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**2014**  
**ITALIAN**  
**GAME**  
**DEVELOPERS**  
**CENSUS**

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## *Contents*

Introduction ..... 2

Facts & figures ..... 4

Selected companies & games ..... 10

Supporting institutions ..... 29

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## *Introduction*

Italian gaming market revenue in 2013 was over €1 billion with 21m gamers, which is 30% of the population, and these numbers place Italy among the largest gaming markets in Europe. Despite this scenario, game development community in Italy is not as much crowded as one could assume. In fact, and interestingly, there is still plenty of room for the community to grow in the boot-shaped peninsula.

Besides two major studios founded in the late '90s, the Italian game development scene has grown mainly in the last three years with the establishment of several studios around the country. Although relatively small and relatively young, the Italian games industry is moving successfully its first steps in the market and is gathering more and more attention globally.

While Ubisoft Milan is the only publisher-owned development studio in the country and Milestone, with SBK and MotoGP, is by far the largest Italian company, expanded opportunities for indie game developers have contributed to put in evidence the growing pool of indigenous talents.

Recently, many games created in Italy have received international recognition, from Ovosonico's Murasaki Baby to Storm in a Teacup's Nero, from MixedBag's Futuridium EP Deluxe to Forge Reply's Joe Dever's Lone Wolf, from Bad Seed Entertainment' Sheep Up! to Santa Ragione's MirrorMoon EP.

Today the Italian games industry is quite various and fragmented, but what Italian game developers all have in common is the fine combination of technical competence and creativity, which already defines the 'Made in Italy' brand in many other fields of excellence, such as fashion and design.

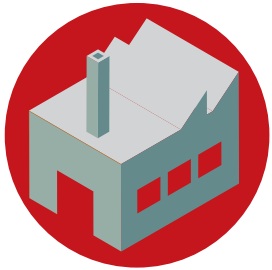
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Key statistics of the Italian games industry are presented in this report. The source of these facts and figures is the second survey on the state of game development in Italy, commissioned in 2014 by AESVI - the Italian Games Industry Association - to ASK - Centre for Research on Management and Economics of Arts and Culture Institutions. The first survey was conducted in 2011. The report has been supported also by the Italian Trade Agency.

For what concerns methodology, a questionnaire has been distributed predominantly through online game developers communities and addressed to executives' profiles. The distribution has started on July 1st 2014 and ended on July 31st 2014.

# *Facts & figures*





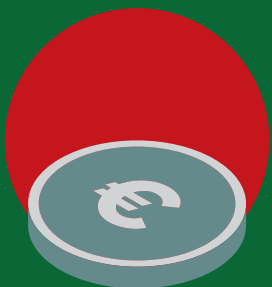
### *Number of companies and type of business*

There are currently over 100 game development studios in Italy, which are getting more organized year over year. Whereas in 2011 the most common type of business was the self-employed entrepreneur, in the last 3 years the number of limited liability companies has increased and today it represents almost half of the industry. Such positive trend shows the health of the companies operating in the field and their will to improve their productivity.



### *Number of employees*

The number of people working in game development in Italy has increased by around 30% since 2011, with 700 professionals active in the industry today. The dimension of Italian game development companies is rather small, counting an average of 3 to 5 people working in each company. However, since 2011 the number of more structured companies has increased, with nearly 40% of game development studios having today over 6 employees.



### *Estimated annual turnover*

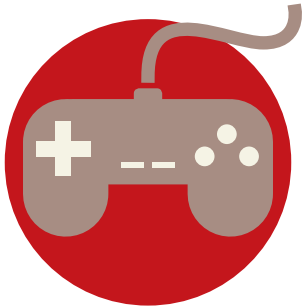
In the last 3 years the estimated annual turnover of Italian game development sector has increased, reaching about 20 million euros in 2013, around 15% higher than in 2011. This figure is still quite low compared to other EU countries, but can be easily explained by considering the emerging phase of the industry in the country which is largely dominated by a robust startup ecosystem.



### *Year of establishment*

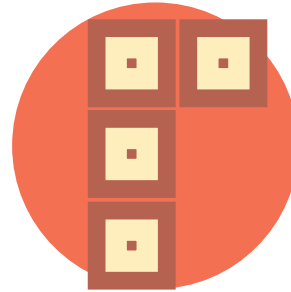
The majority (46%) of Italian game development studios have been established in the last 3 years, whereas 20% of the companies have been in business for over 8 years and 27% for over 4 years. If, on the one hand, brand new game developers are entering the market, on the other, larger and more long-established companies seem to secure for themselves a stable position in the industry.





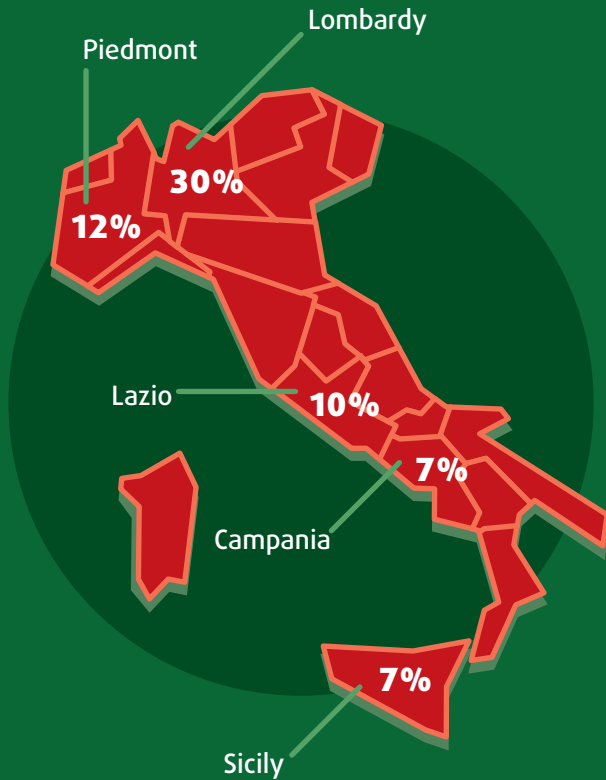
## *Development platform*

Mobile gaming development has significantly increased in the last 3 years and today involves nearly half of the total Italian production. Many studios are also working on PC and online games, although there is a healthy contingent with a console focus. Results show that PC and console games production allows companies to generate higher revenues, reaching an average turnover of 650.000 euros and 1 million euros respectively.



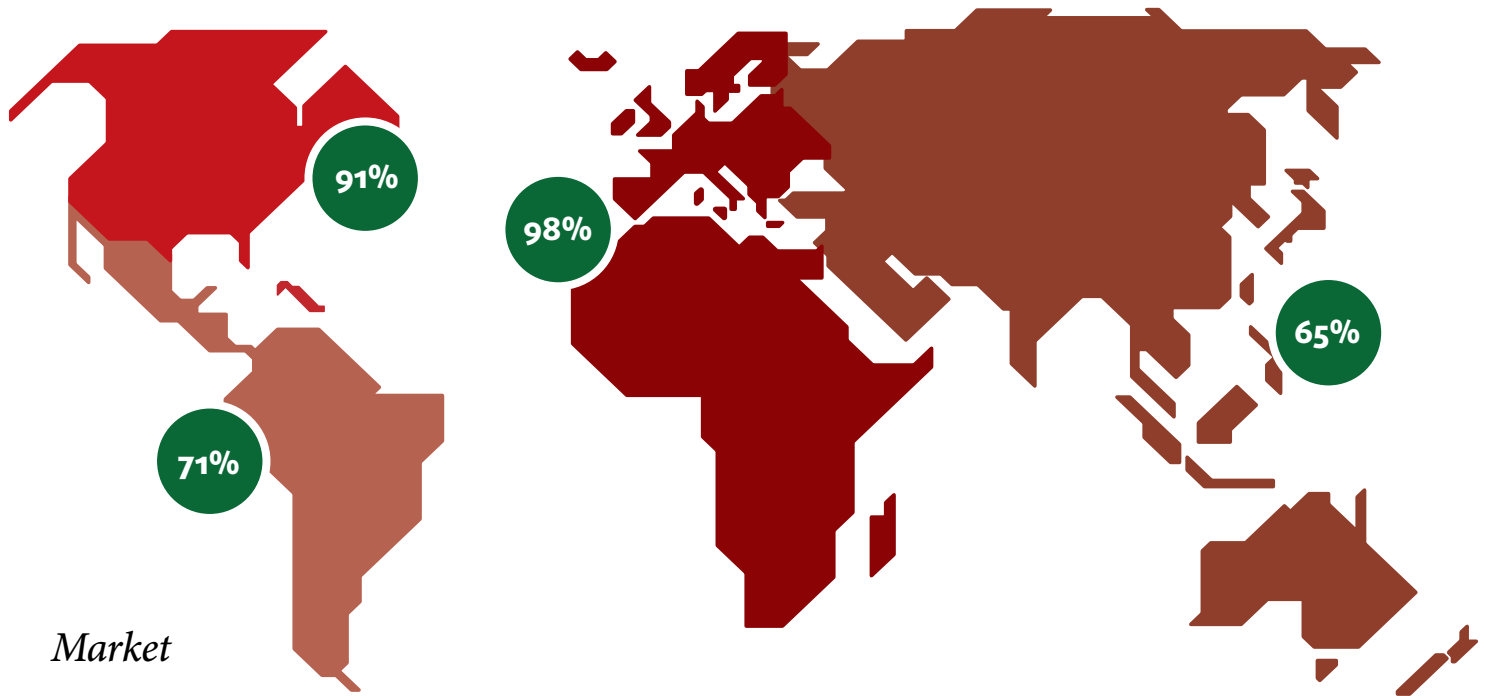
## *Genre production*

Although football-based games are the most popular games in Italy, followed by racing and shooter titles, the output of the Italian development scene is much more various. Puzzle games have today the highest market share (11%), followed by Adventure and Arcade (8% each). Italian game developers are also active in developing Family/Kids and Serious Games (around 7% each).



## *Region distribution*

Major hot spot of the industry is in Lombardy, with 30% of game development studios located in Milan and neighboring provinces. However game developers are scattered all over the country, with other important regional hubs in Piedmont (12%) and in Lazio (10%). In Southern Italy, Campania and Sicily are pretty active, as each of the regions hosts 7% of the companies operating in the field.



## *Market*

Due to the global nature of game business, Italian games developers are quite active on the global stage, not only with triple-A games, but also with the booming indie development scene. The whole Italian games production is exported, with 98% of Italian videogames being distributed in Europe, 91% in North America, as well as 71% reaching South America and 65% in Asia/Pacific. Considering the rapid growth of the sector, games could become soon a key component for Italy's exports and economy.

*Selected companies  
& games*



## 93 Steps

[www.93steps.com](http://www.93steps.com)

Audio Production Studio

**Year of Establishment:** 2012

**Headquarters:** Tombolo (Padua)

**Notable Works:** "War Thunder Heroes" Trailer (2013), "SMITE - Cinematic Teaser" (2014), "World of Tanks: All Platforms" Trailer (2014)

**Achievements:** Finalist in 2014 Develop Industry Excellence Awards | Creative Contribution: Audio

# Develop

INDUSTRY EXCELLENCE AWARDS 2014

# FINALIST





## *Bad Seed Entertainment*

[www.badseedentertainment.com](http://www.badseedentertainment.com)

**Year of Establishment:** 2013

**Headquarters:** Milan

**Title:** Sheep Up! (2013)

**Platform:** iOS, Android, Blackberry, Windows Phone (Sheep Up! Black Light - 2014)

**Achievements:** Selected by AppCampus | Microsoft and Aalto University (2014); Winner of Working Capital Grant by Telecom Italia (2013); € 500.000 seed investment from GameFounders, Mind The Bridge and United Ventures, the leading tech fund in Italy





## *Digital Tales*

[www.dtales.it](http://www.dtales.it)

**Year of Establishment:** 2006

**Headquarters:** Milan

**Title:** SBK 14 Official Mobile Game (2014)

**Platform:** iOS

**Achievements:** SBK14 is the first official Superbike Championship mobile game; Featured twice on iTunes among the "Best New Games" and "Best New Updates"; Topping the Racing and Sports charts across major App Stores in the world and boasting 3.4 million downloads



*foofa Studios  
Untold Games*

[www.foofastudios.com](http://www.foofastudios.com)

[www.untoldgames.com](http://www.untoldgames.com)

**Year of Establishment:** 2008

**Headquarters:** Genoa

**Title:** Loading Human (Q4 2015)

**Platform:** PC, Mac, designed for Oculus Rift and concept approved for PS4 and Project Morpheus

**Achievements:** Winner of Game Connection America 2014 | Best Project and Best Hardcore PC & Console Project; Completed a successful Kickstarter campaign with 133% of its goal achieved





## *Forge Reply*

[www.forgereply.com](http://www.forgereply.com)

**Year of Establishment:** 2011

**Headquarters:** Milan

**Title:** Joe Dever's Lone Wolf (2013-2014)

**Platform:** iOS, Android, PC

**Achievements:** Over 2 million downloads on the App Store and Google Play; Winner of 2013 Italian Games Awards | Best Italian Indie Game & Best Italian Game Design; Finalist in 2014 Develop Awards | Use of a License or IP; Digital Selection at IndieCade 2014



## *Interactive Project*

[www.interactiveproject.it](http://www.interactiveproject.it)

**Year of Establishment:** 2011

**Headquarters:** Rome

**Title:** OverVolt: crazy slot cars (2014)

**Platform:** Windows Phone

**Achievements:** Selected by AppCampus | Microsoft and Aalto University (2014); Over € 500.000 business capital raised from Venture Capital and Business Angels; Finalist in Game Connection America 2014 | Selected Projects with their first title MyGPTeam Turbo



# *Kunos Simulazioni*

[www.kunos-simulazioni.com](http://www.kunos-simulazioni.com)

**Year of Establishment:** 2006

**Headquarters:** Rome

**Title:** Assetto Corsa (2014)

**Platform:** PC

**Achievements:** Winner of 2013 Italian  
Games Awards | Best Technical Achievement





## *Mangatar*

[www.mangatar.net](http://www.mangatar.net)

**Year of Establishment:** 2012

**Headquarters:** Milan

**Title:** Dengen Chronicles (2014)

**Platform:** iOS, Android, Windows Phone,  
Browser Game

**Achievements:** Selected by AppCampus  
| Microsoft and Aalto University (2013);  
Winner of Italian Awards for Innovation (PNI  
CUBE 2012); € 200.000 seed investment  
from Digital Investments SCA SICAR, one of  
the most important VC in Italy





## *Milestone*

[www.milestone.it](http://www.milestone.it)

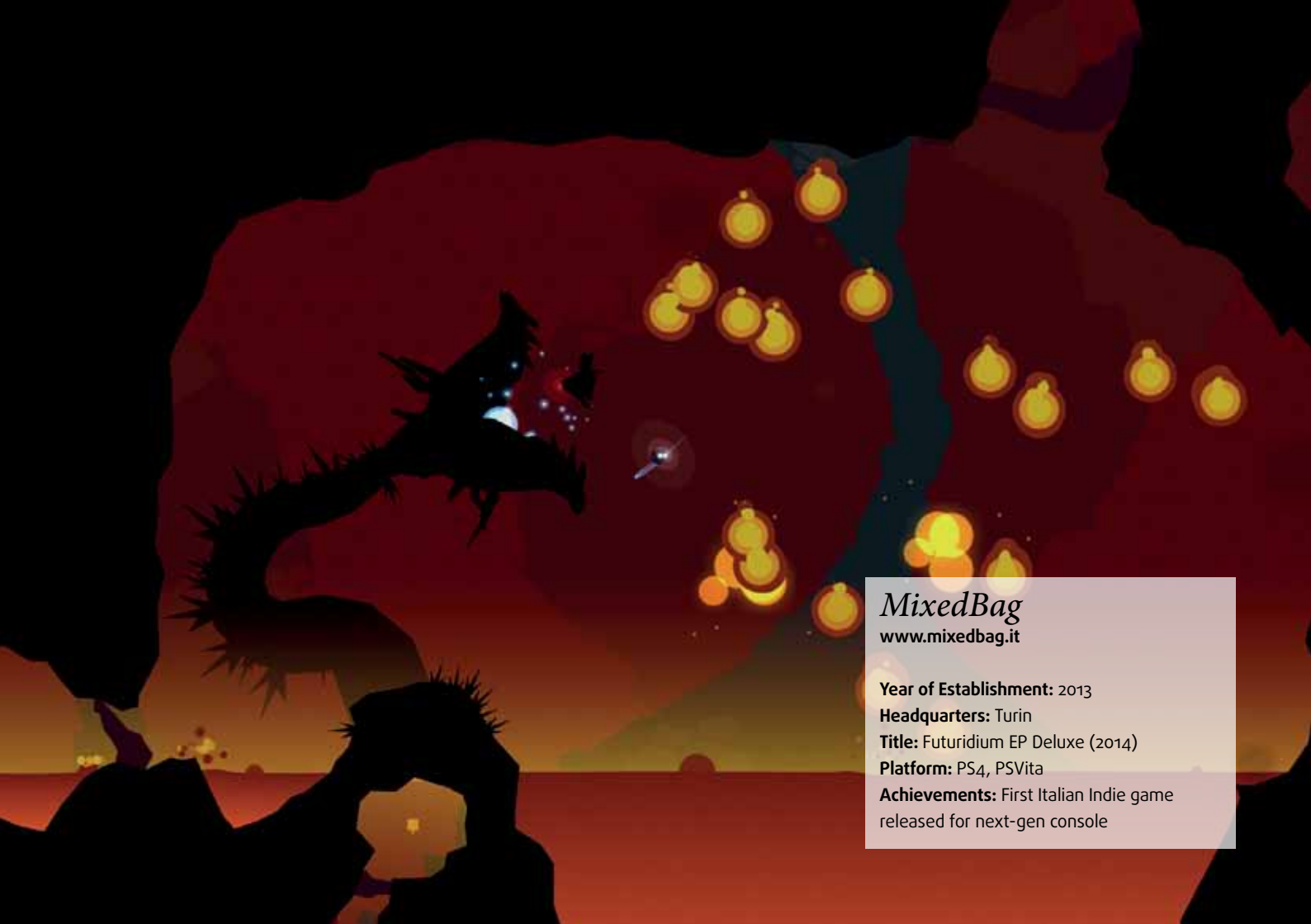
**Year of Establishment:** 1996

**Headquarters:** Milan

**Title:** MOTOGP14 (2014)

**Platform:** PS4, Xbox 360, PS3, PS Vita, PC

**Achievements:** 530.000 copies sold



*MixedBag*

[www.mixedbag.it](http://www.mixedbag.it)

**Year of Establishment:** 2013

**Headquarters:** Turin

**Title:** Futuridium EP Deluxe (2014)

**Platform:** PS4, PSVita

**Achievements:** First Italian Indie game released for next-gen console



## *Ovosonico*

[www.ovosonico.com](http://www.ovosonico.com)

**Year of Establishment:** 2012

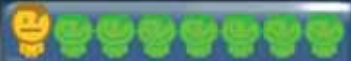
**Headquarters:** Varese

**Title:** Murasaki Baby (2014)

**Platform:** PSVita Exclusive

**Achievements:** Nominee of Game Critics Awards | E3 2014 Best Handheld Game; Winner of Game Informer | Best PS Vita Exclusive of E3 2014 Award; Winner of Eurogamer | Gamescom 2013 Best Independent Game Award

PASSEGGERI



01:39:76

VENTO



13

MOTORE

30%

ALTITUDINE

528



VELOCITA'

413



## *Reludo*

[www.reludo.com](http://www.reludo.com)

**Year of Establishment:** 2011

**Headquarters:** Verona

**Title:** MAYDAY! Emergency Landing (2013)

**Platform:** iOS, Android, Amazon

**Achievements:** First position in more than 60 countries





## *Santa Razione*

[www.santarazione.com](http://www.santarazione.com)

**Year of Establishment:** 2010

**Headquarters:** Milan

**Title:** MirrorMoon EP (2013)

**Platform:** PC, Mac, Linux, OUYA, Amazon  
Fire TV

**Achievements:** 30.000 LTD Sales; IGF 2013  
Nuovo Award Finalist; 2013 IndieCade  
Selection; 2013 Fantastic Arcade Selection



## *Spin Vector*

[www.spinvector.com](http://www.spinvector.com)

**Year of Establishment:** 2001

**Headquarters:** Benevento

**Title:** From Cheese (2012)

**Platform:** Android, iPhone/iPad, Windows Phone, Mac

**Achievements:** nearly 2.000.000 downloads; Winner of 2012 Samsung Smart App Challenge Grand Prize; over € 500.000 won in prizes



## *Storm in a Teacup*

[www.stcware.com](http://www.stcware.com)

**Year of Establishment:** 2013

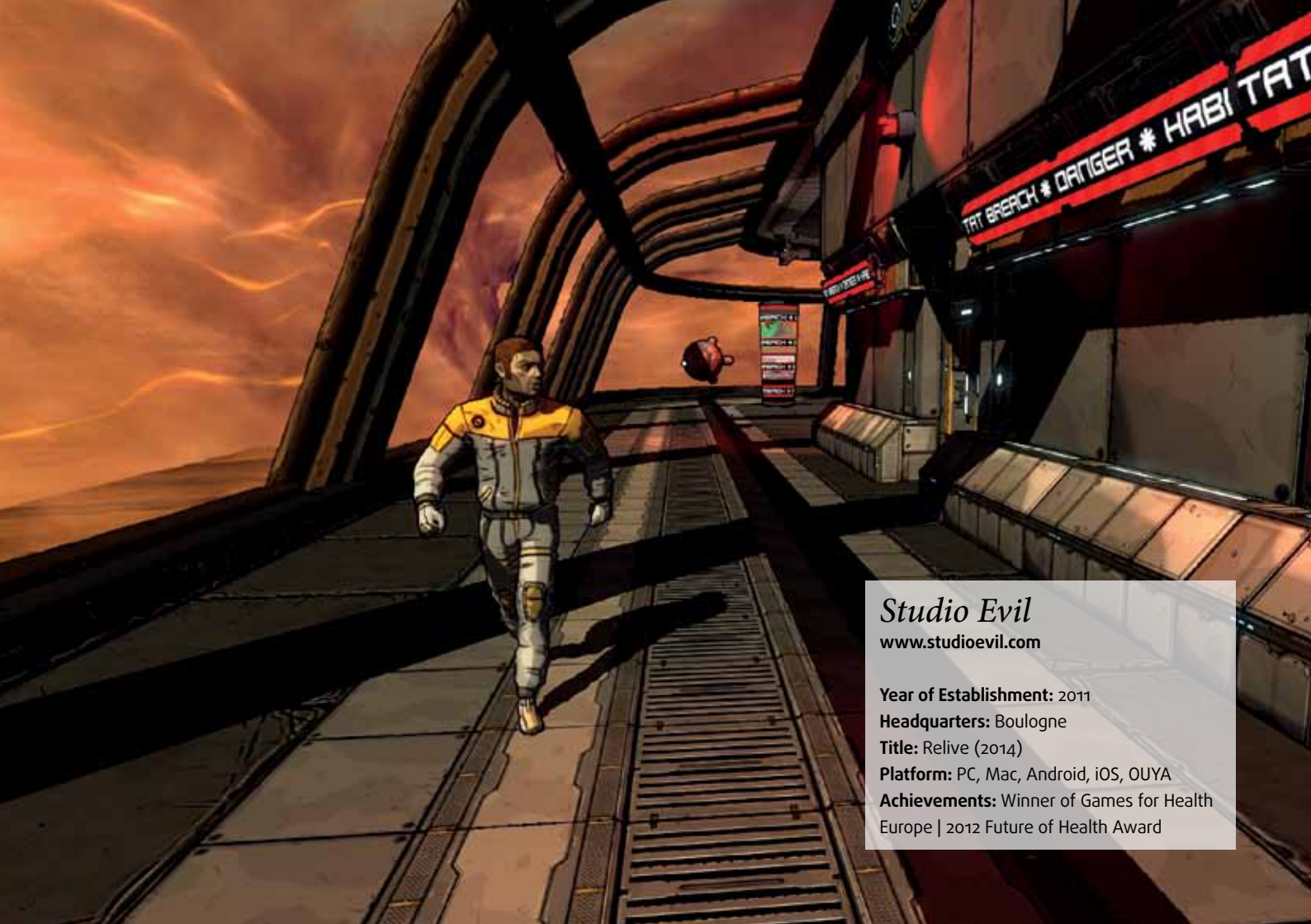
**Headquarters:** Rome

**Title:** NERO (Q1 2015)

**Platform:** Xbox One Exclusive

**Achievements:** Mentioned in 2013 Develop  
Top 100 European Start-up; Winner of 2014  
Trailers FilmFest | Best Videogame Trailer;  
Nominee of Game Connection Europe 2014 |  
Best Console & PC Hardcore Game





## *Studio Evil*

[www.studioevil.com](http://www.studioevil.com)

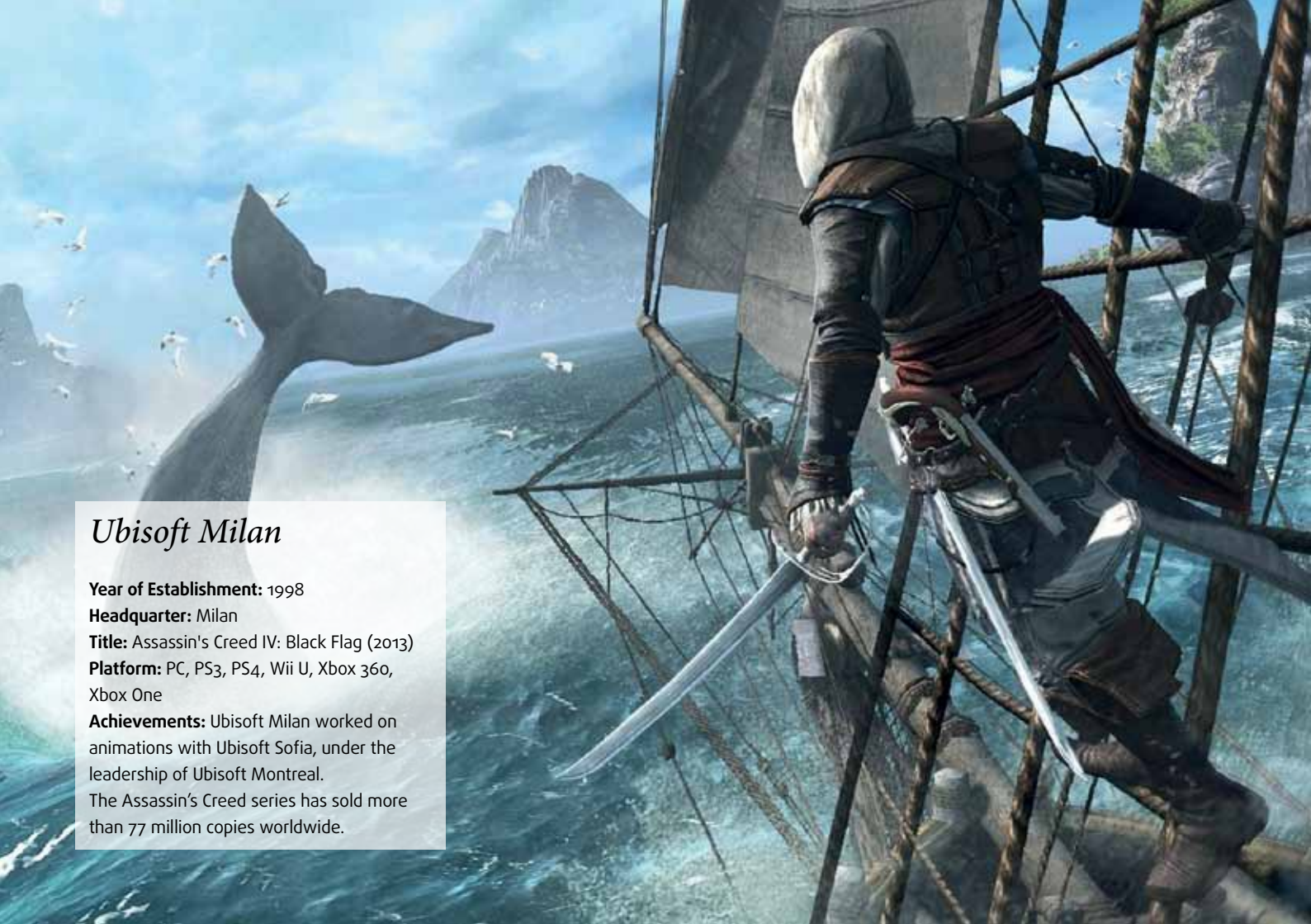
**Year of Establishment:** 2011

**Headquarters:** Boulogne

**Title:** Relive (2014)

**Platform:** PC, Mac, Android, iOS, OUYA

**Achievements:** Winner of Games for Health Europe | 2012 Future of Health Award

A screenshot from the video game Assassin's Creed IV: Black Flag. The main character, Edward Kenway, is seen from behind, standing on the rigging of a wooden sailing ship. He is wearing a dark, hooded assassin's outfit with a red sash. Two swords are visible, one in his right hand and another tucked into his belt. The ship is on a vast, blue ocean under a bright sky with scattered white birds. In the distance, a large, dark whale tail is visible above the water's surface. The background features rugged, rocky islands.

## *Ubisoft Milan*

**Year of Establishment:** 1998

**Headquarter:** Milan

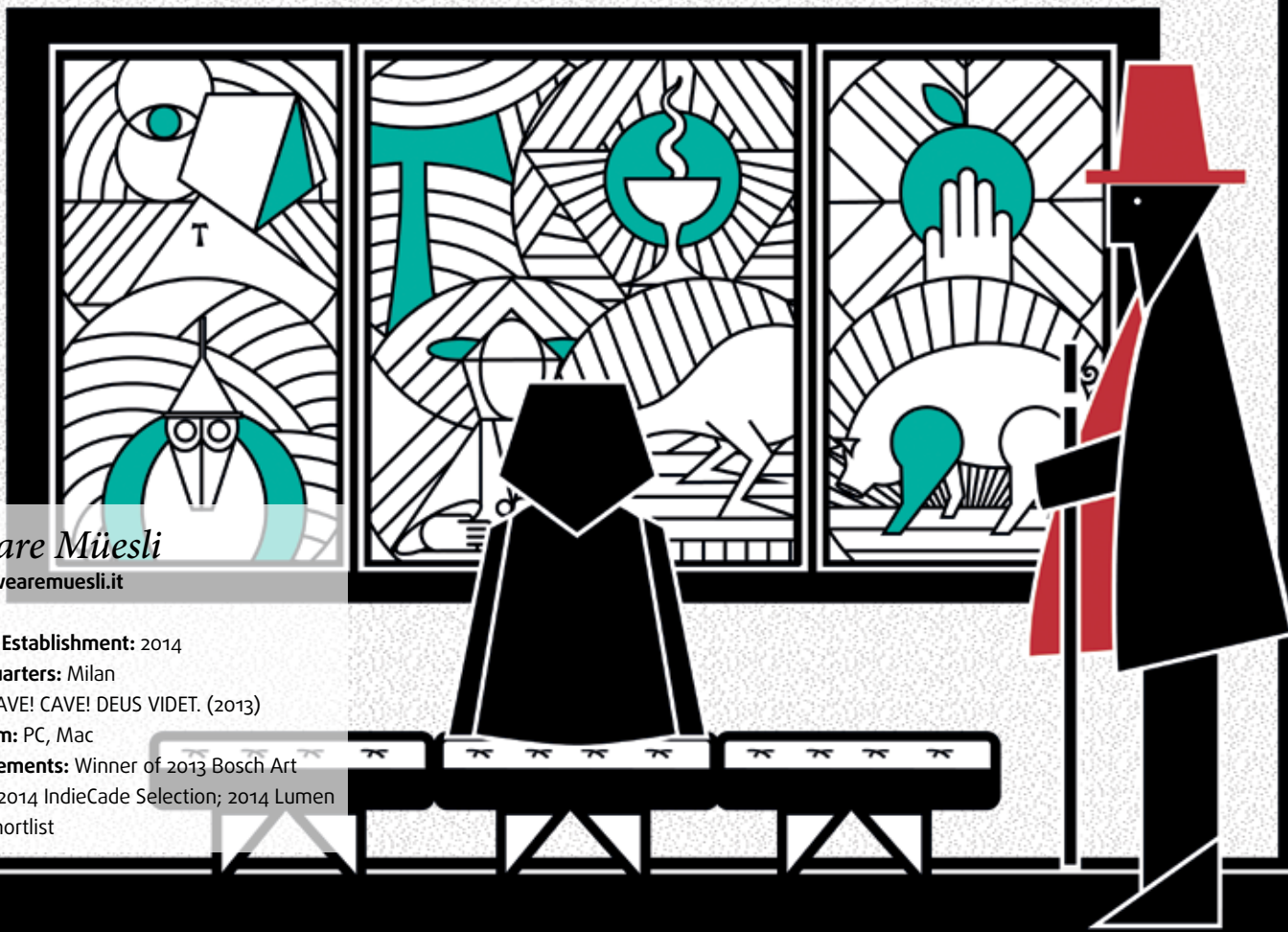
**Title:** Assassin's Creed IV: Black Flag (2013)

**Platform:** PC, PS3, PS4, Wii U, Xbox 360, Xbox One

**Achievements:** Ubisoft Milan worked on animations with Ubisoft Sofia, under the leadership of Ubisoft Montreal.

The Assassin's Creed series has sold more than 77 million copies worldwide.





## *We are Muesli*

[www.weare muesli.it](http://www.weare muesli.it)

**Year of Establishment:** 2014

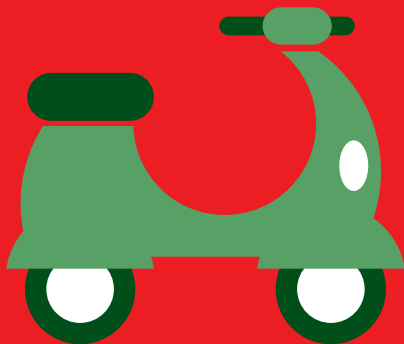
**Headquarters:** Milan

**Title:** CAVE! CAVE! DEUS VIDET. (2013)

**Platform:** PC, Mac

**Achievements:** Winner of 2013 Bosch Art

Game; 2014 IndieCade Selection; 2014 Lumen  
Prize Shortlist



*Supporting institutions*

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# AESVI

ASSOCIAZIONE EDITORI SVILUPPATORI VIDEOGIOCHI ITALIANI

AESVI is the Italian Games Industry Association serving the public affairs needs of video game platforms holders, publishers and developers operating in Italy. The Association was established in 2002 with the aim to represent, promote and defend the collective interests of its members to the Italian public institutions, international organizations, academics, or the public opinion.

At international level, since 2002 AESVI is member of ISFE (Interactive Software Federation of Europe), the European Association based in Brussels, and since 2005 is part of its Board of Directors. On the local side, since 2010, AESVI is member of Confindustria Cultura Italia, a federation of trade bodies gathering all the Italian entertainment and

cultural industries such as video game, music, cinema, publishing and theatrical.

AESVI is the promoter of Milan Games Week ([www.gamesweek.it](http://www.gamesweek.it)), official Italian videogame consumer show; Italian Game Developers Summit ([www.igds.it](http://www.igds.it)), international conference for the Italian videogame developers' community; Premio Drago d'Oro ([www.premiodragodoro.it](http://www.premiodragodoro.it)), official videogame awards ceremony in Italy.





ITALIAN TRADE AGENCY

ICE - Agenzia per la promozione all'estero e  
l'internazionalizzazione delle imprese italiane

The Italian Trade Agency is the Italian government organisation working to develop, facilitate and promote economic and commercial relationships abroad, and marketing Italian goods and services internationally. It further promotes the “Made in Italy” image around the world and Italy itself as a destination for foreign investment.

The Italian Trade Agency is subject to the authority and supervision of the Ministry of Economic Development. Through its international presence, within the Italian diplomatic network, the Italian Trade Agency operates together with business organisations and other public and private entities to offer coordinated support for businesses and Italian organisations involved in the globalization process.

From its Rome Headquarters, with offices in Milan and through its network of 79 branch offices around the world, the Italian Trade Agency provides information, assistance and promotion services to businesses and institutions, encouraging cooperation within the industrial, agricultural and agri-food sectors, distribution and tertiary businesses, to expand the presence of Italian companies on international markets.

The Italian Trade Agency has a dedicated program of activities to promote the Italian audiovisual and Game industry abroad with several promotional events every year in Europe, North America and South East Asia.



**Università Commerciale  
Luigi Bocconi**

ASK  
**Art, Science  
and Knowledge**

ASK Centre (Art, Science and Knowledge) has been founded in 2004 at Bocconi University with the aim of carrying out both theoretical and empirical researches and promoting cultural planning and cultural institutions management activities. The Research Centre is focused on activities and sectors significantly characterized by the relationship between arts and economics.



**AESVI**

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