

MALTA'S VISION VIDEO **G**GAMES DEVELOPMENT and ESPORTS



VIDEO GAMES

- Games are more than 'just entertainment'.
- Games promote creativity, competition and culture.
- Innovation has made Games reach beyond leisure into education and healthcare to provide wider social impacts and technology spill overs.

VIDEO GAMES



- The Video Games sector has been a key driver of technology development in everything from the speed of chip processing, to screen resolution and internet connectivity.
- The scale of opportunities for both the creative and tech sectors as a result of new technologies is enormous.

GLOBAL LANDSCAPE



GAMES HIT MAINSTREAM



- Globally the markets for video games and esports are growing exponentially.
- Games industry globally worth more than the film and music industries combined.
- Global Games Market 2018 - \$134.9bn +10.9% YOY.
- **86% of internet users say they have gamed on at least one device within the past month** – going up to 92% among 16-24s.

GLOBAL REACH

- Fortnite hosts world's largest concert – Earlier this year, DJ Marshmello performed a 10 minute set within the Fortnite game to an estimated 10 million gamers. Beyond the reported **10 million who watched live**, a further 26 million – and counting – have since watched a stream of the event posted on YouTube.



CONVERGENCE

- These industries are converging with the Film, Esports, iGaming and Live Music, sectors
- Malta has already strengths and positive experiences in these sectors.
- Artificial Intelligence, Data Science, Virtual and Augmented Reality are high value growth markets, and are all technologies utilised by the games industry.
- With Malta being at the front of Blockchain innovation we can add more value to the VG sector which can improve underlying technology and revenue systems.

ESPORTS

- Sport and Games played in computer based competitions



ESPORTS

- Esports has become a global spectator sport 292M occasional viewers and esports enthusiasts worldwide.
- A multibillion dollar business in the making expected to generate \$1.5Bn in 2019
- Reaching the unreachable: the millennials
- >80% esports viewers are 18-34
- Convergence with iGaming.
- 2 International events in Malta 2018

POTENTIAL FOR MALTA



BUSINESS POTENTIAL

Game development/production

- Studios operating as digital manufacturing units
- High-skill, high-value added employment

Game publication/marketing

- Back-office activities for global market-players
- Skill, value-added and risk profiles similar to financial services

Esports events

- Niche tourism with global exposure opportunities
- Operations similar to music festival tourism events
- Global market is expected to double in three years



THE LOCAL HEROES



GROWTH IN MALTA VIDEO GAMES INDUSTRY

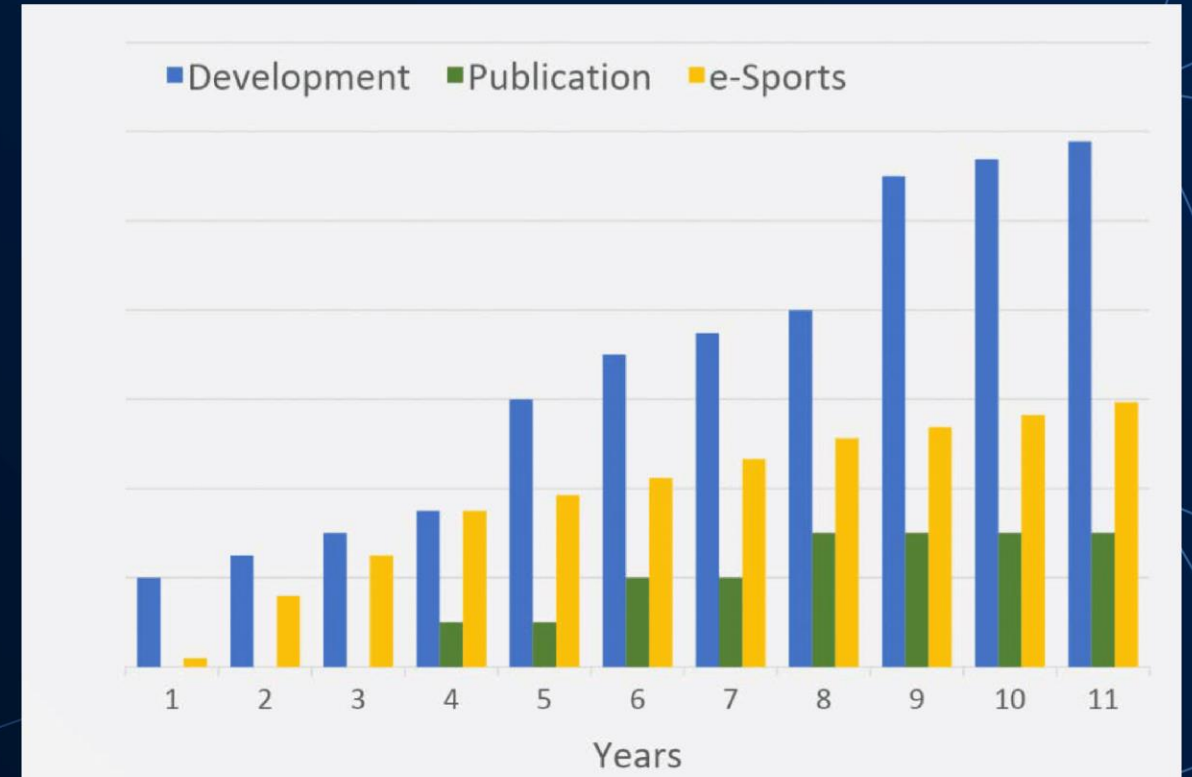
Employees



With over 200 new jobs created, these companies are providing exciting opportunities for young Maltese and exposing them to the latest platforms and practices to increase competitiveness

A POTENTIAL INDUSTRY GROWTH AGENDA

1. Big push into Esports and game production with synergetic effects and global exposure
2. Double-digit growth in first three years would attract publishing activity
3. Synergetic growth continues with stability attained within 10 years



OUR VISION

To directly generate between 2,200 and 3,000 FTE

Over 1% of Annual Economic Value Added (c. 120m in 2018 money) within 10 years

MEASURES TO EXPLOIT OPPORTUNITIES AND REDRESS COMPETITIVENESS GAPS



FINANCIAL INCENTIVES

Adopt EU-compliant models for tax rebates and grants to firms

Development of Video Games with a Cultural Dimension

- This is a scheme targeted to limited liability companies engaged in the development of video games with a cultural content. The maximum support per single undertaking may not exceed €200,000.
- In addition we are in the process of having this scheme extended to cover larger game productions in line with support frameworks offered in other EU countries.
- Leveraging of start-up, innovation and business competitiveness funding offered by Malta Enterprise.
- We are also looking at personal income tax incentives to attract international talent.

FINANCIAL INCENTIVES

Financial seed/risk capital to invest into game production

- Seeking to create a videogame venture capital investment fund, leveraging private industry investment

TALENT

Suitably qualified local talent

POLICY MEASURES

GamingMalta and EGIM are to organise and co-ordinate:

- Scholarships and work placements for Maltese students
- International Masters classes in Malta to promote educational tourism and centres of excellence

EDUCATION

POLICY MEASURES

Supporting UOM/MCAST Courses in BA Game Art and Visual Design (Game Design) and BA Interactive Media (Development of Game Engines)

- Imported curricula from international leading colleges, internships and practical units delivered by Game Design companies in Malta
- Investment in 3 new computer labs at MCAST ICA/ICT
- International Master Classes with THU or other International Colleges
- Establishment of an incubator for video game development startups within GamingMalta

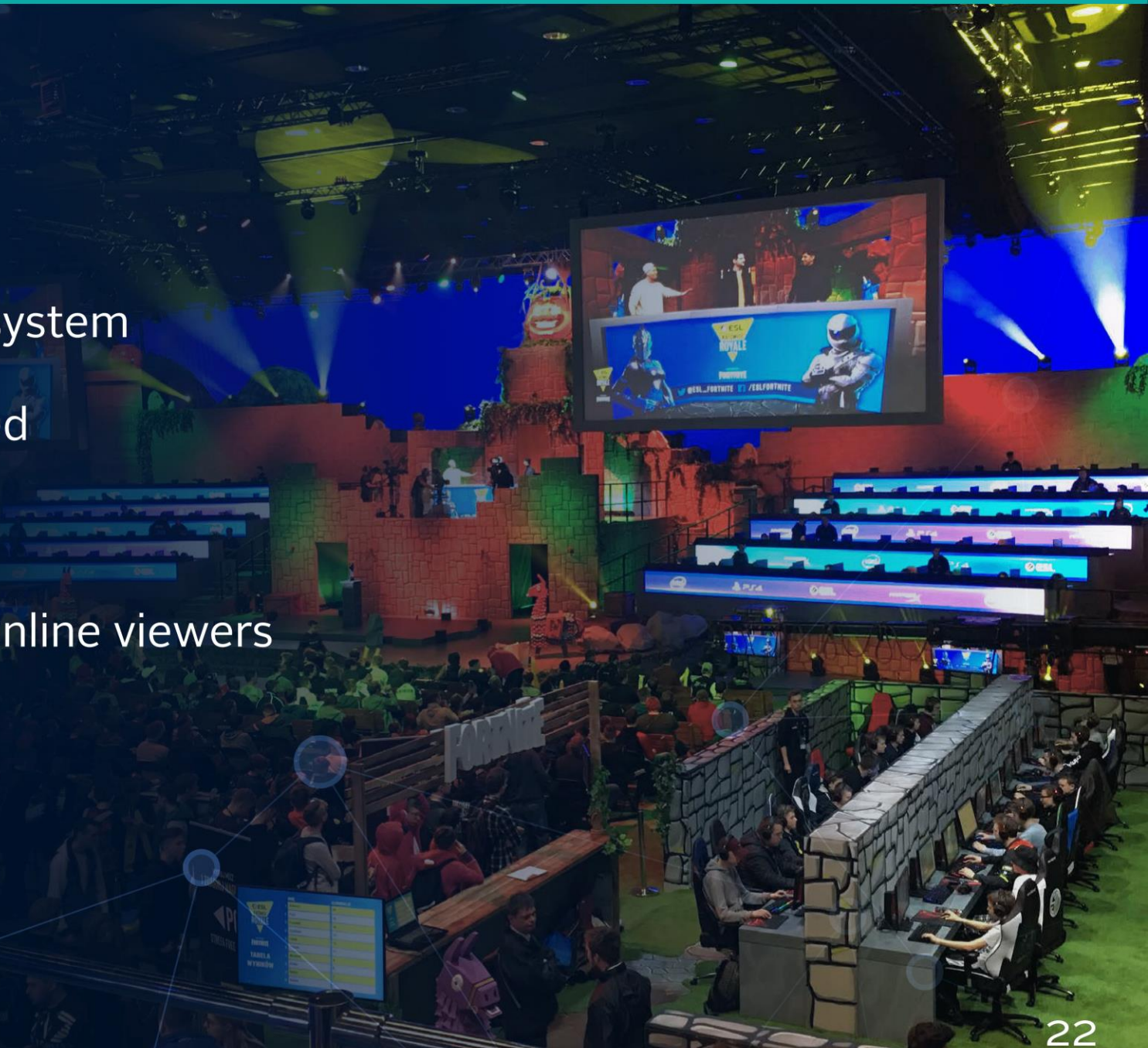
PROMOTION

POLICY MEASURES

- Malta to host thought leadership conferences and events to form collaborations and foster co-development with other international video games development regions.
- Promotion of Malta at International Games Development Conferences

ESPORTS

- We want to build a strong local ecosystem
- Help local talent to grow and succeed
- Attract International Competitions
- Promote Malta through millions of online viewers
- Attract niche tourism



ESPORTS

- Educate about responsible gaming and careers in Esports
- Provide new job opportunities in Digital Arts, Media and Esports Business
- Efforts to attract local and international Esports organisations to develop a multi year programme for a local grassroots esport ecosystem and the organisation of international events.



ESPORTS



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THANKYOU



GOVERNMENT OF MALTA