Desarrollo

Español

Videojuegos

Desarrollo Español de Videojuegos

- Association of professional developers.
- Representing cultural, economic and professional interests of Spanish production companies.
- Retaining our talent and national IP.
- Developing new models of digital distribution and business.
- Promoting an ‘original brand’ synonymous with quality and innovation as another way of promoting our culture worldwide.

Desarrollo Español de Videojuegos

- The largest companies, representing approximately 90% of the sector.
- The sector has started too late its dialog with the Public Administration.
- Since March Spanish Congress considers the sector as cultural industry
- Now we are negotiating with the public Administration specifics ways of funding videogames.

Videogames cultural industry

- A powerful global market
- High value added, much R & D
- 60% of artists among professionals
- Between 28 and 37 % of population between the ages of 16 and 49 are ‘active players’.
- Many similarities with cinema industry, but also many differents

Digital content, evolution of sales world-wide 2003-2007

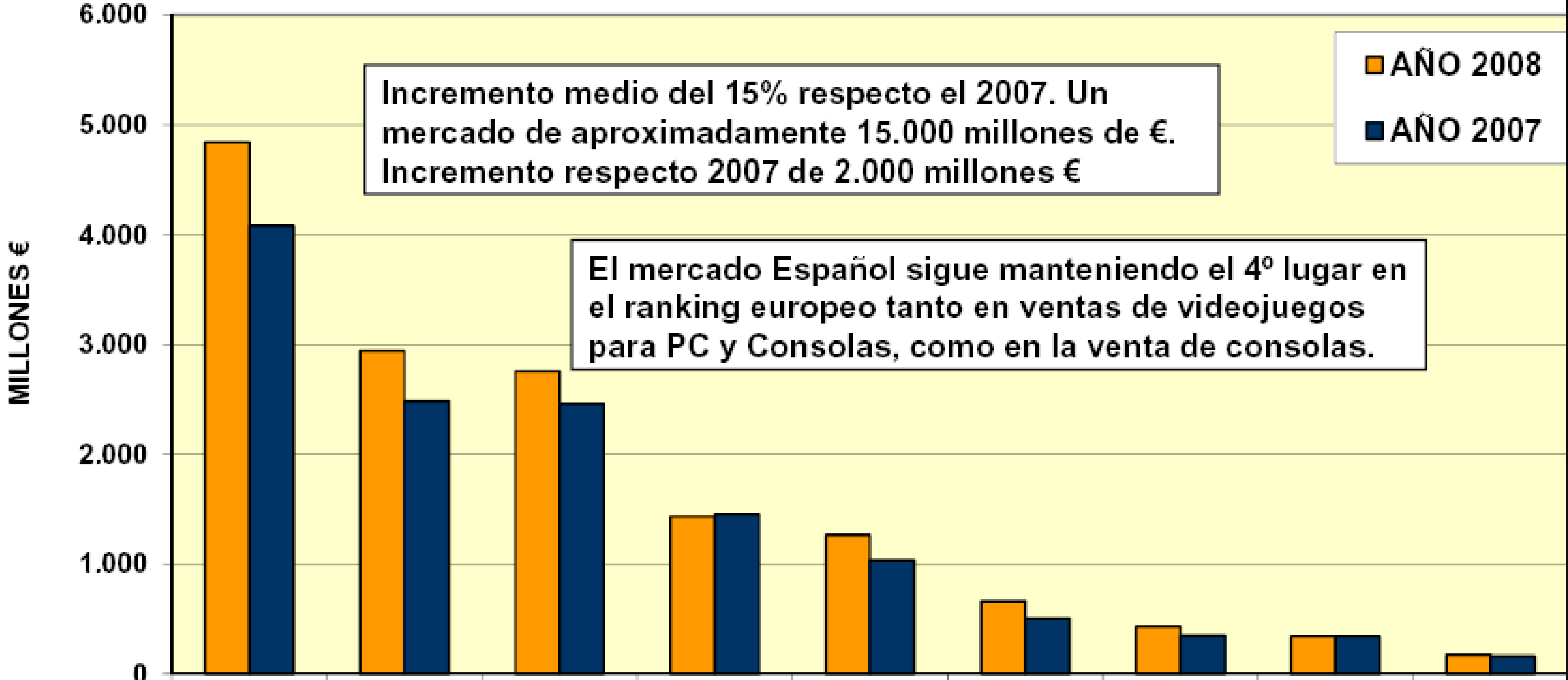
	Billing 2003 (M$)	Billing 2004 (M$)	Billing 2005 (M$)	Billing 2006 (M$)	Billing 2007 (M$)	TCMA 03-07 %
Music	36,228	36,526	35,765	34,861	33,437	-2.0%
Films/Video	78,351	83,954	81,661	83,781	85,904	2.3%
Videogames	23,667	26,869	28,395	32,954	41,948	15.4%
Publications[1]	340,612	351,206	364,397	370,581	379,314	2.7%
Audio-visual[2]	294,873	321,387	340,110	363,173	383,150	6.8%
Total	773,371	819,942	850,328	885,350	923,753	4.5%

[1] Including newspaper, books and magazines
[2] Including television (including advertising) and radio

Source: "Global Entertainment & Media Outlook: 2008-2012" de PricewaterhouseCoopers (2008)

EU market 2008

TOTAL MERCADO EUROPEO EN VALOR



	R.UNIDO	FRANCIA	ALEMANIA	ESPAÑA	ITALIA	HOLANDA	BELGICA	SUECIA	PORTUGAL
AÑO 2008	4.842	2.944	2.756	1.432	1.263	663	428	343	174
AÑO 2007	4.080	2.482	2.458	1.454	1.038	507	350	345	162

Digital content, evolution of sales in Spain 2003-2007

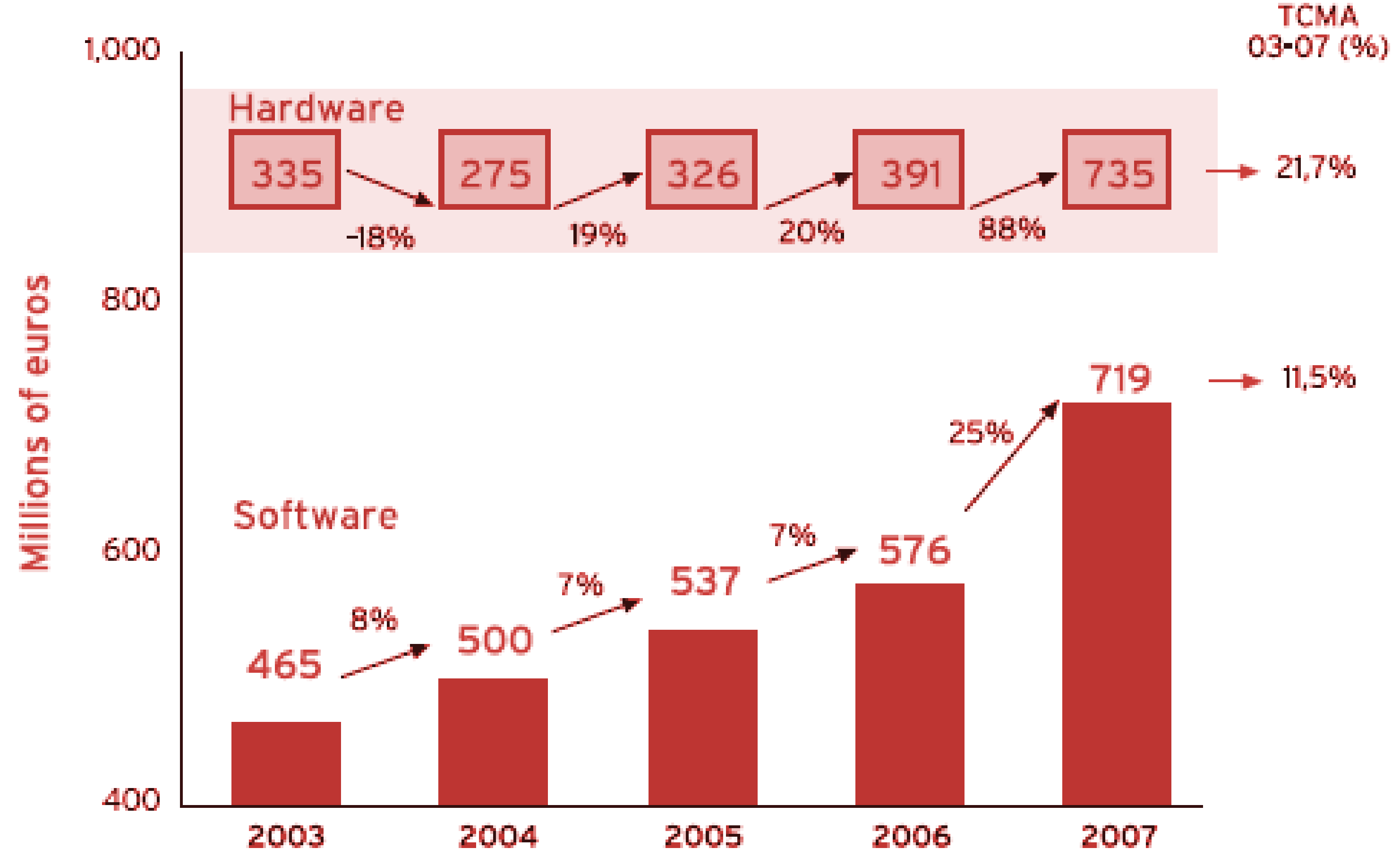
	Billing 2003 (M€)	Billing 2004 (M€)	Billing 2005 (M€)	Billing 2006 (M€)	Billing 2007 (M€)
Video games[1]	465	500	537	576	719
Films/Video[2]	1,052	1,096	927	911	916
TV/Radio	4,677	4,532	5,028	5,346	5,767
Music	457	406	399	368	284
Publications	6,965	7,286	7,377	7,722	8,237[3]
Total	13,616	13,820	14,268	14,923	15,923

[1] Does not include hardware.
[2] Including box-office takings and sale and rental of films.
[3] Due to the absence of official data, estimates for 2007 publication sales based on previous growth rates and industry forecasts

Source: ONTSI based on various sources (see detailed analysis by sector)

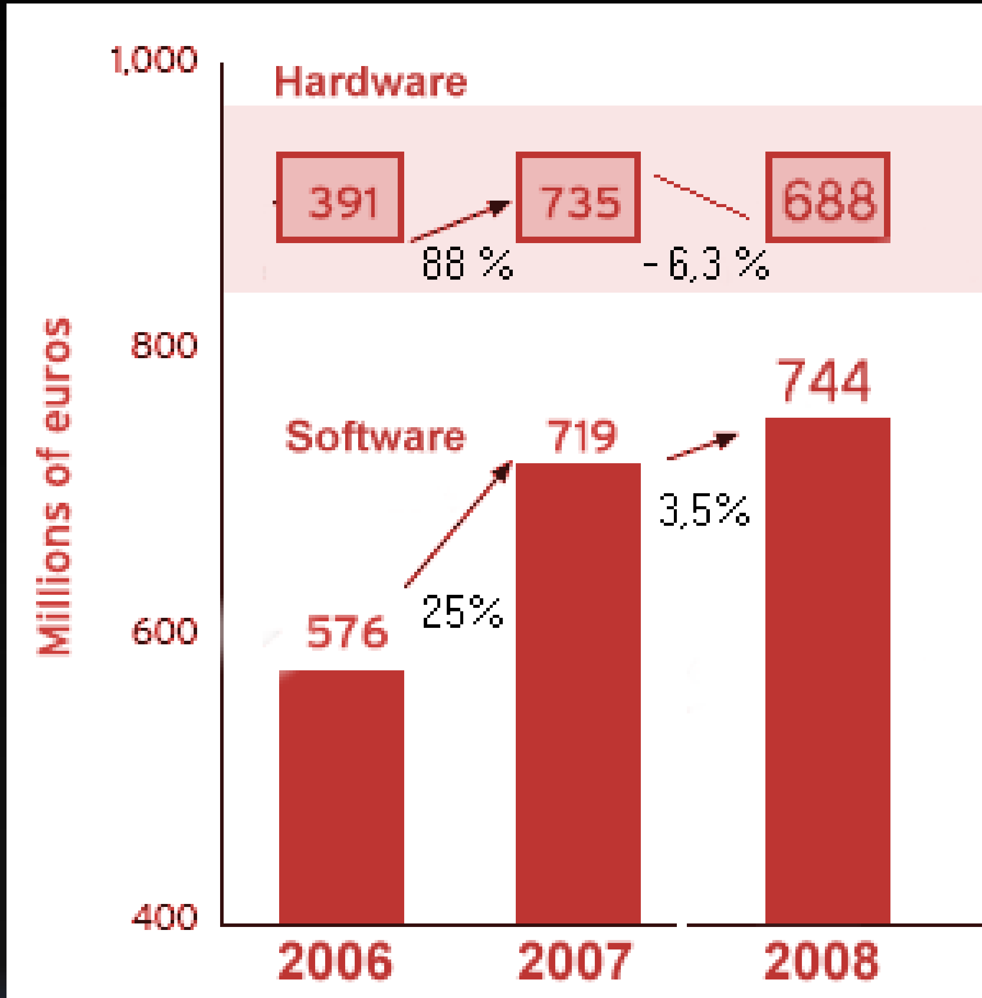
1 - Video games does not include hardware.

Growth in the Spanish sector 2003-2007

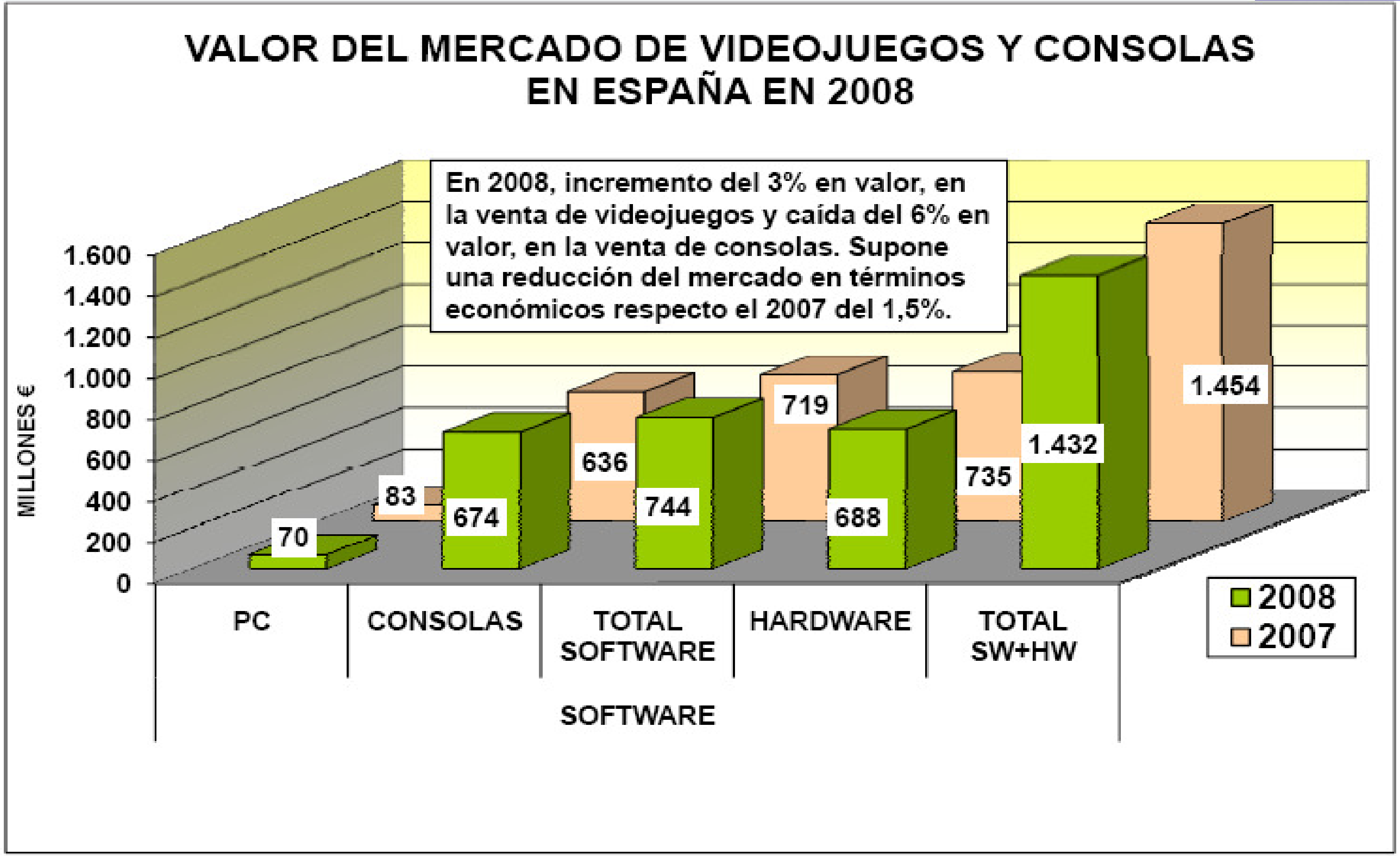


Source: ONTSI and "Resumen anual del sector de videojuegos año 2007"

Spanish market 2008

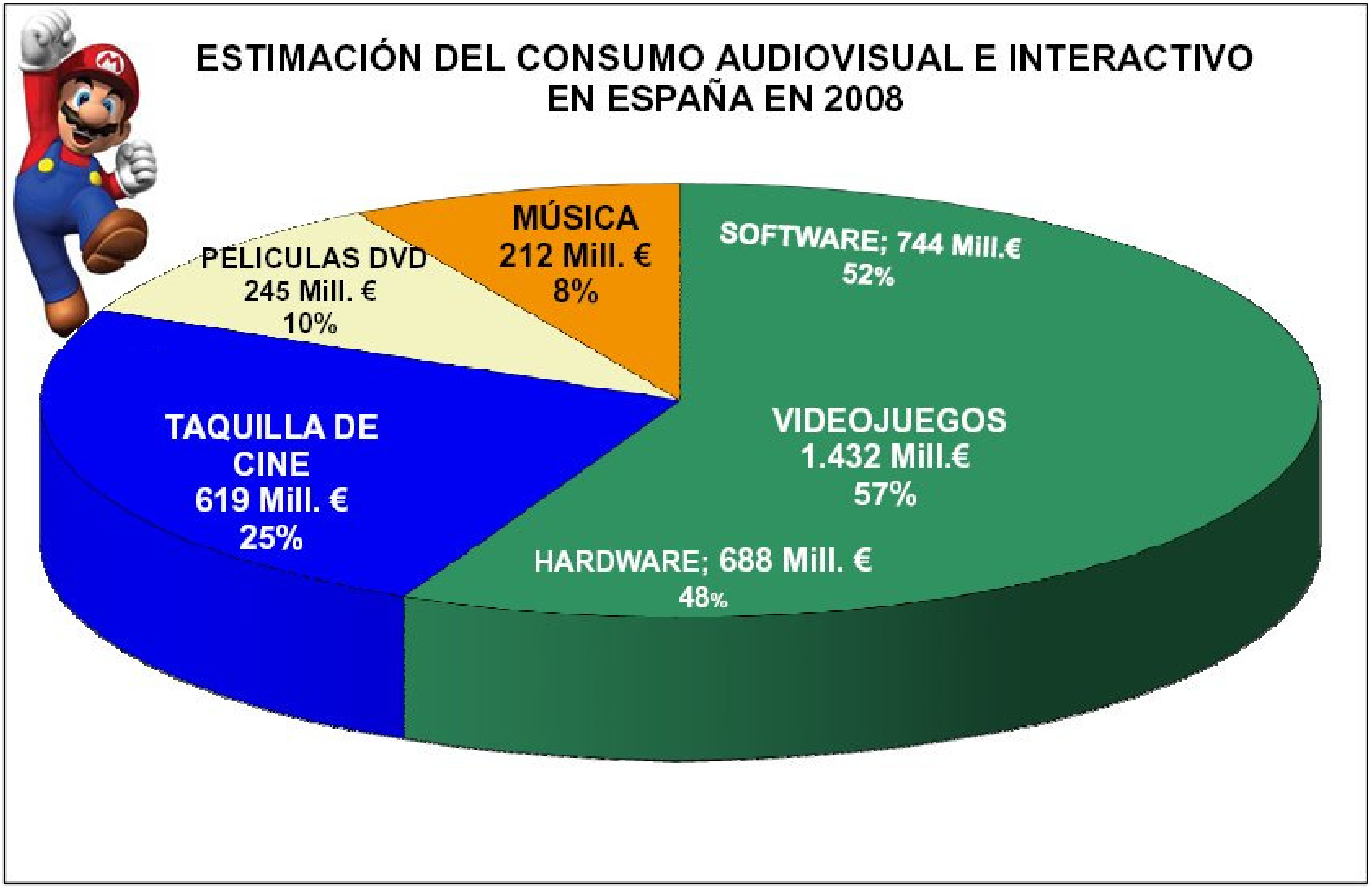


Consoles in Spain 2008



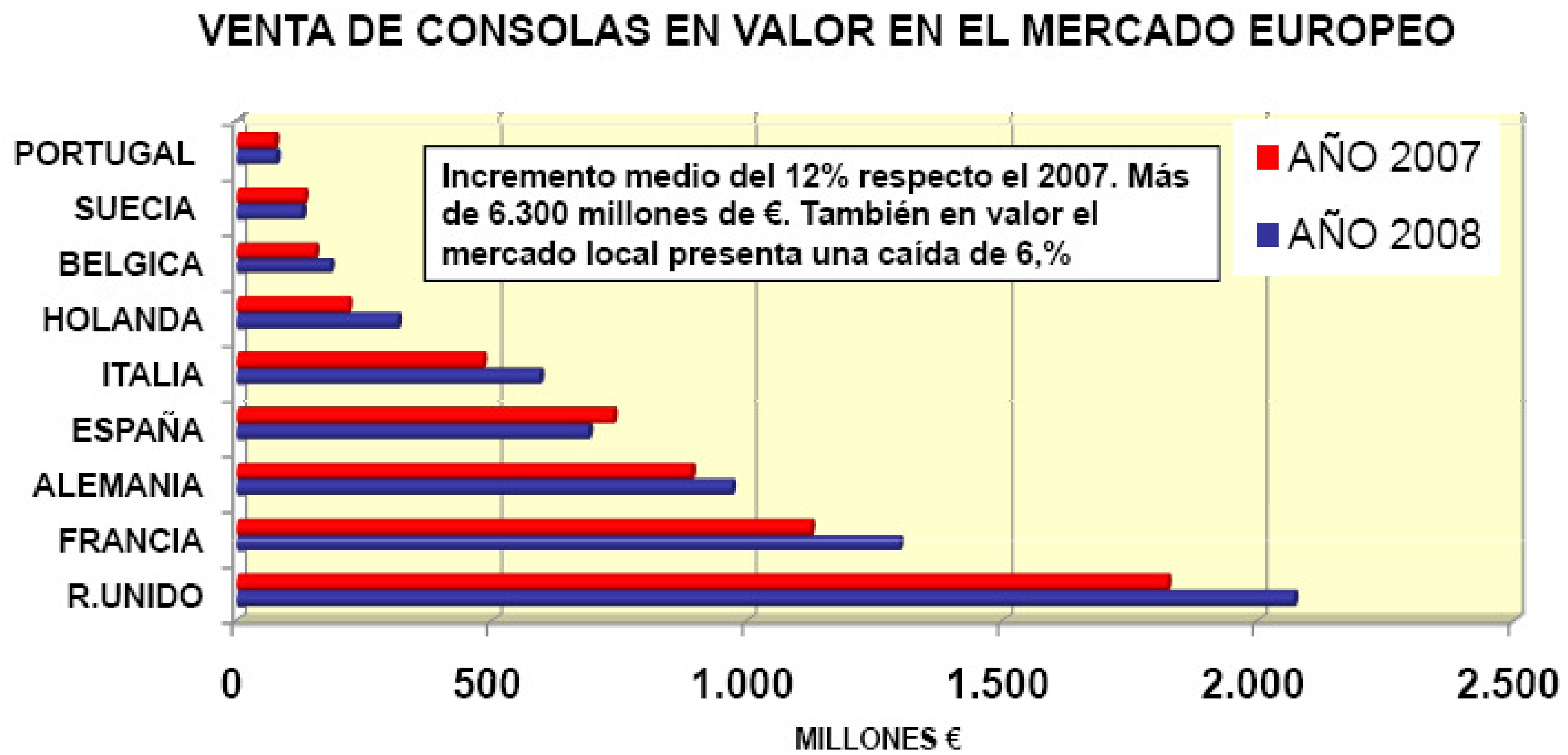
Fuente: MC/GfK

Leisure use in Spain 2008



Fuente: MºCULTURA/UVE/PROMUSICAE/ADESE

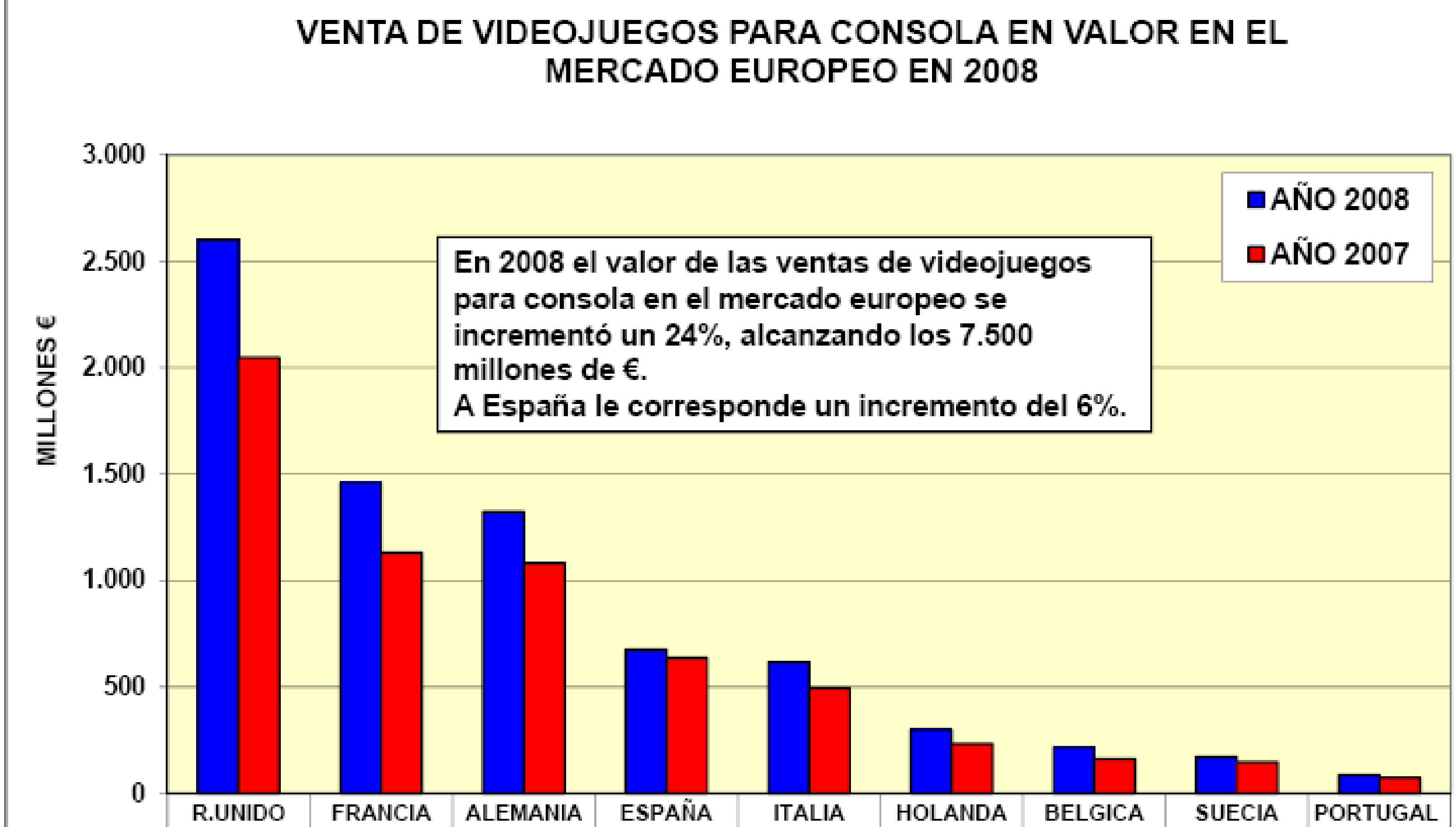
Europe:consoles 2008



	R.UNIDO	FRANCIA	ALEMANIA	ESPAÑA	ITALIA	HOLANDA	BELGICA	SUECIA	PORTUGAL
AÑO 2007	1.821	1.122	889	735	481	217	153	131	73
AÑO 2008	2.070	1.297	968	688	592	314	182	126	76

Fuente: MC/GfK

Europe: software for consoles 2008



	R.UNIDO	FRANCIA	ALEMANIA	ESPAÑA	ITALIA	HOLANDA	BELGICA	SUECIA	PORTUGAL
AÑO 2008	2.602	1.460	1.324	674	616	299	215	170	84
AÑO 2007	2.048	1.131	1.080	636	494	232	162	146	74

Fuente: MC/GfK

The Rise of the Spanish Games Industry

- Spain led the way with the first 8-bits
- Independent production has survived thanks to help from multinationals
- The companies has increased from 10 in 2005 to over 100 in 2009
- The largest companies, representing near to 90% of the sector
- Our revenue are a little more than 2% of total software sales in the sector.

Involvement of Public Administration

- Sometimes we were like a physical game, other software or an audiovisual by-product
- Our permanent R & D is unknown throughout the production process
- The Spanish Ministry of Industry has initiated actions aimed at seeking ways to funding our sector
- The Ministry of Culture is in talks with us and we hope they start collaboration to funding prototypes and contents.

Grants for Innovation

- Finance R & D, and the technical process until the development of a prototype
- Ministry of Industry has the main actor through the Plan Avanza
- We had to compete with other TIC (IT) projects.
- The evaluators really don´t know our technologies

Grants for Development

- The production process is linked to create content and the development of technological components
- In Spain there is no help for product development
- Content never receives grants

Grants for Marketing

- We can access the final user, as developers of interactive content
- We need to know about marketing techniques and product promotion with the digital distribution
- We hope we can offer help for marketing which will help us acquire the knowledge of the market, which we need to be able to compete

Fiscal credits for exports

- Our industry needs to export to be profitable, and with these grants we would be better prepared
- We hope allow a ‘natural selection’ of companies which would get tax credit to reinvest in exports
- Other grants could be used to cover production and salary costs using the profit from export

Grants for Training

- There isn't enough professionals with knowledge and experience in making internationally competitive products.
- Students improve their knowledge in our companies, where they complete their training go to outside Spain.
- We also want to retain the talent that is now leaving and also employ professionals from outside the country.

Grants for job creation

- A large project needs a lot of employees. If there is no continuity with another big project, they need to leave the company .
- We don’t have any help wend we engage the double or triple workers in mid production process.
- The grants for job creation allow us to have a stable nucleus of staff. Thus we can invest more in R & D when the production process suffers.

Financial instruments

- We need to develop financing strategies to allow our companies to take risks in going for their own products rather than producing other people's products
- It is important that the Official Credit Institute should create specific procedures to endorse videogame sector projects
- We are confident we can attract private financial backing which can benefit from R & D investment

Plan Avanza I+D Convocatoria 1/2009

- Total budget Avanza I+D 505 M€: 150 M€ Grants and 355 M€ loans

- Payment without guarantees at one go

- % of Funding:

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Project	Big Enterp. Asoc./Agrup.	Medium Enterpris.	Small Enterpris
Industrial Research (1)	≤ 50%	≤ 60%	≤ 70%
Experimental Development (1)	≤ 25%	≤ 35%	≤ 45%

GOBIERNO DE ESPAÑA
MINISTERIO DE INDUSTRIA, TURISMO Y COMERCIO

Unión Europea
Fondo Europeo de Desarrollo Regional

plan avanza2

Plan Avanza2: 2009 - 2012

Plan Avanza2 (2009-2012)

Desarrollo del sector TIC (PYMEs)

Ppto. 2009: 663 M€

- Apoyar a las empresas que desarrollen nuevos productos y servicios con elevado componente TIC y promover la participación industrial española en la construcción de la Internet del Futuro, con especial atención a los contenidos digitales.

✓ Convocatoria Internet del Futuro
✓ Convocatoria Contenidos Digitales

Capacitación Ciudadanos / PYMEs

Ppto. 2009: 548 M€

- Fomentar el acceso y el uso de las nuevas tecnologías tanto por parte de los ciudadanos como por parte de las PYMES.

✓ Capacitación Ciudadania
✓ Capacitación PYMES

Servicios Públicos Digitales

Ppto. 2009: 186 M€

- Impulso del desarrollo y la implantación de la S.I, mejorando la prestación de los servicios públicos electrónicos al ciudadano y las empresas mediante el uso de las TIC.

✓ Sanidad
✓ Administración Local
✓ Registros Civiles

Infraestructura

Ppto. 2009: 89 M€

- Lograr la transición a la TDT.
- Más alcance y velocidad de la Banda Ancha en zonas rurales.
- Ofrecer a la comunidad científica mejores redes y servicios.
- Medidas normativas en el ámbito de las Infraestructuras Comunes en edificios y canalizaciones de telecomunicaciones en dominio público

✓ Transición a la TDT
✓ Plan de Extensión de la Banda Ancha – Fase 3
✓ Rediris

Confianza, Seguridad y Accesibilidad

Ppto. 2009: 11 M€

- Generar confianza en las TIC, tanto en los ciudadanos como en las empresas, a través de políticas públicas de seguridad de la información.

✓ Plan eConfianza
✓ Accesibilidad TIC
✓ Carta de derechos de los usuarios

Thank you !

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Welcome

Bienvenidos