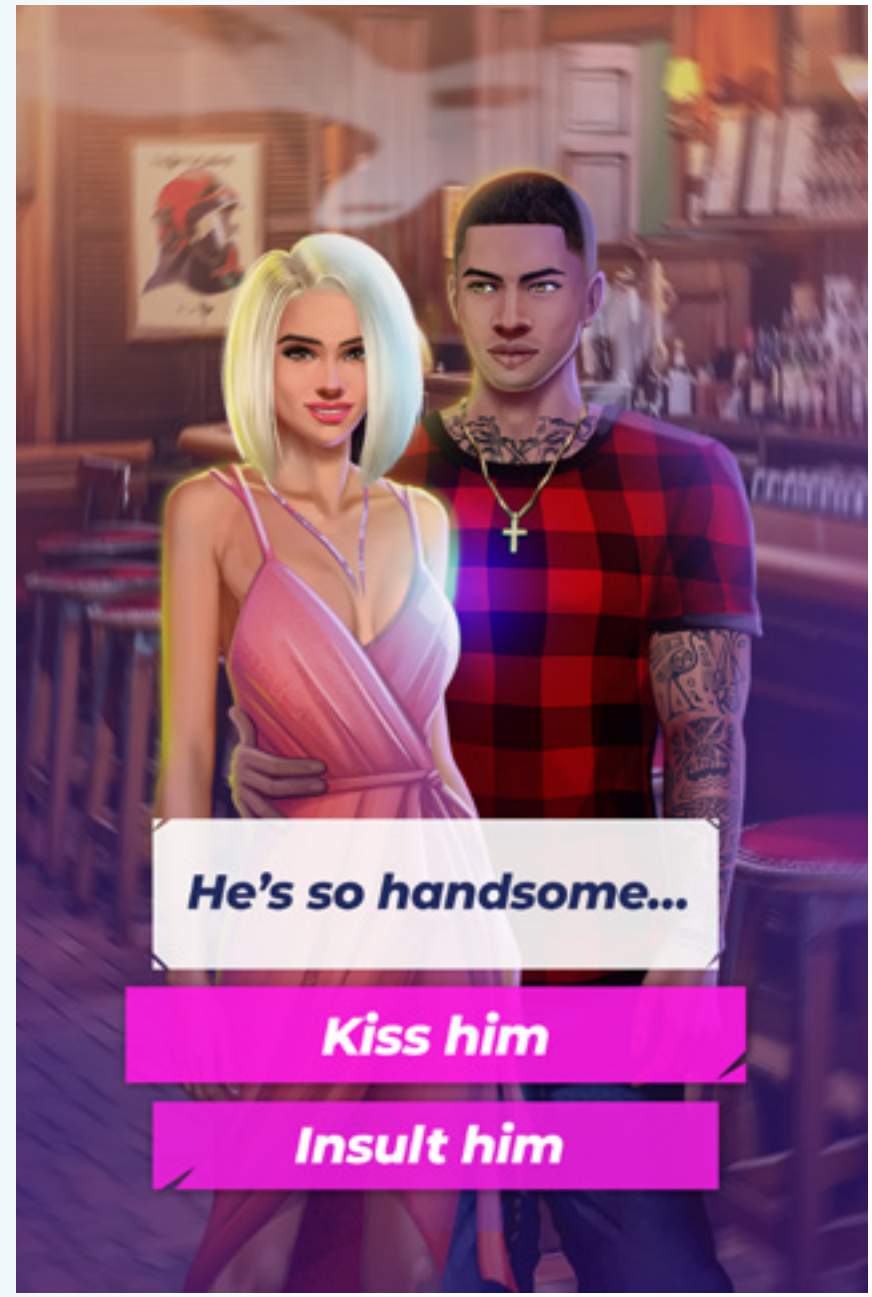
Ubisoft Belgrade was established in 2016 and focuses on strengthening Ubisoft's presence on multiple platforms – PC, console, and Google Stadia. Our studio has contributed to multiple triple AAA titles, including Tom Clancy's Ghost Recon, Steep, The Crew 2, Tom Clancy's Rainbow Six, Skull&Bones and Riders Republic.

Here you will get a chance to work together with young, creative and talented individuals who are just as passionate about gaming as you are!





LOVE[®]
STORY
GAMES



He's so handsome...

Kiss him

Insult him



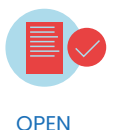
WEBELINX GAMES



MOBILE



HIRING
NEW
TALENT



OPEN
FOR
MEDIA



NEW
PROJECT

webelinxgames.com
team of: 96

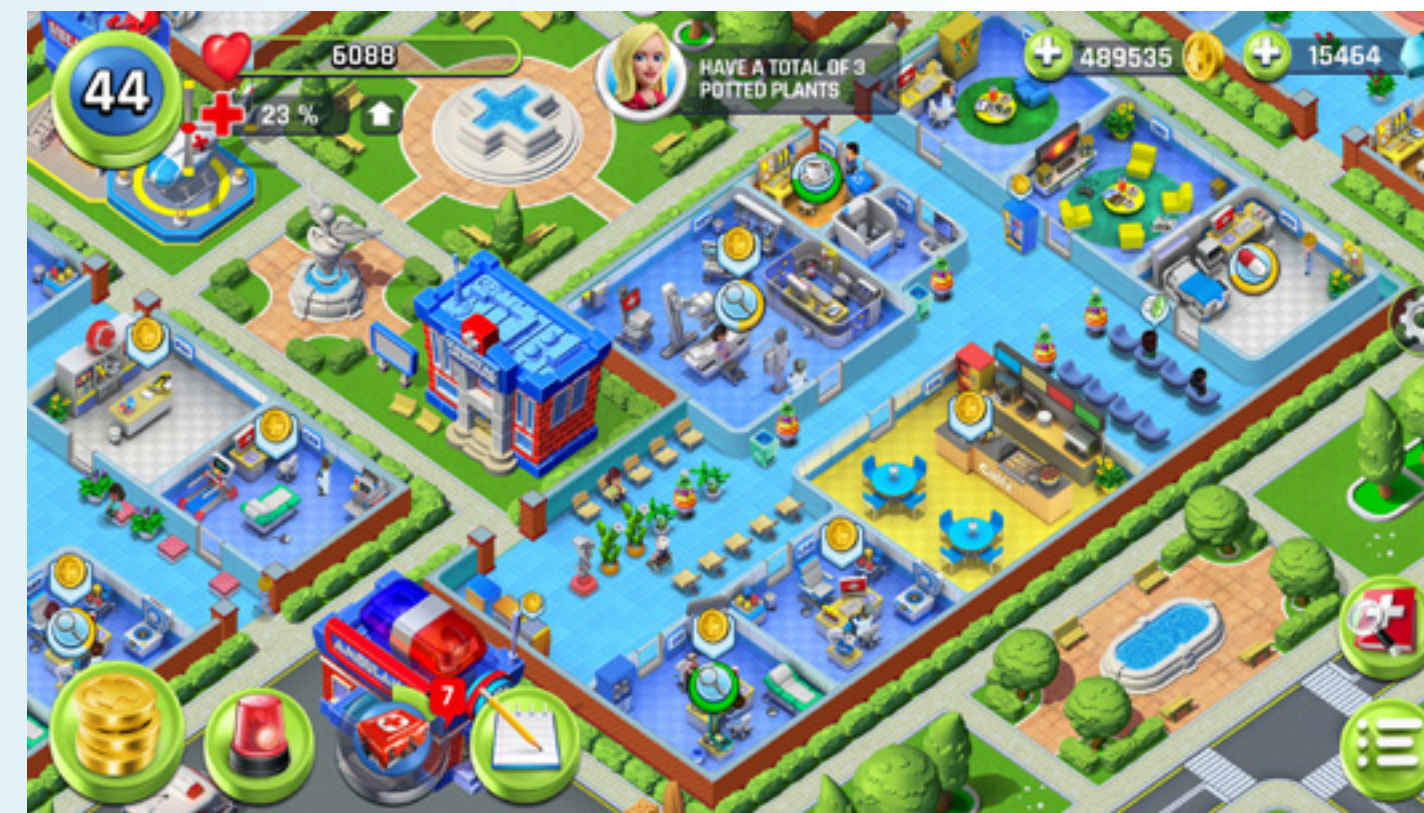
Webelinx is a development studio based in Niš, Serbia, founded in 2011 by a group of few enthusiasts willing to create something completely new on the mobile market.

Almost 10 years and over one billion downloads on the two largest mobile platforms later, we now pride ourselves with 135 employees, from multicultural backgrounds, divided into 2 departments for developing immersive, customer-oriented Apps and Games.

Throughout its history, Webelinx worked hard on building diversified portfolios in different categories and we are currently dedicated to expanding the scope of our work from mobile devices onto multi-platform love story-telling games as well.

In a stimulating environment built on professional work, trust, and respect, Webelinx gives young people the chance and freedom to explore and nurture their potential, which is the core of the company's culture and an asset that drives Webelinx to the top.





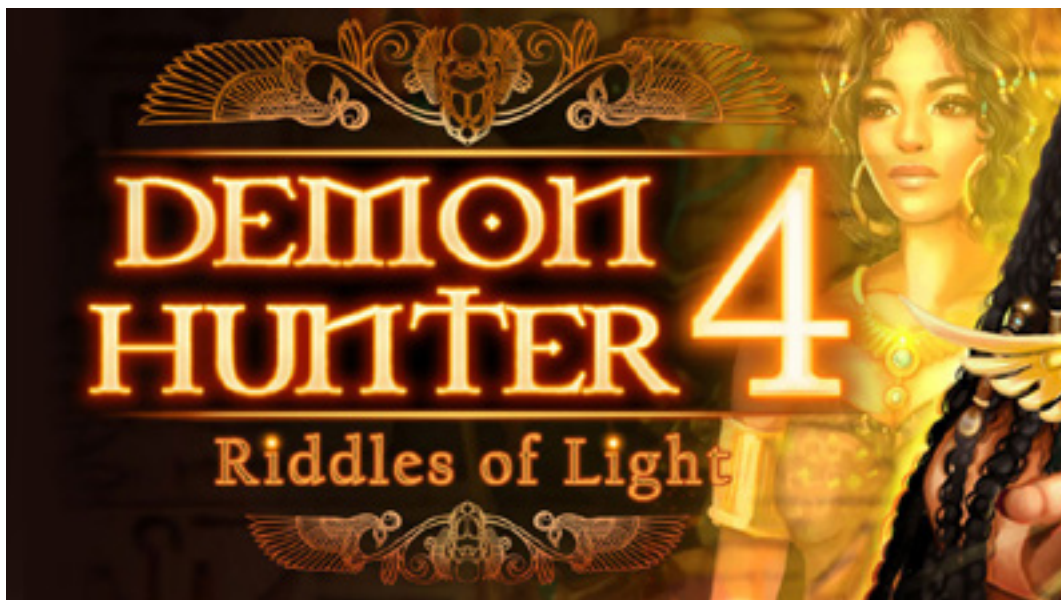
YBOGA



yboga.com
team of: 7

Yboga studio was founded in mid-2016 in Belgrade with the focus on creating simulation and management games for mobile devices. At the very beginning of the studio's business the idea was to make a hospital management simulation game, and after nine months a soft launch was made, followed by the final version for Android. Dream Hospital, which is available for Android and iOS, has recorded over 5 million downloads up to date and was well received by the audience.

All of this is made possible with our in-house developed technology that we are constantly working on. Our plan is to keep the further improvement of our technology and studio as a whole specifically by making more games with it and continue learning in the process. Currently we are working on a new exciting product that should be a step forward compared to our previous game and let us proceed going forward in the direction we have initially set. Our goal is to establish ourselves as a respectable game studio that creates high quality simulation games for mobile.



BRAVE GIANT

bravegiant.com
team of: 30+

Brave Giant was founded in 2012 in Novi Sad, Serbia. We started as a small development studio with a team of 5. However, during the years we have grown, and now count 30 hard-working brave giants. Our growing team's singular aim has always been game development and creating premium quality video games for PC, Mac, IOS, Android, and Windows Store. The company is known for its engaging casual hidden-object puzzle adventure games of all genres. By gathering talented programmers and artists that have been dedicated to designing innovative worlds and vivid storylines, the studio has developed and published numerous games world-wide in more than 10 languages, across all relevant gaming markets. After years of consecutive successes, it is expanding its work to new gaming platforms and gaming forms.

Thanks to building strong partnerships over the years, with the world's most recognized video game companies, Brave Giant has reached millions of satisfied players all over the globe, while delivering unique and exciting games that provide breathtaking gameplay. Our mission is to provide players with stimulating emotional, visual, and intellectual experiences through captivating immersive worlds that can be enjoyed by a variety of people.



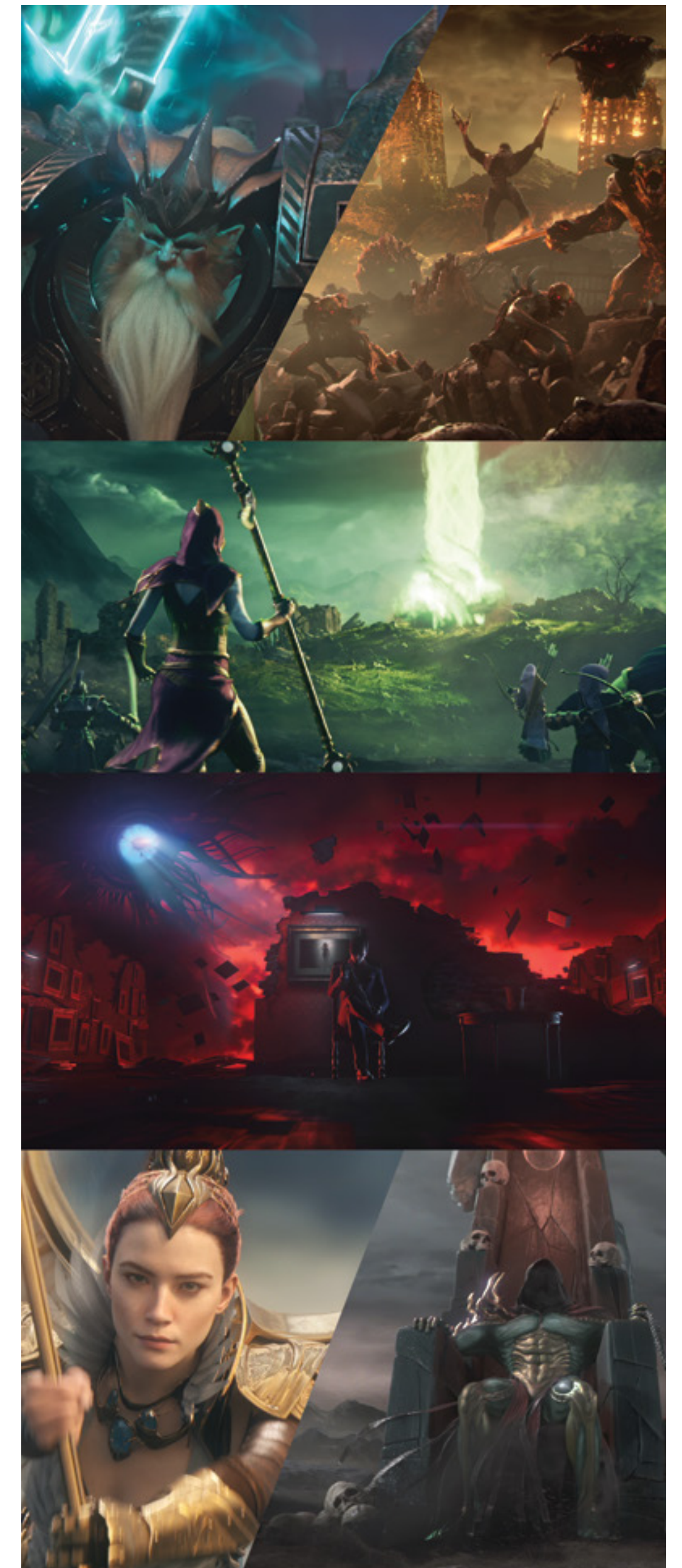
BUNKER VFX



bunkervfx.com
team of: 35

Bunker VFX studio was founded in 2014, in Belgrade, Serbia. From the very first year the studio has been focused on the production of high end game trailers and cinematics. Since very beginning the studio has started working intensively on the development of the working environment and pipeline suitable for this type of production. This particularly meant investing in experienced artists, creating unique internal pipeline tailored for game trailers and also investing in hardware and software required for this kind of production. The combination of great internal teamwork of 40 senior artists and trustful external collaboration resulted after a short period of time in making cinematic trailers for AAA games. List of our clients include Bethesda Softworks, Red Barrels, Electronic Arts, Zynga, THQ Nordic, Warner Bros Entertainment, Rovio Entertainment, Com2Us etc. Bunker continued with the development of the creative department, both responding to clients needs and offering various creative solutions in order to achieve exceptional quality in production.

Our mission is to design exceptional visual stories by cooperating closely with our clients. By carefully choosing the projects we work on, we thrive to deliver extraordinary visual content primarily in the field of game cinematics. Furthermore, we try to build strong, creative and long lasting relationships with our clients that will distinguish our work from the rest. Additionally, we are focused on the development of unique visual signature that would be recognizable in the field. Deeply, we believe in challenges.





CRATER TRAINING CENTER



PROVIDES
SERVICES



OPEN
FOR
MEDIA

school.craterstudio.com

team of: 20

Founded for professionals by professionals, our singular aim is to bridge the undeniable gap between academic study and on-the-job practice in the field of computer graphics. As of 2020, our course portfolio officially includes game art and development.

With courses designed and delivered by working senior artists, we provide actionable education that mirrors a studio environment and allows our students to hit the ground running as soon as they join their first project. Thanks to the modular and agile program structure, students or entire teams can shape their learning path according to need, approaching skill development from a strategic, market-oriented standpoint.



A meeting point between industry and academia, we are one of the founders of CGA Belgrade platform and collaborate daily with partners from both sectors on forging community ties and strengthening the overall capacities of Serbia's CG industry.



CRATER
TRAINING CENTER



ALSET STUDIO

 MOBILE  NEW PROJECT **alsetstudio.com**
team of: 10

We are a game development studio. Founded in 2018, Alset Studio consists of professionals that have been working in the video game industry for many years. We are concept artists, 3d modelers, illustrators, designers, and programmers.



APARTEKO

 PROVIDES SERVICES  PROVIDES OUT-SOURCING  NEW PROJECT **aparteko.com**
team of: 10

Aparteko was founded in 2012 by a group of college friends, with the plan to implement several ideas to fill in the gaps on the Serbian social gaming market. Since there was no proper quiz game around, we have decided to make a highly involving, super interesting multiplayer Facebook trivia game. Slagalica soon became the number one game in the region, breaking all the records in growth rate, number of users, and social media hype.



COFA GAMES

cofagames.com
team of: 10

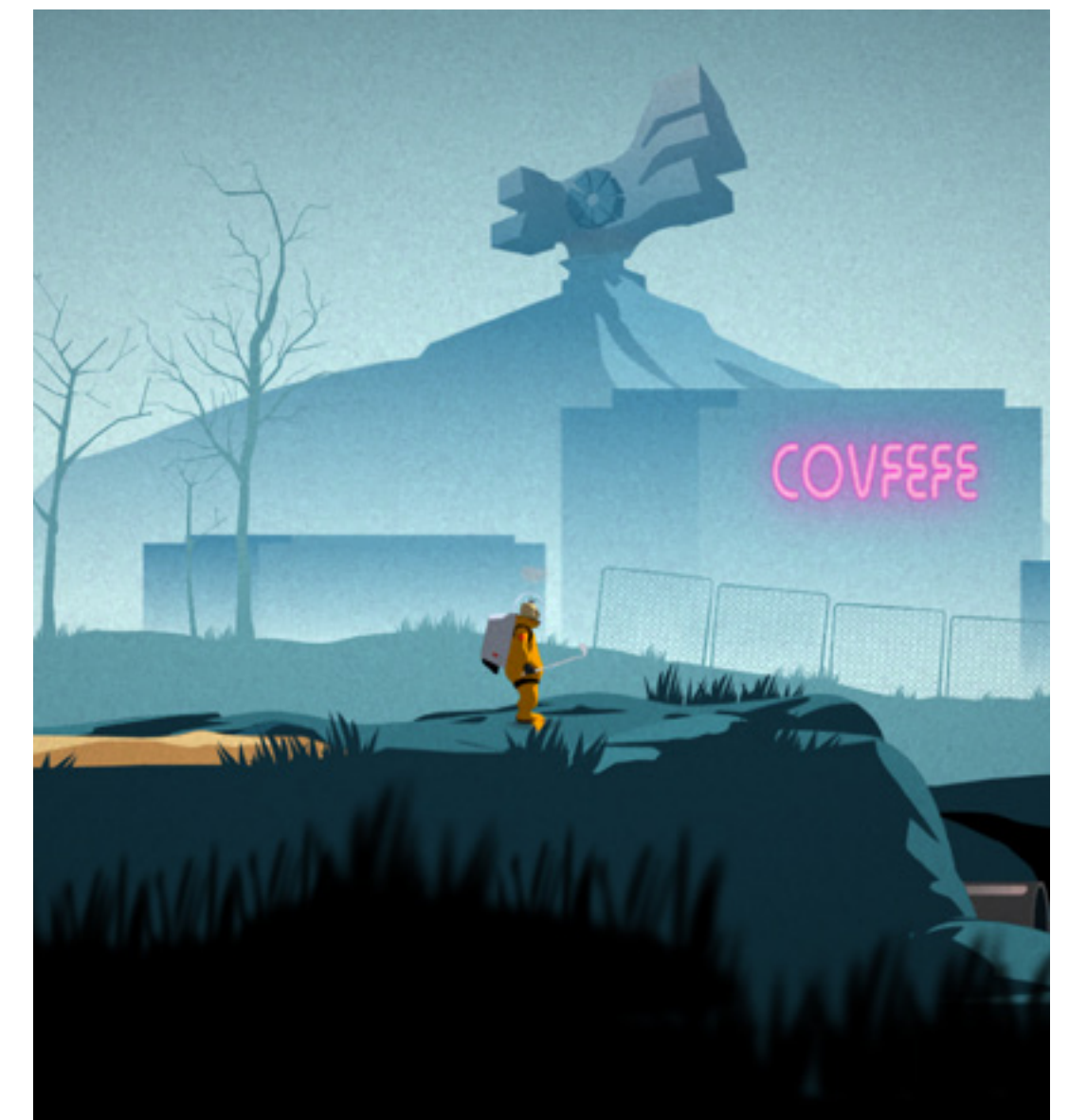
COFA Games is an independent studio from Belgrade working on Awakening of Heroes, an objective-based mobile MOBA game. With more than 1 million organic downloads, their game is getting promising feedback from beta players, especially about the unique characters and the innovations bringing to the conservative MOBA genre. Awakening of Heroes has been awarded multiple times including The most promising game at GDC pitch in San Francisco and The best multiplayer game at Casual Connect.

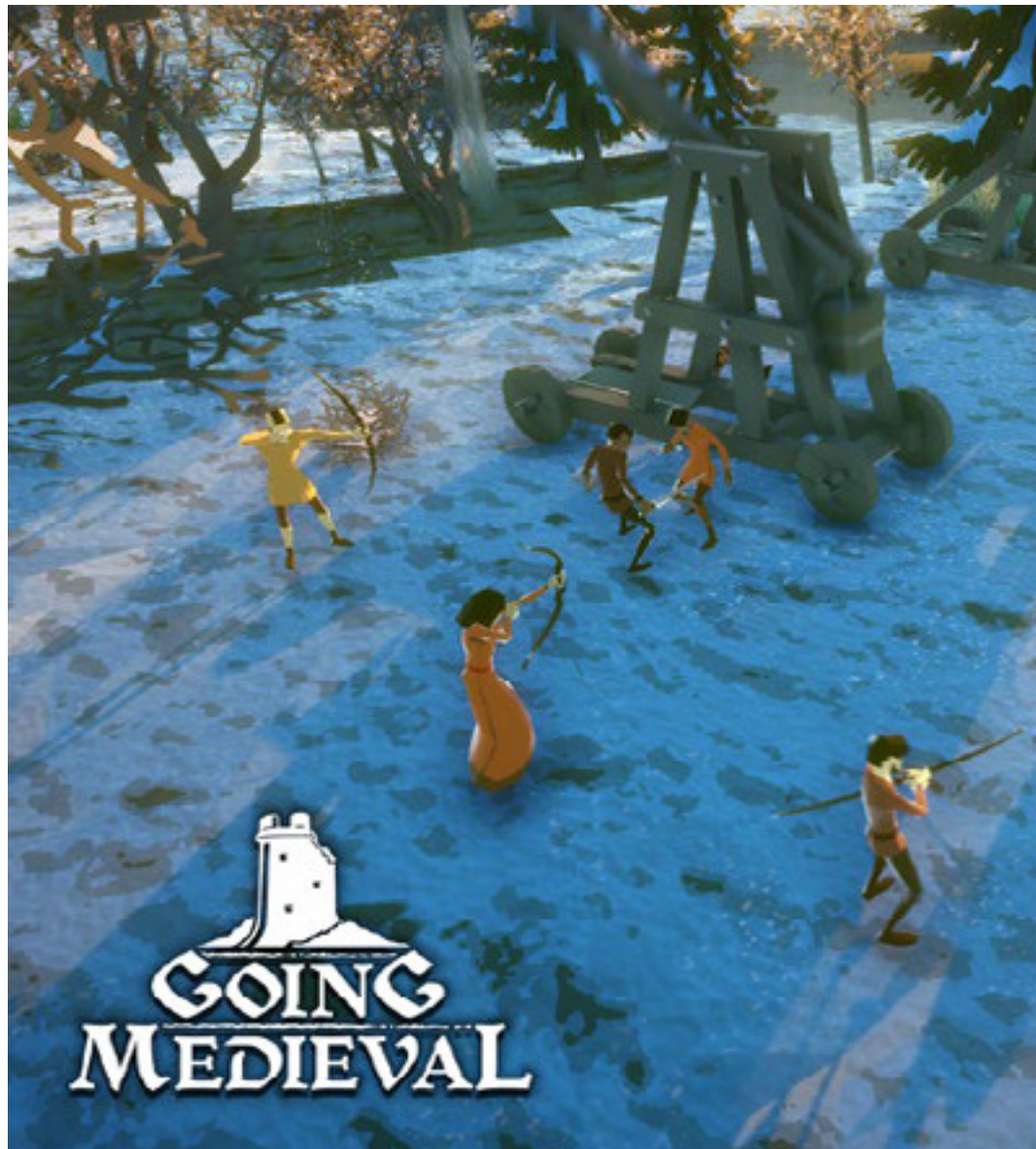


DEMAGOG STUDIO

demagogstudio.com
team of: 7

Demagog Studio creates digital content for a generation that will live to witness the end times. The studio is best known for the Apple-featured game Golf Club: Wasteland.





FOXY VOXEL

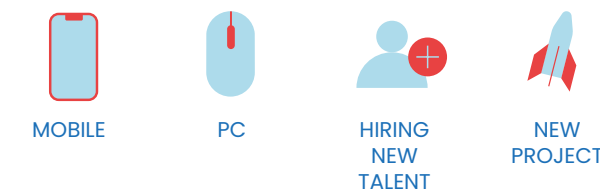


foxyvoxel.io
team of: 7

Foxy Voxel is an independent game development studio founded in Novi Sad, Serbia, in 2019. The team, consisted of experienced game developers, is working on a medieval colony sim/city builder game - Going Medieval. Set in alternate post-apocalyptic medieval Europe, players get to guide a group of survivors while they re-settle areas reclaimed by nature. Their goal will be to construct a multi-story fortress in land reclaimed by the wilderness, defend against raids and keep your villagers happy as the world will shape their personalities.

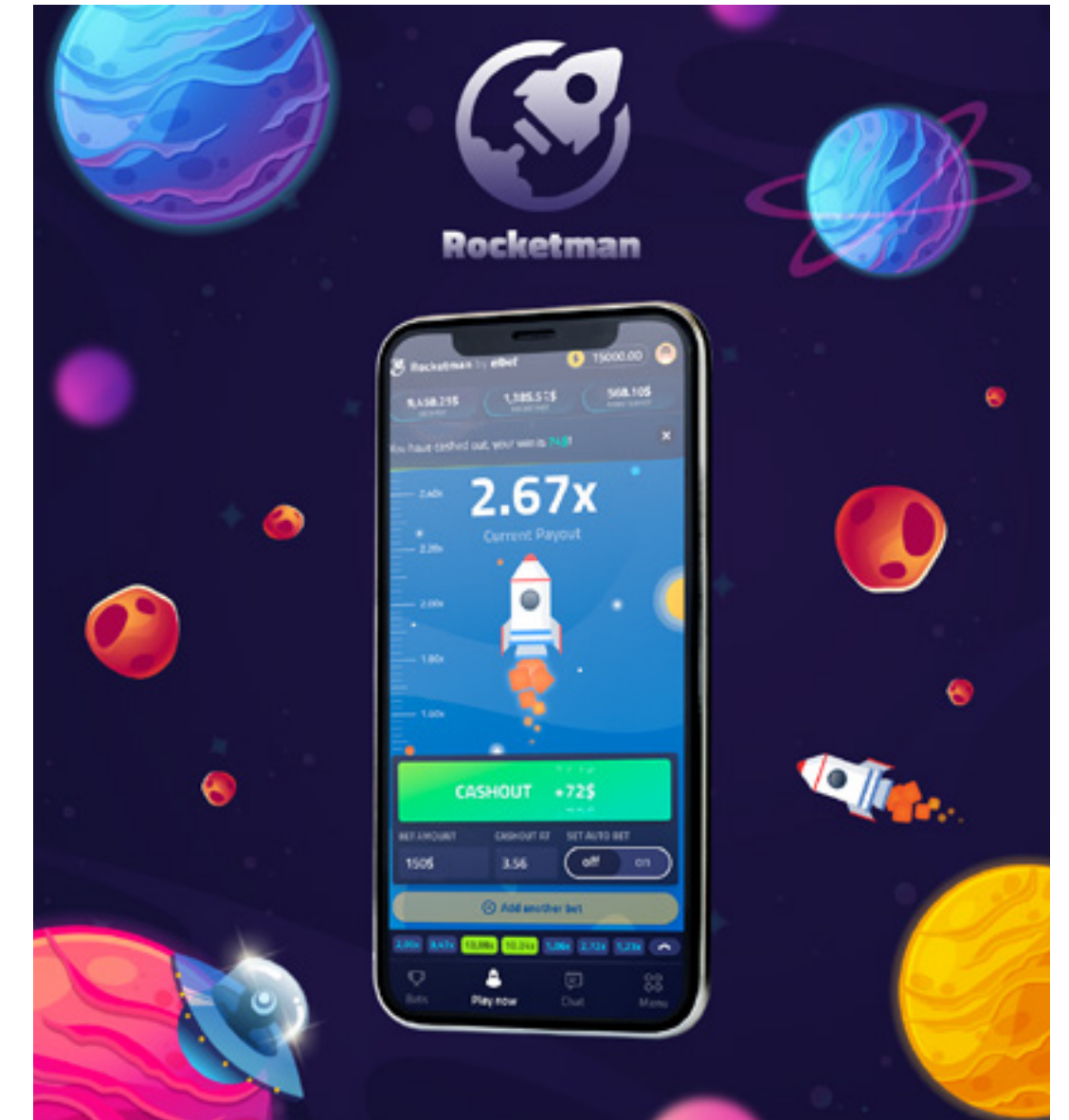


ELBET



elbet.com
team of: 25

Elbet was founded in Belgrade in 2002 as a technology company specializing in the development of software solutions for the gaming industry. Extensive portfolio of games now includes more than 16 titles, covering number games, virtual sports and casino games. Latest addition to the portfolio is the "Rocketman" game produced solely for the mobile/online platform, which will be the new focus of the company in the upcoming years. Elbet games are used by more than 130+ operators in 30 countries worldwide, and are enjoyed every day by millions of players.



GAME BIZ CONSULTING

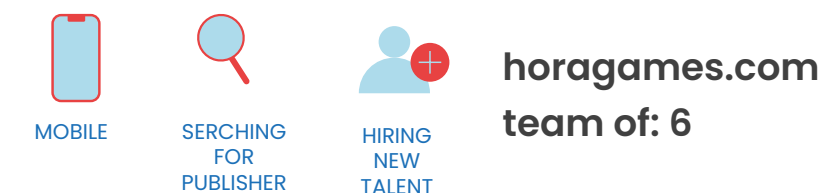


gamebizconsulting.com
team of: 5

At GameBiz, we provide a variety of services that enable our clients inside and outside the video games industry to accomplish their goals. Our team has decades of experience in creating, publishing and monetizing video games. Most importantly, we know the right people in the industry, from East to West.



HORA GAMES






horagames.com
team of: 6

Gaming company focusing on bringing excellent quality, addictive gameplay and innovation to your mobile devices! With our project Crypto Idle Miner, we explore the implementation of blockchain technology in gaming with success! Crypto Idle Miner has over 250.000 downloads on Google Play and Appstore. As a team, we strive for new technologies, exceptional quality and out-of-the-box thinking. Our goal is to establish ourselves as one of the recognizable developers and publishers of casual mobile games







PHOBOS

 PC
  HIRING NEW TALENT
  NEW PROJECT
 team of: 6

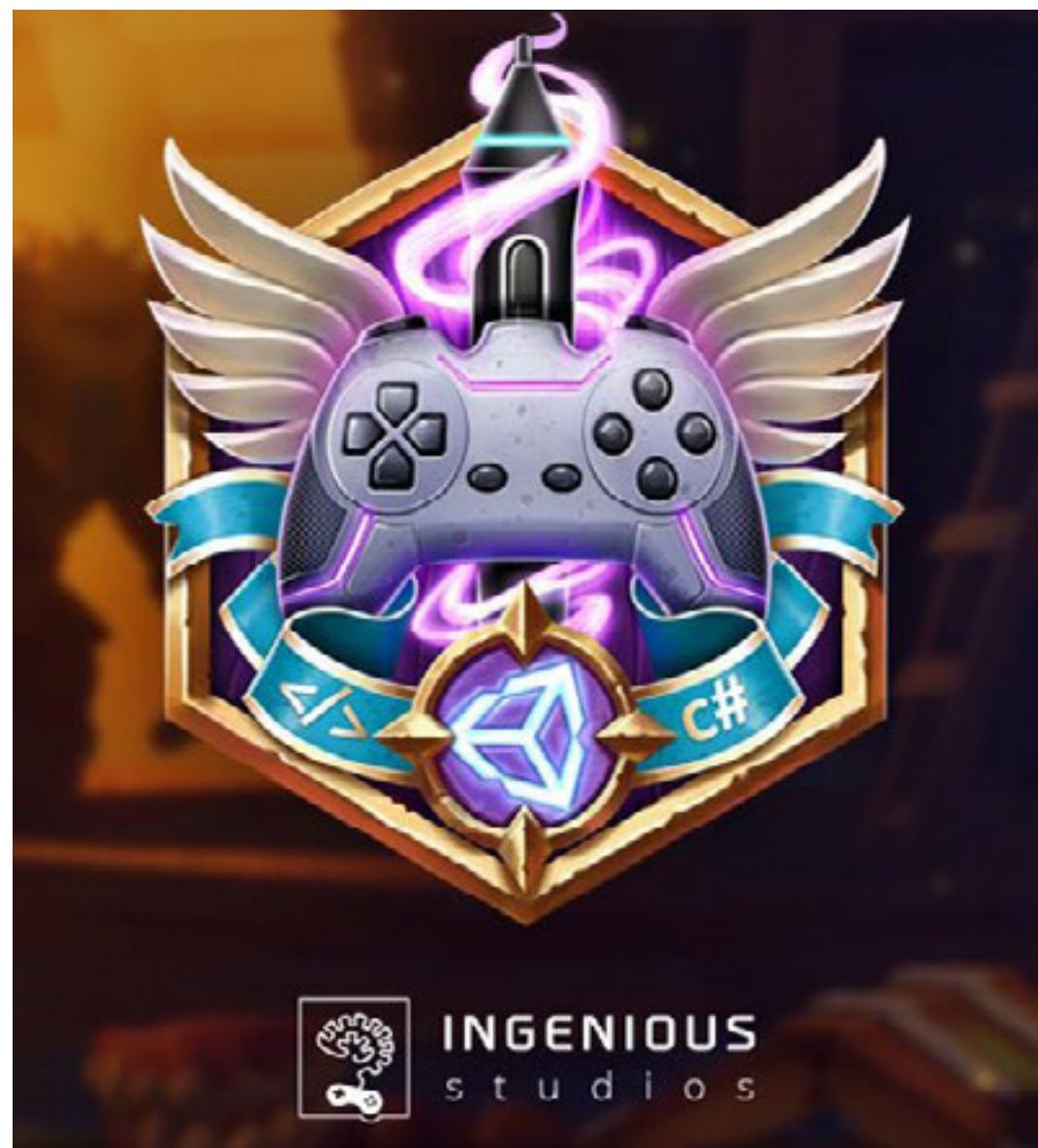
One year ago, a small team of Phobos was born, and the plan to create a game of our own was finally set in motion. The wheels started spinning, ideas roared to life and we were off to our first game-making adventure. A story being written for several years now became a story of a game in development. Soon after, road took us to Nordeus Hub where we joined the Booster program, and their team with Milos Paunovic at the helm helped us nurture and mature our idea. We weathered many storms, escaped countless shipwrecks, and switched between many metaphors, to make our game a better one. We started 2, now there's 6, counting down days to our first release.



PIXQUAKE

 PC
  NEW PROJECT
 pixquake.com
team of: 3

PixQuake is a game developing studio from Belgrade, Serbia, creating casual games of various genres.



INGENIOUS STUDIOS

 MOBILE
  PC
  OPEN FOR FUNDING
  NEW PROJECT
  PROVIDES SERVICES
  PROVIDES OUT-SOURCING
 ingenious-studios.com
team of: 17

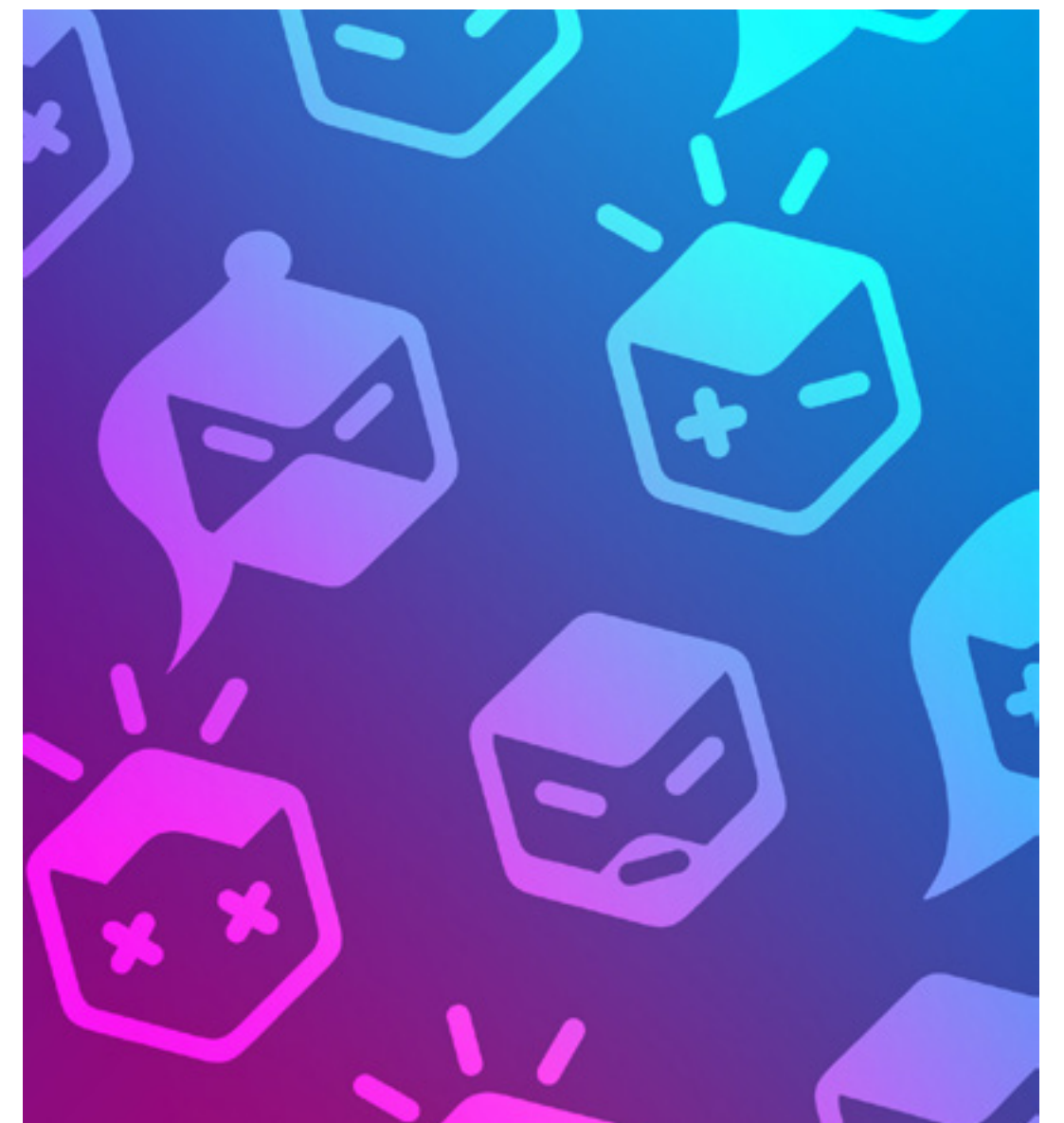
Ingenious Studios is a team of game designers, artists, and developers, working passionately on something we all love - making games. We are a full-cycle game development studio with core strength in Unity development, and a deep understanding of gameplay, game art, and design. Our services include developing games from scratch based on the client's vision, as well as filling in some game development roles depending on the project's needs.



QUBE D.O.O.





 MOBILE
  PC
  OPEN FOR FUNDING
  HIRING NEW TALENT
  NEW PROJECT
 qube3dstudio.com
team of: 11

Qube is an art and development studio specializing in complete and engaging visual and game experiences. We create game assets for online, mobile and console games. Our team brings years of experience to the table to breathe life into your ideas. We are working with you from early concept stage to the final release and beyond. We have worked together with our clients to create the art for award winning mobile games, launched their websites and seen their products make an impact on the market.








PLAYSTUDIOS / TEAM SAVA

 MOBILE
  HIRING NEW TALENT
  NEW PROJECT
  PROVIDES SERVICES
 team-sava.com
team of: 85

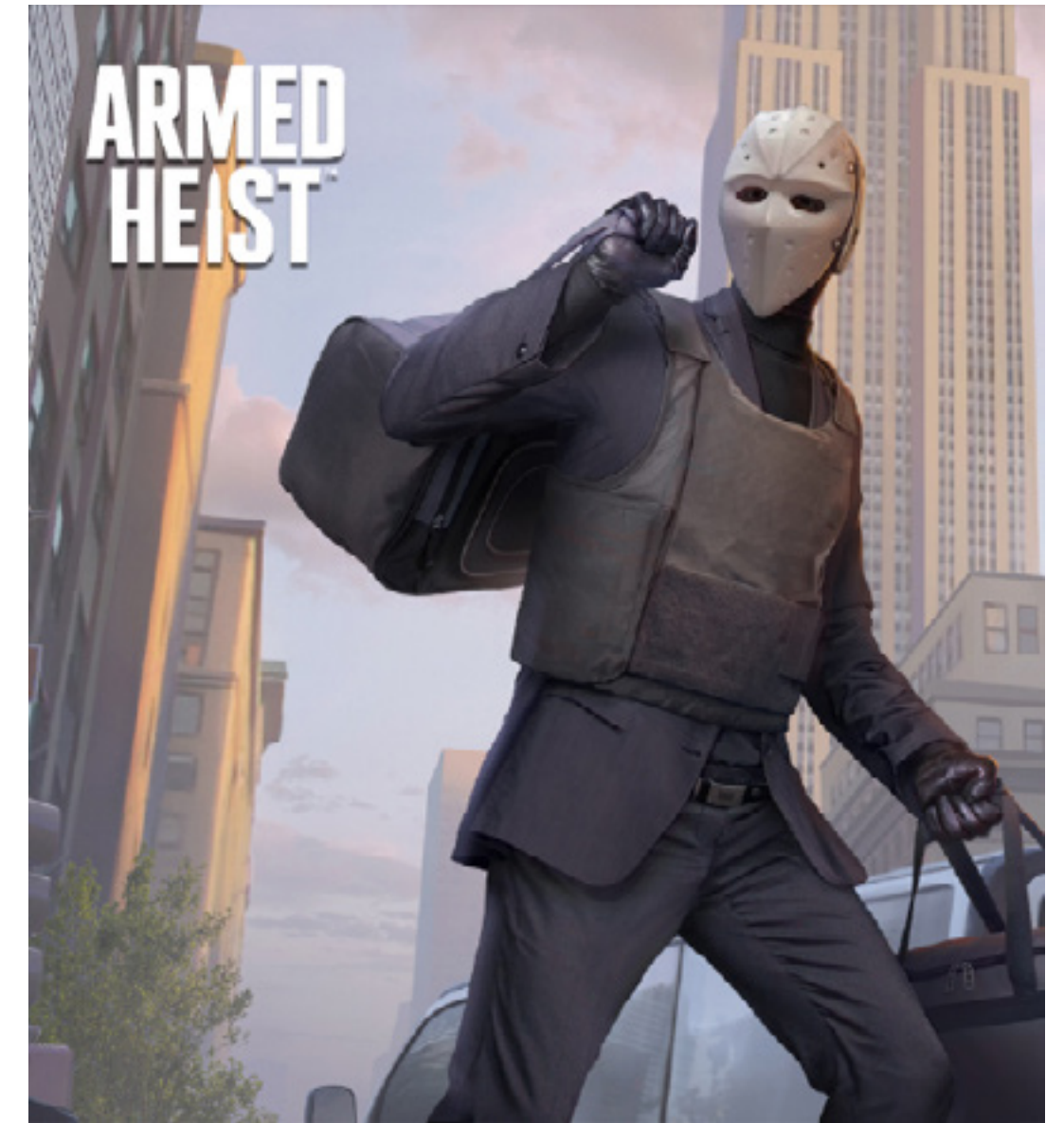
Team Sava specializes in building outstanding teams of passionate, top-notch professionals in Serbia and enabling them to take part in the active development of amazing projects. Our goal is to establish a dedicated team for our partners that will work on developing their in-house products. Our partner PlayStudios is a global consumer gaming company focused on the ever-expanding market for social and mobile gaming.





SOZAP


 MOBILE
  HIRING NEW TALENT
  NEW PROJECT
 sozap.com
team of: 18

Sozap is a serbian/swedish mobile game development studio. We are a group of passionate gamers located in South Serbia in Nis. The whole team has one goal – to make great games. Our team consists of people who devoted their lives to playing and making good video games. Our game Armed Heist has more than 14 million installs on Android and iOS platforms, and we are very proud of it. Armed heist is a third-person multiplayer shooter game that gets your heart pumping! Besides this game, at the moment we are working on some new projects, and we really hope that they will get the similar results as Armed heist did.



Plugins

 Authentication
  Achievement
  Leaderboard
  Analytic

 Chat
  Cloud storage
  Multiplayer




Custom code

Your developers can write some high-quality code, which we run in a sandbox environment. Each of the plugins can have web interface which provides easily managing your game!

Availability

Our team can provide support for your game across the globe! Your players will have the lowest possible latency for your team!


SERVERBYTES

 MOBILE
  PC
  OPEN FOR FUNDING
 serverbytes.net
team of: 4

At ServerBytes, we believe there is a better way to create games. A more innovative platform that automates backend game development, encouraging you to focus on your game, and leave the operational concerns to us. ServerBytes is designed to increase productivity without sacrificing creativity. We're excited to simplify game development for everyone through our platform, plugins, and community!



STYGIAN SOFTWARE

 PC
 stygiansoftware.com
team of: 5

Stygian Software is a small indie company from Serbia that develops old-school isometric turn-based RPGs.





SPRING ONION STUDIO

HIRING NEW TALENT
 OPEN FOR MEDIA
 NEW PROJECT
 PROVIDES SERVICES
 PROVIDES OUT-SOURCING
 springonionstudio.com
 team of: 18

Spring Onion Studio is a 3D Animation, Visual Effects and Motion Graphics Studio based in Belgrade and founded in 2008. The studio has made its reputation with its high-end, stylized and realistic animation but is best known for character development and character animations. Our game trailer and cinematic production pipeline cover all stage of game development for a wide range of art services - 3D art, concept art, character development and animation.



TRIA D.O.O.

MOBILE
 NEW PROJECT
 PROVIDES SERVICES
 PROVIDES OUT-SOURCING
 tria.rs
 team of: 7

TRIA is a creative studio based in Belgrade and founded by a team of industry wizards with a love for games and interactive multimedia experiences. Today, Playable and Video Ads for mobile games and apps are the top service we provide, with clients like Twitter, King, Machine Zone, Traplight Games, etc. In the spare time the team is also working on an Infinite runner game, with a working title: Rift Runner.



TENDER TROUPE

MOBILE
 PC
 HIRING NEW TALENT
 OPEN FOR MEDIA
 NEW PROJECT
 tendertroupe.com
 team of: 12

We are a troupe of veteran game developers bringing high-quality polished games to a wider, more casual audience through time management sims and fantasy RPGs. Our games are designed with a mature player in mind.



SUPERVERSE INDUSTRIES

MOBILE
 PC
 OPEN FOR FUNDING
 OPEN FOR MEDIA
 NEW PROJECT
 PROVIDES SERVICES
 SEARCHING FOR PUBLISHER
 indus3.org
 team of: 5

Superverse Industries is a game development company based in Belgrade, founded by Nemanja Bondžulić in 2002. With roots set deep in the 90's demo-scene, Superverse Industries is now working, with the very same passion, on creating impressive interactive audio-visual experiences and games for PC, VR/AR, and mobile platforms. The recently released arcade space shooter game SUPERVERSE in early access remains the primary focus of the company, with a new game title for mobile platforms in development.





TUMMY GAMES



PC



HIRING
NEW
TALENT



NEW
PROJECT

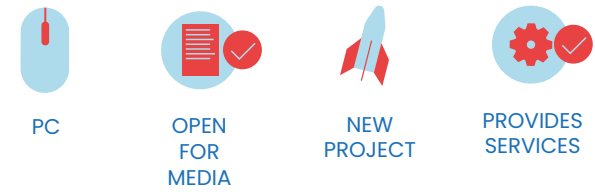
tummygames.com

team of: 8

Tummy Games is a small gaming company from Serbia located in the city of Novi Sad. We focus on developing Hyper Casual games, and so far over 60.000.000 people played our games.



3GEN



3Gen is a company behind "ImaGen", "3Gen" and "3Vial"



facebook.com/3GenApp
team of: 1

AM PM GAMES

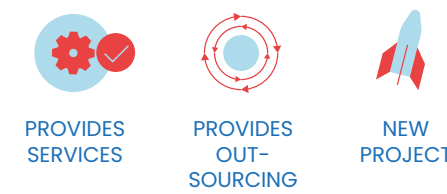


Why AM-PM? Because every time is great time for gaming. With several games published, AM-PM above all values good gameplay, followed by originality and experimenting with various mechanics.



@ am.pm.games
team of: 6

BRANISLAV GAGIC



Branislav Gagic is a composer for video games and other media. He is passionate about taking his listeners on a musical journey, by creating tracks that inspire the imagination.



branislavgagic.com
team of: 1

CRYPTIC LEGENDS

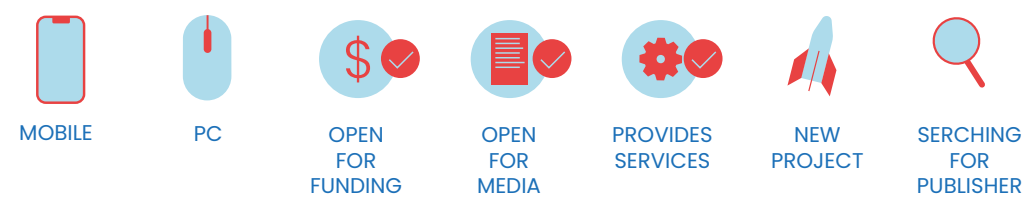


Cryptic Legends is a Belgrade based team of designers and developers, bent on bringing games to the players' true ownership via seamless and meaningful blockchain integration.



crypticlegends.co
team of: 8

ADREAMATION

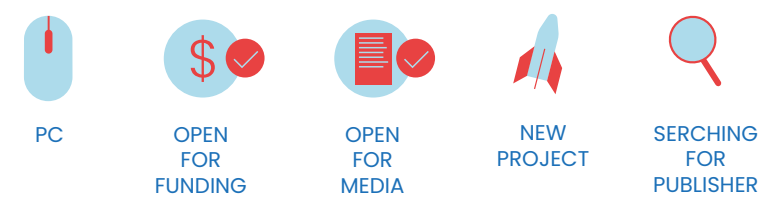


Trying the impossible. Creating the best entertainment despite all odds and obstacles.



fishingmaniacs.
adreamation.com
team of: 20

BABYBOTTLE

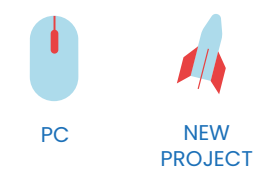


This studio was founded as a result of a huge appreciation for video games and many years of work on different projects, ranging from 3D game graphics to video game production. The studio offers outsourcing services for different platforms.



babybottlestudio.com
team of: 1

BOHEMIAN PULP



Indie Game Dev working on a story-based future-noir detective game "Let Bions be bygones"



linktr.ee/bohemianpulp
team of: 2

DEUTRIX

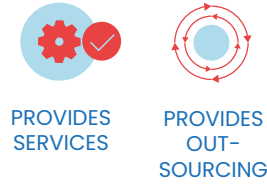


Game and Web development studio based in Novi Sad, Serbia.



deutrix.com
team of: 2

DEVOTION STUDIOS

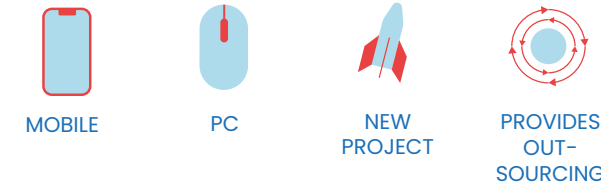


Devoted to make the best audio experience for your game, trailer, animated movie or song. The team consists of award winning Sound Designers, Composers, Music Producers and Voice Over Actors, currently working in the AAA industry and iGaming industry across the world.



vimeo.com/markozivanovic
team of: 12

ENYPH GAMES

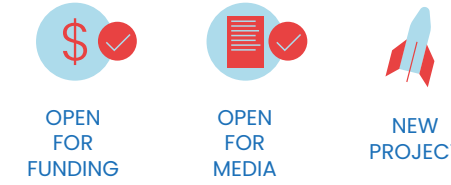


Their best projects are Puzzle Game for Kids: Cartoon characters and Scroller, and their latest project is Fly-Out!, an android game. Although still very young, they hope to develop even more games in the future, and - for a living.



[enyph games](https://enyphgames.com)
team of: 2

FLAT HILL GAMES

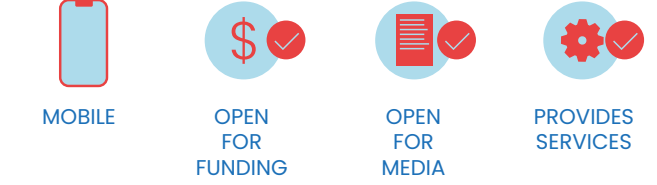


Flat Hill Games is a small indie game development studio specialized in VR/AR games. The company's goal is to make a sustainable business with VR games and be ready for the market when it goes mainstream.



flathillgames.com
team of: 9

LIFT KVIZ



Lift Kviz is a company that develops live interactive game formats. Our first project is a mobile quiz game, with a live video QUIZ SHOW that allows users to play trivia games in real-time and win prize money.



liftkviz.rs
team of: 13

DISTILL GAMES



Distill Games is an indie studio formed around the mobile racing game Race Duels. We are on a mission to extract the essence of fun from gaming experiences and build very approachable but long lasting games.



www.distillgames.com
team of: 5

FAT PUG STUDIO



One man dev studio focused on small projects and freelancing.



fatpugstudio.com
team of: 3

HERON GAMES



Heron Games is a full-service mobile game development team with a focus on hyper-casual games.



heron.games
team of: 20

MARBLEIT



Over the years of gaining experience, our work now covers a wide range of technologies and platforms. Starting from front end and back end web development, to video games and hybrid apps - you name it.



marbleit.rs
team of: 30

MATEJ & CO

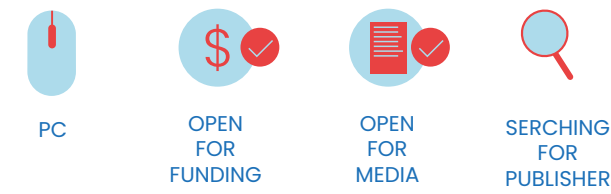


Matej&CO is a mobile applications development team. We are family-based team established in 2010. We are developing games in Unity.



matejandco.com
team of: 3

MOONBURNT STUDIO



Moonburnt Studio is an independent game development studio. In 2016 we raised over 40,000€ through a Kickstarter campaign for the development of "COLUMNAE: A Past Under Construction", a narrative-focused non-linear point & click adventure set in a post-apocalyptic steampunk-ish world.



moonburntstudio.com
team of: 2

PRINCEPS



Welcome to Princeps Games, a Tabletop Game Development Studio in Novi Sad, Serbia. We started in 2019 with great desire and determination to offer the World our best: games that will bring you only joy and entertainment.



princepsgames.com
team of: 3

SOBAKAISTI



We are creating an educative alternate reality game that should help people find their meaning of life through the gamification of everyday challenges and choices.



sobakaisti.org
team of: 4

MIRACLE DOJO



We are aiming to create memorable gaming experiences that may leave a real impact on people's lives.



miracledoj.com
team of: 8

ORAHARO

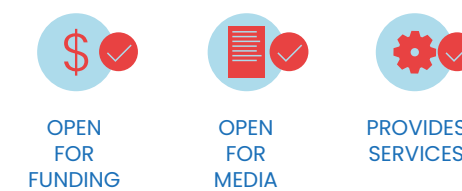


Oraharo Entertainment is a small Belgrade-based studio, with only one published title so far. We choose fun over money and we make our games in our free time, until one of them buys us a yacht.



oraharo.com
team of: 1

SENSIBLE SHOUTING



Sensible Shouting provides all vocal necessities your game may require - voice acting and voiceover services. We aim to help indie dev teams and go big in the gaming industry.

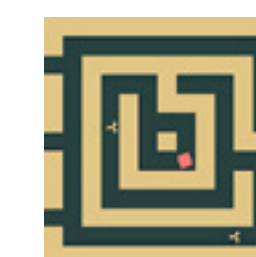


[linkedin.com/
company/senshout](https://www.linkedin.com/company/senshout)
team of: 5

STARGAZER STUDIO



Stargazer Studio is an indie-game developer team of two. Our first game Trial and Terror, a 2D abstract action-puzzle is available on Steam and Android.



stargazerstudio.net
team of: 2

STUDIO DON QUIXOTE

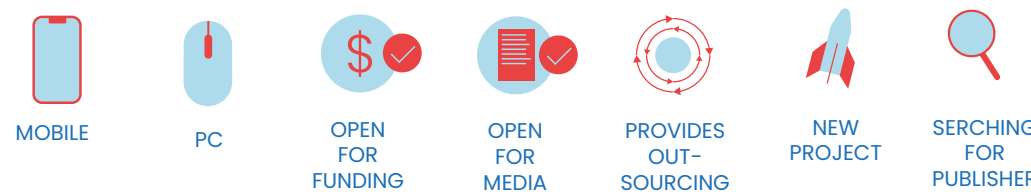


Studio Don Quixote, with their association Minotaur Production, produced over 25 short and long fiction, documentaries and 3d animation movies and games.



markokacanski.com
team of: 2

SUPERLATIVE



We are a digital products company working with startups from all around the world. As passionate gamers and engineers, we're exploring how to devote more time to our game development business.



superlative.digital
team of: 7

THUNDER STRIKE



Thunder Strike is a game dev studio specialized in creating innovative and unique gameplay experiences pushing the boundaries of mixed reality in games and empowering everyone to have fun.



thunderstrikegames.com
team of: 4

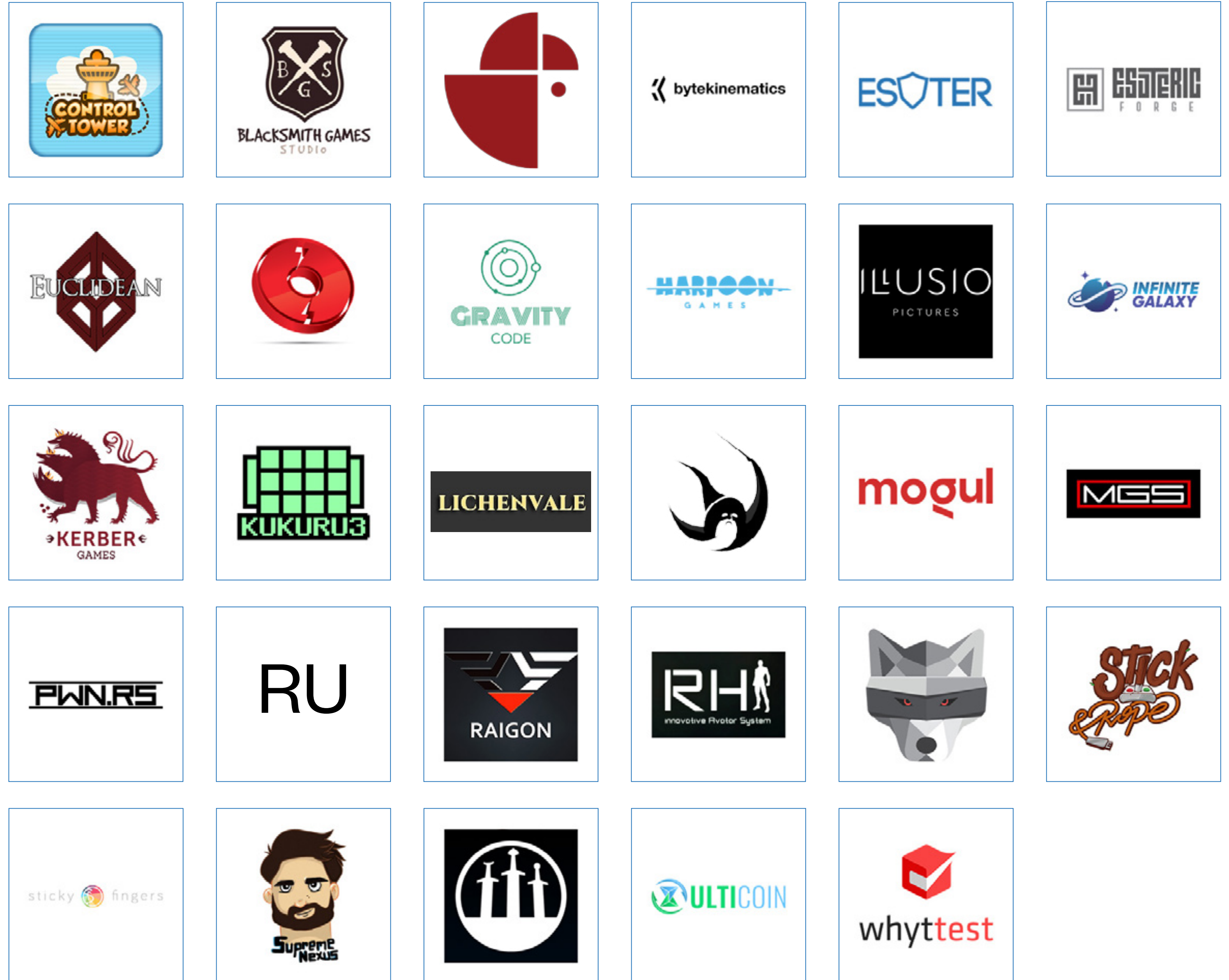
WAVEFORM STUDIO

Nikola Nikita Jeremić is a professional video-game music com-poser and has been actively working in this field for the past six years. He is the CEO and mastermind behind the Waveform Studio. Eventually, he ended up in the world AAA league.

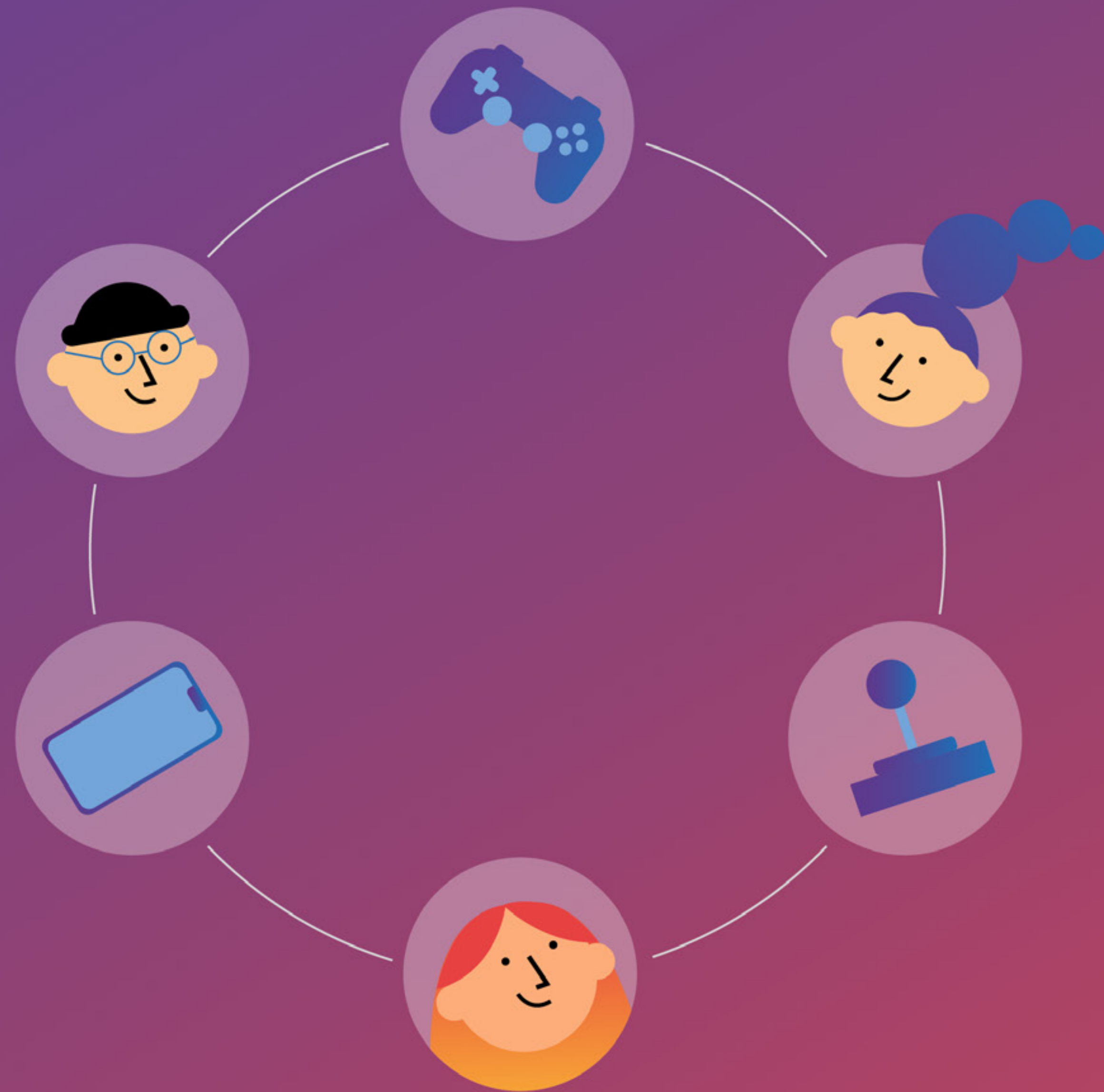


nikolanikitajeremic.com
team of: 1

OUR OTHER MEMBERS:



ECCO- SYSTEM



Dear Readers,

The year 2020 was one of the most challenging ones we have had to face. Yet, I am incredibly proud of what our industry as a whole has been able to overcome.

While many sectors suffered greatly, the games industry as a whole was able to thrive and grow like never before. But it is essential to take a closer look at how the total numbers can differ when you look at where the companies come from, how big and established they are, and where they stand in the production cycle - the broad picture can change quite quickly then.

During 2020, the path to growth became much more challenging for many start-up entrepreneurs as onsite meetings in games industry conferences were suddenly cancelled and replaced by an endless series of online events and Zoom calls. We all took a giant leap to remote work bringing completely new management and mental health difficulties. And it became more challenging than ever to recruit new talent. Simultaneously, the tensions between key digital distribution platforms and service providers emerged, bringing an entirely new kind of uncertainty for the games industry.

The main work of EGDF (European Game Developers Federation) happens on the European level in the maze of Brussels. Therefore, it is crucial to be in contact with grassroots industry ecosystems and bring from there real challenges to European tables. This would not be possible without our local member associations', like SGA - who are also our member, determined work that delivers aggregated information to us and acts as a united voice on the national level.

Especially, small companies lack the resources to work on many issues on their own. But pooling these limited resources and opinions and portraying them to decision-makers in a democratic and transparent manner will empower everyone of us. In emerging ecosystems like in Serbia, it is incredibly important to map your needs early on and find out how to best work on them - set the stage before it is being played on. Together we can change the rules on all fronts.

We in EGDF make sure to advocate for our members in Brussels, and we secure that you know how policymakers are planning to change your future. We discuss with platforms the difficult topics a small studio would not dare to ask. The help of every one of you, be it on the national or international level, will make sure that we can continue doing this. Together we are stronger, more agile and more empowered and will tackle the new challenges that lie ahead.



Hendrik Lesser
President of EGDF

INDIE CREATORS

That's where it all started.

The foundations of gaming were laid by the ingenuity and passion of pioneers who could look far into the future and pour their hearts and souls into independent projects, often creating lasting masterpieces with no funding and resources.

Today, the indie scene is perhaps a bit more glamorous and sustainable, but it still contains that essence of deep love for all things game dev related.

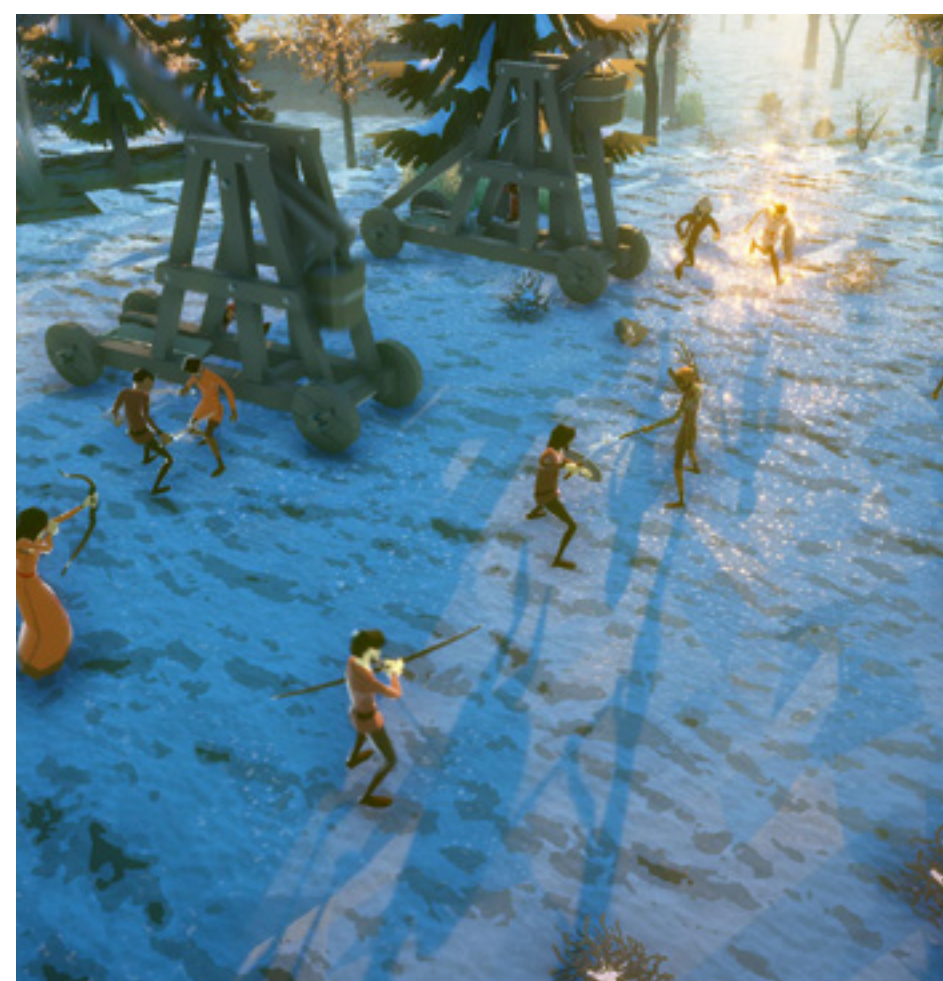
We couldn't be more proud of our members - individuals and small indie teams - whose devotion shows in amazing demos and concepts, but also award-winning games, multimedial gems and inclusive projects.

Through our projects and initiatives, more and more of them are taking an interest in biz dev topics as well, combining their game design prowess with strategies for successful launch days. We're certain more and more games will be viable for investments and eventually, find their way to gamers all around the world, positioning Serbia on the global map of the gaming industry.

More indie and fresh game dev voices!



By **Severin Malinović**
Community Manager at
Foxy Voxel



As an indie game developer, one of the first things you become aware of is how much creative freedom you have – there’s nothing quite like bringing your ideas to life. And when you surround yourself with a group of supporting people that are willing to show the world what you do – it makes our job that much easier. Thanks to the Serbia Games Association, we’re able to do just that.

Beyond providing the latest news for the regional game development scene, SGA helped us connect with the festivals related to the type of game we are creating. Thanks to them, Going Medieval has been a part of such events as EuroPlay, DevCon, and Reboot Online.



When it comes to publishers – finding one isn’t that hard nowadays, as long as you have a solid basis for your game. In the early phase of the development of Going Medieval, we worked on marketing material for the game, created a teaser trailer for it, and started a Steam Page. It didn’t take long before various publishers approached us. In the end, we signed with

The Irregular Corporation, which provided us with financial support, additional marketing, help with QA and localization.

So, if you are second-guessing whether you should step into the shoes of an indie developer, our answer is: YES! The industry needs as many independent and new voices as it can get.

TABLETOP GAMES

RPGs, strategies, card games... Historically accurate storylines or just pure, unadulterated fun-inducing scenarios. All of our members' tabletop projects show a deep understanding of game design processes and a knack for creating engaging prototypes. Whether they are crowdfunded or self financed, they always find a carefully targeted niche of devoted fans. All this is carefully brought to life with top notch visuals.

Through the creation of tabletop games, more and more talented young professionals are able to experience the excitement of working in the gaming industry. Our job is to give them the support and the experience they need in order to bring these games to life and ship physical copies to satisfied players all over the world.

- individuals and small indie teams - whose devotion shows in amazing demos and concepts, but also award-winning games, multimedial gems and inclusive projects.

Through our projects and initiatives, more and more of them are taking an interest in biz dev topics as well, combining their game design prowess with strategies for successful launch days. We're certain more and more games will be viable for investments and eventually, find their way to gamers all around the world, positioning Serbia on the global map of the gaming industry.

Tabletop games

– a feat of complex game design and game art, propelled by the community spirit



We gathered a creative team of friends and that's how Kerber Games was made. Our vision was to develop creative products in Serbia and sell them globally. Tabletop games were our first pick because we were passionate about bringing them to life with our community via crowdfunding. With our first product, the Final Challenge – a party game of bravery, resourcefulness & backstabbing – our journey began.

Sometimes there are discussions within the community whether or not table-top game creators should even be considered a part of the traditional understanding of the gaming industry. But play one (especially ours), and you'll understand the amount of game design, mechanic envisioning and balancing

that needs to be done in order for the game to work, be fun and have a replayable value. Not to mention top notch graphics and UI solutions that are crucial in a card game. You want these games to be easy to learn.

Pulling a Hail Mary, we have contacted almost every gaming entity in Serbia. The Serbian Gaming Association has taken us as equal members solely based on our prototype and energy, and has moved Heaven and Earth for us. One thing led to another and we've met with most of the stakeholders in the Serbian gaming industry and got tons of advice and support. We've also become a part of Nordeus'



Booster Development program, which broadened our perspective of the production process, and most importantly, helped us understand how to test our ideas with potential users.

Thanks to the support of the gaming community we took our efforts one step further, transforming from an informal team to an aspiring startup. After participating in Delta's Business Incubator we are a few steps away from negotiating our seed investment.

We have a long way to go, but for a few friends with a vague idea we believe we've come far! We believe tabletop games should forever keep bringing joy to the world!



By **Dušan and David** from Kerber Games



SERVICES

The world's 2.7 billion gamers have spent almost \$60 billion on games in 2020. The market is estimated to surpass \$200 billion by 2023. This rapid expansion wouldn't be possible without various services provided by diverse teams who help make, distribute and market amazing games.

The maturity of a gaming industry can also be measured by how diverse the service part of the industry actually is. That's why we're proud to see more and more service-oriented business slowly carving their path.

To name a few, our members are making AAA game-trailers, offering consulting services, QA, art services - creating game assets, concept art and more, but there are also teams working on playable ads or UA strategies, adding to the global talent force of exceptional professionals.

Taking a leap of faith, straight into the game service industry. It paid off!



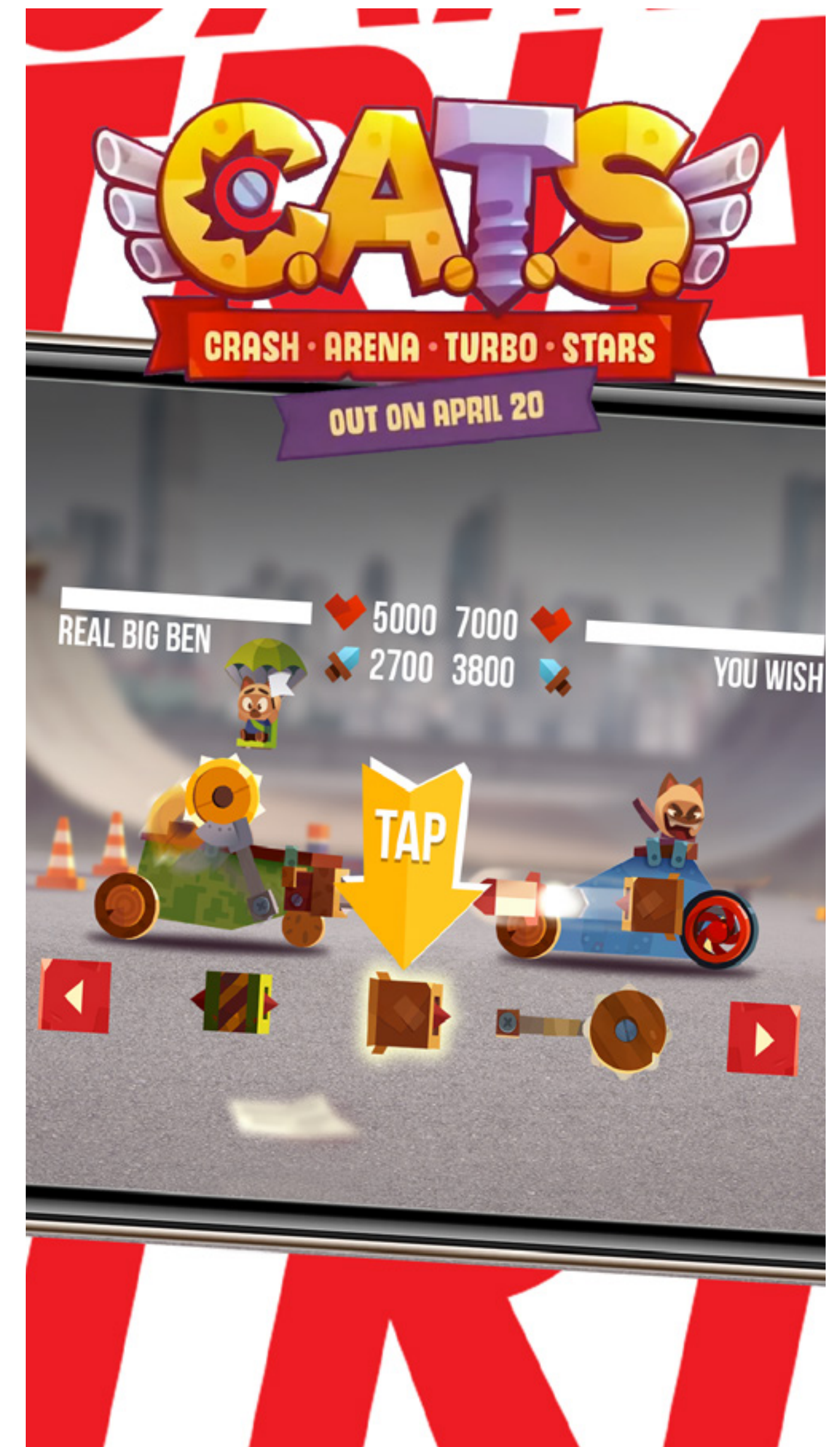
By **Marko Ristic**
from TRIA



Built on the foundation of friendship and experience, we have become a well-coordinated team.

Our core members first started working together as colleagues in another company. We soon realized that we could make a great independent team. We boldly left the company, good titles and hefty salaries behind, got connected with a major game advertising company, and started developing Playable Ads. We founded TRIA DOO and gave ourselves even flashier titles. The team was almost immediately expanded and we started developing our own game. Last year, our partner company was acquired by Twitter, and we became Twitter Suppliers. The client base also includes several major and minor gaming companies, such as King, Machine Zone, Small Giant Games, etc.

Built on the foundation of friendship and experience, we have become a well-coordinated team. The gaming industry is a complex machine and we recognized an opportunity to utilize our specific experience as a service for other gaming companies. Always searching for new technologies, solutions and thrills, we strive to advance further as service providers.



Welcome the MetaHumans!



Bringing compelling real-time digital humans to life is incredibly challenging and time-consuming. It can take months of research, costly scanning equipment, and an army of tech artists. What if we could make the process radically simpler, faster, and more scalable—without compromising on quality?

MetaHuman Creator: state-of-the-art characters at scale

We're excited to announce the MetaHuman Creator, a new tool that will empower anyone to create a bespoke photorealistic digital human, fully rigged and complete with hair and clothing, in a matter of minutes. MetaHuman Creator sets a new benchmark for both the believability of digital humans, and also for the ease of creating them. You can directly manipulate facial features, adjust skin complexion, and select from preset body types, hairstyles, clothing, and more. You can even edit your character's teeth!

Imagine game characters that will blow your players' minds, digital humans on the latest virtual production set that will stand up to close-up shots, virtual participants in immersive training scenarios - more believable than ever before: the possibilities for creators are limitless.

"Up until now one of the most arduous tasks in 3D content creation has been



constructing truly convincing digital humans. Even the most experienced artists require significant amounts of time, effort, and equipment, just for one character. After decades of research and development, and thanks to bringing companies like 3Lateral, Cubic Motion, and Quixel into the Epic family, that barrier is being erased through Unreal Engine, and we're thrilled to introduce MetaHuman Creator." - Vladimir Mastilovic, VP, Digital Humans Technology at Epic Games

How does it work?

MetaHuman Creator is a cloud-streamed app that takes real-time digital human creation from weeks or even months to less than an hour—at an unprecedented standard of quality, fidelity, and realism. When your character is finished, you can export and download it, rigged and ready to animate in Unreal Engine.

We also released two high-quality, fully rigged sample characters that represent the current state of the art for real-time digital humans and serve as a showcase of what's achievable with MetaHuman Creator. They're yours to explore, modify, and use in your Unreal Engine 4.26.1 or later projects; they are available on Unreal Engine Marketplace.

MetaHuman Creator will be free for use with Unreal Engine, with Early Access available in April 2021!



Gaming as an outlet for all our creative juices

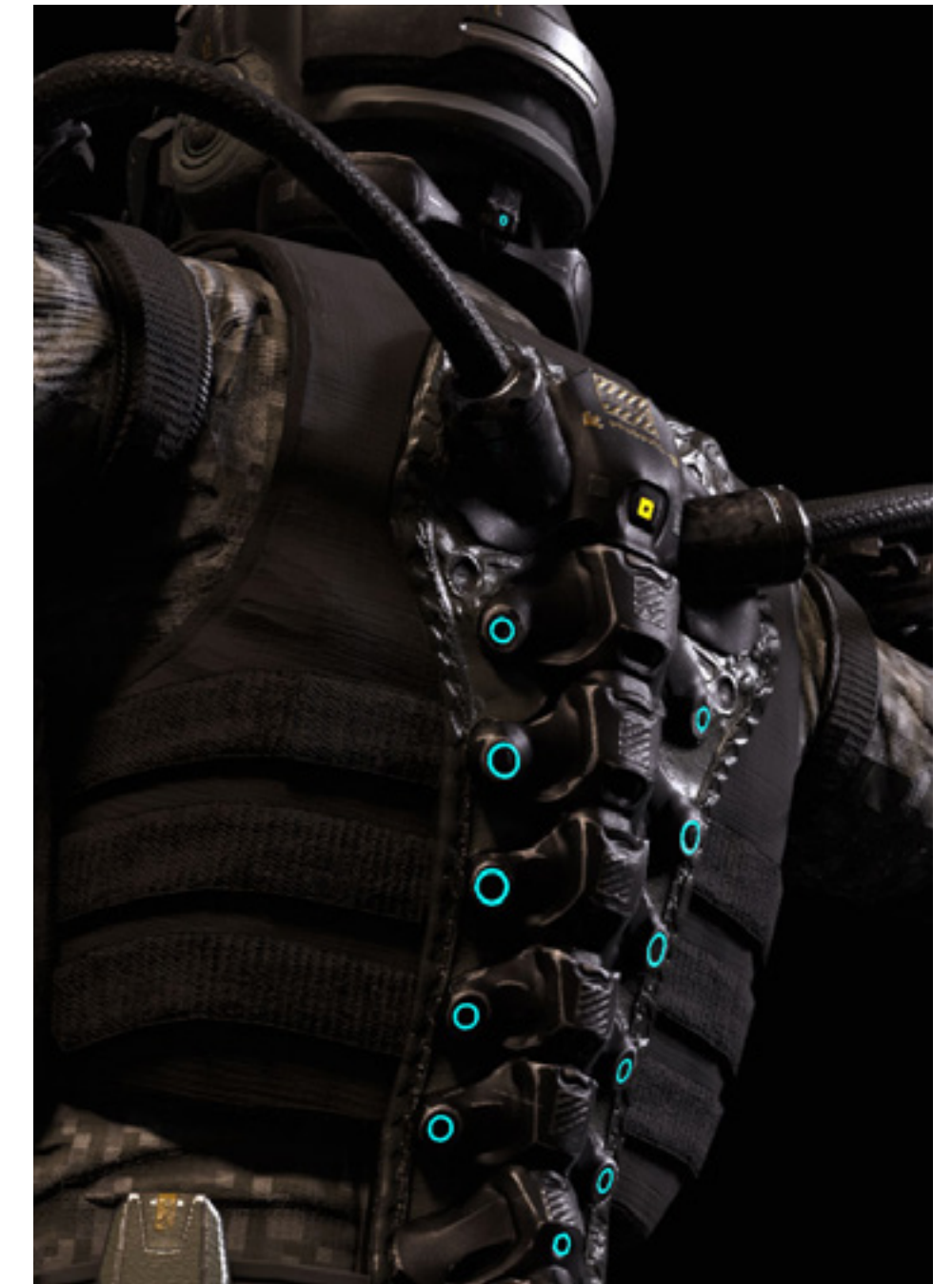
High-quality standards in Animation, focus on Art Direction, technical preparation of Assets and Pipeline optimisation have brought Spring Onion Studio on the world map of Game Art Production. But how did we end up in the gaming industry?

Through years of work in the creative industry and working with advertising agencies, production houses, television and brands, Spring Onion Studio has decided to use its vast experience in Character Animation and bring value to cinematic and game art production. The studio has partnered with the most prominent European games and publishing companies, such as Innogames and

Kalypso Media, which resulted in numerous cinematic productions: Disciples Liberation Announcement Trailer, Forge of Empire game Ads, Elvenar Live-Action Game commercial to name a few.

Our exceptional team consists of 18 professionals, all with a different educational background (artists, marketing managers, creative directors, project managers), which allows them to use their creative potential to its maximum.

One of their exciting collaborations was creating 50 characters from scratch for Adobe. These characters are used daily by famous digital artists such as Beeple.



By **Nevena Vidić**
New Business at
SPRING ONION STUDIO

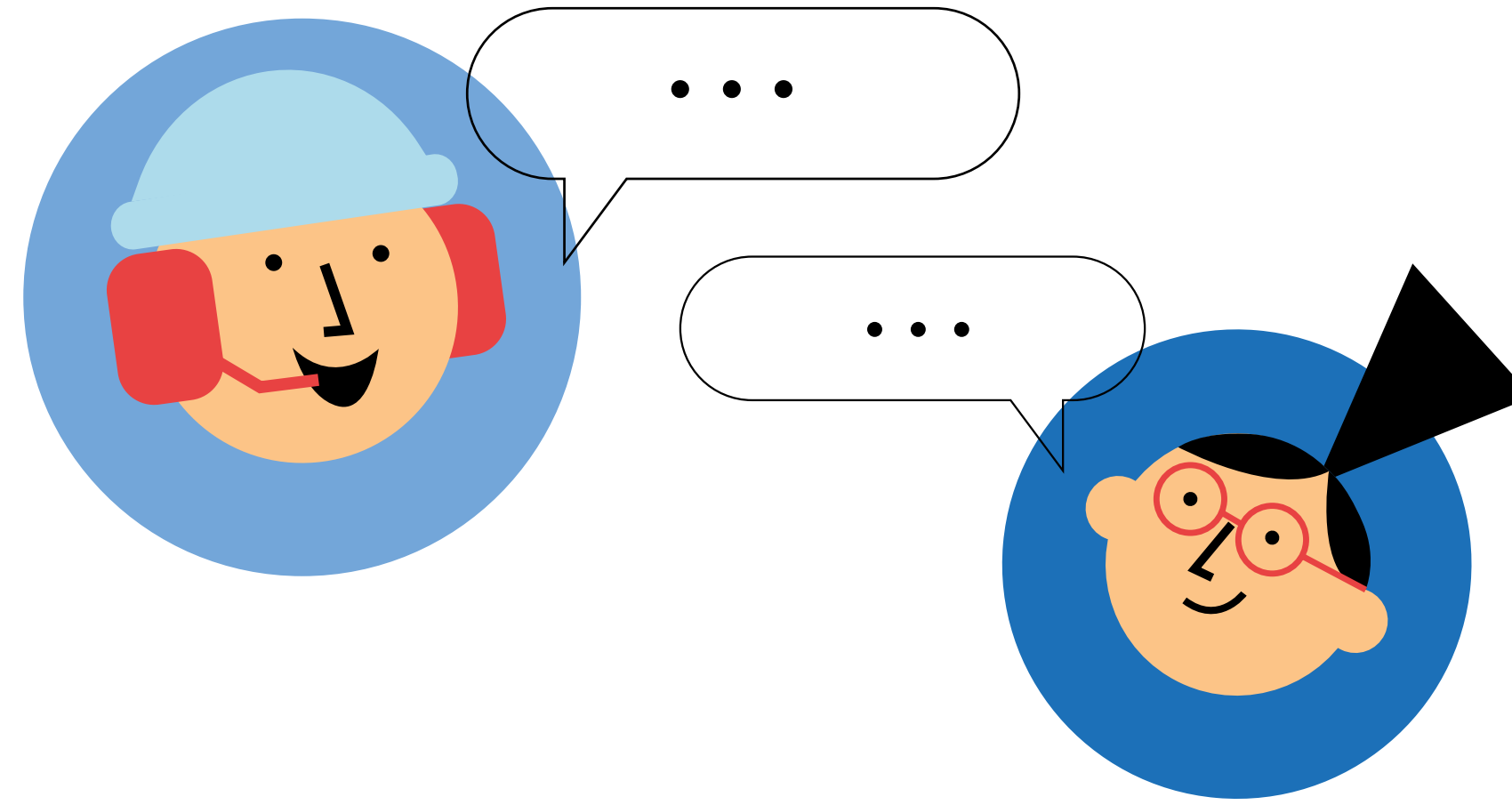


Beeple's artworks featuring Spring Onion Studio characters are getting sold for a couple of million dollars each, not bad?

All this is a testament to the fluidity of roles and industries. More and more the lines are getting blurred and we can use professionals of all backgrounds, find so many news ideas now that we've officially stepped into the gaming world. Creativity is through the roof and all new collaborations we do are jam packed with talented people and out-of-the-box ideas.

How we built our Discord community

We feel this little online nook kept us going throughout this tricky year.

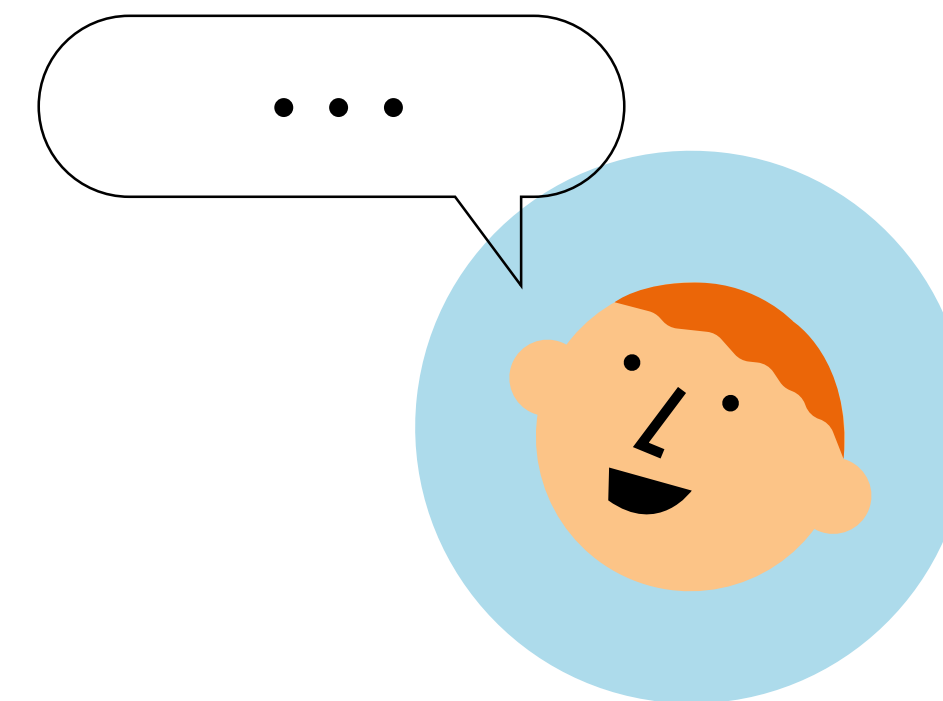


Remember meetups? Yeah, we miss them too. After your standard session of lectures we used to indulge in good old-fashioned face-to-face conversation. Ideas would bounce around, deals would get made and your circle of industry acquaintances broadened.

We wanted to make an online space for people to gather at, after these meetups, so they keep in touch and have a place to get fresh industry-related info. In the spirit of gaming we decided to build this online community on Discord.

Come 2020 - and we're all pretty much chained to our desks, for better or worse.

This resulted in our Discord community skyrocketing to now more than 1000 game industry professionals from all over Serbia, daily communicating on 40 dedicated channels.



Why we love our Discord server:

- City barriers are breached - people from all over the country participate in daily discussions
- Seniors and juniors alike have a platform to exchange advice and ideas
- Portfolios are being exchanged and reviewed
- It's a place to post demos and get feedback
- Teams are being formed and perfect teammates found
- Unofficial admins for different areas are managing these mini-communities (of artists, developers, producers...) and organising independent coffee breaks and meetings

We feel this little online nook kept us going throughout this tricky year. Even after everything settles down, we plan to expand our Discord and adapt to whatever "new normal" awaits. Our hearts are full to see everyone being so open and forthcoming - building another important pillar that boosts our entire gaming industry.

SGA Programs: growing and engaging the Serbian games community



By **Relja Bobić**
SGA Program Director

SGA is first and foremost a community. A community of like-minded professionals and all those interested to pursue a professional path in games, whose main meeting points are usually SGA's and our members' community meetups, game jams and programs in which local and international industry experts are sharing their valuable knowledge.

2020 has made most of these situations practically impossible to realize, and communication between the Serbian gaming community was narrowed down to the very active Discord community, and numerous online programs. For SGA, which had been building its community impact through such events from the very beginning, this was a hard wall to hit. However, we managed not only to relocate our events into the virtual domain, but also to increase the volume and diversity of our programs through numerous online lectures, workshops or AMA sessions. 2020 was also the year in which SGA's team was extended, with my own contribution being specifically directed at developing and structuring the program and project strategy of the association.

We started 2021 with a much clearer vision of our role within the ecosystem, the topics we need to focus on, specific

One of our roles within the ecosystem is to strengthen and deepen the talent pool of young or more experienced professionals.

program cycles we would like to kickstart or international activities that we wish to be engaged in. While developing many free of charge programs for the wider community, we identified key areas in which our members needed the most support, while also complementing the programs of our partners and friends from within the ecosystem, such as Nordeus HUB or CGA Belgrade, to name a few. SGA is now able to present relevant programs on a weekly basis, in collaboration with its partners, international network, member companies and some amazing individuals.

One of our roles within the ecosystem is to strengthen and deepen the talent pool of young or more experienced professionals available to our members, who are all part of a rapidly growing local game development ecosystem that is in need of new, promising talent. Shift 2 Games is a

program cycle through which we present different job positions within the industry, with the idea to engage students and young professionals coming from various fields to immerse themselves into the genuinely transdisciplinary workflow of a gaming company. SGA Mentorship program for our members was, on the other hand, a no-brainer in terms of supporting juniors and mediors already working in the industry to grow, and create even better and more successful games. Finally, Playing Narratives is our first international program immersing young creatives into the process of game development, and introducing them to the industry as such. Along the way, we also established a "future tradition" with the premiere of SGA Assemble: A Year in Serbian Games event.

Serbia seems to be buzzing about the gaming industry over the last years, and for a country already known for its creative and technological talent, it is a frontier that needs to be further pushed and explored. It is impressive to see how much is already going on, and how much motivation and interest is in the air. All that buzz is making it even more inspiring to work on new connections, new opportunities, new formats and new professional playgrounds that local creatives and tech-savvy enthusiasts will immerse themselves in.

TALENT



Shift 2 Games

A “shift to gaming” might be an inspiring choice for many of the young professionals, and is something that the local, flourishing gaming ecosystem definitely needs.

In February 2021, SGA announced its new program Shift 2 Games, with the goal of bringing different job positions within the gaming industry closer to students and young professionals, but also to anyone else interested to continue their career in gaming. As a truly transdisciplinary field, the gaming industry brings together very diverse professions, and as some of them are experiencing job market challenges in Serbia over the last years, a “shift to gaming” might be an inspiring choice for many of the young professionals, and is something that the local, flourishing gaming ecosystem definitely needs.

Each episode is dedicated to a specific position and is co-presented with an SGA member company. Their team members represent and demystify certain job positions within the gaming industry through an interview, show-and-tell and a Q&A with the audience. Through personal stories of some of the leaders in the local industry, every two weeks we talk about how they started working in gaming, how did their previous formal and informal education influence the work they do, and what were the biggest challenges in the beginning. The program also shows what a typical workday looks like, what tools are used, and what kind of workflow is expected. All of the sessions will be archived in a dedicated playlist on SGA’s YouTube channel, thus creating a valuable resource for anyone and everyone planning to immerse themselves into our industry.



**SHIFT 2
GAMES**

Architect turned level designer



By **Andrea Aleksić**
Level artist/Level designer at
Phobos



A year ago, I was an architecture student finishing her thesis at home, trying to find something new and interesting to occupy my free time. So when a close friend of mine shared his plan to develop a video game, I wanted to hear all about it, and I expressed my desire to help out, if I could. By then he had already registered his team to join the Booster programme in Nordeus Hub, and my name was added to the list.

We started working together and after a while I figured out there are several roles in game development that suit my

profile and interests, which is something I wasn't actually aware of before. **It's probably wrong to think that in order to do something you have to know how to do it beforehand, when in reality every job requires a constant learning process.**

When lockdown hit, we kept our pace, meeting at each other's homes. I didn't think of it as "work", but rather just us friends trying to make something good. Our determination was recognized in the Hub, we received a lot of support, and also became a member of SGA.

After my graduation, a few months had passed and I was still working on this project, postponing the time when I started looking for a job in architecture. Then at one point I simply realized there was no need for that when in fact I'd much rather be working on video games.



SGA Mentorship

Speed up your gaming career!

This Spring, SGA is introducing the pilot cycle of its new mentorship program, with the idea to empower people working in our member companies, and provide them with mentoring support from more experienced colleagues across the SGA network. We firmly believe that this type of professional development is especially useful for young professionals in the gaming industry, where tools and ways of working change quickly, and working on a portfolio and skills never stops.

In order to achieve results through a mentoring relationship, honesty, openness and trust are necessary, while the process

“
I had a rare fortune in life to be able to do my dream job. Over the years I learned tremendously from people that I had a chance to work with. Now, I want to pay forward my dues and help others in any way I can.



Stanislav Stanković,
Electronic Arts

“
Initiatives like this one are what drives the ecosystem further. For me, it’s both fun and useful, it makes sense from all perspectives. Good talent is increasingly harder to find, and we must do whatever we can to guide young professionals towards success.



Mladen Vlašić,
Google

itself provides excellent opportunities for networking and horizontal exchange of knowledge and experience with other participants. Several workshops will be organized, which will introduce all of the participants to this specific process of personal and professional development, and monitor their cooperation. The pilot cycle of the SGA mentorship program is being realized between April and June, while another one will take place before the end of the year. Up to 15 mentors and mentees will be able to participate in each cycle.

All participants, both mentors and mentees, will go through three workshops moderated by representatives of Creative Mentorship organization, which is our key partner for this program, and have at least six individual mentoring sessions. Participation in the program is intended for all SGA member companies and their team members who are subscribed to our Start, Pro or Premium membership packages.

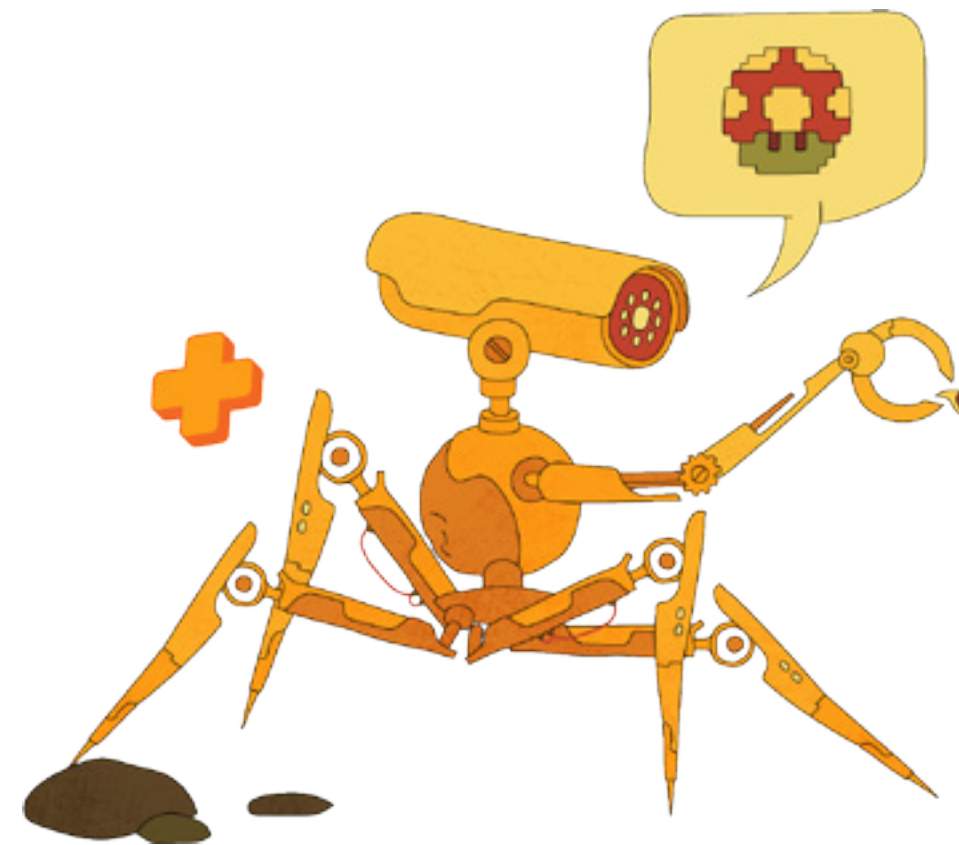
“
We wish to inspire mentorship, to strengthen young people while working on their professional and personal development, and to support other organizations to start new mentorship programs. We absolutely love working with creatives, innovators, game changers and good people. That’s why we’re extremely happy to start this cooperation with the SGA.



Dragana Jevtić,
Creative Mentorship

Playing Narratives: from comics to games

Playing Narratives is our first international project which explores the bridges between the fields of comics and gaming through a unique educational and mentoring program.



An initiative of the French and Goethe institutes in Serbia in collaboration with SGA, Playing Narratives is our first international project which explores the bridges between the fields of comics and gaming through a unique educational and mentoring program. The program is intended for young comics artists, illustrators, animators, creative writers, as well as those who deal with computer modeling or sound design.

Participants selected via an open call will attend lectures and workshops on

diverse topics relevant to the process of developing a video game, but will also get acquainted with technical and business aspects of producing and marketing a video game. Almost a year-long journey will give them a chance to work with experienced industry experts from Germany, France and Serbia, visit some of the local companies and to experience teamwork - all on a weekly level. Workspace, equipment and materials are all covered, as well as a reward for the best team, chosen by an international jury at the end of the process.

The project is supported by the Franco-German Cultural Fund, but also a number of Serbian gaming companies from the SGA network: Digital Arrow (as general sponsor), 3Lateral as part of Epic Games and Two Desperados (as distinguished sponsors), as well as Ubisoft Belgrade (as sponsor). The German gaming accelerator Spielfabrique and the renowned French school Cnam-Enjmin are also on board providing their expertise as associate partners.

SGA Jobs Platform



This report shows that our members plan to employ 350 more people in 2021. In addition to this, our Trends page shows that the number of people employed in the industry has been on a steady rise since 2017.

Finding talent is not always easy, nor is finding the perfect company or team to work in. More often than not, amazing opportunities lie hidden deep within a studio's web page, that's difficult to stumble upon if you don't know what you're looking for exactly. That is why in August 2020 we decided to launch a platform that will aggregate all active positions in the Serbian gaming industry.

Curating this platform also enabled us to actively track the way in which the ecosystem is shifting, which allows us to draw some interesting conclusions. For example, more and more companies are thinking about building their Employer Branding strategies, which shows they're in it for the long run. Smaller teams are looking for UA experts, which means their metrics are good. Indie crews are looking for exceptional artists or biz-dev support - to better prepare for their pitch sessions at conferences.

We also noticed that many companies opened their hiring processes for people all over Serbia. It's a huge step forward, and combined with optional remote work it will help smaller communities to develop at a much faster pace!

You now see how this is much more than a simple bulletin board. It helps us grow the ecosystem and track any changes. We plan to expand our platform in the future with complementary 101 events, mentorship programs and info pages, to help people navigate the beginning of their professional gaming careers.

An illustration of a person with blonde hair, wearing a green shirt and blue binoculars, looking through them. The person is surrounded by several grey speech bubbles of various shapes and sizes, suggesting communication or search. The illustration is positioned behind a dark green text box.

**For more go to
www.sga.rs/en/jobs/
or just click here!**

More than 950 people were interested in applying to various job positions in only three months, a 10% of all people who browsed different positions and landed on the SGA Jobs page.

So far we've published more than 270 positions, while more than 100 positions remain active on a daily basis.

As expected, categories with most positions are programming and art, but we see more and more openings in HR, UA, marketing, QA and support. Anything from full-time to part-time positions, internships and project-based positions.

EDU- CATION



2020

A year of game education

Access to talent is one of the most important objectives for the development of the whole industry, and our gaming community is dedicated to improving game-related education across the country.

This year marked the launch of **Master 4.0 in Gaming at the University of Kragujevac** and the announcement of the first such master program at the **University of Arts in Belgrade (starting in 2021)**. As part of these flagship projects, in 2021 both Universities will launch additional courses in game development and will boost the talent pipeline for indie teams and small-mid sizes studios.



Unreal Engine Education for Professors

30+ professors enrolled

12 state faculties

40+ hours of training



Epic Games and Crater Training Center recognized the efforts of educational institutions in Serbia to introduce new study programs that include interactive technologies. In collaboration with 3Lateral, Crater developed a **special Unreal Engine course for professors** that will enable them to gain current knowledge, expertise, and adequate lecture material in the field of engine technology. More than 30 professors who work at faculties and colleges in Belgrade, Novi Sad, Kragujevac, Nis, and Zrenjanin, and who educate between 1,000 and 1,500 students a year, will attend this course in the first phase.

Nordeus Hub also made significant steps in the direction of **creating an**

online ecosystem that will foster learning and knowledge sharing online. Diverse digital programs expanded the reach of the Hub, and erased the geographical barrier, allowing talent from all parts of Serbia (and the region) to tune in. The numbers on the Hub infographic perfectly showcase the rising interest of talent in game development, and it sums up all the reasons why we are so excited about the future of game-related education.

Combining this with the work-ethic and proactivity we see in all young professionals within our ecosystem is bound to result in world-class talent nourished right here in Serbia.

We're very happy to present an updated list of gaming-related education opportunities in Serbia. Since our last report, the list has expanded, thanks to tremendous and unified efforts of everyone involved in the ecosystem.



**Faculty of Contemporary Arts Belgrade,
Graphic Design department**
BA in Animation, Illustration and Game Art



**College of Vocational Studies –
Belgrade Polytechnic**
BA in Concept Art and Character Design



University of Novi Sad, Academy of Arts
BA in Video Game Design



Faculty of Dramatic Arts in Belgrade
BA in Dramaturgy; BA in Sound Recording and Design; Master in Digital Transformation of Media and Culture



**Metropolitan University,
Faculty of Information Technology**
BA in Game Development;
Faculty of Digital Arts
BA in Design of Interactive Media



**Singidunum University,
Faculty of Media and Communications**
BA in Digital Arts



University of Niš

University of Niš
MA in Intelligent data analysis



**University of Belgrade,
Faculties of Organizational Sciences
and Electrical Engineering**
MA in Advanced IT in Digital Transformation



“Master 4.0” program for IT and Business
joint initiative of universities of Belgrade,
Kragujevac and Niš

**“Master 4.0” program
for Creative Industries/Gaming**
joint initiative of universities of Belgrade and
Kragujevac



FEFA
MA, Business in Gaming



SAE Institute Belgrade
BA/BSc (Hons) Game Art Animation



Crater Training Center
VFX Creation and Game Art Education



Faculty of Contemporary Arts
Animation, Illustration and Game Art



Faculty of Technical Sciences
Animation in Engineering

ALL OUR MEMBERS

#

3Gen

3lateral

4 Save Soft

A

Adreamation

Alset Studio

AM PM Games

Aparteko

B

BabyBottle

Blacksmith Studios

Bohemian Pulp

Bom Solutions

Branislav Gagic

Brave Giant

Bunker

Byte Kinematics

C

COFA Games

Comparative

Crater VFX Training Center

Cryptic Legends

D

Demagog Studio

Deutrix

Devotion Studios

Digital Arrow

Distill Games

E

ElBet

Enyph Games

Esoter Studio

Esoteric Forge

Euclidean Studios

F

Fat Pug Studio

Flat Hill Games

Fortuna E Sports

Foxy Voxel

Fragile Software

G

Game Biz

Gravity Code

H

Harpoon Games

Heron Games

Hora Games

I

Illusio Pictures

Infinite Galaxy

Ingenious Studios

K

Kerber Games

KUKURU3

L

Lichenvale

Lift Kviz

M

Mad Head Games

Mad Mage Games

MarbleIT

Matej & Co

Miracle Dojo

Mogul Digital

Moonburnt studio

Munzesky Studio

N

Nordeus

O

Oraharo

P

Peaksel

Phobos

Pixquake

Playrix RS

PlayStudios / Team Sava

Princeps

PWNRS

Q

Qube DOO

R

Radioactive Unicorn

Raigon

Remote Human

S

Sensible Shouting

ServerBytes

Sobakaisti

Software Wolf Studio

SoZap

Spring Onion Studio

Stargazer Studio

Stick and Rope

Sticky Fingers

Studio Don Kihot

Stygian Software

Superverse Industries

SupremeNexus

T

Tender Troupe

Three Swords Studio

Thunder Strike

Tria

Tummy Games

Two Desperados

U

Ubisoft

Ulti Coin

W

Waveform Studio

Webelinx Games

Whyttest

Y

Yboga

Partners

Our official partners actively support the work of the association and help our members make competitive products and deliver premium services.

centili

Deloitte.

karanovic/partners

Program partners

Initiatives, associations and institutions that collaborate with us on mutual projects and programs – this is how we enrich the ecosystem.



Friends

Who help us build a strong network and a richer ecosystem



Media partners

We rely on our media partners to promote new titles and events, to inform all interested parties on major events and other success stories.



SGA⁺

sga.rs