

The state of the European educational games sector

Evidence-based development of serious games for the educational sector:
challenges and perspectives

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EGDF unites

EGDF represents European game developers on a European level. It helps to build up policies that support the growth of the European game developer studios and foster the development of the entire digital ecosystem in Europe.

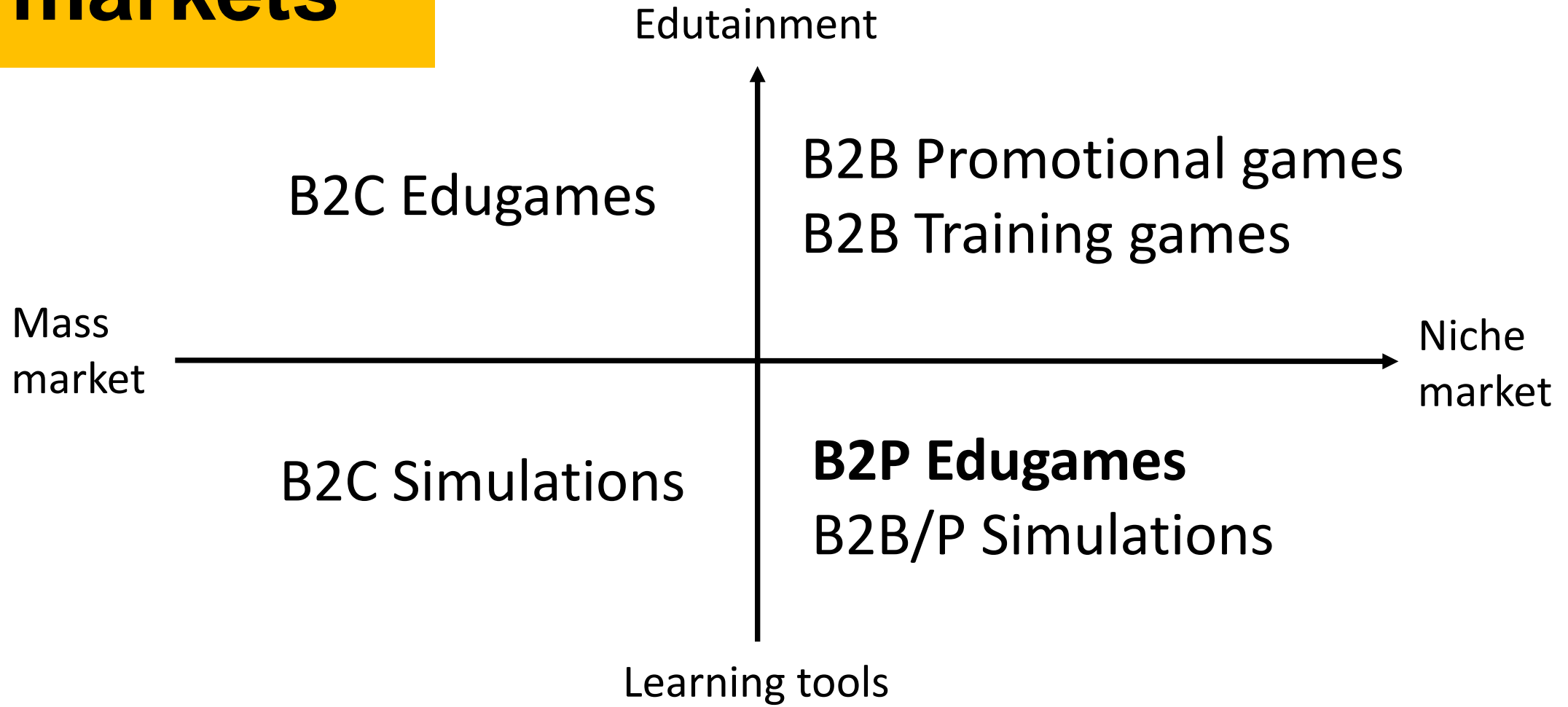
16 trade associations: EGDF unites national trade associations for game developers from 16 European countries: Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Malta, Netherlands, Norway, Poland, Romania, Spain, Sweden, Turkey and the United Kingdoms.

2000+ game dev studios: Together with its member associations EGDF represents more than 2 000 of more than **4 000 game developer studios in Europe**. Most of them are SMEs.

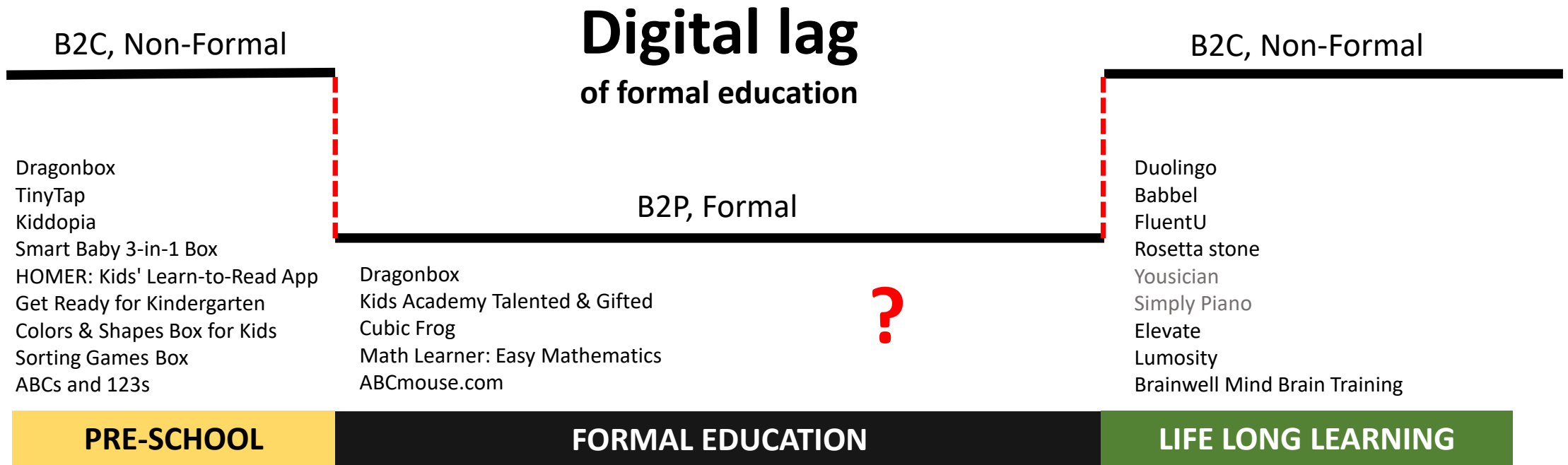
25 000+ people these 2 000 game studios employ more than 25 000 people. **All in all, game developers employ more than 55 000 people in Europe**. The European computer and video games industry, including distributors and students, encompasses more than 100 000 individuals.



Edugame markets



When it comes to games developed, the formal education is falling behind consumer markets



Top edu games and educational game like apps in US Appstore (Appannie, 11.9.2018)

Challenge 1: Validation

- **The same requirements should apply to all learning tools:** In the educational sector, traditional educational tools are rarely validated or tested before use in educational settings. However game-based learning and the use of games in the classroom is generally only accepted if the games have been certified or validated via scientific means.
- **We have the evidence, now we need the institutions:** In order to become recognised on the B2P markets globally, the possible certification/validation should be done by an independent public sector actor.
- **Wide enough focus:** In addition to learning outcomes, validation should ensure that edugames developed with public funding have a sustainable business model and they take into account all the requirements of the teachers and educational institutions, as well as the needs of the students (and their parents).

Challenge 2: Access to European Markets

- **Investment:** Public sector should use one or two percent of their annual investment in public education on new and innovative learning tools and games. These pilots should focus on achieving better learning results year after year.
- **Access to decision makers:** It is extremely difficult for an edugame focused developer to reach decision makers deciding what material is purchased to schools. Thus educame publishers are needed to bridge the gap.
 - **Example:** store.teachergaming.com
- **Market information:** On the European level, developers need updated information on how to access markets for educational material in each member state.
- **(Taxation:** A lower VAT rate for ebooks might create unfair advantage for digital books for education)

Challenge 3: Regulatory fragmentation

- **European/national standards for the implementation of GDPR:**
Europe finally has a unified data protection framework.
Unfortunately, it just moved the regulatory fragmentation from European to a local level as each school/school district has a different approach on its implementation.
 - Example: www.oppimisenuusiaika.fi
- **Widening the focus from data minimalisation to data portability:**
What learning data do we need about ourselves and how should we use it for optimising our Life Long Learning goals?

TOP5 edugame markets

Source: Metaari's 2018-2023
Global Game-based Learning
Market

- 1.China
- 2.USA
- 3.India
- 4.Japan
- 5.South-Korea

Thank you
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