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Strategies for Enhancing Revenue in the Swiss Video Gaming Industry

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by

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Executive Summary

The Swiss video gaming industry, although characterized by creativity and innovation, faces significant challenges that hinder its ability to maximize revenue. This thesis explores the current state of the industry, identifies the primary obstacles, and proposes strategic initiatives to enhance its financial performance.

The main objective of this study is to determine how the Swiss video gaming industry can generate greater revenue. Through a comprehensive literature review and primary data collected from interviews with industry stakeholders, the research highlights several critical issues. These include the lack of major studios and publishers in Switzerland, high development and operational costs, limited government support, and the need for more significant production scales and frequent game releases.

Findings from the interviews indicate that the current infrastructure and support systems are inadequate, significantly impacting revenue generation. The absence of major studios and publishers in Switzerland is a substantial barrier, leading to a fragmented industry with small studios struggling to survive. Stakeholders emphasize the need for increased government support to attract major players and foster a more robust ecosystem. The literature review corroborates these insights, showcasing how countries like Canada and France have benefited from strong government backing and a supportive environment for the gaming industry.

To overcome these challenges, the thesis recommends several strategic initiatives. Key among them is the necessity for the Swiss government to recognize the video gaming industry as a priority sector, similar to its approach towards other cultural industries. Enhanced financial incentives, such as tax reliefs and substantial funding, are crucial to support the development and marketing of high-quality games. Additionally, fostering collaboration between small and large studios and improving educational programs tailored to game development can help retain talent and stimulate industry growth.

In conclusion, while the Swiss video gaming industry has shown remarkable growth and potential, realizing its full revenue potential requires significant structural and financial support. By adopting the recommended strategies, Switzerland can position itself as a competitive player in the global gaming market, ultimately driving economic growth and cultural innovation.

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1. Introduction

The video game industry has undergone significant evolution over the past 50 years (World Economic Forum 2020). Initially, video games were confined to home consoles (Wallach 2022d). However, technological advancements have expanded the platforms on which games can be played, including PCs, mobiles, and consoles. Players now have the flexibility to choose different modes, such as "single player" for an immersive solo experience or "multiplayer" for engaging with gamers worldwide (Wallach 2022d). Additionally, various formats have emerged, such as virtual reality (VR), which uses specialized headsets to create interactive 3D worlds, and augmented reality (AR), which overlays digital elements onto the real world, blending the physical and virtual (Wallach 2022d).

In the early days, video games were often associated with children and young men and were not regarded on par with traditional entertainment forms like television, film, or music, which had a longer history and broader acceptance (Schudey, Kasperovich, Ikram, and Panhans 2023). Over time, technological advancements, the rise of online connectivity, and the development of more sophisticated games have transformed the gaming industry and altered public perceptions (Schudey, Kasperovich, Ikram, and Panhans 2023).

Today, the video gaming industry is one of the fastest-growing sectors in media entertainment, with a market value estimated at $184.4 billion in 2022 (Arora 2023). It generates more revenue than the movie and music industries combined (Arora 2023). In 2022, there were approximately 3.2 billion gamers worldwide, representing 40% of the global population (Howarth 2024). Video gaming, once primarily aimed at young men, is now enjoyed by all age groups and genders, including women, parents, and senior citizens. According to BCG, the average age of gamers today exceeds 30 years (Schudey, Kasperovich, Ikram, and Panhans 2023).

The future of the video gaming industry appears extremely promising. Experts predict that by 2030, the market value will reach $300 billion, with around 3.8 billion gamers globally (Batchelor 2023). Given this potential, this thesis seeks to explore the state of the video gaming industry in Switzerland. Data indicates that the Swiss gaming industry is characterized by creativity and innovation (RTS 2017). The industry has seen remarkable growth, generating a total revenue of 1.3 billion CHF in 2023 (PWC 2023 - 2027). Despite these impressive figures, they remain modest compared to larger gaming markets like the United States and China, projected to generate $78.01 billion (Us Statista 2024) and $94.49 billion respectively by 2024 (China Statista 2024).

While Switzerland's gaming industry cannot be directly compared to those of the US and China due to differences in population size and market scale, this thesis focuses on examining how Switzerland's gaming sector can enhance its financial performance. The aim is to identify whether the current systems in place are optimal or if there are factors hindering the industry's ability to maximize its earnings.

1.1 Research question

How could the Swiss video gaming industry generate greater revenue?

1.1.1 Specific sub-questions

- What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?
- What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?
- What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

1.2 Objective

The main objective of this thesis is to determine the current challenges and barriers within the Swiss video gaming industry and to identify strategies that can help generate greater revenue. By understanding these obstacles and devising practical solutions, this study aims to enhance the financial performance and overall growth of the industry.

1.3 Organization of the thesis

1.3.1 Literature Review

The section begins with an overview of video games, their history, and the global market, the value chain of the video gaming industry and his revenue stream. It then focuses on the Swiss video gaming industry, examining its value chain, ecosystem, and the challenges it faces.

1.3.2 Results

This part of the paper focuses on the primary data obtained through interviews. It is meticulously organized to ensure a clear and systematic presentation. Each interview is analyzed individually as a case study, with the aim of answering the sub questions related to the central research question.

1.3.3 Discussion

This part of the thesis analyzes the collected primary data from interviews and secondary data from the literature review to comprehensively address the main research question and associated sub-questions. It begins with the key findings from the interviews with Swiss video gaming stakeholders, followed by a summary of the findings from the literature review. Finally, the information gathered from both the literature review (secondary data) and the interviews (primary data) is compared to answer the sub-questions and provide recommendations.

2. Literature review

2.1 Definition of video games

According to theorists, there is no clear-cut definition of “video game” and thus it is common to refer video games both as technological support devices (i.e., hardware, such as consoles) and to the individual game itself (the software, the program) (González-Piñero 2017). While there isn't a universally accepted definition for the term "video game", certain fundamental aspects have been recognized by theorists in the gaming industry (González-Piñero 2017). These key elements will give us a clearer idea of what a video game really is, why it's so popular, the feeling of a player when a gamer plays video games and in which platforms it can be played and so on (González-Piñero 2017).

First of all, we have the definition proposed by Claire & Dubois and Rodriguez which are more generic definitions regarding the video games (González-Piñero 2017).:

“Interactive animated images accompanied by an environmental sound and an interface (Claire & Dubois, 2011, p. 16).” (González-Piñero 2017)

Here they are referring video gaming as an animated world surrounded by environmental sound and where the player can actively engage with the game and influence its content. The term “interactive animated” is very important. The fact that by playing video games you can enter in a virtual world may be one of the reasons why video games are so popular with all age groups today (Links 2023).

Indeed, in some ways, video games offer a safe and entertaining way to explore virtual worlds, have fun and engage in activities that may not be possible in real life (Links 2023). By offering players this sensation, they get a good dose of escapism, immersing them in the game and allowing them to forget for few moments the various problems they face in everyday life (Links 2023).

By “environmental sound”, they are mainly referring to sound like footsteps, gunfire, background music and so on. According to the type of game, gamer will experience different type of sounds sound and this will help to bring realism to the game. They also mention that to play the video game, will need an interface. An interface is how the player can be able to interact with the game. It can be a joystick, a keyboard, a mouse, or any other device for entering commands (Rsg 2024).

*“All electronic games with an essentially playful objective played with the use of a computer, through diverse media (Rodriguez, 2002).” (*González-Piñero 2017)

Rodriguez indicates that the main objective by playing with video games is to have fun (González-Piñero 2017). In the sense, that when a player plays a video game, it must allow him to enjoy himself, to go through different types of states, whether of excitement, danger or amusement, whether it is alone or in online with friends. And the beauty of video games is that they allow you to experience all these types of emotions without real-life risks (Adair 2023). He is also mentioning that the gaming can be played in various platforms, like computer, pc or even on smartphone (Mozolevska 2023).

Then we have Darley and Levis who are proposing a more complete and closer definition by describing the video game as (González-Piñero 2017):

"*It is an enveloping activity with a specific goal, in a micro-world controlled by relatively simple and clear norms (Darley 2000, p. 164).”* (González-Piñero 2017)

“A game consists of a computing environment on a screen whose rules have been previously programmed (Levis, 1997, p. 27).” (González-Piñero 2017)

There are 3 main ideas that should be retain through the definition proposed by Darley and Levis. The first idea is that each of games have specific goals or things you need to achieve while playing. In a way that is the beauty of each game, and which characterize them. Indeed, usually, players will play games because they believe that goals are meaningful. The goal will really depend on the game they play. For example, in a game like FIFA, the objective will be to score more goals than your opponents (Gilbert 2023), whereas in a game like Fortnite, it will be to eliminate all your opponents and remain as the last man standing in the battle (Gilbert 2023). Then, the second idea is that usually it is very easy to understand the rule of a game, gamers will know very quickly what they can and can't do. The third idea is that video gaming is an enveloping activity, in the sense that when gamers play video game, usually, they will have tendency to be totally involved in it (Links 2023).

“Videogames [unlike simulations] are artistic representations of a phenomenon (...). The designer simplifies this phenomenon deliberately to focus the player's attention on those important factors (...). The games create a fantastic representation, not a scientific model (p. 8). Chris Crawford (1982)” (González-Piñero 2017)

Here Crawford puts forward two central ideas of video games in his definition (González-Piñero 2017):

The first is the manipulation of the player's attention. In other words, game developers intentionally direct the player's attention to ensure that they notice certain important elements and become attached to them. It's like a film director directing your attention to crucial scenes in a movie. The 2nd idea is that video games don't have to be super-realistic - they can be imaginative and fantastic or make the game experience more enjoyable and interesting (Links 2023).

2.2 Video gaming industry

2.2.1 History of Video gaming industry

The origins of video games date back to the late 1940s, and more precisely to 1947, when Thomas T. Goldsmith Jr. and Estle Ray Mann filed a patent entitled "Cathode-Ray Tube Amusement Device" (Kowert, Quandt 2016). This device simulated artillery fire on an oscilloscope screen. Although considered the first known electronic game with an electronic screen, it is important to note that this device was purely analog and did not run on a computer. Nevertheless, it is recognized as an important precursor in the history and subsequent development of video games (Kowert, Quandt 2016).

Then, it was mainly in the early 1950 that the potential of the gaming on computer was explore (Facts 2022). It was a time where computers were not widely accessible to the public. At that time, it was more usual to find in place like universities and big corporation. Computers were mainly used by people like researcher, scientist, engineer etc (Facts

2022). It is during that periods that some of that some of the first simulations gaming were released like Nim in 1951, Oxo in 1952 and Tennis in two in 1958 (Facts 2022). By the way, Tennis for two game is often considered as the first video game prototype and this is due to the fact it was the first game which was having a graphical motion display (not the case with Nim and Oxo) and a game which was using the computer processing (not the case with Cathode-Ray Tube Amusement Device) (Kowert, Quandt 2016). But none of these 3 games have ever been played on a large scale or commercialized. These games were either produced as prototypes or were exhibited to the public at isolated events (Kowert, Quandt 2016).

The game that revolutionized the industry was the video game "Spacewar", released in 1962. This game is often considered as the first to have been designed for commercial purposes, and the first to be playable on multiple computers (Kowert, Quandt 2016). Thus, the game could be played by two players on separate machines, representing the first form of multiplayer interaction in the world of video games (Kowert, Quandt 2016).

In 1972, the sector underwent a major transition (Facts 2022). Ralph Baer has played an important role in this evolution; he is often referred as “The Father of video games” (Facts 2022). He has notably released the first game home console (multi-program video game system that could be played on a television set) under the name of Magnavox Odyse (Facts 2022).

In the same year, another company called Atari was created (Kowert, Quandt 2016). This company will totally shift the dimension of the video gaming industry and will dominate the industry during the next decade. It is typically the company behind the release of the arcade game “Pong” in 1972. Pong is often considered as the first video game who has succeed commercially (Kowert, Quandt 2016). Although the game's concept was very similar to that of Tennis in Two, released in 1958, the difference lies in the game's accessibility (Kowert, Quandt 2016). Indeed, thanks to this game, Atari has revolutionized the video game industry by integrating a computer and a display screen into a single device, encapsulated in a box with a coin slot (Kowert, Quandt 2016). Thus, for the first time, people could experience video games by inserting coins, making this form of interactive entertainment accessible to a wider audience at an affordable price (Publisher 2016). Pong kicked off the arcade gaming phenomenon, paving the way for the explosive growth of this captivating form of entertainment. In the late 1970s and 1980s, the industry underwent a period often referred to as the "Golden Gaming Arcade period" - as the name suggests, it was the era of arcade games (Publisher 2016).

Games such as Space Invader and Pac Mac, produced by Japanese companies, became a worldwide phenomenon. In fact, in Japan, Space Invader was so popular that it caused a national coin shortage (Publisher 2016). Thanks, to these games, the Japanese gained worldwide popularity. During that period, sales generated by the American industry rose sharply going from $308 million (1978) to $2.8 billion (1980) (Publisher 2016). However, the golden age soon came to an end with the video game crash of 1983 (Publisher 2016). The industry's revenues, which had peaked at around 3.2 billion dollars, plummeted to 100 million in 1985 (Facts 2022). The crash was attributed to several factors, including the poor quality of the games, a saturated game console market, increased competition from computer gaming, and an abundance of poorly designed and over-hyped games. Lasting for a couple of years, the crash resulted in the bankruptcy of numerous home computer and video game console companies including Atari (Facts 2022).

In 1985, the industry was able to recover from this crisis and the Japanese company Nintendo has play a big role. Indeed, to further control game production, Nintendo introduced proprietary circuits that prevented unlicensed games from being played on its console (Publisher 2016). This strategy has helped Nintendo dominate the home video game market in the U.S., with a significant portion of households owning a Nintendo system. Nintendo will typically release the game “Super Mario Bross” a game which will be one of the most sell and influential game of all time (Publisher 2016).

In the 1990s, the gaming industry underwent significant transformations like the transition from 2D graphic to 3D graphics. The introduction of 3D graphics transformed gaming in some ways, bringing spatial realism, and diversified game genres. Games like Super Mario played a key role in this, enabling real-time rendering and laying the foundations for the visually rich and varied gaming experiences we enjoy today (Landesmuseum 2020).

This period was also characterized by consoles war, it was mainly between Nintendo’s Nintendo 64 and Sega’s Saturn. In 1994, Sony will enter the gaming market by releasing PlayStation. The PlayStation will quickly impose as become a major player in the landscape of console gaming. This era will also be characterized by the popularity of PC gaming, special thanks to games like Warcraft and Doom which are considered as iconic games and have left a lasting impact on the broader landscape of PC gaming (Landesmuseum 2020).

While online multiplayer gaming existed in various forms before the late 1990s, this period marked a significant shift toward more seamless and engaging online experiences. The subsequent decades would witness further advancements, leading to the robust online multiplayer gaming culture we have today (LG 2023).

The 2000 s will be characterized by significant advancements in gaming technology, particularly with the expansion of high-speed internet this has led the rise of online multiplayer gaming and the introduction of HD (High Definition) gaming and consoles (LG 2023).

Regarding consoles, in 2000, Sony will release the PlayStation 2, this console will become the best-selling console of all time (Ritcher 2013). In 2001, Microsoft will make their entry by launching their home console (Xbox). The Xbox will make a substantial impact on the industry as it will significantly improve and popularized online gaming on consoles. The 2000s were dominated by Sony, Microsoft, and Nintendo, who released a whole series of consoles over the years. All these consoles had a profound impact on the gaming industry, shaping trends, influencing gaming experiences and expanding the gaming audience (Landesmuseum 2020).

This era was also characterized by the rise of mobile games. Indeed, although "Snake", the game released in 1997, was a worldwide success, it is estimated to have been installed on over 400 million devices (Landesmuseum 2020).

From 2010 to now, the industry was characterized by technological advancements, diverse gaming experiences, and a global community (LG 2023). Next-gen consoles and the rise of esports defined the era. Diverse gaming released during this era will achieve unprecedented popularity like Minecraft in 2011 or GTA 5 in 2013 which are two most sell game. Innovations like VR and cloud gaming hinted at the industry's future direction (Hewish 2023). This period will particularity characterized by the increase game influencer which are people who have get popularity by creating content related to gaming on platform like YouTube and Twitch. These influencers have contributed

enormously to the success of the gaming industry and to the building of a gaming community (LG 2023).

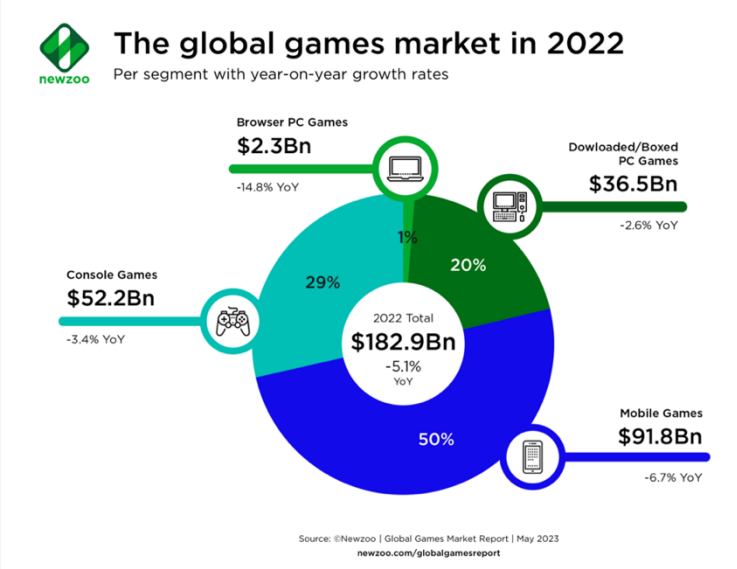
With future games that are eagerly anticipated by gamers, such as GTA 6, (experts predicts that it will collects 1 billion $ in 24 hours) (Bansal 2023) and future consoles that will enable gamers to have better experiences, there's no doubt that this industry has no end to growth (LG 2023).

2.2.2 Global market overview

The video game industry is a multi-billion-dollar business. But it would be interesting to have an overview of the video game market and find out more about such things as which platforms, which countries, which companies, which types of games generate the most money for the industry...

Market per segment

Figure 1 - Mobile is the biggest segment



Source: (Newzoo 2024)

Today, games are mainly played on 3 different platforms which are console, pc, and mobile. As indicated by the chart of Newzoo (Figure 1), in 2022, the segment which is bringing the most revenue is the mobile one (Newzoo 2024). By generating $91.8 billion, mobile games alone account for 50% of the gaming industry's revenues. This percentage is not surprising. Indeed, since the explosion of smartphones with the launch of the first iPhone in 2007 and the widespread availability of broadband internet, the mobile gaming market has exploded (Sano 2022). One of the main reasons for the success of this segment is that mobile gaming has become more accessible and convenient than traditional gaming platforms like pc and console (Sano 2022). It means that with just smartphone in your hand, someone can play a game (Sano 2022). Another reason for the success of this segment is due to the Free-to-Play (F2P) model that they proposed in this segment. This business model allows players to download games and play them

for free (Zheng 2022). Video game developers used to earn money mainly from advertising, with players able to spend money on virtual items, upgrades, or other game features. This model made games accessible to a wide audience, enabling more people to try and play games without any upfront cost (Zheng 2022). While mobile gamer is looking for more casual game, many mobile games in these genres are designed to be easy to learn and pick up, offering short periods of fun and relaxation rather than requiring a significant time commitment (Adjust 2022). The diversity of these game genres caters for different tastes: like puzzles to rack your brains, role-playing games to build a character, adventure to explore, strategy for those who like to plan, and idle games for those who want to check and see their progress without playing all the time (Adjust 2022).

Console is the 2nd segment which is bringing the most revenue (Newzoo 2024). They are followed by the Pc which is subdivided in 2 categories which are browser pc games and download/ boxes pc game. “Brower pc games” are games which can be play directly on browser like Google, there is no need to download or to buy a CD while “Download/Boxed PC games” are like traditional console games, in the sense that you need to buy or download the game and then put it in the pc to play the game (Newzoo 2024).

Figure 2 - Top 10 Video Game Markets by Revenue

	Market	Revenue (USD)	Players
1.	United States	$46.4B	209.8M
2.	China	$44.0B	696.5M
3.	Japan	$19.1B	73.4M
4.	South Korea	$7.4B	33.3M
5.	Germany	$6.5B	49.5M
6.	United Kingdom	$5.5B	38.5M
7.	France	$4.1B	38.8M
8.	Canada	$3.3B	22.0M
9.	Italy	$3.1B	36.1M
10.	Brazil	$2.6B	102.6M

Source: (Newzoo 2024)

When it comes to the geographical areas where video games enjoy the greatest popularity, with a market revenue of $84.8 billion and a market share of 46%, Asia-Pacific is clearly in the lead (Newzoo 2024). This dominance is due in part to countries such as China, Japan, and South Korea, which by generating $44.0, $19.1, and $7.4 billion respectively in 2022, rank at 2nd, 3rd and 4th position of countries generating the most revenue in the video gaming industry (Newzoo 2024).

North America constitutes the second- largest video game market ($49.7 billion). Almost all revenues from North America come from the United States. In fact, by generating $46 billion in revenues by 2022, the United States is the top revenue-generating country in the video gaming industry. Then are followed by Europe ($33.3 billion), Latin America ($8.4 billion) and lastly of Middle East & Africa market ($6.8 billion) (Newzoo 2024).

One of the main reasons for the massive proportion generated by countries like the US, China, Japan, and South Korea is that they have large populations with a high percentage of gamers. This enables them to create a significant consumer base for video games (Newzoo 2024). As you can see from the stat proposed by Newzoo on the image, with 699 million gamers, China is the country with the highest number of gamers in the world, while the USA, Japan and South Korea have 209, 73 and 33 million gamers respectively (Newzoo 2024).

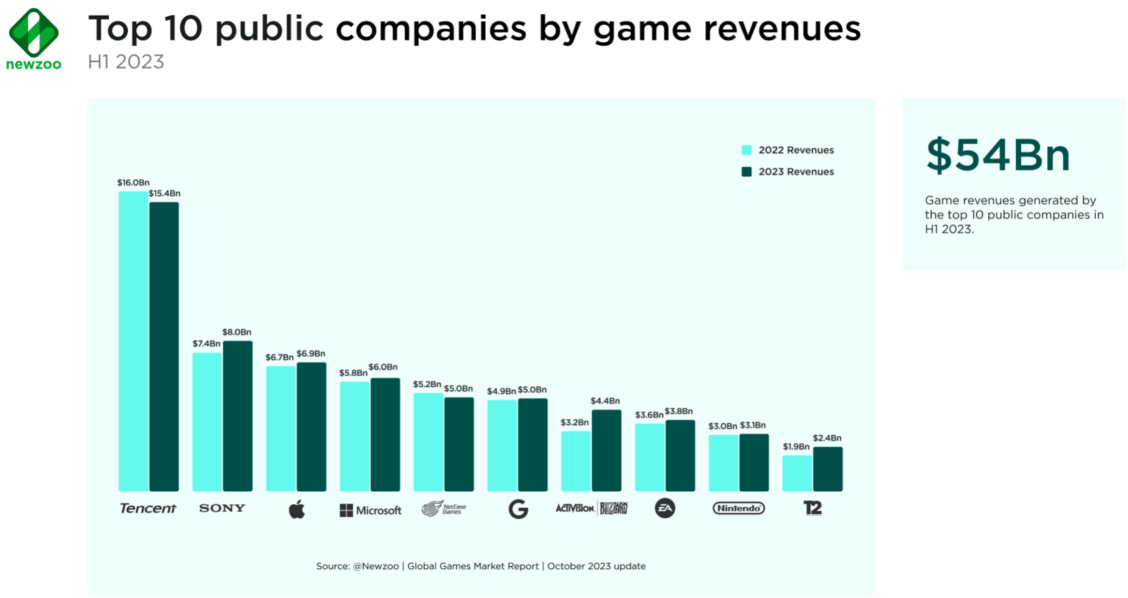
Then the other big point is that all these countries have a strong gaming culture that has greatly influenced the global gaming industry (Patterson 2024). These countries have a rich history of producing popular and successful games, fostering a deep-rooted cultural affinity towards gaming that fuels both domestic consumption and international appeal (Wolf 2017).Taking the US as an example, the country is home to some iconic game developers like Blizzard Entertainment, Electronic Arts, and Rockstar Games who have created globally renowned titles such as The Sims, Grand Theft Auto and World of Warcraft (Krambs 2024). The US is also a hub for Esports events and gaming conventions like E3 which is an expo which served as a cornerstone of the gaming world, by showcasing new games, technology, and industry innovations. All this demonstrate the showcasing of the country's deep involvement in the gaming community and probably contributing a lot for the country (Appinio Research 2024). While a country like Japan has been a major influencer in the history of the video gaming as well. Japan has contributed enormously to the development of such iconic games as Super Mario, Pokémon, Sonic and The Legend of Zelda (Prisco 2017). These games have not only been critically acclaimed but have also attracted a great deal of international interest, demonstrating Japan's prowess in creating popular and successful game franchises (Prisco 2017). Other factors which are contributing to their countries are their strong help got from the government. Indeed, these countries have supportive environments for the gaming industry. They have policies that foster innovation and creativity within the sector contribute to its growth and success. Indeed, typically, if we take the US as an example, the sources provided by USGrants.org highlight the availability of funding opportunities for gaming service providers in the USA (USGrants.org 2024). We can see that through tax incentives and subsidies, the government really aims to encourage innovation and growth within the gaming industry. Notably, the government offers a variety of funding opportunities designed to support initiatives such as the development, operation, and evaluation of entertainment education programs, including those related to games, entertainment applications and education (USGrants.org 2024). These funding opportunities underline the government's commitment to promoting creativity, investment, and talent development in the games sector. So, there's no doubt that all this support is making a huge contribution to the development of the US gaming industry (USGrants.org 2024).

We can also take the example of South Korea, where government support has played a key role in the growth of the South Korean gaming industry. Investment in the IT sector has led to the emergence of online platforms, the availability of affordable personal computers and widespread access to high-speed Internet (Fouad 2023). This support has contributed to the spread of PC bangs across the country, providing fertile ground for the success of games such as Starcraft and Lineage (Fouad 2023). In addition, the South Korean government has taken proactive steps to support the gaming industry, including relaxing regulations, providing more subsidies for start-ups, restructuring the industry, and supporting both the gaming sector and e-sports leagues (Kang 2020). These efforts are aimed at harnessing the economic potential of the gaming industry, particularly in view of its rapid expansion in all around the world (Kang 2020)

Market by companies:

Based on the report coming from Newzoo, in the 1st half of the 2023, by generating $ 15.1 billion the company who has generated the most revenue is Tencent (Figure 4) (Newzoo 2024). Tencent is Chinese multinational company active in the sector of entertainment and technology sector. It has as core business gaming, social media, e-commerce (Tbh 2023). Their dominance in the gaming is primarily due to its vast portfolio of popular games like League of Legends, Honor of Kings, PUBG Mobile; of excellent strategic investments in other gaming companies like Riot Games, Epic Games, Activision Blizzard, and dominance in the Chinese market (Tbh 2023). Sony, the Japanese technology, and electronics firm, comes second with approximately $8.08 billion, followed by Apple ($6.9 billion), Microsoft ($6 billion), NetEase ($ 5.0 billion), and Google ($ 5.0 billion) (Newzoo 2024). Regarding the case of Apple, the company generates revenue mainly through its App Store ecosystem (Wallach 2022). According to the data, the company charges around 30% commission on all in-app expenses, including in-app purchases, subscriptions, and premium app fees. All of this has largely contributed to its revenue growth in the gaming sector over the years (Wallach 2022). Although Apple does not produce its own gaming hardware or software, Apple's reduction in transactions within the App Store has made it one of the top revenue generators in global gaming content revenue (Haider 2022). Typically, as an example, in 2020, Apple has generated an estimated revenue of $13.5 billion in the gaming sector (Haider 2022). Google generates revenue mainly through Google Play Store in the similar way as Apple (Haider 2022).

Figure 3 - TOP 10 Companies generating the most revenue in the gaming industry in 2023



Source: (Newzoo 2024)

2.2.3 Value chain

Understanding the value chain of the video gaming industry is crucial for identifying revenue-enhancing opportunities. As illustrated in Figure 6 (González-Piñero 2017), the industry's value chain comprises several key players whose roles and interactions are essential for game development and distribution. A thorough analysis of these components can reveal strategies to boost the Swiss video gaming industry's revenue.

At the foundation of the value chain are hardware manufacturers, who develop and produce the platforms essential for video game play. These platforms include game consoles, PCs, and mobile devices (phones and tablets), with specific manufacturers dominating each category (González-Piñero 2017). For instance, console platforms are primarily developed by companies such as Sony and Microsoft, known for their PlayStation and Xbox series respectively (Schneider 2019). PC gaming relies on components from manufacturers like Nvidia or Convair, while mobile gaming platforms are typically developed by companies such as Apple and Samsung (Koss 2023).

Figure 4 - Value chain of the video gaming industry



Source: (González-Piñero 2017)

Following the manufacturers in the video gaming industry's value chain are the game developers, who are arguably among the most crucial contributors. These developers are the creative forces behind the games, responsible for elements such as story writing, design, and programming (González-Piñero 2017). It is essential to recognize that creating a video game is not the task of a single skill set or discipline. Often the creation of a game needs the collaborative effort of a diverse and multidisciplinary team encompassing areas such as art, music, programming, and effective management to produce a well-designed and cohesive game (Ramadan, Widyani 2013).

The landscape of game developers varies widely in terms of size, structure, and business models, generally falling into one of three categories: Indie developers, AA, AAA developers. Indie developers typically work with smaller budgets and teams, focusing on innovation and artistic expression, whereas AA and AAA developers operate with larger budgets and teams, aiming to produce high-quality, commercially successful games (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

The indie developers are often characterized as a smaller, independent team of game developers (fewer than 50, sometimes it can even be one person) that operates without the financial backing of a larger video game publisher (Diver 2016). These developers are often known for their autonomy, creativity, and will often have tendency to work on smaller-scale projects than AAA studios. Even though that the fact that they work independently with limited budget comprised some disadvantages, it has also is own benefits (Diver 2016).

Respected indie game developer Lucas Pope, whose games have garnered critical acclaim and BAFTA awards, including 'Best Game' for both 'Papers, Please' and 'Return of the Obra Dinn,' once stated (Diver 2016):

“For me, being independent just means I can make whatever I want, whenever I want. It’s a luxury I feel very fortunate to have.” (Diver 2016)

As mentioned by Pope, one of the biggest advantages from being an independent developer is that they have greater creative freedom in the production of their games (Diver 2016). This freedom gives them the opportunity to address specialized audiences and explore innovative ideas that might be considered too niche or unconventional by larger entities. Whereas game developers with big budgets can't afford to take risks in their development, because their high development costs somehow force them to try and reach as many people as possible to maximize sales profits (Keijser 2012).

It's also worth mentioning that the fact that independent developers are working on smaller projects than AAA studios doesn't necessarily mean that their games will earn less than AAA games. Minecraft is undoubtedly the perfect example that proves this (Diver 2016). Minecraft was an indie game which was released by Markus Persson (Founder of Mojang Studios) in 2011 (Diver 2016). The game's concept of Minecraft is to mine resources, craft tools and build structures. With no specific objectives, through this game players have the freedom to create their own experiences through exploration, survival, and imaginative construction in the game's pixelated landscape (Landin 2023). At his release the game will be an immediate success (Goslin 2019). The game was such a monumental success that in 2014, Microsoft decided to buy Mojang Studios from Persson for $2.5 billion (Diver 2016). Although after the buyout, Minecraft went from being an independently developed game to one under the aegis of a major video game company. There is no doubt that breakthrough of games like Minecraft contributed enormously to the acceptance of indie gaming in the market (Diver 2016). Today, with over 300 million copies sold worldwide, it is the second best-selling video game of all time (Nguyen 2023).

While the “AAA” game developer is quite the opposite of indie developer (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). These developers are generally associated with large-scale projects characterized by high production values, large budgets, and considerable marketing efforts. The funding for AAA projects is usually provided by major publishers, which enable developers to make ambitious, technically advanced games (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). Unlike indie developers, AAA developers will have a much larger team structure. They may contain teams comprising hundreds or even thousands of different professionals’ experts which will focus on various disciplines such as sound, programming animation, graphics, marketing, game design, etc (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

Typically, these examples underscore the notable scale of personnel involved in the development of AAA games. Based on the data, the game “Call of Duty: Modern Warfare 2” released in 2009 has listed more than 200 people in the end credit of their game. Or we could also mention the famous game released in 2013: "GTA 5". With a budget of $265 million, this game is considered as the most expensive game in history. More than 500 people have contributed to the making of this game (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). The main reason for the large number of employees is that, in general, AAA games are characterized by their great complexity, whether in terms of advanced graphics, sophisticated game mechanics, cinematic stories, character design and so on. All these elements require the involvement of a large number of employees to bring these ambitious projects to fruition (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

Then we have the publishers. They play crucial in this value chain (González-Piñero 2017). They will be the one who will act as the intermediary between the game developer and the consumer. They can be defined as company or entity which will be responsible to oversee and manage various aspects of game’s development such as financing, marketing, distribution (Azsan 2023). Apart from all these they also assist in securing licenses, managing intellectual property, and ensuring that the game reaches its target audience through various platforms and distribution channels (Azsan 2023).

The biggest video game publishers are primarily located in countries like United States, Japan, and China (Game World Observer 2023). These countries are home to some of the largest gaming companies and industries. For example, the United States is home to major publishers like Sony Interactive Entertainment, Microsoft Gaming, Electronic Arts, Activision Blizzard, etc. (Game World Observer 2023). China has prominent publishers like Tencent Interactive Entertainment which is known as the biggest publisher in the industry (Newzoo 2024). Japan has publishers like Nintendo, Square Enix, Namco Entertainment, Capcom Sega (Statista 2024d).

One of the main reasons for the success of AAA titles is the substantial financial support provided by large publishers (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). This support covers both the development and marketing phases of a game. By partnering with a major publisher, developers gain access to extensive resources that can greatly enhance both the quality of the game and its global market presence (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). For instance, the publisher "Rockstar" allocated over $137 million specifically for the development of GTA 5 (Diver 2016). In a similar vein, "Activision" committed over $200 million to the marketing efforts for Call of Duty: Modern Warfare 2 (Diver 2016). Such substantial investments from prominent publishers not only ensure the production of high-quality games but also fund aggressive marketing strategies. This dual approach significantly boosts the game’s visibility across various markets, driving its overall success.

While AAA may have some of the disadvantages of a large publisher, such as lack of freedom, it's important to mention that the publisher, is omnipresent, from the design (financial support) to the distribution of the game (Azsan 2023). Their contribution allows the developer to concentrate solely on the development of the game, and he doesn't have to think about things like financing, promotion, how he should proceed to maximize the accessibility and global reach of his games (Azsan 2023).

On the other hand, independent developers often navigate the industry without a traditional publisher. While this gives them greater creative freedom, it also imposes additional responsibilities. Independent developers generally finance themselves through alternative means, such as crowdfunding or personal investment. They also often have to manage marketing and distribution independently (Diver 2016).

After the publisher in the industry's value chain comes the distributor (González-Piñero 2017). Distributors act as intermediaries between the publisher and the retailer. Their main responsibilities include managing warehousing (such as storage and good inventory management), transportation, and the delivery of final games to retailers. Their goal is to ensure a smooth flow of products within the supply chain (González-Piñero 2017). Many publishing companies have their own distribution networks to deliver products directly to retailers (González-Piñero 2017). This includes both physical distributions, where boxed copies of games are shipped to stores, and digital distribution, where games are made available for download (González-Piñero 2017).

One of the perfect examples of a digital distributor is “Steam.” Owned by Valve Corporation, Steam is a pivotal digital distribution platform for PC gaming that has fundamentally transformed the video gaming industry since its launch in 2003 (Yuen 2021). It serves as a central hub where users can purchase, download, and update games, offering a vast library from major publishers and indie developers alike (Yuen 2021). This model has significantly streamlined the process for both consumers and developers, eliminating the need for physical copies and providing continuous updates and support (Yuen 2021).

Steam changed the gaming landscape by implementing features such as automatic game updates, digital rights management, and anti-cheat measures. These innovations have enhanced the user experience and maintained game integrity. Steam's community features, like forums, friend lists, and user reviews, foster a vibrant gaming community and facilitate social interaction among gamers (Yuen 2021).

Financially, Steam's impact is immense. In 2019, the platform had over 1 billion registered accounts, with 90 million active users and upwards of 14 million daily concurrent users (Yuen 2021). In 2023, Steam continued to demonstrate its market power. Over 500 games on the platform earned more than $3 million in gross revenue, doubling the number from 2018 (McEvoy 2024). Furthermore, the platform achieved a milestone by reaching over 33 million concurrent users for the first time. Notably, more than a quarter of new releases on Steam were from studios launching their first titles on the platform, showcasing its appeal to emerging developers (McEvoy 2024). Additionally, Valve reported that 11.8 million players participated in Steam Playtests in the previous year, reflecting a 41% increase from 2022 (McEvoy 2024). This growth underscores Steam's critical role in engaging users and supporting game development and testing (McEvoy 2024).

Despite its dominance, Steam's position is being challenged by Epic Games, which offers a more favorable revenue share to developers and leverages its popular game Fortnite to attract users. The competition between Steam and Epic Games represents an ongoing battle for market dominance, highlighting the dynamic and competitive nature of the digital distribution market (Yuen 2021).

The final link in the value chain is the retailer. By making available in their stores all the accessories linked to the video game industry, they enable gamers to buy the hardware or software they want. Retails like Walmart are a distribution channel that facilitates direct sales to consumers (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). Because it gives them visibility and accessibility to their products. This visibility and accessibility are essential to reach a wide audience and maximize the overall impact of the industry (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

However, this value chain model no longer seems relevant. Indeed, in recent years, consumers who once tended to buy their games in physical copies, now prefer to buy their games in digital copies (González-Piñero 2017). First, it's important to know what is meant by online digital distribution in the context of the video game industry. Online digital distribution is simply a method of distributing games over the Internet, enabling players to play video games without having to buy physical copies such as CDs or DVDs (Blancaflor, San Migugel 2018). This method allows consumers to buy games online and download them directly to various platforms such as game consoles, PC's or even phones (Blancaflor, San Miguel 2018). This method is so beloved and preferred to the physical medium, that for the first time in the gaming industry, Sony and Microsoft, the two main console manufacturers, have respectively released a console (Playstation 5 and Xbox Series X) that only accepts digital content (Blancaflor, San Miguel 2018).

This method has several advantages. First, it's more convenient for consumers, who can buy their games at any time, which is not the case with physical copies (Karthikeyan 2021). Creators and publishers also prefer digital products to physical ones because they can use effective marketing strategies, such as substantial discounts on digital platforms (Karthikeyan 2021). And that's because digital stores don't have to bear the extra costs, such as space rental and staff management. This enables them to offer attractive prices to their customers. So even consumers who prefer to play games via physical copies will tend to switch to digital copies, as games will be cheaper online (Karthikeyan 2021).

The main functions that will be impacted by this distribution method are distribution and retailers. Indeed, since publishers would be able to publish video games directly on the various platforms, there would be no need for video game distributors and retailers (González-Piñero 2017).

Distribution of costs within the player

While this may vary from country to country, in general the average console game costs over $60 (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). We have seen that there are 5 major players in the value chain of the video game industry (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). Now it would be interesting to know how much each of these 5 players will earn from the sale of a video game. Let's take the example of a video game that sells for $60 (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). In fact, the breakdown is quite simple: each of the players will earn the same amount of money on the sale of a $60 console game, whether it's the hardware manufacturer, developer, publisher, distributor or retailer; they'll all earn $12 each on the sale of a game (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). Although PC games will be cheaper than console games, they will have the same type of repatriation

as console games (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). The reason why console games are more expensive than PC games is due to the fact that console game developers have to pay fees to console developers and due to the fact that pc's are easier to copy illegally (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

2.2.4 Revenue stream in the video gaming industry

To answer to the research, it will be prenominal to understand how the revenue is generated within the industry. The industry has several revenue streams. Here are some keyways they make revenues:

Video game's sales:

Video game sales are the main ways by which the industry generates revenue. As previously mentioned, gamers can use two methods to play video games. Either they buy physical copies of the games from stores like Walmart, or they opt for a more convenient method, namely digital copies. Secondly, it's important to mention that some game categories generate more revenue than others, and it's often the same categories that generate the most revenue in the film and music industries, industries to which video games are often compared because of their similarities in many respects (Rootham 2023).

One of their greatest similarities is that most of the revenue generated by the video game industry comes from AAA titles (games made with a big budget) (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). The video game industry, like the film and music industries, operates in a world were creating something exceptional often requires a lot of money. Indeed, from the development of a game to its distribution through advertising, costs are very high (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). In all three sectors, there's always one thing that everyone's talking about. These are the games, films and music that are made with a big budget. Indeed, even if there are many other games, films, or songs on the market, these are the ones that generally bring in the most moneym (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). As a rule of thumb, around 90% of the money in the gaming industry comes from just 10% of the games (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). This means that a small number of games generate most of the money, just as in the world of film and music (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). In the video game industry, the games that generate the most revenue are generally AAA titles. These games are often considered to be the most revenue-generating because of their pricing model and sales structure. These big-budget games are usually sold at full price, with no microtransactions or recurring payments, and thus generate substantial upfront revenues at the time of purchase (Ahmadu 2023).

In general, these games often belong to well-established franchises that are very popular with gamers (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020). Coupled with the extensive marketing work devoted to them, it's only natural that these types of games generate a heightened level of interest and anticipation within the gaming community. That's why, very often, when these types of games are released, they tend to be an immediate success and generate huge sums of money (Egenfeldt-Nielsen, Heide Smith, & Pajares Tosca, 2020).

The perfect example that might illustrate this is "GTA 5". Released in 2013, this game is part of the 5th major installment in the GTA series. Produced with a total budget of $265 million, it is considered one of the most expensive games in history. On its release, the

game will break all records in its path, generating over $800 million in 24 hours and $1 billion in 3 days. Days (Kain 2024).

Even though that it exists some AAA titles which could be played on mobile, mostly the AAA titles are more susceptible to be played on platform like console and PC. Today, even if PC's and Console segment are largely outpaced by mobile, it can still count on the power of its AAA titles. These AAA titles are undoubtedly one of the reasons why they still manage to generate huge sums of money in their respective segments (Ahmadu 2023).

When discussing revenue in the video game industry, the significant impact of mobile gaming cannot be overlooked. While AAA titles on traditional platforms like consoles and PCs have historically been major contributors, mobile gaming has now taken the lead as the most lucrative segment. According to Newzoo 2024, mobile games account for more than 50% of the industry's total revenues (Newzoo 2024). This shift is largely due to the accessibility and convenience of mobile platforms, which surpass traditional gaming methods. Unlike consoles or PCs, mobile games can be played on devices that most people already possess and use daily. This ease of access has catapulted mobile gaming to the forefront of the industry, fundamentally transforming how revenues are generated (Sano 2022). According to figures, there are approximately 6.5 billion of smartphones in the world (Howarth 2023). Unlike traditional gaming platforms such as consoles or PCs, which require specific hardware, mobile games can be easily downloaded and played on devices people already own (Aspiegel 2023). The big advantage with this platform is that players can access the games they want at any time and in any place, whether they're queuing, on the move or relaxing at home. The small size of many mobile games makes them ideal for short play sessions, enabling them to fit into busy lifestyles (Aspiegel 2023).

The business model adopted by the mobile sector is undoubtedly one of the main reasons why this segment is favored. In the context of mobile games, the business model often adapted is Free to Play (F2P) (Zheng 2022). The main feature of this model is that it allows players to download games and play them for free (Zheng 2022). Players can enjoy the essentials of the game for free, while being able to enhance their experience by purchasing optional elements or features. This approach enables developers to reach a wider player base and engage users who might not otherwise have tried the game (Zheng 2022). Because of its accessibility and inclusivity, this model has attracted a wide audience of gamers who aren't necessarily willing to pay upfront for games. In 2017, data shows that around 85% of all gaming revenue comes from F2P's games (Batchelor 2018).

Even though that it exists couple of other business models, as the F2P is the most predominant one in the industry (Batchelor 2018), It will therefore be interesting to examine how revenues are generated with this business model. By adopting this business model, developers and publishers adopt various monetization strategies to generate revenues. Here are the main strategies used to generate money:

1.In-App purchases (IAP) or microtransactions:	F2P games often offer a feature such as the purchase of virtual items, bonuses, or other enhancements that enrich the gaming experience. Players have the choice of purchasing these items to progress faster or to personalize their gaming experience. Therefore, monetization occurs when users make optional purchases during or after use of the game. In fact, it has become the main method of monetizing these games (Solutions 2024).
2.In-App Ads:	This is one of the main monetization strategies for F2P games. It is a feature that allows developers to generate revenue by displaying in-game advertisements. Sponsorship and brand partnerships can also contribute to revenues (Cuofano 2024). According to PwC statistics, the game advertising is expected to be four times more important than advertising on connected TV by 2023 (Khan 2023).
3.Virtual currency:	Many F2P games incorporate virtual currency features into their gameplay. These virtual currencies can be acquired through play, daily rewards or in-app purchases. This virtual currency can then be spent to purchase virtual items or to enhance the gaming experience. So, when players decide to spend these virtual currencies, they become a source of revenue for developers (Cuofano 2024).
4.Premium Content:	With this feature, the core of the game is free, but playability is usually limited in some way. For example, it's only possible to play for a certain period, or certain actions are restricted within the game. These features can be unlocked through one-off purchases or via subscriptions (Cuofano 2024).

Video console's sale:

Although game consoles account for a smaller share of the video game sector's total sales than games, they remain a crucial source of revenue for the industry. According to Statista data, the worldwide console market will generate $24.1 billion in 2024 (Console Statista 2024). With over 158 million units sold worldwide in February 2024, the console with the highest revenue is the PlayStation 2 (Console Statista 2024). The PlayStation 5, generation's latest console, has sold over 50 million units since its release at the end of 2023 (Console Statista 2024). Although these figures fall far short of those achieved by the PlayStation 2, they remain impressive and demonstrate the continuing importance of console sales in the gaming industry, despite the growing popularity of mobile and PC games (Console Statista 2024).

Collaboration and partnership:

In-game advertising and, more specifically, influencer partnerships and sponsored content have become the norm in the industry. It's quite common to see popular brands and celebrities making appearances in the world of virtual games. These cross-collaborations enable fans to establish a deeper connection and affinity, creating even greater brand loyalty within these global digital communities. Today, brands and advertisers are willing to invest billions to be associated with video games (Arora 2023).

Collaborations and partnerships with other sectors, such as music, fashion, and luxury retail, have evolved into important sources of revenue for the video game industry. Indeed, by taking advantage of the popularity and reach of gaming platforms, brands and advertisers have the opportunity to connect with large and diverse audiences in new and innovative ways (Arora 2023). As a result, these collaborations not only generate direct revenues via sponsorships, advertising agreements and product sales, but are also contributing to the overall growth and expansion of the video game ecosystem (Arora 2023).

This trend is also evident in the Swiss video gaming industry. For instance, Goldbach Audience has launched a new advertising solution that integrates video and display ads within video games and related environments. This initiative enables advertisers to reach up to 2 million unique clients and generate 16 million ad impressions per month (Goldbach 2024). The various forms of advertising offered include contextual in-game advertising, rewarded in-game video advertising, and ads in game-related environments. Goldbach Audience's partnerships with leading gaming providers like Gadsme and Activision Blizzard illustrate the significant investment in the Swiss gaming sector (Goldbach 2024). Their collaboration demonstrates how brands can seamlessly integrate their presence into the gaming environment, enhancing player engagement and brand visibility. This example highlights that brands and advertisers are indeed willing to invest heavily in the Swiss video gaming market, reflecting a broader global trend of substantial investments in video game advertising (Goldbach 2024).

In addition, the Swiss esports scene is undergoing a remarkable transformation, driven by private-sector initiatives and major investments from various companies (Jcc 2019). Several Swiss soccer clubs have also entered the esports arena by creating their own esports teams (Confédération 2018). Companies such as Migros, Swisscom, UPC, and Raiffeisen have actively invested in the Swiss esports' scene (Jcc 2019).

These examples demonstrate that the Swiss video gaming industry is embracing collaboration and partnership strategies. By engaging with various sectors and leveraging cross-collaborations, the Swiss gaming industry can enhance brand loyalty, expand its reach, and generate substantial revenues through innovative and diverse channels. This alignment with global trends positions the Swiss market to capitalize on the growing intersection between gaming and other industries, fostering a robust and dynamic gaming ecosystem.

2.3 Switzerland video gaming industry

2.3.1 Value chain

To determine if the Swiss video gaming industry has the potential to generate greater revenue, it's important to analyze the current value chain of video gaming in Switzerland. This analysis will help us understand the industry's structure and the existing support systems. By examining the value chain, we can pinpoint deficiencies and opportunities for enhancement.

As seen in the figure 6, the value chain of the traditional video gaming is mainly of composed of hardware manufacturer, developer, publisher, distributor, and retailers (González-Piñero 2017).

Developer

In Switzerland, the landscape of game development studios has seen significant growth in recent years. According to a report by the Swiss Federal Council, there are currently approximately 100 to 120 game development studios in the country (Confédération Suisse 2018). This is a substantial increase compared to 2010, when there were only about ten studios. By 2016, these studios collectively employed around 500 people and generated an annual revenue of approximately 50 million Swiss francs (Confédération Suisse 2018).

Although it seems like there is like lot of studios development, it is important to highlight that nearly all of these are small-scale development studios. The report of Swiss Federal Council also precise that in Switzerland, independent game creators often struggle to earn sufficient income solely from game production, and for many, it remains a secondary activity (Confédération Suisse 2018). In the sense that most studios don't focus solely on making games; they engage in various external activities to ensure their financial survival (Confédération Suisse 2018). These activities often include like web design, graphic design, developing applications etc. Additionally, many creators have other jobs or side projects. This situation leads to longer production times and a lower volume of Swiss games completed and brought to market each year (Confédération Suisse 2018).

The most famous and biggest studio developer is Giant Software. The most renowned and largest game development studio in Switzerland is Giant Software. This company is best known for creating the globally acclaimed game, Farming Simulator. Since its release in 2008, over 30 million copies of Farming Simulator have been sold worldwide. The team has offices not only in Switzerland (Zurich) but also in Germany (Erlangen), the USA (Chicago), and the Czech Republic (Brno). Swiss developers are known for their strong artistic vision and innovative approach to game creation. Their work is frequently recognized on the international stage, with many projects winning prestigious awards (GIANTS Software 2024).

Publisher

As we noted earlier in the value chain of the video gaming industry, publishers are the one who will finance and commercialize video games (Confédération Suisse 2018). Unfortunately, in Switzerland, there aren't any publishers (Confédération Suisse 2018). As a result, Swiss video game firms are often forced to publish their titles independently, such as by offering them on online video game stores like Steam. They also have the possibility to try and secure a publishing deal with an international publisher. Both approaches necessitate that the video game company share a portion of the revenues generated from game sales with the publishing platform or firm (Confédération Suisse 2018).

Distribution

In Switzerland, there are currently virtually no local online distribution platforms. Thus, Swiss producers must distribute their products via international platforms. Similar to publishers, these distribution methods are based on taking a portion of the sales made (Confédération Suisse 2018).

Retailer

The distribution is conducted through retail sales in various outlets, it can be specialized stores like video game shops, bookstores, supermarkets, and electronics stores. Additionality is important to precise that a significant and growing portion of distribution is now done online. In 2014, the Swiss Interactive Entertainment Association (SIEA) estimated that online sales accounted for 30% of total sales (Confédération Suisse 2018).

2.3.2 Ecosystem

To address the question of whether the Swiss video gaming industry could generate greater revenue, it's crucial to first examine the current ecosystem of video gaming in Switzerland. This exploration will allow us to understand how the industry is structured and the support systems that are already in place within this landscape. By gaining a clearer picture of the existing ecosystem, we can identify any areas where there may be deficiencies or opportunities for improvement. Understanding these elements is essential for assessing the potential for success and growth of the video gaming industry in Switzerland.

2.3.2.1 Studios in Switzerland

Switzerland has a vibrant community of independent game developers who are at the heart of creativity and innovation in the video game industry. These developers, often engaged in small-scale experimental projects, play an essential role in the evolution of game design and technology. According to the report, released in 2021, Switzerland will have around 130 game development studios. These studios are mainly concentrated in Zurich, Lausanne and Geneva (Switzerland - IGDA 2024). Renowned studios such as GIANTS Software, Opticale, apelab, EverdreamSoft, Disney Research, Artanim and CtrlMovie are key contributors to this dynamic ecosystem, which supports a wide range of activities from game development to technological innovation, underlining Switzerland's position as a hub of video game excellence (Switzerland - IGDA 2024).

2.3.2.2 Supportive Organizations and Institutions

A network of organizations and institutions, led by the Swiss Arts Council Pro Helvetia, plays a crucial role in nurturing and supporting the Swiss video game industry (The Swiss Arts Council Pro Helvetia 2022). Funded entirely by the Swiss Confederation, Pro Helvetia supports artistic production across Switzerland, promotes cultural exchange, and facilitates the dissemination of Swiss culture globally (The Swiss Arts Council Pro Helvetia 2022). This backing has been instrumental in the international expansion of the Swiss video game industry, which has seen a sharp increase in the number of game studios and international awards in recent years (The Swiss Arts Council Pro Helvetia 2022).

However, despite the significant role Pro Helvetia plays, many stakeholders within the Swiss video gaming community feel that the financial support provided is insufficient. Pro Helvetia allocates around 400,000 Swiss francs annually across the sector (RTS 2017), but individual funding for game projects does not typically exceed 40,000 CHF (Pro Helvetia - Swiss Arts Council 2024). Given the cost of developing video games, which can range from 100,000 CHF for simpler games to over 1 million CHF for more complex endeavors, the contributions from Pro Helvetia fall short of the substantial financial resources required to fully develop and market competitive games on an international stage. This funding gap poses a challenge for developers aiming to produce high-quality content that can compete globally, underscoring a critical need for enhanced financial support to truly elevate the Swiss video game industry (Schneider 2019). Due to this funding gap, many Swiss game developers face significant financial hurdles that affect their ability to focus solely on game development. To bridge the gap between the funding provided by Pro Helvetia and the actual costs associated with developing competitive games, developers often find themselves needing to take on part-time jobs. (Schneider 2019)

Apart from Pro Helvetia we have also supportive organization like Alp ICT, and swissnex who are playing a crucial role in fostering the growth and success of the Swiss video game industry (Switzerland – IGDA 2024). These organizations provide valuable support through various initiatives, including business and publishing workshops, development grants, international promotion, and national events like the Ludicious Zurich Game Festival, gameZfestival, and Zurich Game Show. By nurturing the local game development community, these organizations are helping to create a sustainable and vibrant industry in Switzerland (Switzerland – IGDA 2024).

Then, we have the Swiss Game Developers Association (SGDA) which represents the interests of video game developers. It also serves as an information platform and promotes the next generation of game developers. With the Swiss Game Awards, it recognizes the most innovative Swiss games (Swiss Game Developers Association SGDA 2022). The association collaborates with organizations in related sectors and with partners in the video game industry. It also supports the Swiss section of the International Game Developers Association (Switzerland – IGDA 2024).

Another one who plays a big role is the SIEA (Swiss Interactive Entertainement Association). This association was created in 2003 and was formed to represent the interests of the Swiss video game industry. The association's members include both the major platform providers and the leading software publishers in Switzerland. The SIEA's goal is to promote the growth and development of the Swiss video game industry, both domestically and internationally (Swiss Game Developers Association SGDA 2024).

2.3.2.3 Cultural Recognition and State Funding for the Swiss Gaming Sector

In 2018, the Swiss Federal Council officially recognized the video gaming industry as a cultural asset, marking a significant shift in governmental perception (Federal 2018). Previously viewed merely as entertainment, video games are now acknowledged on par with traditional arts like film, music, and literature. This recognition not only underscores the legitimacy and cultural value of the industry but also signals a pivotal change (Pricewatercoopers 2022). The designation as a cultural asset has profound implications for the Swiss game development sector. It enhances the industry's stature, enabling it to draw both talent and investment more effectively. It also supports the promotion of Swiss games on an international stage, fosters greater creativity and innovation within the sector, and contributes to the economic prosperity of the country (Pricewatercoopers 2022).

Apart from the grants offered by Pro Helvetia, which is a subsidy from the Confederation, there are also grants provided by the cantons. Currently, the Canton of Vaud offers grants. This digital creation grant has been available since 2019, and the Canton of Vaud was the first canton to support the creation of video games and to recognize these products as cultural goods. It's a grant of 50,000 CHF that's distributed through a competition. To have a chance of winning part of this sum, the video game project must stand out through its "originality, technical innovation, artistic creativity, game design, graphic/sound design, narrative, and architecture", as well as its "marketing strategy and development potential" (Collet 2023).

2.3.2.4 Academic foundation

The Swiss video game industry is a thriving ecosystem that extends beyond talented individuals and innovative studios. It also encompasses a strong academic base that fosters the next generation of game developers and supports the unique aesthetic of Swiss games. Their games are particularly distinctive and recognized for their design, often based on innovative technologies developed at Swiss polytechnics (RTS 2021). This creative approach, fueled by the fusion of technical expertise and artistic expression, has in some ways contributed to Switzerland's emergence as a prominent center for innovative and engaging video games. A wide range of educational institutions offer game development programs in Switzerland, including ZHdK, Fachhochschule Nordwestschweiz, HEAD Media, SAE Institute Zurich, EPFL the University of Lucerne and couple of more (Swiss Game Developers Association SGDA 2022b). These renowned institutions recognize the importance of game development and offer specialized programs that enable budding creators to acquire the skills, knowledge and theoretical foundations needed to excel in this sector.

2.3.3 The Swiss video game market

2.3.3.1 Market Overview

According to a study done by PricewaterhouseCoopers (PwC) (Figure 9), in 2022, the Swiss gaming market has generated an estimated revenue of 1.379 billion CHF (PricewaterhouseCoopers 2022). Despite its smaller size, the Swiss gaming market is growing steadily, the projection typically indicates an annual growth rate (CAGR 2022-2027) of 4.5 %, leading to a market volume of CHF 1.721 billion by 2027 in Switzerland (PWC 2023 -2027). Even though that these number are quite impressive, these number are very modest compared to some of the larger gaming markets in the world, such as

the United States and China, which generated over $43.4 billion (Forsans 2019) and $37.9 billion (Writer 2019) in revenue, respectively, in 2018.

In Switzerland, among the various segments of the Video Games market, Mobile gaming stands as the most dominant sector, generated a staggering CHF 800 million in revenue in 2022 which represents approximately a little bit the 60 % of the Swiss gaming market share (PWC 2023-2027). This dominance is attributed to the pervasiveness of smartphones and the widespread adoption of free-to-play mobile games. However, it's important to mention that out of the 800 million in revenue generated by social/playground games, 434 million Swiss francs come from app-based social/playground games and the remaining 358 million Swiss francs come from app-based game advertising revenue (PWC 2023-2027).

Then we have the traditional gaming which is composed of the segment console games and pc games, even though that traditional gaming, is not as dominant as mobile gaming, it is still holds a significant 40% share of the Swiss video gaming industry, generating a notable CHF 538 million in revenue in 2022 (PWC 2023-2027). The Console games is the largest segment within traditional gaming, generated CHF 334 million, highlighting their enduring appeal among gaming enthusiasts. Within traditional gaming, digital console games emerged as the primary revenue driver, generating CHF 155 million, compared to CHF 125 million for physical console games (PWC 2023- 2027). This shift towards digital distribution reflects the growing convenience and accessibility of digital platforms. And CHF 55 million is coming through Online/microtransaction which is console games that offer online multiplayer features and allow players to make in-app purchases (PWC 2023- 2027).

Then regarding the PC gaming segment, even though that it is the one who has the least money out of the 3 segments, it has still generated a total CHF 204 million in revenue in 2022, with digital PC games accounting for a substantial CHF 112 million, physical pc games revenue for 4 million and finally the online & microtransaction resulting for 88 million CHF (PWC 2023- 2027).

Figure 5 - PWC report regarding Swiss video gaming revenue

Switzerland, video games revenue, 2018-2027 (CHFm)

	Historical data					Forecast data					CAGR %
Category	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**	**2027**	**2022–27**
Traditional gaming revenue	**435**	**465**	**510**	**514**	**538**	**560**	**564**	**560**	**553**	**548**	**0.4%**
Total console games revenue	266	282	313	307	334	349	347	337	325	317	-1.1%
Physical console games revenue	130	126	137	127	125	123	114	106	95	85	-7.4%
Digital console games revenue	97	113	129	129	155	166	169	164	157	155	0.0%
Online/microtransaction console games revenue	39	43	47	51	55	59	63	68	72	77	7.1%
Total PC games revenue	169	182	198	208	204	211	218	223	228	232	2.6%
Physical PC games revenue	20	16	11	7.0	4.0	2.3	1.3	0.7	0.4	0.2	-43.3%
Digital PC games revenue	81	91	105	112	112	118	122	124	125	125	2.2%
Online/microtransaction PC games revenue	69	75	81	89	88	91	95	98	102	106	3.8%
Social/casual gaming revenue	**376**	**494**	**629**	**763**	**800**	**834**	**916**	**994**	**1,065**	**1,129**	**7.1%**
App-based social/casual revenue	263	298	384	442	434	443	482	519	552	583	6.1%
In-app games advertising revenue	102	187	236	313	358	384	428	470	508	541	8.6%
Browser-based social/ casual revenue	10	9.8	8.9	8.2	7.5	6.7	6.1	5.6	5.1	4.6	-9.0%
Integrated video games advertising revenue	**40**	**41**	**41**	**41**	**41**	**42**	**42**	**43**	**43**	**44**	**1.2%**
Total video games revenue	**851**	**1,000**	**1,180**	**1,317**	**1,379**	**1,436**	**1,523**	**1,597**	**1,662**	**1,721**	**4.5%**
Year-on-year growth		**17.5%**	**18.1%**	**11.6%**	**4.7%**	**4.1%**	**6.0%**	**4.9%**	**4.0%**	**3.6%**	

Source: Switzerland Entertainment and Media Outlook, PwC, Omdia

Source (PWC 2023- 2027)

2.3.3.2 Competitive mapping

The video gaming market in Switzerland, similar to many other countries, is significantly influenced by the presence and dominance of major multinational companies such as Sony, Nintendo, Microsoft, and Electronic Arts. These firms have established a strong foothold, particularly in serious games and the software and hardware segments (Pricewatercoopers 2022). Primarily, North American, and Japanese companies dominate the Swiss market, holding nearly all of the market share (Confédération 2018). This overwhelming presence of international giants creates substantial challenges for local companies, which struggle to compete in a market saturated by these global players (Confédération 2018).

Moreover, the Swiss gaming industry suffers from a notable absence of local support structures. There is a significant lack of Swiss game publishers, independent communication and marketing professionals specialized in video games, Swiss media dedicated to video gaming, and private investors (Confédération 2018). This deficiency creates an unfavorable environment for the development of local studios. As a result, Swiss creators often need to acquire multiple skills to fill these gaps, which can divert them from their core competencies and ultimately hinder their productivity and innovation (Confédération 2018). Given the small size of the Swiss market and the dominance of multinational companies, Swiss game developers are often compelled to seek opportunities in niche markets. These niche markets are more accessible due to the absence of language barriers and the presence of global operators, such as online distribution platforms (Confédération 2018). However, this strategy necessitates the ability to effectively identify, analyze, and approach markets that align with their projects. This adds an additional layer of complexity and challenge for Swiss studios, which must navigate these niche markets with precision to succeed (Confédération 2018).

2.3.3.3 Market expectations

As seen in Figure 5, the Swiss video gaming market shows a strong preference for social and casual gaming, which generates the most revenue 2023 (PWC 2023 - 2027). This trend indicates a significant shift in consumer behavior towards more accessible and convenient gaming experiences. Social and casual gaming revenues encompass consumer spending on app-based games available on tablets and smartphones, as well as browser games designed for a casual audience 2023 (PWC 2023 - 2027). Examples of such games include "Ruzzle" and Zynga's "Words with Friends." These revenues come from several sources: the purchase of social and casual game apps, subscription services for these games, and the purchase of virtual items within the games. Additionally, this category includes revenues from "hardcore" mobile games like "Infinity Blade 2," which, despite their intense gameplay, are still part of the mobile gaming ecosystem 2023 (PWC 2023 - 2027).

Data from Sensor Tower reveals that in 2022, games such as "Candy Crush Saga" and "Clash of Clans" were among the most lucrative in Switzerland 2023 (PWC 2023 - 2027). Based on the report the game "Candy Crush Saga" alone earned 19.4 million Swiss francs in 2022, a figure comparable to the record revenues of the film "Avatar: The Way of Water." Additionally, game like "State of Survival: Zombie War" performed exceptionally well in the Swiss market, highlighting the substantial revenue potential of popular mobile games 2023 (PWC 2023 - 2027).

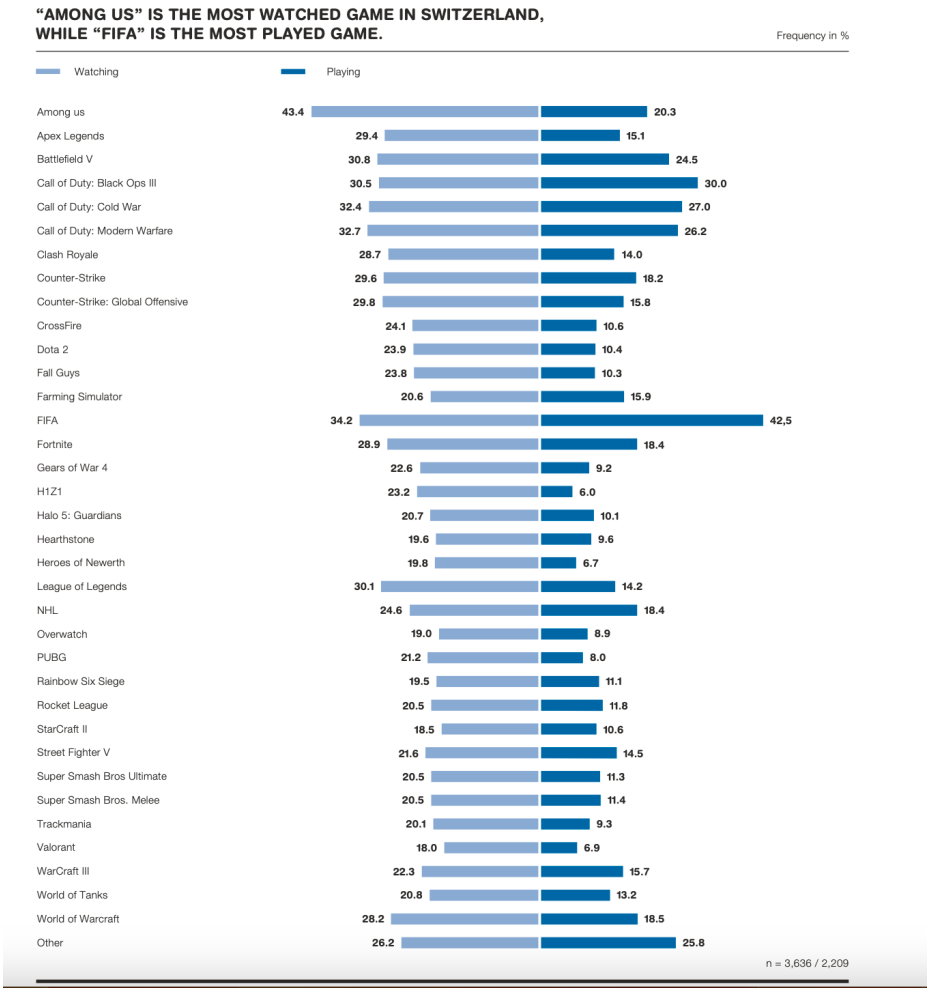
Despite the growing prominence of social and casual gaming, traditional gaming continues to hold a significant place in the Swiss market 2023 (PWC 2023 - 2027). This segment encompasses both console and PC games, which maintain a loyal and dedicated player base 2023 (PWC 2023 - 2027). The growth of traditional gaming is somewhat restrained by the decline in physical game sales. Consumers are increasingly shifting towards digital purchases and online/microtransaction models, reflecting broader global trends in gaming consumption 2023 (PWC 2023 - 2027).

This trend is driven by the convenience and accessibility of digital platforms, allowing gamers to purchase and download games instantly (PWC 2023 - 2027). The increasing popularity of online and microtransaction models also contributes to the evolving landscape of traditional gaming. These models enable players to enhance their gaming experience through in-game purchases, providing a steady revenue stream for game developers and publishers (PWC 2023 - 2027).

Traditional gaming in Switzerland is also marked by its diverse range of popular genres. According to a survey conducted by ZHAW in 2021, "FIFA" is the most popular game played in Switzerland (See Figure 6). Additionally, Multiplayer Online Battle Arena (MOBA) games are highly favored among Swiss gamers (Marcel 2021). These games typically involve two or more teams competing against each other on an arena-like playing field. The report highlights the variety of genres in the most played games list, indicating the diverse gaming interests in Switzerland. Popular genres include sports

(FIFA), first-person shooters (Call of Duty series, Counterstrike), battle royale (Fortnite, Apex Legends), and strategy games (League of Legends, DOTA 2). This diversity indicates a broad appeal and varied tastes within the gaming community (Marcel 2021).

Figure 6 – Most played game in Switzerland



Source: (Marcel 2021)

Overall, the market expectations of Swiss gamers are characterized by a preference for a diverse range of gaming genres, from sports and first-person shooters to battle royale and strategy games (Marcel 2021). This indicates a broad and varied taste within the gaming community, with a strong emphasis on accessibility and convenience, as evidenced by the significant revenue generated from social and casual gaming (Marcel 2021). Developers and publishers looking to succeed in the Swiss market should focus on offering a wide variety of gaming experiences to cater to these diverse interests (Marcel 2021).

2.3.4 Challenges and barriers faced by the Swiss Video Gaming Industry

It seems like there are several challenges and barriers preventing the Swiss video gaming industry from generating more revenue. Analyzing these challenges will be crucial to understanding the limitations and identifying strategies to overcome them. By addressing these barriers, we can propose effective strategies to boost revenue and enhance the industry's global influence.

Lack of political and economic support from the government

One of the main problems faced by the industry is the lack of the support provide by the government to the Swiss video gaming industry. Indeed, even though that the Federal Council has recognized the video gaming industry as their cultural asset in 2018, according to Matthias Sala who is the President of the Swiss Game Developers Association, he feels like that is clearly not enough to boost the industry (Pricewatercoopers 2022).

"The Federal Council's decision to designate games as a digital cultural asset is a major step and important for the Swiss game developer landscape. But to really boost the industry and attract investments (similar to the film industry) the government needs to address the economic and commercial questions. Without the promotion of co-investments, gaming will remain largely an import product in Switzerland. Matthias Sala, President, Swiss Game Developers Association [SGDA] (Pricewatercoopers 2022)*".*

According to Sala, the fact that Swiss government's decision to designate video games as a digital cultural asset is already a positive step. However, he feels it is not enough to truly boost the industry and attract investments. According, to him, to truly boost the industry, the government needs to address the economic and commercial aspects of the industry, such as promoting co-investments (Pricewatercoopers 2022). In this case, by co-investments he mainly refers to funding coming from both the government and private investors. Sala believes that this combined financial support would help boost the Swiss video gaming industry by providing the necessary resources for developing new games. He feels like without the promotion of co-investment, Switzerland will mostly import games from other countries instead of producing its own. This means that Swiss video gaming industry will become more a consumer than a producer. And this not good because it means Swiss game development scene won't grow or become competitive, and that they will miss out on the potential benefits of having a strong, self-sufficient gaming market (Pricewatercoopers 2022). So basically, Sala is expecting from the government that they provide stronger financial support for the Swiss video gaming industry otherwise he believes that it will be hard to boost the industry (Pricewatercoopers 2022).

Moreover, Swiss game developers emphasize the need for improvement in the overall framework conditions. According to them, the environment is still somewhat hesitant, lacking political attention, and there are no concrete economic incentives in comparison to other countries like England, which offers tax breaks, or Montreal, which has provided support for decades to attract video game companies (RTS 2017). It seems like this lack of government support has leads to other problems such as limited access to funding for a development of a game, lack of presence of big studios of development and publishers in Switzerland, large number of brains drain etc. (Schneider 2019)

Switzerland's small market size

Switzerland's small domestic market may limit the potential size of the domestic market for Swiss games (Boltshauser 2022). The size of the domestic market is an important factor in determining the profitability of a games industry (NI Business Info 2022). In larger markets, games have more potential customers, which can lead to higher sales and profit (Lou 2022). Conversely, in smaller markets, there are fewer potential customers, which can make it harder for game developers to recoup the costs of developing and marketing their games (Lou 2022). Switzerland has a population of around 8.8 million people (Worldometer 2024), which is significantly smaller than the populations of the United States, Japan, and China. This smaller population means that there is a smaller pool of potential customers for Swiss games. As a result, Swiss game developers may have difficulty generating enough revenue to support their businesses solely from the domestic market. This can have several negative consequences for the Swiss video game industry. For example, it can make it difficult for Swiss game developers to attract funding from investors, as investors may be concerned about the ability of Swiss games to generate profits in the domestic market. It can also make it difficult for Swiss games to achieve critical mass (O'Connor 2023), as they may not have a large enough audience to generate enough buzz and excitement.

The high cost of living in Switzerland

Based on Corinne Schneider's bachelor thesis on the Swiss video gaming industry, the high cost of living in Switzerland has a big impact on the industry. Typically, Swiss gaming studios like "Okomotive" and "Sunnyside Games" have pointed out that these costs make it difficult for Swiss video game companies to expand and compete globally (Schneider 2019). According to them, this has led to scenarios where developers launch a single game and then move to commissioned work to secure a more stable income (Schneider 2019). The high costs have also deterred large international studios, such as Ubisoft, from maintaining a presence in Switzerland, as seen when Ubisoft closed its Zurich studio after only six months due to financial constraints (Schneider 2019). Similarly, GIANTS Software has managed to somewhat mitigate these costs by outsourcing much of its operations (Schneider 2019). The need for a highly skilled development team further justifies the high salaries, but also adds to the financial challenges, making it tough to sustain companies with more than three employees. This financial environment stifles growth and makes it hard for Swiss game firms to take advantage of the global nature of the industry (Schneider 2019).

Brain drain

It seems like Swiss video gaming industry faces a significant challenge of brain drain in its industry. Typically, an empirical study done few years ago by the Swiss Federal Statistical Office showed that 9% of design graduates and 30% of information technology graduates relocate to foreign countries for work (Schneider 2019). Matthias Sala, who is the president of Swiss Game Developers Association stated, "We have well-educated and talented video game developers that look for jobs abroad or stay here and get distracted" (Pricewatercoopers 2022).

This challenge of brain drain has notably been confirmed by Gabriel Sonderegger, a video game developer at Sunny Side, in a podcast called "L'invité de La Matinale" conducted by RTS. When he was asked about the concern of trained professionals leaving Switzerland for opportunities abroad, Sonderegger responded, "*I don't just fear*

it, it is already happening, unfortunately. I see many of my colleagues or people who, once they finish certain contracts, leave. That's what we are trying to address by creating a virtuous circle with enough structures in Switzerland to retain everyone. This would mean having people living and continuing to develop professionally within Swiss studios" (RTS L'invité De La Matinale 2021).

Overall, it appears that there lack of opportunities in Switzerland drives talented developers to seek opportunity in abroad. They will often tend to move to places like United States, where there are more opportunities and the chance to work with more established gaming companies (Gossett 2024).

The lack of financing

It seems like there is a big problem of financing for Swiss game developer. Pro Helvetia which is the main funding agency for the Swiss video gaming allocates a maximum of CHF 40,000 per project for video game (Pro Helvetia - Swiss Arts Council 2024) . Considering the cost of developing a video game in Switzerland, it seems that the amount allocated is clearly insufficient. Typically, the cost of developing a video game at Stray Fawn Studio is close to one million, and if we estimate that out of this million, the state's contribution is only 40,000, we can clearly say that Pro Helvetia's contribution is clearly insufficient (Schneider 2019).

Another example which proves this case of lack of financing of the state is the case of Okomative studio, which developed the award-winning video game FAR: Lone Sails.
The studio needed an amount of CHF 500,000 to develop their game, and as the contribution of the state was clearly not enough to complete their video game, the Okomotive team decided to pay themselves very low salaries, and parallel of the development of the game they were doing part-time jobs in order to complete the game. (Schneider 2019).

Lack of knowledge in the business aspects

In today's gaming industry, possessing business knowledge is crucial for success. Companies like Wallimage which a public investment fund which supports both the film and gaming sectors, have highlighted the importance of integrating economic and commercial strategies into game development (Wallonia 2024). According to Sophie and Vincent from Wallimage, "Presenting a project in 3 minutes is not easy. Don't forget to focus on your economic model, budgeting, and commercialization… all elements that will contribute to the success of your gaming project, not just artistically, but also commercially. To develop in gaming, you must think business first ": (Wallonia 2024)

This example shows that being successful in the video game industry requires more than just developing games. It highlights the importance of having business skills, such as understanding economic models, budgeting, and marketing. These elements are crucial for getting funding and ensuring the game's commercial success (Wallonia 2024).

There appears to be a significant lack of business expertise within the Swiss video gaming industry. Based on Corine Schneider's bachelor thesis, interview partners highlighted this as a major issue. For example, a representative from Pro Helvetia noted that Swiss game design programs do not teach crucial skills like team leadership or negotiation, which are essential for securing business deals at international events (Schneider 2019).

2.3.5 Strategic Analysis and Development Framework for Revenue Enhancement in the Swiss Video Gaming Industry

Drawing on insights from the literature, we will outline potential strategies to improve the revenue of the Swiss video gaming industry.

The importance of the Government Support for an industry in the video gaming

The literature review demonstrates that government support appears to be a crucial factor in enhancing the revenue potential of the Swiss video gaming industry. The experience of the Canadian video game industry provides a compelling example of how targeted government interventions can significantly boost a nascent and financially unstable industry. In 2005, many Canadian video game companies were small and financially unstable, a situation comparable to the current state of the Swiss video gaming industry, which is dominated by small-sized studios (Schneider 2019). To address these challenges, the Canadian government provided crucial support through various measures to help these companies grow. For example, in Quebec, the government offered significant financial incentives, including wage subsidies that covered between 26.25% and 37.5% of employees' salaries for those working on multimedia products like video games (Schneider 2019). These subsidies made it financially attractive for large studios, such as Ubisoft, to set up offices in Quebec, which greatly boosted the local industry (Schneider 2019). Additionally, the Canadian video game industry receives substantial national support from the Canada Media Fund, which distributes $353 million each year to various television and digital media enterprises throughout Canada. This funding has played a pivotal role in transforming the landscape of the Canadian video game sector. From having just 170 studios in 2005 (Schneider 2019), the industry has expanded to 970 studios around the country. It now employs more than 32’000 employees and contributes $5.5 billion to the Canadian GDP (Admin 2024). This remarkable growth underscores the effectiveness of targeted governmental support in nurturing and expanding the video game industry. Overall, when comparing the Canadian video game industry's situation with that of Switzerland, there's a noticeable disparity in the level of government investment. The Canadian government has taken a serious approach to supporting its video game industry (Admin 2024). Initiatives like the substantial financial incentives in Quebec and the robust funding from the Canada Media Fund, which allocates $353 million annually (Schneider 2019), have facilitated impressive growth in the sector. In contrast, the support provided by Switzerland, with Pro Helvetia allocating just 400,000 CHF per year (RTS 2017), seems minimal. This relatively small investment might be insufficient to stimulate significant growth or to enable Swiss video game companies to compete on a global scale, highlighting a stark difference in governmental commitment to the industry between the two countries.

Mobile games

Focusing on mobile game development is a promising strategy for Switzerland’s indie game studios. As previously highlighted (See Figure 1), the mobile sector generates the most revenue and it the one generating money in the Swiss industry (Pricewatercoopers 2022). This segment has low barriers to entry and requires fewer resources. The widespread use of mobile devices offers substantial opportunities for monetization through in-app purchases and advertising, which can be very profitable. Additionally, mobile games typically require smaller development teams and less time to create, which is ideal for indie studios. This allows them to swiftly develop and launch games, marketing them directly to consumers through app stores and social media. By targeting

the mobile gaming sector, Swiss indie developers could significantly boost their revenue and strengthen their global presence.

3. Methods

The goal of this bachelor's thesis is to explore how the Swiss video game industry can generate more revenue and become more influential. The study looks at the challenges and barriers that hinder the industry's growth and suggests ways to improve. The research is based on two types of data: primary and secondary.

For the secondary data, a detailed review of academic journals, websites, books, and industry reports was conducted. Key sources included Newzoo for video game industry insights, Swiss Federal Council reports, RTS reports, and information from organizations like the Swiss Game Developer Association (SGDA) and the Swiss Interactive Entertainment Association (SIEA). Previous academic work, such as bachelor's theses, also provided valuable information. This comprehensive review helped establish a theoretical framework and contextual background for understanding the current state of the Swiss video game industry.

For the primary data, a convenience sampling technique was employed. This method was chosen due to its practicality and efficiency in gathering insights from accessible experts within a limited timeframe and resources. Convenience sampling allowed for the inclusion of participants who were readily available and willing to participate, ensuring a diverse range of expert opinions from the Swiss video gaming industry. The selection of Swiss regions (Zurich, Bern, Lausanne, and Vevey) was based on the presence of notable video game development activities and the geographical distribution of key industry stakeholders. These regions were chosen to represent a broad spectrum of the Swiss video gaming landscape, capturing insights from both major urban centers and other significant locations. Interviews were conducted with eight experts from the Swiss video gaming industry. A structured questionnaire with 12 questions was used to guide the interviews, ensuring consistency across all participants. Questions 1 to 8 were quantitative, asking participants to rate different aspects of the industry on a scale of 1 to 5 and explain their ratings. Questions 9 to 12 were qualitative, gathering insights on industry challenges, potential improvements, and the role of government support. Each interview lasted between 30 and 60 minutes and was conducted online to accommodate the participants' schedules and locations. The use of online interviews also allowed for a wider reach, enabling the inclusion of experts from different parts of Switzerland.

The interviews were transcribed using an AI application called "Headliner." Each interview was then analyzed individually, resulting in eight case studies. The quantitative data were summarized to identify common trends and patterns, while the qualitative data were coded and thematically analyzed to extract key insights. The information from the interviews was cross-checked with the secondary data to ensure consistency and validate findings. Any discrepancies were further analyzed to resolve differences, providing a comprehensive understanding of the Swiss video game industry.

This mixed-methods approach, combining secondary data review and primary data collection through convenience sampling and expert interviews, provided a thorough understanding of the Swiss video game industry. It helped identify the challenges and barriers to growth and offered strategies for enhancing the industry's revenue and influence.

4. Results

This section analyzes the data collected through the interviews conducted between April and May 2024. Here you will have the main point of their answer for each of the sub question:

4.1 Case study – Respondent A

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

He believes that the current state of the Swiss video game industry's infrastructure and support systems significantly hinders revenue generation. The lack of major studios and publishers has a profound impact, which he rates as a 5 out of 5. While Switzerland has many small studios, very few focus solely on video games; most diversify into software development, advertisements, and small apps to survive. Prominent studios like Giant Software and Urban Games are exceptions, but there aren't enough of them. Major studios like Nintendo, Microsoft, and Sony having development operations in Switzerland would be transformative. He feels like the absence of large development studios limits collaboration, training opportunities, and motivation for smaller studios, ultimately impacting revenue generation.

Similarly, he rates the lack of major publishers as a 5 out of 5 in terms of impact. Currently, Switzerland has no major publishers. This absence complicates financing for Swiss developers, who now rely heavily on external funding, which is challenging to secure. Having local publishers would simplify many aspects of development, as the ecosystem is quite small and interconnected. Local publishers would better understand the preferences and culture of the Swiss market, providing more tailored support. They would finance, publish, and market games more effectively, significantly boosting the industry’s growth and visibility. The proximity of publishers would also make project management more practical and collaborative.

He rates the overall efficiency of the Swiss video game industry's value chain as 1.5 out of 5. The value chain is incomplete due to the absence of influential studios and publishers, hindering collaboration and limiting job opportunities for young graduates. Existing distributors, like Alzo, Ingram, and Techdata, primarily focus on physical products, which are declining as digital sales rise. Improving this value chain requires establishing significant studios and publishers to foster better synergies and more ambitious projects.

The effectiveness of the Swiss video game ecosystem is rated as 2.5 to out of 5. Educational institutions and training programs are strong, but the lack of major development studios and insufficient government support are critical weaknesses. Institutions like EPFL provide excellent technical education, but there is a gap in infrastructure and project management training specific to game development. Government programs like Pro Helvetia offer some support, but it is not enough to sustain large projects or compete with the robust support systems in countries like Germany or France. A stronger investment and recognition from the government, as well as focusing on creating larger, more collaborative studios, would greatly improve the ecosystem.

Comparing state aid to other countries, he rates Switzerland a 2 out of 5 for the effort. However, he feels that Switzerland is still far behind compared to other countries. For instance, countries like Canada provide substantial support to studios during their development phase. They offer significant financial contributions, reduce taxes, cover salaries and overheads, and create an overall supportive environment. In France and Canada, there are already many established studios, making it easier to collaborate and benefit from existing infrastructure. In Switzerland, developers often feel isolated, divided by micro-territories such as the French-speaking and German-speaking regions, which complicates collaboration due to language barriers. He believes that the Swiss government needs to make a significant effort both economically and politically. For example, in the canton of Vaud or through Pro Helvetia, there are funds available, such as 40,000 francs to help develop projects. While this is helpful, it quickly runs out when you have a team of ten people working on a project, making it insufficient for long-term sustainability. He suggests that similar to publishers who finance projects and then take a percentage of the profits to recoup their investment, the Swiss government should adopt a similar model. Currently, there is no real willingness from the state to recognize video games as a priority sector, unlike in Europe, where the industry is supported and developed as part of the economic strategy.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He believes that the primary challenges and barriers preventing the Swiss video game industry from maximizing its revenue potential are multifaceted. Firstly, on a scale of 1 to 5, he rates the lack of significant AA or AAA production as a 4. The absence of these large-scale productions limits the industry's potential because successful AA or AAA games can generate substantial revenue and visibility. While Swiss studios excel in creating high-quality indie games, the industry would benefit from more resources and support to develop larger AA games. He thinks that an increase in AA or AAA production could significantly boost the sector’s economic dynamic by attracting substantial investments, creating jobs, and enhancing Switzerland's international reputation in the gaming industry.

He identifies the high cost of living in Switzerland as another major barrier, rating it a 5 in terms of impact. The expensive nature of operating in Switzerland, including high salaries and office costs, discourages large studios from setting up in the country. This economic barrier makes it challenging for new and existing studios to thrive, leading to higher operational costs compared to neighboring countries like Germany or France, which offer more favorable conditions.

One of the biggest challenges, he notes, is the brain drain, where educated and talented developers find positions abroad due to limited opportunities in Switzerland. He rates this issue a 5, attributing it to the lack of large studios and ambitious projects within the country. Young developers often have to leave Switzerland to work on bigger projects, which stifles local industry growth.

Another significant barrier, according to him, is the lack of business knowledge among developers, which he rates a 4. While Swiss developers are skilled in game creation, they often lack the necessary business acumen to monetize their games effectively, market them, and secure funding. He sees a need for more education in business strategies, marketing, and funding acquisition to help developers reach their full potential.

He estimates that developing a video game in Switzerland typically costs between CHF 300,000 and CHF 1,000,000. However, he rates the government's contribution to funding these projects very low, around 1.5 out of 5. Government contributions, mainly through Pro Helvetia, are often capped at CHF 40,000, which he finds insufficient for most projects. According to him, this significant funding gap forces many developers to turn to crowdfunding, use personal savings, or take on part-time jobs to finance their projects. He feels like the lack of substantial funding creates a challenging environment for game development in Switzerland, making it difficult for studios to produce high-quality games or scale their operations.

He strongly believes that the lack of recognition and substantial support from the government significantly limits the growth potential of the Swiss video game industry. According to him recognizing the industry as culturally valuable is one thing, but investing in it is another, and Switzerland has yet to fully embrace this second step. In contrast, Europe has recognized the importance of this industry and provides substantial support to foster its development. He stresses that the Swiss government needs to take a more active role, similar to countries like Canada, which offers tax incentives, substantial funding, and other supportive measures.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

First of all, he believes developers shouldn't primarily shift their focus to the mobile gaming market despite its potential for high revenue. He explains that the mobile market has become highly competitive and complex. The costs associated with developing mobile games can be as high as those for console games due to significant investment requirements in development and marketing. Moreover, the barriers to entry have increased; it's not just about making a game but also about sustaining visibility in a market where many games are free to play, and revenue depends heavily on continuous advertising and content updates. Thus, he suggests that the perceived financial advantages of mobile gaming might not be as great as they seem, and sticking with console and PC platforms, where the market might be more manageable and less volatile, could be a wider choice for Swiss developers.

He believes that government recognition will definitely make a significant difference. As he has mentioned before, he thinks more support from the government, both politically and economically, similar to what Canada is currently offering, is crucial. The Canadian government has shown strong belief in the industry, helping it become a global hub for video game development with major studios like Ubisoft and Electronic Arts operating there, and popular games like FIFA being developed in Canada. He points out that this kind of success shows that it's indeed possible to generate millions, even billions, but it requires substantial resources and confidence in the industry, and it will take time. He also highlights that a major strength of Switzerland is its education system, which is excellent but could be transformed into a European specialty hub to attract talent. This could encourage studios to expand and develop in Switzerland. With the country's advantage of being multilingual and institutions like EPFL offering courses in English, Switzerland could potentially become a key reference point for postgraduate education in game development. By enhancing its educational infrastructure, Switzerland could retain and develop talent locally, fostering a larger gaming culture. This could attract studios to open in Switzerland, directly tapping into the local pool of trained professionals. He strongly believes that focusing on education is pivotal as it can drive industry growth, encourage more studios to establish here, expand the workforce, and enhance Switzerland’s reputation as an innovation hub. His vision is that this approach could

transform Switzerland into a European center for video game profession training and potentially increase industry revenues.

4.2 Case study – Respondent B

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

He emphasizes that the lack of major studios in Switzerland significantly impacts the video game industry, deserving a severe impact rating of 5 out of 5. He notes that having large video game development studios is crucial as they elevate the industry's visibility and recognition within and beyond the country. The absence of such studios, he argues, stunts the industry's growth, prompting Swiss talent to seek opportunities abroad, which in turn contributes to brain drain and limits the development of advanced skills locally. He believes this also complicates efforts to convince the government of the industry's potential, as the scale and influence of the industry could be dramatically different with the presence of large studios.

Moreover, he identifies another major issue with a serious rating of 4 out of 5 concerning the absence of major publishers in Switzerland. He explains that many Swiss game creators are not experienced enough to effectively negotiate with top international publishers. This often results in partnerships with publishers who prioritize volume over quality, to the detriment of the developers and the games themselves. These publishers are interested in throwing numerous titles at the market to see what succeeds, without a genuine commitment to the success of each game. He emphasizes the importance of working with reputable publishers like Devolver Digital or Raw Fury, who are known for their supportive approach towards developers and their commitment to the quality of the games. To attract such partnerships according to him Swiss studios must enhance their reputation and recognition in the global market. In order to tackle this problem of lack of publisher he suggests starting a new publisher in Switzerland to help local game developers. This new publisher could get funding from sources like Pro Helvetia and would do more than just give out money. He imagines it as "Pro Helvetia Publishing," a kind of incubator that would guide developers from the early stages of making a game right through to selling it. He believes that this would help Swiss developers avoid bad deals and the high costs that can make it tough to succeed. The idea is to give Swiss games the support they need to stand out globally and keep talented creators in the country.

Discussing the overall efficiency of the Swiss video game industry's value chain, he rates it poorly at 2 out of 5. He points out the almost nonexistent value chain where key components like substantial game development and influential publishing are missing. He feels like most Swiss studios diversify their operations beyond gaming to sustain their businesses, which dilutes their focus and impact on the gaming sector. This lack of dedicated resources towards game development and the absence of a strong publishing presence within the country create significant hurdles in achieving broader market reach and higher revenue generation.

For the ecosystem, he rates it a 2.5 out of 5, acknowledging that while it has strengths, there's considerable room for improvement, particularly in terms of studios development, education and government support. He points out that Switzerland has excellent educational institutions like ZHdk and EPFL, but they need to better align their curriculums with the practical needs of the gaming industry, such as business management and game design. This could help local developers not only create games but also understand how to market them and manage their businesses effectively. Additionally, he mentions that the Swiss government's current support through institutions like Pro Helvetia, is insufficient for the needs of the industry, especially in country like Switzerland, where the costs are significantly higher. Moreover, he appreciates the role of festivals like Gamesweek in Zurich, which provide valuable networking opportunities, but stresses that such events alone aren't enough to overcome the broader challenges faced by the industry.

Finally, when comparing the state aid provided to the Swiss video game industry with that of countries like Japan, the UK, and Canada, he gives it a low score of 2 out of 5. He argues that while these nations invest heavily in their gaming sectors through substantial funding, tax incentives, and promotional efforts, Swiss support is minimal and largely symbolic. In his view, this lack of substantial government support is not conducive to significant growth or innovation, which he considers particularly disappointing given Switzerland's economic status and the potential of the gaming industry.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He believes that the lack of AA or AAA game production significantly impacts the Swiss video game industry's ability to generate higher revenues, rating this issue a 4 out of 5. He points out that while Switzerland excels in producing creative indie games like 'Wandering Village' and 'FAR', which demonstrate considerable talent and creativity, he feels like these titles generally don't achieve the same financial success as larger-scale projects. He suggests that introducing more AA titles could significantly shift the industry's economic dynamics because AA games align well with Switzerland's current

resources and are more feasible than costlier AAA titles. He envisions that such games would promote greater collaboration and synergy within the Swiss video game sector, drawing in more investment and talent, which are currently hindered by the limited scale of operations and the focus on smaller projects.

He rates the impact of Switzerland's high cost of living on the video game industry at a significant 5 out of 5. He explains that the steep salaries necessary to compete in such an expensive country can be prohibitive for game development companies. This high cost not only affects the operational viability but also limits the number of developers that companies can afford to employ. He points out that with the amount spent on salaries in Switzerland, companies could hire twice the number of engineers in a country like Japan, stretching their budgets much further. This financial strain makes it challenging for Swiss game developers to sustain operations locally without substantial financial success or external support, often pushing successful companies to consider relocation to more economically favorable environments.

On the issue of brain drain, he also assigns a 5 out of 5, indicating it as a major challenge. The lack of substantial local support and limited career opportunities within Switzerland compel many talented game developers to seek positions abroad where the gaming industry is more robust, and opportunities are more abundant. He notes a cultural undervaluation of game development as a legitimate career path within Switzerland, which further discourages talented individuals from pursuing or continuing their careers in the Swiss gaming sector. The stark difference in industry support and career opportunities, compared to countries like Japan where he now resides, highlights the need for Switzerland to enhance its policies and support systems to retain its homegrown talent and foster a more vibrant local game development scene.

He also agrees that many Swiss game developers, while skilled in game creation, do lack essential business knowledge, which hinders their full potential in the industry. He recounts issues with publishers where inexperienced developers end up with poor contracts because they aren't knowledgeable about marketing or self-publishing. He suggests that integrating more business courses could address this gap, enhancing developers' understanding of the business side of the industry.

He rates the government's contribution to funding video game development in Switzerland as a 2 out of 5, indicating that the support is minimal and not sufficient compared to other countries. He points out that the costs of developing a video game in Switzerland can range from 100,000 to over 1,000,000 CHF, depending on the game's complexity and scale. However, the funding available, like the 40,000 CHF maximum from Pro Helvetia, is significantly lower than what is available in countries like Canada, where developers might receive up to 200,000 CHF. This disparity shows that Swiss funding doesn't stretch far enough to genuinely support game development. He also criticizes the conditions attached to the funding, such as the restriction against using grants for salaries, which complicates the developers' ability to sustain operations during the development phase. He suggests a more robust investment strategy where the government could commit significant funds over a decade, proposing an annual budget

that could support both large and small companies substantially. This approach, he argues, would foster a self-sustaining cycle of growth and innovation within the Swiss game development industry, ultimately leading to a stronger, more competitive national presence in the global gaming market.

According to him, there is no doubt that the lack of governmental recognition is severely limiting the growth potential of the Swiss video game industry. He feels that Switzerland hasn't fully grasped the financial and cultural benefits the video game industry could bring. He notes that, unlike nations like South Korea that have embraced and supported emerging industries such as eSports, Switzerland tends to stick to traditional sectors like banking and engineering, which are considered safer. Most Swiss creative talent, therefore, moves abroad where opportunities are more abundant. He stresses that if the Swiss government recognized and supported the gaming industry more actively, it could transform the sector's landscape by fostering growth and innovation.

He also mentions that the minimal financial support provided by the government makes it nearly impossible to undertake significant projects or establish major studios, which are essential for creating high-budget AA or AAA games. He suggests that the government should consider better tax incentives and possibly subsidize staff salaries to make Switzerland a viable location for game development. This increased support could attract and retain talent within the country, preventing them from seeking opportunities abroad. Furthermore, he discusses the everyday challenges of high living costs in Switzerland, which he believes are the most significant barriers to revenue generation in the Swiss video game industry. High costs make it difficult for independent creators to sustain themselves and discourage them from taking risks or pursuing innovative projects. This economic burden, combined with a cultural mindset that undervalues creative careers, stifles the industry's growth. He emphasizes the need for a more supportive environment that not only makes living and working more affordable but also fosters collaboration and ambition among Swiss game developers.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

According to him, focusing on the mobile segment is not a good solution for Swiss developers. He points out the intense competition within the mobile space, noting that platforms like mobile see thousands of new games each week compared to fewer releases on platforms like Steam. This saturation, coupled with the economic model of mobile games which requires heavy initial investments and continuous content updates, poses significant challenges for Swiss developers who may lack the necessary resources. He strongly believes that the future success of the Swiss gaming industry hinges on increased government recognition and support. The key to becoming a more influential player on the global stage is through the development of high-quality games that can showcase Swiss talent and innovation. This would not only boost direct revenues but also enhance Switzerland's reputation as a serious player in the international gaming market. Furthermore, he suggests a strategic initiative where Swiss developers could be supported to gain international experience and then return to Switzerland to apply their enhanced skills, thus retaining talent within the country. This approach would require proactive government policies to provide substantial funding and support systems that not only facilitate game development but also ensure that developers have adequate living conditions and opportunities in Switzerland.

4.3 Case study – Respondent C

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

According to him the fact we don't have couple of major studios here in Switzerland has a big impact on the industry. He'd give it a 4 out of 5. He emphasizes the real need for major development studios that create jobs, generate revenue, and invigorate the local developer sector. He acknowledges that while there are many studios in Switzerland, very few meet these criteria. He believes that more significant players are necessary to truly boost the industry and showcase Switzerland's capabilities in game development.

Regarding the value chain he feels that the value chain in the Swiss video game industry isn't fully developed yet. The biggest problem, he points out, is that we don't have enough big players in the market. This is a major weakness and a key reason why Switzerland hasn't made a significant mark on the global video game scene. Despite this, he sees some positive signs of progress. He'd give it a 2 out of 5 because there are a few studios that are really pushing the envelope and doing some creative and innovative work. So, there's definitely potential, but the industry as a whole still has a lot of gaps that need to be filled.

He also feels the lack of publishers in Switzerland has a significant impact on the local video game industry, rating the severity at a 4 to 5 on a scale of 5. He highlights that having a few major publishers in the country would be a tremendous advantage, as publishers play a crucial role in accelerating various processes within the game development and distribution cycle. The absence of local publishers, he notes, is a major hindrance that complicates many aspects of game production, from development to

marketing and sales. He expresses regret that Switzerland does not have more prominent local publishers, which would greatly aid Swiss developers by enhancing the industry's infrastructure and support system. The presence of local publishers would not only streamline operations but also potentially keep projects within the country, thereby strengthening the Swiss video game ecosystem. Due to this gap, Swiss game developers are often forced to look for publishers internationally or resort to alternative funding methods like crowdfunding. This situation, he points out, makes the task of financing projects more complex and time-consuming, presenting significant challenges for Swiss game developers aiming to bring their projects to fruition.

Then regarding the ecosystem, he rates the Swiss video game ecosystem a 2 out of 5, emphasizing that while it has immense potential, there is still much to be done. According to him, compared to other cultural industries in Switzerland, such as the film industry, the video game sector could dramatically expand each year and become more attractive. He points out that Switzerland possesses all the necessary elements like schools, studios, and events to support the video game industry. However, these resources could truly thrive with increased funding. He expresses significant concern over the lack of government support, noting that when compared to other sectors in Switzerland, the video game industry is notably lagging behind. According to this absence of governmental recognition and support heavily impacts the sector's development. Even with excellent educational facilities that offer game design and art programs like Ceruleum, Maîtres du Monde, and ZHdk, the country still experiences a substantial brain drain. He believes that for ambitious developers, it is exceedingly difficult to pursue a full career within Switzerland. This situation underscores that while the ecosystem is functional, with the industry’s potential, it could achieve much more impressive outcomes.

For the question regarding how he would rate Switzerland's state aid compared to countries with more robust support like Germany, France, and Canada, he gives a 2 out of 5. He emphasizes that Switzerland, despite its economic capability, lags significantly behind these countries in terms of governmental support for the video game industry. He notes the stark contrast with Montreal, where the video game sector receives substantial financial support including direct subsidies that help cover development costs, along with tax incentives and recruitment bonuses that support local game developers. He acknowledges that while there is some movement towards better support in Switzerland, it is slow and still far from adequate.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

When it comes to his opinion on the lack of AA or AAA game production and its impact on the Swiss video game industry's revenue generation, he exhibits a degree of skepticism, rating it 3 out of 5. He first points out that Switzerland has notable titles like Farming Simulator, which he classifies as "AA" and considers one of the most important European games, significantly contributing to revenue. He also mentions successful indie games like Transport Fever 1 and 2, as well as "Wondering Village" from Zurich, a game developed by a team of 10 people that generates millions.

He argues that it's not AAA games that necessarily bring in the most money, suggesting that industry narratives often mislead by focusing on big-budget games that benefit shareholders more than the creative teams. Instead, he believes real profit comes from innovative projects like Vampire Survivor, similar to how low-cost, high-impact projects like Blair Witch have proven most profitable in the film industry. He emphasizes that Switzerland excels in creating such projects.

However, he acknowledges that AA and AAA projects bring more visibility and opportunities, creating a dynamic environment that can showcase Swiss video gaming on the global stage. He believes that Switzerland should focus more on AA projects due to feasibility constraints, and it is important to ensure these games are recognized as Swiss to avoid remaining in the shadows and missing out on benefits.
He advocates for a balance between indie and AA projects, recognizing the strength of indie games in revenue generation. He believes finding this balance could be Switzerland's strength in the gaming industry.

Then regarding challenges, he rates high cost of in Switzerland a 5 out 5. According to him it is one the most challenging problem here in Switzerland. According to him we're in one of the most expensive countries in the world, and that clearly doesn't make things any easier for an industry that's so creative and artistic. He mentions the example of Electronic Arts ou Ubisoft that one time had their office here, but they didn't sustain stay here long time due to the high cost.

Then regarding the problem of brain drain he feels that is another big problem by giving 4 out 5. According to him many talents trained in Switzerland end up working abroad, often at companies like Ubisoft in Montreal or Annecy. He believes it would be ideal for these talents to return to Switzerland with the skills they've acquired abroad. However, this requires a strong industry within Switzerland itself. Currently, there's a significant brain drain due to better opportunities elsewhere. He emphasizes the need to value and utilize these developed skills. He also mentions the efforts of SGDA to advocate for more support programs, aiming to increase opportunities and provide financial assistance to make developers' situations less precarious. According to him success in the industry often comes gradually, with the improvement of skills and the development of a portfolio.

He stresses the importance of stability, which requires cultural and financial support at both cantonal and federal levels, similar to how filmmakers improve over time with solid support structures. Regarding the government's contribution for a game he rates a 2out of 5. According to him, funding for game development in Switzerland is insufficient compared to the costs involved. For a decent quality game, the budget easily reaches half a million francs, with many Swiss independent games falling between 700,000 and 1 million francs. The support varies across cantons, with Vaud leading the way, followed by Geneva and Zurich. Nationally, Pro Helvetia has provided significant support since 2010, but overall funding remains relatively low compared to other art forms like music or dance in Switzerland. For instance, music receives 2 million francs in Vaud, while game development only gets 50,000 francs annually and it is through competition process so in reality the amount is share by 2 or 3 recipients so generally you will receive like 15'000 CHF making it insufficient given the costs involved in creating quality games.

He also mentions the impact of government recognition on the Swiss video game industry's growth potential, lack of acknowledgment clearly hampers progress on multiple fronts. Without proper support, the industry lacks a central hub where larger studios could nurture talent to develop games. The limited support leads to a closed market, where studios must fend for themselves, resulting in occasional hits rather than consistent success that broader support could foster.

As for current challenges in the Swiss video game industry hindering its revenue generation potential, the focus is on further enhancing collaboration among studios. Establishing spaces for increased mutual assistance is crucial, especially given the industry's reliance on small structures. Initiatives like Zurich's emerging hubs facilitate studio interactions, professional networking, and knowledge sharing, particularly beneficial for newcomers. The emphasis is on embracing the "fail faster" ethos, where

learning from mistakes accelerates growth. Encouraging newcomers to swiftly produce and release their first works helps them understand the complexities of game development, fostering continuous improvement.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He believes that the recognition and support of the government are crucial for advancing the Swiss gaming industry. Without this support, it will be difficult to elevate the industry. He suggests the need for larger development studios that create jobs and generate revenue, emphasizing that without government backing, growth in the industry will be complicated. He proposes the establishment of hubs, similar to what is being developed in Zurich, where various structures and studios can converge, exchange skills, and mentor newcomers. He also stresses the need for significantly increased government funding, particularly for the Swiss Game Developers Association (SGDA), to enable it to support the industry effectively. Currently, the SGDA operates on a meager budget of around 25,000 to 30,000 francs annually, which he considers insufficient compared to other national associations. He points out the importance of the video game industry's representation at the political level, where it is often not seen as a priority deserving of substantial funds. He calls for policies that stabilize the industry, allowing creators to practice their art over long periods, which is vital for sustained success. Additionally, he mentions the potential for cantonal support to stabilize the local industrial base and suggests that municipal and cantonal efforts should continue to sensitize politicians to include video gaming in their political agendas and support processes. Regarding whether Swiss developers should focus more on the mobile market to generate revenue and gain prominence, he advises against it. Initially, the industry gravitated towards mobile gaming, but developers are not interested in continuing in that direction. He argues that the artistic nature of game development cannot be fully rationalized; developers and artists will create what they are passionate about.

Thus, steering them towards mobile gaming is not feasible, as it places them in an even more competitive market that is free-to-play and demands constant content updates on platforms where policies, such as those of Apple, frequently change, creating an unstable environment for developers. Overall, he emphasizes that government involvement and financial backing are essential to stabilize and grow the Swiss video game industry, allowing it to develop and retain talent while becoming more influential on the global stage.

4.4 Case study – Respondent D

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

According to him, the lack of major studios, particularly AA studios, has a significant impact on the evolution of the Swiss video game industry, and he rates this impact a 4. While there are many studios in Switzerland, most of them are small or not fully dedicated to gaming. He uses his studio, Digital Kingdom, as an example, where the business is divided into two main activities: 80% of their revenue comes from Serious Games (educational, training, prevention, marketing, and commercial games) created for private institutions, while the other part is independent game development, which is the only part truly linked to the Swiss video gaming industry. The games developed for private institutions are intended for internal use by these institutions, such as museums or schools, and are never published on platforms like Google Play, Apple Store, or consoles, so those games are not linked with the gaming industry.

Thanks to this model, the company has been active for 10 years. He also mentions that many Swiss independent developers struggle financially and have to supplement their income with other jobs. He feels that the industry in Switzerland is characterized by studios that are not fully dedicated to gaming, often having to diversify their activities to sustain themselves. He feels that the absence of large studios limits job creation and development opportunities, hindering the industry's overall growth and value chain.

He explains that discussing the value chain in Switzerland is challenging because it primarily includes only the studios. These studios are highly fragmented, with most not exclusively focusing on gaming. There are no publishers in Switzerland, and distribution is predominantly online, which is more cost-effective. Therefore, he rates the value chain a 2. Regarding the lack of publishers in Switzerland, he acknowledges that it doesn't make things easier. A Swiss publisher might trust local developers more quickly due to familiarity, but substantial proof of quality and capability is still required. Therefore, whether the publisher is Swiss or not, it doesn't fundamentally change the challenges in securing publishing deals.

Then regarding the Swiss video game ecosystem, he gave a 2 out of 5. While acknowledging the presence of many indie studios and a few that create incredible games, he points out the lack of large development studios. The funding, primarily from Pro Helvetia and Cineforum, is minimal and comes from federal sources. He believes that given Switzerland's economic situation, much more can be done in terms of support

and government involvement. On the education front, there are many schools like EPFL, ZHdk, Maîtres du Monde, and SAE in Geneva, providing good training. However, many trained in Switzerland end up seeking opportunities abroad in countries like France, Canada, the US, and Spain due to limited local opportunities and that's kind of sad.

Overall, he is very critical with the government. He rates the Swiss government's support for the gaming industry a 2 out of 5, particularly when compared to countries like France. He notes that there is minimal support in Switzerland, especially in terms of operational costs and funding. While some cantons, like Vaud, provide symbolic support, such as 50,000 CHF on a competitive basis, it is not enough. He points out that other countries offer more substantial financial aid, tax incentives, and easier startup conditions, which significantly help the gaming industry. In contrast, Switzerland's high cost of living and limited financial support make it challenging to start and sustain large projects. This lack of support means many developers work part-time on games while holding other jobs. He believes that considering Switzerland's wealth, the current level of support is almost the bare minimum. Countries like France and the UK have active policies that encourage the gaming industry through significant subsidies and support programs, while Switzerland's approach remains modest, which is disappointing given its economic resources.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He believes that not producing more AA or AAA games significantly impacts the Swiss video game industry's ability to generate more revenue, rating this impact a 4 out of 5. He explains that in Switzerland, most games are indie games, despite some excellent titles like "Wandering Village" and the globally successful "Farming Simulator." He notes that AA and AAA games provide more visibility, and if Switzerland could produce a few AA projects, it would benefit the industry significantly. He compares the industry to leaders like the United States, China, and Japan, which have more studios and AAA games, leading to higher revenue generation. He argues that producing more AA or AAA games in Switzerland could change the landscape, boosting the local economy by creating jobs and attracting talent from around the world. It would also increase investments in the Swiss gaming industry. However, for this to happen, he believes the government needs to adopt a different perspective and provide more support otherwise it won't be possible.

He rates the impact of Switzerland's high cost of living on the video game industry a 5, indicating a very significant impact. He believes the high costs complicate business operations, which is likely why major studios are reluctant to establish themselves in Switzerland. Everything costs about three times more than in France, making development very expensive. Salaries for employees, including engineers, graphic designers, and programmers, are a major expense. If a studio has to pay an entire team,

costs can skyrocket quickly. One way to mitigate this is by forming partnerships with companies in other countries where production costs are lower, allowing for more affordable game development with Swiss association.

He rates the issue of educated and talented developers finding positions abroad a 4, indicating it is a significant problem. He explains that there are not enough job opportunities in pure game development in Switzerland. Many individuals end up working in VR, development, or art rather than strictly in video games because the gaming sector does not hire extensively. Additionally, with companies shutting down worldwide and senior developers from major studios entering the job market, competition is fierce. The Swiss gaming sector lacks large studios that generate significant revenue, limiting local job opportunities. Consequently, many developers go abroad where the cost of living is lower and the business environment is more conducive to their work. Developing a game independently in Switzerland is almost impossible due to the high costs, especially if it takes years to complete a project. This situation drives many to countries like Canada, the United States, Japan, or France, where the gaming ecosystems are more comprehensive and supportive. These countries provide an environment where creators can take the necessary time to develop their projects without the overwhelming financial burden present in Switzerland.

Then he definitely believes that while most developers in Switzerland are highly skilled at creating games, they often lack business knowledge, which limits their ability to fully exploit the potential of their projects. He believes that nowadays, it's not enough to simply release a good game. Developers need to be adept in areas such as team leadership and especially in negotiation skills. These are crucial for securing business deals at international video game events. For instance, convincing a publisher requires this kind of knowledge and expertise. Without these business skills, many developers struggle to reach the success their projects could potentially achieve.

He states that developing a game like "Swordship" (his game) in Switzerland typically costs around 400,000 to 500,000 CHF. Due to the higher costs of living and wages in Switzerland, the expenses are significantly elevated compared to other countries. He notes that today to create a good game that stands out, the minimum cost is around 300,000 to 400,000 CHF. Regarding the government’s contribution to funding game development, he rates it a 2 out of 5. While there is some support, it is minimal and insufficient to cover the necessary expenses for developing quality games within reasonable timeframes. The current level of support does not adequately address the

financial demands of assembling a competent team and sustaining their salaries throughout the development process.

He believes that the lack of government recognition significantly limits the growth potential of the Swiss video game industry. He argues that with more flexible measures and stronger support, both in terms of education and industry importance, the Swiss video game sector could have a greater impact. With more encouragement and recognition from the government, the industry could thrive and compete more effectively on the international stage. Despite having talent and ideas, without adequate support, it's challenging to turn these into commercial successes. He also mention than in other countries, government contributions have played a significant role in the industry's success. For example, substantial support in countries like France has resulted in the establishment of more studios, a more supportive ecosystem, and a greater chance of creating standout studios and producing globally successful games. He mentions that in countries like France, there have been dedicated educational programs for game development for over 20 years, whereas in Switzerland, such formations have only recently been established. This delay in cultural and educational development, coupled with a lack of political will, has hindered the growth of the Swiss video game industry.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He believes that focusing on the mobile gaming market is a bad strategy for Swiss developers. The mobile market is highly competitive and requires substantial financial resources for a game to stand out, making it unsuitable for Swiss developers.

He also strongly feels that government recognition and support are crucial for the growth of the Swiss gaming industry. Switzerland faces numerous challenges, including being one of the most expensive countries in the world. Without government support, it is difficult for the industry to thrive. He argues that the government needs to invest more money into the industry. Currently, funding entertainment, including gaming, is often questioned, with some preferring that funds be directed to other areas like pensions. However, he emphasizes the significant economic impact the gaming industry can have, citing job creation and revenue generation seen in other countries.

If the government were to support the establishment of one or two large studios in Switzerland, it could drastically change the industry’s landscape. Quality games and global hits are needed to launch the industry forward. He believes that with more comprehensive support, including financial aid and social charges similar to what has been done in France, Switzerland could attract large development studios, retain local talent, and undertake more ambitious projects. This support is essential to prevent talent from leaving the country and to create a robust ecosystem. He stresses that Switzerland has the financial means to do this, but it requires the government’s willingness to act.

4.5 Case study – Respondent E

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

He believes that the current state of the Swiss video game industry's infrastructure and support systems significantly hinders revenue generation.

Firstly, he highlights the impact of the lack of major studios (typically AA studios) and publishers on the Swiss video game industry. He rates this impact a 4 out of 5. The absence of big studios has a significant effect, as there are only a few indie studios and one notable studio, Giant Software. The presence of more major studios would not only boost the economy but also make it easier to secure government support. Major studios create jobs, bring in revenue, and contribute to the economy, making the industry more attractive to local talent who currently prefer to work abroad due to a lack of ambitious projects in Switzerland.

He rates the absence of publishers a 2 out of 5. While it makes things a bit more challenging because developers cannot have face-to-face meetings with publishers, it is not the biggest issue. Proximity to major publishers in Germany, such as Ubisoft, and the digital nature of the gaming industry mitigate this problem. Developers can still secure meetings and opportunities, particularly at major events like Gamescom, which is a significant hub for gaming publishers.

On the overall efficiency of the Swiss video game industry's value chain, he gives a rating of 2 out of 5. The value chain is quite incomplete, with only a few good studios and a notable absence of major studios and publishers. This lack of a comprehensive value chain impacts networking, collaboration, and the potential for forming new partnerships. The only major publisher presence in Switzerland is Nintendo, which focuses primarily on marketing games from outside rather than fostering local development.

Regarding the effectiveness of the Swiss video game ecosystem, including development studios, specialized training programs, institutional support, video game festivals, and the technological environment, he rates it 2.5 out of 5. The ecosystem has some strengths, such as good institutions like ZDK and SAE, which produce capable game developers. However, the lack of major studios makes it challenging for these developers to build sustainable careers in Switzerland. Governmental funding is another critical area that needs improvement to enable the production of bigger games more frequently.

Comparing Swiss state aid to other countries like Germany, France, and Canada, he rates it a 2 out of 5. According to him, there is a huge difference, particularly when looking at Germany. He feels that German government funding is substantial, providing significant support to both big and small studios. For example, in Germany, even large studios receive multiple millions for their projects. This level of investment aims to attract studios to Germany and establish the country as a major gaming hub. He believes that this kind of robust support is what Switzerland lacks. The Swiss government, in his view, does not provide comparable financial backing or incentives, making it much harder for local developers to thrive and compete on a global scale.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He identifies several significant challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential.

Firstly, on a scale of 1 to 5, he rates the lack of significant AA or AAA production as a 3. He believes that while producing big AAA games doesn't guarantee profitability, it does generate significant buzz and visibility for the industry. Swiss studios excel in creating high-quality games on a smaller scale, which can be highly successful. Stray Fawn Studio, with its game "Wandering Village," is a great example of this success on a smaller scale. He feels that focusing on AA games, which are more manageable and can still achieve great success, would be beneficial for the Swiss gaming industry. These games can build a loyal audience and provide consistent revenue.

Regarding the impact of AA or AAA production on the sector's economic dynamic, he explains that successful AA games can develop a dedicated fan base and even become franchises, much like the Swiss game "Farming Simulator," which releases new versions annually and maintains a strong audience. He believes that AA games have the potential to boost revenue significantly and enhance industry stability by creating consistent, loyal customer bases and generating ongoing income.

He rates the impact of Switzerland's high cost of living on the country's video game industry as a 5 out of 5. This high cost makes everything significantly more expensive, from starting a business to developing a game. This creates a major barrier for young developers and small studios, making it difficult for them to survive and thrive in the Swiss market.

Regarding the challenge of talented developers finding positions abroad, he rates this issue a 5. He points out that Switzerland has good institutions that produce very skilled game developers, but the lack of government support, high living costs, and the absence of big studios lead many developers to seek opportunities abroad. This brain drain is a significant problem for the Swiss gaming industry.

On the issue of business knowledge among developers, he rates it a 4 out of 5. He believes many developers lack crucial business skills, such as marketing and monetization strategies. This lack of business acumen prevents them from reaching their full potential. Developers need to think about their target audience and marketing from the outset, not just focus on making a good game. Effective marketing and understanding of the business side are essential for success.

He estimates the typical cost of developing a good indie game in Switzerland to be around 300,000 to 400,000 CHF, but the government's contribution is often capped at 50,000 CHF, which is insufficient. He finds the ease of obtaining funding to be challenging and rates the government's contribution to funding video game development as very low. The process often requires developers to secure private investment before the government provides matching funds, which is tough for many.

He points out that the absence of local publishers is a challenge. According to him brand managers for big games are often based in Germany, responsible for Germany, Austria, and Switzerland, but they might not understand the Swiss market or culture. This lack of local representation means fewer targeted marketing efforts in Switzerland, making it harder to generate revenue. The conservative nature of Swiss society and lower cultural acceptance of gaming compared to countries like France and Spain also hinder the industry's growth. However, he notes that this is slowly changing, with games like Fortnite and platforms like Twitch helping to improve the cultural acceptance of gaming in Switzerland.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He identifies several strategic initiatives that the Swiss video game industry could adopt to enhance its global influence and revenue generation.

First, he believes that Swiss developers should not focus more on the mobile market, despite it being the biggest revenue-generating segment. He explains that the free-to-play model on mobile requires very strict marketing strategies to succeed and the competition is much tougher. He suggests that Swiss developers should stick to what they are already doing well focusing on PC and console games. This approach is working for them, and there is no need to shift focus to the crowded mobile market.

Secondly, he emphasizes the crucial role of government support for the Swiss gaming industry to become more influential and generate more revenue globally. He believes this support will be the most important factor in overcoming the many challenges the industry faces. The government needs to believe in the industry and invest money into it, similar to what Germany has done. They should provide more substantial funding, as the current levels are insufficient. He suggests that the government could offer tax incentives for studios and payment of wages, among other supports. The recognition and support of the Swiss government would help solve several challenges currently hindering the industry.

Furthermore, he stresses the need for the government to create a better environment to attract big studios to set up in Switzerland. This would, in turn, boost the entire industry. On their part, Swiss developers should continue to focus on making high-quality games, particularly good indie games and AA titles. He notes the importance of increasing the frequency of game releases, as the current release frequency is too long. Producing a few worldwide hits could automatically give a significant boost to the industry.

4.6 Case study – Respondent F

He believes that the current state of the Swiss video game industry's infrastructure and support systems significantly hinders revenue generation.

First, he emphasizes the lack of major AA or AAA studios, rating the impact of this deficiency a 5 out of 5. Switzerland's gaming sector is somewhat behind, and the absence of large studios means there's less opportunity for people to work full-time in the industry and gain valuable experience. In countries like the USA, many small studios were founded by employees of large studios, bringing essential know-how in managing and growing a business. This kind of experience and synergy is missing in Switzerland due to the absence of big studios, which goes beyond mere game production; it's about managing a business and navigating market complexities.

He also points out the lack of publishers in Switzerland as a significant issue, giving it a 4 out of 5. While it's possible to work with publishers abroad, having local publishers would facilitate better communication and trust. The lack of publishers forces Swiss developers to seek deals in other countries, complicating the process due to distance and less personal contact. The human factor plays a crucial role here, as face-to-face interactions are often more effective in building trust and resolving issues.

On the overall efficiency of the Swiss video game industry's value chain, he rates it a 2 out of 5. The industry mainly consists of development studios with a glaring absence of major studios and publishers. Compared to neighboring countries like France and Germany, Switzerland's value chain is incomplete, he feels that will negatively impacts the industry's growth and revenue potential.

Regarding the effectiveness of the Swiss video game ecosystem, he gives a score of 2.5 out of 5. He highlights that Switzerland's educational system has potential but needs improvement. There are opportunities to study game design at institutions like the University of Zurich and Lucerne University of Applied Sciences and Arts, but more needs to be done to encourage young people to consider careers in game development. The government should promote this industry more actively to make it a viable career choice. There are several events and networking opportunities, such as Fantasy Basel and Swiss Games Day, but more government support and funding are needed to enhance these initiatives. He suggests that the government could provide more financial support for these events as part of cultural and business development. He also emphasizes the need for successful large studios with international hits to establish Switzerland as a serious player in the gaming industry. In countries like the USA, Germany, and France, the gaming industry has been thriving for decades, and Switzerland is somewhat behind. However, he believes that with the right support and infrastructure, it has the potential to catch up.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He identifies several primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential.

First, he rates the impact of the lack of significant AA or AAA production a 4 out of 5. He believes that producing more AA games in Switzerland would open up many opportunities. According to him, people often associate successful big games with America or Germany, and this perception impacts the recognition of Swiss developers. He feels that increasing AA production would help establish Switzerland as a serious player in the industry, encouraging more interest in game development careers locally.

Secondly, he gives a 5 out of 5 rating to the impact of Switzerland’s high cost of living on the video game industry. He explains that the high living costs make it extremely challenging for indie developers, who often don't make significant money initially. According to him, the high expenses, combined with the uncertainty of game success, create a substantial barrier for developers. Costs for living, business operations, and taxes are much higher in Switzerland compared to other countries, making it difficult for developers to sustain their projects.

He also sees the brain drain as a major issue, rating it a 5 out of 5. He believes that many talented and educated developers leave Switzerland for better opportunities abroad because of the limited local opportunities and high costs. He hopes that these developers might return and start their studios in Switzerland, bringing valuable experience from large foreign studios. However, he feels that attracting and retaining talent remains a significant challenge due to the current industry conditions.

He believes that Swiss developers, despite being skilled in game creation, lack crucial business knowledge. He rates this issue a 4 out of 5. According to him, developers need to understand business management, market trends, and effective marketing strategies

to succeed. He feels that many Swiss developers lack experience in these areas, which hampers their ability to turn their projects into commercial successes. He believes that business acumen is as important as technical skills in the gaming industry.

Regarding the cost of developing a video game in Switzerland, he finds it quite variable and complex. He explains that the cost depends significantly on whether the game development is a full-time endeavor or a part-time project. For a hobby project done alongside a full-time job, the out-of-pocket costs can be around 8,000 to 10,000 CHF for necessary expenses like graphics and music. However, if one were to develop a game full-time, the costs could be much higher. He estimates that developing a game full-time over six to eight months would require a budget of around 50,000 to 70,000 CHF for salaries alone. For a team of three people working for a year, the costs could reach up to 200,000 CHF. He rates the government's contribution to funding video game development a 2 out of 5, highlighting that funding from entities like Pro Helvetia is minimal and difficult to obtain. His personal experience with seeking financial support has been challenging, often requiring him to finance his projects himself.

Lastly, he highlights the lack of recognition at the government level as a significant barrier to growth. He feels that the Swiss government does not prioritize the video game industry, which affects its development and recognition as a viable career path. According to him, the government encourages young people to pursue traditional careers over game development, which limits the industry's growth potential. He believes that government recognition and support could significantly boost the industry, helping to overcome many existing challenges. He feels that Switzerland clearly has the talent, but because of the lack of support, many talents go unnoticed, preventing the country from shining more in the global gaming market.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He believes that the Swiss video game industry can adopt several strategic initiatives to enhance its global influence and revenue generation.

First, regarding the mobile market, he thinks focusing on it would be a bad idea. He points out that it's not as simple as it seems. He himself considered entering the mobile market but quickly realized how incredibly complicated and competitive it is. With over 100 new games released each week, it's extremely difficult for a small developer to stand out. A significant budget is needed for marketing to avoid the game being completely overlooked. Moreover, the revenue shares from platforms like Apple and Google are not favorable, making it hard for developers to profit. He feels that unless there's a substantial budget, focusing on the mobile market isn't worthwhile.

Secondly, he is convinced that government recognition and support are crucial for developing the Swiss gaming industry. He believes that government support will make all the difference. It’s essential to have comprehensive support, including good training programs, a few major studios, successful games, and publishers. For all of this to happen, stronger government backing is needed. He mentions that having access to

loans or financial support from the government would have significantly helped him build his business. He suggests that being more lenient with taxes and providing more financial incentives would greatly benefit the industry.

He stresses the importance of investing in education and encouraging young people to pursue careers in game development. More specialized programs should be offered in universities across Switzerland, not just in Zurich. According to him, the government needs to create an environment where young people can become proficient game developers. Currently, the profession isn't highly regarded in Switzerland, which is a shame given the industry's potential. Even those who train locally often prefer to move abroad, meaning Switzerland doesn't fully benefit from its talent pool. He also believes that there should be more AA game projects to boost visibility, create jobs, and generate buzz. He notes that the Swiss industry is currently quite discreet and needs more visibility and collaboration. He advocates for letting studios with potential operate without being burdened by excessive taxes and regulations. He mentions that government financial support is just one piece of the puzzle. Innovation and a business mindset are equally important. Developers should focus on completing multiple projects, not just relying on a single success.

4.7 Case study – Respondent G

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

He believes that the current state of the Swiss video game industry's infrastructure and support systems significantly hinders revenue generation.

Firstly, he feels that the lack of major AA or AAA studios has an enormous impact, rating it a 5 out of 5. The absence of these studios is detrimental because the industry functions as an ecosystem. According to him, without healthy, large studios, it is challenging to create a stable workforce that can remain within the Swiss market. For example, in Romandie, there are perhaps only two studios that survive with at least 30% of their focus on video games. This scarcity makes it impossible for employees to move between companies, leading to a brain drain as skilled workers seek opportunities abroad. This lack of a virtuous cycle results in a deficit of schools, resources, and large publishers or structures that allow for specialization within different genres. Consequently, the shortage of local talent creates a continuous loop of brain drain.

He rates the absence of publishers in Switzerland a 2 out of 5. Currently, there are no publishers in Switzerland. While Nintendo Switzerland exists, they focus solely on promotion rather than publishing. Local promotion is handled by branches of major brands, such as Nintendo, which organize events like stands at Polyland or the Swiss fair. However, these are purely marketing divisions without financial centers to fund projects. Despite this, he feels the lack of major publishers in Switzerland does not have

a significant impact on the industry. He notes that it does not make a substantial difference because developers can secure funding and publishing deals from nearby countries like France, where there is a strong cultural proximity.

He rates the overall efficiency of the Swiss video game industry's value chain a 2 out of 5, stating that it is practically nonexistent. According to him, the most important thing is that the industry lacks big studios, which significantly impacts its growth and revenue potential. He believes that adding 2 or 3 more significant studios could boost the industry. Compared to countries like France, Switzerland's value chain is underdeveloped, which hampers the industry's growth.

Regarding the effectiveness of the Swiss video game ecosystem, he gives it a 2 out of 5. While there are elements that could be improved, the primary issue lies with the studios. Healthy, large studios are essential for creating a sustainable workforce that can stay in the Swiss market. Additionally, he notes that government support is lacking, which further hampers the industry's growth. The educational aspect is also underdeveloped, with few video game schools that are highly centralized. The most significant and qualitative school is in Zurich, with smaller schools like SAE in Geneva not producing many graduates. He understands that it is challenging to establish more schools without a robust industry to support them. However, for larger studios to thrive, substantial government support is necessary, especially in a country like Switzerland. This interconnected issue highlights the need for a healthier ecosystem to sustain and grow the industry.

When comparing with countries that offer more robust support, such as Germany, France, and Canada, he rates Swiss state aid a 2 out of 5. Given Switzerland's financial capabilities, the current support for the video game industry is minimal. There are substantial aids for cinema and theater, which are less profitable industries, while video game support is minimal despite its significant economic potential. He feels that Swiss state aid could be vastly improved, as the current level of investment does not match the economic dynamism and job creation potential of the video game industry. In comparison to other countries, Switzerland is missing a significant opportunity by not investing adequately in this sector.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He strongly believes that the lack of significant AA production specially limits the revenue potential of the Swiss video game industry, rating this issue a 5 out of 5. He explains that having major studios is crucial for creating a robust ecosystem. For example, there is a project called Beautiful Light in Geneva, which is a “AA” project and has gained some traction, potentially serving as a catalyst. However, he emphasizes that, like in all markets, it’s essential to have very large studios that can create a trickle-down effect, fostering smaller studios and startups around them. He points out that countries with similar populations and standards of living, such as Sweden, have successfully built a thriving video game industry by establishing a few major studios. Indeed, for instance, with studios like “King” and “Dice”, Sweden has managed to create a substantial industry because these large studios form the backbone of the ecosystem. These studios train individuals who then branch out to form smaller companies, creating a dynamic and sustainable environment.

He compares this to the situation in Switzerland, where the absence of such large players means there is no similar ecosystem. Without these significant studios, it is challenging to foster new companies and specialized structures such as marketing agencies or smaller development teams. He highlights the example of Poland, where the success of

the project "Witcher" led to the creation of an entire industry around it. So he clearly believe this kind of project is important for the industry.

Secondly, he rates the impact of Switzerland's high cost of living on the video game industry a 5 out of 5. The high cost of living makes it extremely challenging for indie developers and small studios to survive. Compared to countries like Canada, where the cost of living is much lower and government support is more substantial, Switzerland's high expenses make it difficult for developers to sustain their projects. He points out that with the same budget, a game developed in Canada could be three to four times more ambitious. The high costs in Switzerland, combined with less generous government support, create a substantial barrier for developers. This environment forces many talented developers to move abroad, where they can find better financial and professional opportunities.

He agrees that one of the biggest challenges in the Swiss video game industry is that a majority of educated and talented developers find positions abroad, rating this issue a 5 out of 5. According to him, the lack of support from the Swiss government significantly contributes to this problem. The government views the video game industry as an artistic rather than a technological field, which limits opportunities for collaboration with institutions like EPFL or ETH. This lack of integration hampers the development of the industry. He emphasizes that to create a sustainable workforce, Switzerland needs healthy, large studios where professionals can grow and gain experience. Currently, without these opportunities, many graduates and talented individuals prefer to move to countries with more significant projects and better support.

He also believes that while most developers in Switzerland are skilled in game creation, they lack crucial business knowledge, which he rates a 4 out of 5. He feels that many developers do not consider the financial aspects and business models necessary for success in the industry. For example, developers often fail to plan for marketing their games or creating visually appealing elements that could drive sales. He stresses the importance of integrating business considerations into the game development process. This includes attending trade shows, making business proposals, and developing financing models. According to him, the Swiss industry is missing the connection between technical game development and business strategy. He suggests that developers need to think beyond just making a game; they need to understand how to finance it, market it, and create sustainable business models around it. He points out that business education, like that provided by HEC or similar institutions, is critical. These programs could equip game developers with the necessary skills in business development, marketing, and financial management. He notes that there are very few people in the Swiss game development industry with this kind of background, which creates a significant gap. He shares an example from his own experience, stating that his company's growth was significantly boosted by bringing in someone with a background in business and management. Before this, his team often overlooked crucial business aspects. The introduction of a business development specialist radically changed their approach, leading to more strategic planning and better financial outcomes.

Regarding the cost of developing a video game in Switzerland, he finds it highly variable but expensive. He estimates that developing a game can cost around 1.1 million CHF, with government contributions being minimal. He rates the ease of obtaining funding a 2 out of 5, explaining that the government's contribution is often just a fraction of what is needed. For instance, a government grant might cover only 40,000 CHF of a 1.1 million CHF project. This minimal support makes it challenging for developers to secure sufficient funding, often forcing them to rely on personal savings or seek funding from

foreign publishers. He believes that more substantial government support could alleviate some of these financial challenges.

Lastly, he highlights the lack of recognition at the government level as a significant barrier to growth, clearly affecting the industry's development. He feels that the government does not take the video game industry seriously, which impacts collaboration opportunities and investment. This lack of recognition results in a brain drains and a loss of potential revenue as many Swiss developers work abroad. He emphasizes that greater government engagement and recognition are crucial for developing the industry. Without this support, it will be challenging to create a thriving video game sector in Switzerland.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He believes that the Swiss video game industry can adopt several strategic initiatives to enhance its global influence and revenue generation. Firstly, he argues that focusing on the mobile market, despite its status as the biggest revenue-generating market in the world, might not be a good idea for Swiss developers, especially small ones. He feels that the mobile market is incredibly competitive and complicated. Drawing from his own experience, he notes that his company initially focused on mobile games, working with Apple on premium mobile games. However, the shift towards the freemium model and the dominance of platforms like Apple Arcade made it difficult to gain visibility and generate sustainable revenue. He highlights that without significant investment in marketing, small developers' games often go unnoticed in the crowded mobile market, and the revenue share is minimal, benefiting platforms like Apple and Google the most. According to him, today, the mobile market has become unmanageable. The market has changed so much that it now requires massive investments. He explains, from his extensive experience in this market, that initially, developing for mobile meant testing on 3 to 5 devices. Now, with the proliferation of versions of iPads, iWatches, iPhones, iPods, etc., even releasing on Apple requires buying 50 to 60 devices and conducting regular tests to ensure the app works smoothly. This significantly raises the barrier to entry, making it just as expensive, if not more so, than other segments, while the market remains highly competitive. Hence, he concludes that it probably not be a good solution for Swiss developers, particularly the smaller ones.

Regarding the development of the Swiss gaming industry to become a more influential player and generate more revenue on the global market, he emphasizes the crucial role of government recognition and support. He feels that substantial state investment and treating the gaming industry as a key sector, similar to FinTech or biotech, would significantly change the landscape. He points out that Switzerland has a culture of excellence, with renowned institutions like ETH and EPFL, which, according to him, could be leveraged to foster a robust gaming industry if supported properly.

He also believes that having more large studios in Switzerland would be transformative. These studios would create jobs, provide more opportunities, and boost the economy. He feels that the presence of 2-3 large studios could catalyze the industry, attracting more talent and investment. He points to Sweden as an example. Sweden, despite being a small country with a high cost of living, has succeeded in building a significant video game industry. This success is largely due to the presence of a few huge studios like “Dice” and “King”. These hyper-massive players have created a robust ecosystem, training individuals who then start smaller companies, thus fostering a dynamic and sustainable environment. He believes Switzerland could replicate this model and achieve similar success. However, he emphasizes to achieve that it will require more substantial support and recognition from the government, as the current high costs in Switzerland make it difficult to sustain large projects without adequate backing.

Additionally, he highlights the need for stabilization within existing studios. Drawing from advice within his board, including insights from industry experts in Canada, he emphasizes the importance of creating stable production lines and developing sequels to successful games to ensure economic stability and growth over a longer term. He believes that this approach could help Swiss studios see growth and stability over 5-10 years, with the Swiss government playing a supportive role in this process.

4.8 Case study – Respondent H

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

He believes that the current state of the Swiss video game industry's infrastructure and support systems significantly hinders revenue generation.

Firstly, he feels that the lack of major AA or AAA studios has an impact, rating it a 4 out of 5. He thinks that having big studios would raise awareness of the gaming industry in Switzerland. When compared to countries like the United Kingdom or France, which have much bigger and more present gaming markets, Switzerland is lacking. Countries that are influential in the gaming industry typically have a few big studios, and this is what Switzerland is missing. According to him, having a few big AA studios would be really beneficial for the well-being of the industry.

For publishers, he feels it would definitely be easier if there were Swiss publishers. They would understand local developers better, know how they work, and be close by, so if something goes wrong, they could meet directly. It’s about having that local connection and understanding, which would make things a lot smoother. Having an in-country publisher would mean that young people in the industry would struggle less to kickstart their studios and start developing games instead of looking for funding in other countries. He mentions that Stray Fawn Studio is aiming to get into publishing, which could be interesting for the industry. More publishers in Switzerland are needed. He would rate this need a 3 out of 5.

He rates the overall efficiency of the Swiss video game industry's value chain a 2 out of 5. He feels that the value chain is quite nonexistent, especially when compared to countries like France or Germany, which have much more complete value chains. Switzerland struggles with awareness partly due to this weak value chain. He thinks that having some big studios and impactful publishers within the country would greatly improve the situation and foster revenue growth.

Regarding the effectiveness of the Swiss video game ecosystem, he gives it a 2.5 out of 5. While there are some good schools and solid video game festivals, he believes that government support is where significant improvement is needed. The lack of substantial government contribution is holding back the industry on a global scale. He feels that enhanced government support could maximize the revenue potential of the industry.

When comparing Swiss state aid to other countries that offer more robust support, such as Germany, France, and Canada, he rates it a 2 out of 5. He feels that the Swiss government doesn't participate enough in supporting the industry. In contrast, governments in the UK and Germany invest much more money and provide better support to their developers. These countries help finance game development, offer better tax incentives, and cover a percentage of salaries during game development. The lack of such comprehensive support systems in Switzerland limits the industry's growth potential.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

He believes that the primary challenges and barriers preventing the Swiss video game industry from maximizing its revenue potential are multifaceted.

Firstly, he rates the lack of significant AA or AAA production as a 4 out of 5 in terms of its impact on revenue potential. He thinks that while having a few big AAA titles could raise awareness and bring attention to the industry, focusing solely on AAA production is not the solution. Instead, he suggests that having more AA studios would create a better balance, providing high-quality games without the enormous risks associated with AAA projects. The middle ground of AA production would be more sustainable and beneficial for the industry's growth.

Secondly, he rates the impact of Switzerland’s high cost of living on the video game industry as a 5 out of 5. He emphasizes that the high expenses make it extremely challenging for indie developers and small studios to survive. Everything in Switzerland is two to three times more expensive than in other countries, which significantly increases the cost of developing games due to high salaries and other expenses.

Regarding business knowledge among developers, he rates this issue a 4 out of 5. He points out that developers need to think like businessmen, considering not just the creation of a good game but also the marketing and sales aspects. Many developers neglect the importance of marketing, which is crucial for a game’s success. In a competitive and saturated market, having business skills, good leadership, and strong negotiation and marketing abilities are essential for survival, especially for those who are self-publishing.

He also addresses the typical cost of developing a video game in Switzerland, estimating it to be around 400,000 CHF for a good game, with potential costs reaching up to 1 million CHF depending on the scope of the project. He rates the government's contribution to funding video game development poorly, suggesting that while organizations like Pro Helvetia offer some support, it is far from sufficient to cover the substantial costs involved. He argues that more significant funding and attention from the government and big investors are needed to support the industry adequately.

Lastly, he strongly feels that the lack of recognition at the government level is a significant barrier to the growth of the Swiss video game industry. He believes the government

should pay more attention to this industry, offering financial relief and incentives, such as tax exemptions for new companies. When he started his own company, Violet Saints, he found no options for reduced taxes as a newcomer. He suggests that easier financial conditions for indie developers and beginners would significantly help the industry grow.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

He believes that the Swiss video game industry can enhance its global influence and revenue generation through several strategic initiatives. First, while acknowledging that the mobile market is the largest revenue-generating segment, he feels like it is not a good idea for Swiss developers to focus on this area due to its complexity and competitiveness. Instead, he emphasizes the importance of studios pursuing projects they excel at and are passionate about, rather than mimicking successful trends without a solid foundation in mobile gaming.

He also highlights the crucial role of government support in advancing the industry. He argues that if the Swiss government provides substantial economic and political backing, such as increased funding, salary support, and better incentives, it could attract major studios to Switzerland. This governmental support is seen as a key element in developing a robust gaming ecosystem that can nurture talent and create high-quality games, particularly AA titles, which can significantly raise Switzerland's profile in the global market. Furthermore, he stresses the importance of creating a supportive environment for young developers to encourage them to stay and innovate within Switzerland. By continuously pushing for excellence and producing outstanding games, the Swiss gaming industry can garner the necessary recognition and support from the government, ultimately transforming Switzerland into a significant hub for video gaming.

5. Analysis

5.1 Case study synopsis

My first sub-question was: "What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?"
The main goal was to assess the structure of the Swiss video game industry, including the robustness of its value chain, the effectiveness of its ecosystem, and the adequacy of its support systems. The main goal was to assess how these elements collectively contribute to or hinder the industry’s capacity for revenue generation, and to determine if and how these factors are impacting the revenue outcomes.

Here are the key points derived from the stakeholders' answers for this sub-question:

Lack of Major Studios

One most pressing issue identified is the absence of major studios. Out of the eight stakeholders interviewed, five rated this issue as 5 out of 5 in terms of impact, while the remaining three rated it as 4 out of 5. This consensus highlights the critical nature of this gap. The lack of major studios is seen as a major barrier to industry growth, hindering job creation, revenue generation, and the overall development of the sector.
They feel that the absence of major studios has a big impact on the overall swiss video gaming industry. They feel like without large, healthy studios, it becomes difficult to create a sustainable workforce within the Swiss market. This deficiency leads to a vicious

cycle where the absence of major studios results in a lack of specialized schools, insufficient resources, and a shortage of big publishers and other necessary structures. This ecosystem gap contributes to a continuous brain drain, with talented individuals leaving Switzerland for better opportunities abroad.
Moreover, stakeholders observe that while Switzerland has many studios, most of them, this is all small studios, and they cannot survive solely by making video games. These studios often have to diversify into software development, advertising, or creating apps for other industries to remain afloat. For example, some studios develop applications and games dedicated to public institutions, while others engage in part-time jobs parallel to running their game studios. This needs to diversify highlights the economic instability and limited opportunities within the Swiss game development sector. They emphasize that the presence of large development studios would create a virtuous circle. These studios could offer courses, take on interns, and provide inspiration and collaboration opportunities for smaller studios. This synergy is currently missing in Switzerland due to the lack of significant development studios. Consequently, ambitious graduates and developers find it challenging to advance their careers locally and are compelled to seek opportunities abroad, further depleting the local talent pool. Stakeholders believe that having 2-3 large development studios in Switzerland would significantly enhance the industry. Such studios would not only create jobs and revenue but also contribute to the overall economy and to the industry. They argue that large studios would foster a more dynamic and collaborative environment, allowing for the development of high-impact games like Rainbow Six or Farming Simulator, which can elevate the global presence of the Swiss video game industry. Additionally, they feel it would be easier to ask the government for support if there were a few big studios making a substantial impact in the country.

Lack of publisher

Stakeholders believe that the lack of local publishers significantly impacts the Swiss video gaming industry. While some respondents see partnering with publishers in neighboring countries like Germany and France as a feasible option, the vast majority consider the absence of domestic publishers a significant drawback. They argue that local publishers would streamline various aspects of game development and distribution, thereby accelerating the industry's growth. Most agree that having a few major publishers in Switzerland would not only provide financial backing but also crucial strategic support, making it easier for Swiss games to effectively reach the market. However, the current situation compels many Swiss developers to seek publishers internationally or turn to alternative funding methods such as crowdfunding. This often disadvantages Swiss developers, especially those with less negotiation experience, leading them to accept less favorable agreements with international publishers who may focus more on quantity rather than the quality or potential of the games. This situation hampers the development process and limits the Swiss video gaming industry's potential on the global stage.

Weak Value Chain

The stakeholders also expressed significant concerns about the value chain of the Swiss video game industry. Seven out of eight stakeholders rated it as 2 out of 5, while one rated it as 1.5 out of 5. The general sentiment is that the value chain is virtually nonexistent. The critical components of a strong value chain, such as substantial game development and influential publishing, are missing. Despite having numerous studios, their small size and lack of exclusive dedication to game development hinder the industry's growth. Additionally, the absence of publishers within Switzerland means that developers face substantial challenges in bringing their games to market, further limiting revenue potential.

Ineffective Ecosystem

Most stakeholders rated the Swiss video game ecosystem between 2 and 2.5 out of 5. While they acknowledge that education and game festivals are adequate, they emphasize the need for better alignment of educational programs with industry needs. The major criticisms are directed at the lack of major studios and insufficient government support. Stakeholders believe that the absence of large studios leads to a significant brain drain and severely limits the industry's growth. They feel that the government and studio presence are the weakest parts of the ecosystem. According to them, the lack of substantial government support is the primary reason for the shortage of major studios, which hampers the overall development and competitiveness of the Swiss video game industry. The stakeholders are all critical about the government support, pointing out that without robust financial and policy support, the industry cannot achieve its full potential.

Comparison of Swiss state aid with other countries

All stakeholders rate Swiss state aid for the video game industry as a 2 out of 5, signifying that it is perceived as inadequate. They collectively highlight the significant disparity in government support when compared to other countries like Germany, France, Japan and Canada. In these countries, governments provide substantial financial backing, tax incentives, and cover operational costs, fostering a thriving gaming industry. In contrast, Swiss support is seen as minimal and largely symbolic, insufficient to sustain large projects or compete globally. Stakeholders feel that Switzerland, despite its economic capacity, lags behind in recognizing and investing in the video game industry. They point out that while there are some funds available, such as those from Pro Helvetia, the amounts are too small to make a meaningful impact. The high cost of living and operating in Switzerland exacerbates this issue, making it difficult for local developers to thrive without more robust support.

The second sub-question: was "what are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?" Overall, through the answer got through the interview I was able to identify several primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential. Here is the main insight that I got for this sub-question from the stakeholder:

Lack of production of AA & AAA games:

The majority of stakeholders believe that the lack of AA and AAA game production significantly impacts the Swiss video game industry. Out of eight stakeholders, six rated this issue between 4 and 5, while two rated it as 3 out of 5. Overall, they all argue that producing larger, high-profile games could greatly enhance visibility and revenue potential. Most stakeholders acknowledge that AA games are the most feasible and beneficial focus for Switzerland, given the high costs and resource demands of AAA games. They believe AA games would improve visibility, create synergy, and foster collaboration, attracting international developers to work on these projects. This kind of project will create much-needed awareness for the Swiss video gaming industry.

SGDA and MYI Entertainment emphasized that while focusing on AA games is important, Switzerland should not neglect its strength in indie projects. Swiss indie developers excel at producing high-quality games on a small scale, achieving substantial

success. For example, "Wandering Village," developed by a team of 10 people, has become a major success. They suggest that balancing indie and AA projects could be a key strength for the Swiss video game industry.

Another important point which was mentioned is that games should be localized Swiss creations. If players are unaware that a game is developed in Switzerland, it won't bring the desired awareness to the industry. For example, many people don't know that "Farming Simulator" is a Swiss game and mistakenly believe it to be German. Recognizing and promoting the Swiss origins of these games can help boost the industry's profile and attract more attention and investment.

High Cost of Living

All stakeholders agree that the high cost of living in Switzerland is a significant challenge for the gaming industry. They note that everything costs two to three times more than in countries like France or Japan, which has a clear impact on the creative sector like gaming. They also highlight that salaries in Switzerland are particularly steep. For example, paying an engineer around 8,000 francs a month is common, but with that amount, two to three engineers could be hired in other countries. So basically, developing a game in Switzerland will be two to three higher than most of any countries and it has big impact. They point out that Ubisoft once had offices in Switzerland but decided to completely close them and relocate to Germany. Similarly, Microsoft shut down its Xbox division in Switzerland, maintaining operations only in Germany due to the high cost of maintaining offices and employees in Switzerland. This disparity makes it challenging to manage costs effectively. Additionally, the Swiss Franc doesn't stretch far domestically and struggles against other currencies due to not being part of the Eurozone, often leading to unfavorable exchange rates. This makes developing games in Switzerland very expensive and is a primary reason why major studios are reluctant to set up operations in the country.

Brain Drain

Out of the 8 stakeholder everyone has gave a rate between 4 and 5 showing it has a clearly a big impact.

One of the main reasons stakeholders believe this is because the opportunities in Switzerland are limited. They feel that there is a need for healthy studios that can create jobs and retain talent within the Swiss market. Unfortunately, at the moment, there are no large studios in Switzerland. This makes it difficult for professionals to develop their careers and work on large projects locally. For independent developers with ambitious dreams, launching in Switzerland is particularly challenging unless they have strong financial support. The high cost of living exacerbates this issue, and there are no special measures from the government to mitigate these costs.

As a result, many new graduates and talented individuals prefer to move abroad, where they find more opportunities and can work on larger projects. They believe that in other countries, they can better develop their skills and careers due to the abundance of opportunities and the presence of major studios.

Lack of business knowledge

All stakeholders rated the issue of lacking business knowledge between 4 and 5, indicating it is a significant concern. They believe that, while most developers in Switzerland are skilled in game creation, they lack crucial business knowledge, which prevents them from reaching their full potential in the industry. Today, it is crucial to know how to manage a business, plan effectively, prepare a marketing plan, have good negotiation skills. For example, developers must know how to write attractive proposals to secure funding or partnerships. For those without financing, it is essential to know how to sell their projects, develop business plans, and find funding models. There is a whole business aspect that many developers lack. They are very strong in technical skills but often neglect these business-related aspects.

Low contribution of the government in the financing part of a game

Seven stakeholders rated the issue at 2, and one rated it at 1.5, indicating the government's contribution to game financing is minimal. To develop a good game in Switzerland, the cost averages between CHF 300,000 and CHF 1 million. Pro Helvetia offers some support, but it is capped at CHF 40,000, which all stakeholders agree is insufficient to make a significant impact.

Without finding an investor or publisher, funding a game is highly challenging. Some stakeholders mentioned that several studios have had to take drastic measures, such as sacrificing months of salary or taking on part-time jobs, just to finance their projects. Often, game financing is achieved through publishers, personal savings, or crowdfunding. In neighboring countries like France, Germany, and the UK, game development receives substantial financial support, far exceeding what is available in Switzerland.

Lack of contribution of the government

All eight stakeholders agree that the lack of recognition at the government level is significantly limiting the growth potential of the Swiss video game industry. They believe the government's insufficient acknowledgment and investment are major barriers to the industry's development.

Stakeholders argue that Switzerland, despite its economic capacity, fails to see the financial and cultural benefits the gaming industry can bring. Unlike other countries, such as South Korea, France, Germany, Canada, where governments actively support and grow their gaming sectors through financial backing and policy initiatives, Switzerland remains focused on its traditional industries like banking and engineering.

They note that in countries where governments have recognized the importance of the gaming industry, substantial investments and supportive measures have led to its growth and success. For example, Canada offers tax breaks and substantial subsidies to gaming studios, making it a hub for game development despite its high living costs.

In Switzerland, however, the lack of such support means the industry struggles to establish itself, resulting in a brain drain where talented individuals leave for countries with more opportunities. What the Swiss video gaming industry needs is really is a big help politically and economically from the government. This lack of recognition and support prevents the creation of a robust ecosystem that could include major studios, enabling local talent to grow and contribute to the industry. The stakeholders feel that if the Swiss government took a more proactive role in recognizing and investing in the

gaming industry, it would unlock significant potential, creating jobs, attracting international talent, and boosting the economy. The current minimal support stifles the industry, which, with proper backing, could thrive and compete on a global scale.

“What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?” Here is the main insight that we got for the 3rd sub-question from the stakeholder:

Focus on the mobile market

All the stakeholders mentioned that it would not be a good idea for Swiss developers to focus on the mobile market due to its extreme competitiveness and complexity. According to the stakeholders, approximately 100 games are released per week on the mobile market, making it a highly saturated space. Without significant investment in marketing, small developers' games often go unnoticed, with minimal revenue share, primarily benefiting platforms like Apple and Google. Additionally, the policies on these platforms are unstable, with frequent changes by Apple affecting the profitability and visibility of games. Furthermore, they emphasized that the free-to-play business model, which dominates the mobile market, is not easy to manage. It requires continuous updates, extensive in-game purchases, and sophisticated monetization strategies, which can be challenging for small developers to implement effectively.

Sunny Side Studio, which has a deep understanding of this market highlighted that today the mobile market has become unmanageable. Initially, developing for mobile required testing on only a few devices, but now, with the proliferation of various iPads, iWatches, iPhones, iPods, and other devices, releasing on Apple requires purchasing 50 to 60 devices and conducting regular tests to ensure smooth operation. This significantly raises the barrier to entry, making it just as expensive, if not more so, than pc and console segment, while the mobile market remains highly competitive. Therefore, Sunny Side concludes that focusing on the mobile market might not be a good solution for Swiss developers, particularly the smaller ones.

Potential strategies to enhance its global influence and revenue generation

All eight stakeholders agree that government support and recognition will be crucial for advancing the Swiss gaming industry. They argue that such backing could significantly boost the industry's growth potential, making it more competitive on a global scale. They emphasize that, without substantial government involvement, it will be challenging to elevate the industry. Basically, the main expectation from most of the stakeholder is bigger government support politically and economically wise. They believe that with stronger support of the government it will be possible to have two to three big studios in Switzerland and this will automatically boost the industry.

The stakeholders draw comparisons to countries like Canada, where strong governmental support has turned the nation into a global hub for video game development. Major studios like Ubisoft and Electronic Arts thrive there, producing globally popular games like FIFA. This success, they note, demonstrates that generating billions, is possible with substantial resources and confidence in the industry. The

stakeholders believe that the establishment of larger development studios (AA studios) in Switzerland would be crucial to develop the industry, because it will create jobs, generate revenue, and catalyze the industry. Once example which is quite good is Sweden. Like Switzerland, Sweden is a small country with a high cost of living but has succeed to build a significant video game industry just by establishing a few massive studios like DICE and King. These studios form the backbone of the ecosystem, training individuals who then branch out to form smaller companies, creating a dynamic and sustainable environment. They believe that Switzerland could replicate this model and achieve similar success. However, to achieve the similar success attained either by Canada or by Sweden, it will require more substantial support and recognition from the government, as the current high costs in Switzerland make it difficult to sustain large projects without adequate backing.

Then they point out that Switzerland's excellent education system could be transformed into a European specialty hub to attract talent, which could encourage studios to expand and develop locally. With multilingual capabilities and institutions like EPFL, ZHdK SAE offering courses in English, Switzerland has the potential to become a key reference point for postgraduate education in game development, fostering a larger gaming culture and attracting studios to tap into a well-trained local pool of professionals. Moreover, stakeholders stress the importance of investing in education and encouraging young people to pursue careers in game development. They advocate for more specialized programs to be offered across Switzerland, not just in Zurich, to create a proficient workforce. The government should create an environment where game development is highly regarded, enabling talent to flourish without the need to move abroad. By enhancing the educational infrastructure and providing robust support, Switzerland can retain and develop its talent locally, fostering a dynamic and thriving gaming industry.

Then, one solution which was propose is the creation of hubs, similar to those being developed in Zurich. These hubs would serve as central locations where various game development studios can come together to collaborate, exchange skills, and mentor new developers. The idea is to create spaces where studios support each other more intensively, fostering a sense of community and collaboration. Given that many studios are small, these hubs would facilitate matchmaking, professional exchange, and knowledge sharing, particularly for newcomers. The aim is to make developers more competitive by learning from each other’s mistakes quickly and efficiently—what they refer to as "fail faster." This approach would help new developers understand the realities of releasing a game and improve over time, ultimately building a stronger, more interconnected ecosystem.

In addition, they advocate for a supportive environment for young developers to encourage them to stay and innovate within Switzerland. By continuously pushing for excellence and producing outstanding games, the Swiss gaming industry can garner the necessary recognition and support from the government, ultimately transforming Switzerland into a significant hub for video gaming. They believe that focusing on both AA and indie game projects, enhancing the educational infrastructure, and providing robust financial and policy support could drive significant growth in the industry.

5.2 Main finding of Literature review

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

In the literature review I noticed that there was a clear lack in the value chain of the Swiss video gaming industry. The problem with their value chain is that there were missing some key players which are major studio of development and publishers. Although Switzerland has around approximately 130 studios of development in Switzerland, 90 % of these studios were all small studios. The biggest studio of development is Giant Software, then there are maybe 10 of medium of size and then the rest of all of them are all small studios. The problem with most Swiss studios is is most of them will not fully do games. They were doing couple of other activities like creation of web design, development of App and somewhere also doing part time jobs in parallel. And the biggest issue with that is that because of the fact Swiss developer don't focus their full focus on the development of games, in order to develop one game, the project was taking more time. The fact that there weren't any big studios of development in Switzerland was probably the main reason why there were some issues like brain drain, lack of AA games, lack of awareness for the Swiss video gaming industry. Then regarding the publisher, there aren't any publisher in Switzerland. A publisher is very important because mostly he will be the one who will finance and commercialize the game. The fact that Switzerland hasn't any publisher is a big issue. Regarding the ecosystem, the overall seems good. The biggest issue in this ecosystem is the government support. Indeed, although the government is giving some fund, the amount that they are providing right now is clearly not enough.

The literature review highlights significant gaps in the value chain of the Swiss video gaming industry, particularly in the areas of development studios and publishing. Although there are approximately 130 game development studios in Switzerland, most of these are small scale. Giant Software stands out as the biggest and the one, with a handful of medium-sized studios and the remainder being quite small. Many of these studios do not exclusively develop games. They often engage in other activities like web design, app development, and some team members even hold part-time jobs. This dilution of focus extends the time required to develop games, impacting productivity and project timelines. A major concern is the absence of major development studios in Switzerland, which contributes to issues like brain drain, a lack of AA games, and limited global awareness of the Swiss video gaming industry. The lack of large studios limits the industry's capacity to retain top talent and produce high-caliber games that compete on the international stage.

Additionally, Switzerland lacks local publishers, is a critical gap in the video gaming value chain. Publishers are crucial as they don't not only finance games but also manage their commercialization. Without local publishers, Swiss developers must either self-publish, which can be limiting, or seek international publishers, which may involve relinquishing a greater share of revenues and control over their projects.

Regarding the ecosystem, while it is generally supportive, the level of government funding is a significant concern. The government does provide some funding, but the amounts are clearly insufficient to meet the needs of the industry and more precisely of the developer. This shortfall in funding prevents the industry from scaling up and achieving its full potential.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

Lack of government and economic support

The findings from the literature reveal that there is a clear indication of insufficient political and economic support from the Swiss government towards the video gaming industry. Swiss game developers highlight a significant need for improvements in the overall framework conditions governing the industry. They point out a notable deficiency in political attention and the absence of concrete economic incentives when compared to other regions like England, which offers tax breaks, or Montreal, known for its long-standing support aimed at attracting video game companies. It seems like this lack of robust government backing is seen as a major hurdle, preventing the Swiss video gaming sector from achieving its full potential and competitiveness on a global scale.

Small Market Size:

The literature review indicates that Switzerland's small domestic market presents a significant limitation, restricting the potential customer base for Swiss-made games. This constraint makes it challenging for developers to generate substantial sales domestically, which in turn affects the attractiveness of the industry to investors.

High Cost of Living:

Based on the insights from various sources, the high cost of living in Switzerland significantly burdens local video gaming companies. This economic pressure constrains their ability to expand and compete on an international level, as operational costs substantially exceed those in more economically favorable locations.

Brain Drain:

The literature review reveals a concerning trend of brain drain, where skilled developers move abroad in search of better opportunities due to the limited scope and scale of the Swiss video gaming industry. This exodus not only depletes the country of its talent but also stifles the industry’s development and innovation potential.

Insufficient Financing:

Funding emerges as a critical issue in the literature, with entities like Pro Helvetia providing maximum grants that fall short of the actual costs needed to develop competitive video games. This discrepancy forces developers to either seek additional income sources or compromise on their living standards to sustain their projects.

Lack of Business Acumen:

The literature review indicated there is a noted deficiency in business expertise within the Swiss video gaming sector. The literature points out that many developers lack crucial business skills, which are essential for navigating the complex landscape of international gaming markets and securing profitable deals.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

The literature review highlights the crucial role of government support in boosting the video gaming industry, as demonstrated by Canada's approach. In 2005, Canada transformed its predominantly small-scale gaming industry into a global hub through strategic government support, including significant financial incentives and robust funding. This contrast with Switzerland's more modest support suggests that increased governmental involvement could similarly elevate the Swiss video game industry, helping it become more competitive on the global stage. With a better government framework there will be possibility to have some big studios and this will enormously contribute for the overall industry growth.

Additionally, the literature highlights that a promising strategic initiative for Swiss indie studios is to capitalize on the mobile gaming market. This sector not only offers high potential for revenue generation but also features lower barriers to entry, making it an ideal focus area for smaller studios looking to expand their reach and financial success.

5.3 Comparison of Literature and Interviews

In this part, I will cross check the information's that I get in literature review and the interview. The main aim is really to compare the 3 sub questions the answer I got and see if both information find in the literature review and interview are matching or not. This will order to answer the sub- questions/hypothesis of my thesis. In other words, I verify the data collected through the literature review and the data collected through the interviews by comparing them.

What is the current state of the Swiss video game industry's infrastructure and support systems, and how do they impact revenue generation?

Both the literature review and the interviews affirm that there is clear lack in the infrastructure and support systems, and it clearly impacts the revenue generation and growth of the Swiss video gaming industry. The main point is lack here of big studios, local publishers and of good support system from the government.

What are the primary challenges and barriers that prevent the Swiss video game industry from maximizing its revenue potential?

Both the literature review and interviews highlight significant challenges within the Swiss video game industry that impede its ability to maximize revenue potential. Key issues include the limited production of AA games, Switzerland's high cost of living, inadequate financing, a deficiency in business acumen, and insufficient government support. These obstacles collectively stifle the industry's growth and prevent it from achieving its full potential in the competitive global gaming market.

What strategic initiatives could the Swiss video game industry adopt to enhance its global influence and revenue generation?

First of all, both the literature review and interviews highlight that the key factor for developing the Swiss video game industry is government recognition and support. Without this, developing the industry effectively will be complicated. Government support would attract bigger studios and publishers, enable the creation of AA games, and increase industry visibility.

Then, there was a point of mismatch between the literature review and the interviews. The literature review highlights that the mobile segment could be a good opportunity for small developers to succeed. However, during the interviews, all stakeholders believed that the mobile segment is not a good idea. They emphasized that it is a highly competitive market, with approximately 100 games released each week. Unless a developer has a significant budget for marketing, their game is likely to go unnoticed. Furthermore, stakeholders highlighted that the market has changed compared to a few years ago. Previously, developers only needed to test on 3 to 5 devices. Now, with numerous versions of iPads, iWatches, iPhones, and iPods, even releasing on Apple requires purchasing 50 to 60 devices and conducting regular tests. They believe this approach is too expensive, with a high risk of failure due to the game's potential to go unnoticed.

5.4 Recommendation

Based on the literature review and interviews conducted, it is evident that the most crucial factor for developing the Swiss video gaming industry is strong government support and recognition. Without this, growing the industry effectively will be very difficult. Stakeholders believe the government should contribute both politically and economically to create a better environment for the Swiss video gaming industry. Currently, the industry faces significant challenges, from game financing to the stabilization of studios. Stakeholders expect concrete help from the government. For example, in the UK, the government provides substantial funding for game development and offers tax relief that allows gaming studios to claim back a significant portion of production costs. This type of support is what is needed in Switzerland.

The stakeholders interviewed for the primary data collection believe that with better government support, Switzerland could attract two to three major studios. This support would also encourage publishers to establish a presence in Switzerland, helping to create a stronger ecosystem for the Swiss video gaming industry. Attracting big studios is particularly important. Stakeholders believe that having big studios can completely transform the industry's dynamics. Examples from the UK, Poland, Sweden, and Canada show that just a few big studios can significantly enhance industry synergy. While Switzerland has many studios, most are small and not fully focused on game development. Many of these small studios must diversify their activities, which slows down the game production process. One of the main reasons our talent goes abroad is

the lack of opportunities here. By attracting a few big studios, we could create more job opportunities, retain our talent in Switzerland, and enable work on larger games projects. This would bring significant awareness to the Swiss video gaming industry. However, to achieve this, strong government support is essential. The industry faces many challenges, including the high cost of living in Switzerland. Unless the government supports the Swiss video gaming industry as other countries do, it will be hard for the industry to grow and attract big studios.

However, changing the federal mentality will not be easy. Players in the Swiss video game industry have already taken steps to initiate change, but progress is slow. During my interviews with stakeholders, it was noted that associations such as the Swiss Game Developers Association (SGDA) and the Swiss Interactive Entertainment Association (SIEA) are actively preparing more comprehensive reports to advocate for change at the federal level. These associations will play a crucial role in driving this transformation. They must ensure that solid, detailed reports on the current state and potential of the Swiss video game industry are produced and presented to the government.

Demonstrating that there is a genuine demand for games among the Swiss population and that the Swiss games industry has immense potential but needs proper support to grow is key to changing mindsets. Stakeholders need to engage directly with political decision-makers through lobbying actions and by forming advisory groups made up of industry experts. This ensures that the needs and potential of the gaming sector are clearly understood and prioritized.

To bring about this change, associations like the SGDA and SIEA should take concrete actions. They should release detailed reports that address several key aspects such as the challenges facing the Swiss games industry, the reasons for investing in the sector, and the strong potential for growth and innovation. These reports should highlight how other countries, like Sweden, the UK, Canada, and Finland, have benefited from substantial government support, leading to significant revenue generation, job creation, and international recognition in their gaming sectors.

It is essential to point out that the rest of Europe is investing heavily in the games industry, and that Switzerland risks missing out on major opportunities if it does not follow suit. Emphasizing the potential economic benefits is key. Switzerland has the potential to become a hub for the video game industry, especially with the presence of excellent educational institutions producing qualified graduates. However, what is currently lacking are major studios. Attracting and establishing these studios can lead to significant revenue generation, job creation, and international collaboration opportunities. This would stimulate the local economy and position Switzerland as a key player in the global games market. By presenting these arguments and data, stakeholders can make a compelling case for the Swiss government to support and invest in the games industry, ensuring it reaches its full potential.

Another question that could be considered is: Isn't it too late for Switzerland to make a mark in the video game industry?

Regarding timing, some stakeholders mentioned that the Swiss video gaming industry is significantly behind compared to other industries such as those in France, Germany, and Canada. These countries have been involved in the gaming industry much longer and have developed a powerful ecosystem. Switzerland, however, lacks such a robust infrastructure, and government support has been minimal. Despite this, Switzerland has excellent developers who specialize in niche markets, which is one of the industry's greatest strengths. This specialization has allowed the Swiss gaming industry to stand

out in a highly competitive market. Swiss creations are characterized by diversity, innovation, and strong artistic vision, which are recognized internationally. Successful games like Farming Simulator, FAR, Transport Fever, and Wandering Village demonstrate the potential of Swiss developers. Based on this we can say It is not too late for Switzerland to make a mark in the video game industry. The country has the talent to create exceptional games that can gain international acclaim. Additionally, the emerging trend of artificial intelligence (AI) offers a new opportunity for Switzerland to excel. Focusing on AI in gaming, particularly in augmented reality (AR) and virtual reality (VR), could position Switzerland as a leader in this innovative field. Investing in AI technology and related education can drive future success in the gaming industry and potentially influence other sectors such as banking, healthcare, and education. This could also persuade the government to invest more in the gaming industry, recognizing its broader economic benefits.

To really boost the industry, government support is essential on all fronts, including job encouragement. Many stakeholders mentioned during interviews that the cultural undervaluation of game development as a career in Switzerland discourages talented individuals. The country's focus on traditional sectors like banking and engineering, seen as safer, needs to change. For example, in Sweden, large studios have significantly contributed to job creation, with some employing more than 200 to 500 people. This provides a motivation for people to pursue careers in the gaming industry, knowing they will have ample job opportunities post-graduation. In Switzerland, the lack of large studios means fewer employment opportunities. Most studios here are small, with fewer than ten employees. Often, when opting for a developer career in Switzerland, one either works alone or with a small team, unlike in other countries where studios employ large groups of 50 to 80 people. Additionally, independent developers in Switzerland face financial insecurity, with no guaranteed salary during game development. The high cost of living makes it nearly impossible to survive on this profession alone, leading many to choose more stable, traditional careers or seek opportunities abroad where they receive more support. Thus, to encourage more people to choose development careers in Switzerland, larger studios that generate revenue, create jobs, and offer internships are needed. The government must enhance economic, political, and educational support for the industry, viewing it as a serious business sector. Without substantial governmental support, achieving significant progress will be challenging.

There are examples of studios that have succeeded without government support. A typical example is the Swiss studio "Giant Software". So how did they do it? When Christian Amman and Stefan Geiger, the owners, and sole developers, started out, they didn't have a publisher for their game (Farming Simulator), and they also had a financing problem (GamesIndustry 2018). So, to gain visibility, they promoted their game prototype via a dedicated forum, in direct dialogue with fans (GamesIndustry 2018). This popular initiative was a great success and attracted the attention of a German distributor who saw the game's potential and decided to market it. From the outset, Farming Simulator was a huge success (GamesIndustry 2018). This success laid the foundations for future series, enabling Giant Software to gain international recognition and expand. The success of Farming Simulator allowed Giant Software to grow significantly. Often, it takes one blockbuster game to boost both a studio and the industry. When a game becomes a hit, it can capitalize on the success with subsequent releases, generating even more revenue each year. Giant Software exemplifies this, having built on the success of Farming Simulator to create a series that continues to generate increasing revenue annually. This success has enabled them to collaborate more and attract publishers, fundamentally changing their studio's scale.

However, not every studio can achieve this without support. For Swiss studios, increased government support for initial game development could be crucial. During the interviews, one idea proposed was for the government to act like a publisher. Currently, Pro Helvetia is the government body that provides funding for video games in Switzerland. However, their support is minimal, offering only CHF 40,000 per game, which is insufficient given that developing a game in Switzerland can cost between CHF 100,000 and CHF 1,000,000. Instead of providing a nominal sum, the government could finance games more substantially and recoup a percentage of the revenue once the game is released. This model would be mutually beneficial; if the game succeeds, the government would earn a percentage, which would be highly advantageous. This approach would help studios develop games as envisioned, and if a game is highly successful, it would significantly aid the studio's growth. If the government acted as a publisher, it could address the funding challenges within the Swiss video gaming industry. This would allow developers to focus solely on creating high-quality games without being constrained by budget limitations, leading to more frequent releases and greater international visibility. Currently, aside from recognizing the gaming industry as a cultural asset, the government has not made significant investments. It's crucial for them to start investing in the industry due to its immense potential.

Until the government takes concrete action, the Swiss gaming industry must continue producing excellent games that shine on the international stage, such as Farming Simulator, Wandering Village, FAR, and Transport Fever. They need to find ways to finance their games and continue developing high-quality products that bring international recognition to the Swiss gaming industry. In the meantime, improving visibility at the international level is crucial. Associations like the Swiss Interactive Entertainment Association (SIEA), the International Game Developers Association (IGDA), and the Swiss Game Developers Association (SGDA) will play key roles in promoting Swiss talent and innovation globally. These associations can have a significant international impact by promoting Swiss talent and innovation at global gaming events and conferences. They can build partnerships with gaming companies and organizations worldwide, facilitating knowledge exchange and joint projects. They can support Swiss game developers in marketing and distributing their games internationally, helping to reach a broader audience. By advocating for industry-friendly policies within Switzerland and on the global stage, they can ensure a competitive environment conducive to growth. Partnerships with international institutions can enhance education and training, improving game development skills and creating exchange programs for Swiss developers. Switzerland's reputation for quality and precision can attract international consumers and partners to Swiss-developed games, boosting the country's presence in the global gaming industry.

6. Limitation

One of the main limitations of this bachelor’s thesis is the impossibility of obtaining interviews with the main institutions responsible for funding the Swiss video game industry, particularly Pro Helvetia, due to time constraints. Their perspective would have been invaluable in understanding the intricacies of financial support mechanisms and the challenges facing the industry. Pro Helvetia plays a crucial role in providing financial assistance and grants to creative projects in Switzerland, including video games. Insight from this institution could have shed light on the criteria for funding, the level of support available, and the specific challenges they encounter in supporting the gaming sector. Taking their views into account would have provided a more complete analysis and richer context for the recommendations, potentially highlighting gaps in the current support system and offering concrete suggestions for improvement.

In addition, I was unable to interview a foreign publisher again due to time constraints. The perspective of an international publisher would have been invaluable in understanding the potential for international collaboration and investment. Foreign publishers often have extensive experience in multiple markets and could provide insights into what makes a market attractive for investment, the types of support they look for from local governments, and the ways in which they collaborate with local studios. Their input could have highlighted opportunities for Swiss developers to attract international partnerships and investments, and identified best practices from other countries that could be applied in Switzerland. This would have added a global dimension to the analysis, making the recommendations more robust and comprehensive.

7. Conclusion

Based on the comprehensive research and analysis conducted for this bachelor's thesis, it is evident that the most crucial factor for the development and growth of the Swiss video gaming industry is strong government support and recognition. Both the literature review and interviews with industry stakeholders underscore this necessity. Without substantial backing from the government, the industry will struggle to overcome the numerous challenges it faces, including high development costs, lack of large-scale publishers, and the high cost of living in Switzerland. Stakeholders have emphasized that enhanced government support could significantly attract two to three major studios to Switzerland, which would be transformative for the industry. This support would also encourage publishers to invest in the Swiss market, fostering a more robust and sustainable ecosystem for video gaming. The presence of big studios is particularly important. Drawing on examples from countries like the UK, Poland, Sweden, and Canada, we see that just with a few major studios can drastically improve industry synergy, create more job opportunities, and retain local talent. These countries have shown that a well-supported video gaming industry can thrive and generate substantial revenue, thereby enhancing global influence.

Currently, Switzerland has a large number of small studios, many of which are not solely focused on game development. This diversification is often necessary for financial survival but slows down game production. To change this dynamic, attracting big studios will be essential. It would provide more significant project opportunities, better retention of talent, and increased awareness of the Swiss video gaming industry on a global scale. However, achieving this requires strong and consistent government support, similar to what is seen in other countries. This includes financial incentives, such as tax reliefs, substantial funding for game development, and support for marketing and distribution efforts. Without such measures, it will be difficult for the Swiss video gaming industry to grow and compete internationally. The support and recognition from the government are indispensable for overcoming these barriers and realizing the industry's full potential.

To change the government mindset, associations such as SGDA, SIEA, and IGDA should work on creating stronger dossiers and reports to convincingly argue that the Swiss government needs to invest more in the gaming industry. These associations will play a crucial role in influencing government decisions and should persistently push for greater support. They must continually advocate and communicate to the government that they are overlooking an industry with immense potential where Switzerland could excel. They should highlight that many other countries, and Europe as a whole, have recognized the high potential of the video game industry and have made substantial investments and provided robust support. These associations need to ensure the Swiss government understands the significant opportunity it is missing and the necessity of investing in the gaming sector.

Additionally, the industry should continue to produce high-quality indie games while also focusing on developing more AA games. Where the Swiss gaming industry is very strong is in video game creation, especially in niche categories. Swiss game creation is characterized by great diversity, and that's one of the industry's strengths. The projects are often innovative and driven by a strong artistic vision.

This is how they have managed to develop games that have enjoyed monumental success worldwide, such as Farming Simulator, FAR and Transport Fever. The industry must continue to focus on these kinds of games to sustain its success and growth. Increasing the frequency of game releases is crucial, as the current release rate is quite slow. The games themselves are the primary revenue drivers for the industry, making the quality of the games essential for sustained growth and success. By balancing the production of indie and AA games and improving the release frequency, the Swiss video gaming industry can better meet market demands and generate greater revenue.

Another opportunity would be to focus on the aspect of artificial intelligence. With recent advancements in this field, AI has the potential to transform the video game industry. Both augmented reality (AR) and virtual reality (VR) are markets that could become extremely interesting in the future. Therefore, Switzerland should be prepared to capitalize on this market. It would be strategic to start developing games that incorporate AI, AR, and VR technologies. Additionally, educational institutions in Switzerland should place a greater emphasis on these areas to ensure that the country does not miss out on this significant opportunity.

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Appendix 1: Questionnaires

Code	Question	Translation
QP01	Sur une échelle de 1 à 5, quel impact le manque de grands studios (studio AA typiquement) et de grands éditeurs a-t-il sur l'industrie suisse du jeu vidéo ? (1 = pas d'impact ; 5 = un très gros impact) Sur une échelle de 1 à 5, comment évalueriez-vous l'efficacité globale de la chaîne de valeur de l'industrie suisse du jeu vidéo, en considérant les fabricants de jeux, les studios de développement, les éditeurs et les distributeurs ? (1 = très inefficace ; 5 = très efficace) Quels segments de cette chaîne pourraient être améliorés pour favoriser une croissance de revenus ?	On a scale of 1 to 5, what impact does the lack of large studios (typically AA studios) and major publishers have on the Swiss video game industry? (1 = no impact; 5 = very significant impact) On a scale of 1 to 5, how would you rate the overall effectiveness of the Swiss video game industry's value chain, considering game manufacturers, development studios, publishers, and distributors? (1 = very ineffective; 5 = very effective) Which segments of this chain could be improved to foster revenue growth?
QP02	Sur une échelle de 1 à 5, comment évalueriez-vous l'efficacité de l'écosystème du jeu vidéo en Suisse, incluant les studios de développement, les programmes de formation spécialisée, le soutien institutionnel, les festivals de jeux vidéo, dans sa capacité à générer des revenus pour l'industrie ? (1 = très inefficace ; 5 = très efficace) Quels aspects de cet écosystème pensez-vous qu'il serait crucial d'améliorer pour maximiser le potentiel de revenus ?	On a scale of 1 to 5, how would you rate the effectiveness of the video game ecosystem in Switzerland, including development studios, specialized training programs, institutional support, and video game festivals, in its ability to generate revenue for the industry? (1 = very ineffective; 5 = very effective) Which aspects of this ecosystem do you think are crucial to improve to maximize revenue potential?
QP03	*Si vous comparez avec les autres pays qui offrent des soutiens plus robustes (comme l'Allemagne, la France, le Canada) politiquement et économiquement, quelle note donneriez-vous sur une échelle de 1 à 5 pour l'aide de l'état ?* *(1 = très mauvais ; 5 = très bon)*	If you compare with other countries that offer more robust support (such as Germany, France, Canada) politically and economically, what rating would you give on a scale of 1 to 5 for state aid? (1 = very poor; 5 = very good)
QP04	*Sur une échelle de 1 à 5, quel est l'impact de l'absence de production significative de jeux de catégories AA ou AAA sur le potentiel de revenus de l'industrie suisse du jeu vidéo ? (1 = aucun impact, 5 = grand important)* *Quel impact un accroissement des productions de jeux de catégories AA ou AAA pourrait-il avoir sur la dynamique économique du secteur ?*	On a scale of 1 to 5, what is the impact of the lack of significant AA or AAA game production on the revenue potential of the Swiss video game industry? (1 = no impact, 5 = significant impact) What impact could an increase in AA or AAA game production have on the economic dynamics of the sector?
QP05	*Sur une échelle de 1 à 5, où 1 signifie 'aucun impact' et 5 signifie un très grand impact', quel est selon vous l'impact de ses coûts de vie élevée sur l'industrie du jeu vidéo dans le pays ?*	On a scale of 1 to 5, where 1 means 'no impact' and 5 means a very big impact', what impact do you think Switzerland's small size, multilingualism and high cost of living have on the country's video game industry?
QP06	*Pensez-vous que l'un des plus grands défis de l'industrie suisse des jeux vidéo est que la majorité des développeurs formés et talentueux trouvent un emploi à l'étranger ? Sur une échelle de 1 à 5, quelle est, selon vous, l'importance de ce problème et pourquoi pensez-vous qu'il se pose ?"*	Do you agree that one of the biggest challenges in the Swiss video game industry is that a majority of educated and talented developers find positions abroad? On a scale of 1 to 5, how significant do you believe this issue is, and why do you think it occurs?"

QP07	*Pensez-vous que, bien que la majorité des développeurs en Suisse soient compétents dans la création de jeux, ils manquent de connaissances dans le domaine des affaires (business), ce qui les empêche d'atteindre leur plein potentiel dans l'industrie ?*	Do you think that, although most developers in Switzerland are skilled in game creation, they lack business knowledge, which prevents them from reaching their full potential in the industry?
QP08	*Quel est le coût typique du développement d'un jeu vidéo en Suisse ?* *Sur une échelle de 1 à 5, comment évalueriez-vous la contribution du gouvernement au financement du développement des jeux vidéo en Suisse ? (1 = Très mauvais, 5 = Excellent)*	*What is the typical cost of developing a video game in Switzerland and, on a scale of 1 to 5, how would you rate the ease of obtaining funding for such projects? On a scale of 1 to 5, how would you rate the government's contribution to funding video game development in Switzerland? (1= Very bad ; 5= Excellent)*
QP09	*Pensez-vous que le manque de reconnaissance au niveau gouvernemental limite le potentiel de croissance de l'industrie du jeu vidéo suisse ?* *Si, oui, comment le gouvernement devrait-il agir pour favoriser la croissance de l'industrie des jeux vidéo ?*	Do you think the lack of recognition at government level is limiting the growth potential of the Swiss video game industry? How do you think the government should act to foster growth in the video gaming industry? Additionally, how could these actions potentially influence the sector's expansion in Switzerland?
QP10	*Quels sont les défis actuels dans l'industrie du jeu vidéo en Suisse qui limitent sa capacité à générer davantage de revenus ?*	What are the current challenges in the Swiss video game industry that are limiting its ability to generate more revenue?
QP11	*Le marché de mobile est le marché qui génère le plus de revenue dans le monde. Est -ce que les développeurs devraient plus se focaliser plus sur ce segment ?*	The mobile market is the biggest revenue-generating market in the world. Should developers focus more on this segment ?
QP12	*Comment l'industrie du gaming en Suisse pourrait-elle se développer et ainsi devenir un acteur plus influent et générer davantage de revenus sur le marché global ?* *Est-ce vraiment la reconnaissance et le soutien du gouvernement qui va faire toute la différence ?*	How could the Swiss gaming industry develop to become a more influential player and generate more revenue on the global market? Is it really the recognition and support of the government that will make all the difference?

Appendix 2 – Interview transcription - Respondent A

Code	Response	Translation
QP01A	Je mettrai un 5. Alors, il faut faire attention c'est vrai que nous avons beaucoup de studios. Mais, très peu de studios font uniquement des jeux videos. Enfin je ne sais pas si vous en avez parlé avec certains mais ils vous diront ils font du jeu vidéo mais pas que. C'est à dire qu'ils font du développement logiciel, ils font des choses à côté parce que souvent ne faire que du jeu vidéo ça ne leur permet pas de survivre. Ils font des publicités, ils font des petites apps pour la Migros, des choses comme ça. Et la plupart sont obligés d'être très diversifiés à ce niveau-là pour réussir à survivre. On a quelques gros studios comme vous devez probablement les connaitre comme Giant Software, Urban Games, mais ils ne sont pas vraiment pas nombreux. Et, ceci complique énormément la tâche. Ils manquent des plus gros studios de leur gabarit en Suisse. Ça aurait été bien que des gros studios comme Nintendo, Microsoft, Sony, Ubisoft se consacrent sur le point de studio development en Suisse. A l'heure actuel nous avons Electronic Arts, ils ont leur siège européen à Genève, rue du Molar. Mais si vous allez chez eux, il y aura un département marketing, il y aura un département vente, il y aura un département comptabilité, mais il n'y a absolument pas de développement Le fait qu'en Suisse on n'ait pas de gros studios de développement, c'est quand même dommage. Parce que si on avait des studios de développement, ça pourrait être des gens qui donneraient des cours. Ça pourrait être des gens qui prendraient des stagiaires. Ça pourrait donner des motivations, des idées à d'autres studios. Ils pourraient collaborer avec des studios en Suisse, avec des petits développeurs en leur disant, nous, on développe cette partie, toi, tu fais ça, toi, tu fais ça, toi, tu fais ça. Et toutes ces collaborations, toute cette synergie n'existe pas. On est souvent contacté par des gens qui nous disent qu'ils aimeraient travailler dans le domaine du jeu vidéo, où est-ce qu'on peut faire un stage, où est-ce qu'on peut travailler, comment on peut trouver des filières et autres. Et puis souvent on leur dit, si vous voulez faire un stage, il y a des petits studios indépendants, mais si vous voulez travailler dans un plus grand studio, vous allez devoir partir à l'étranger automatiquement. Vous n'avez pas de possibilité de le faire en Suisse. Après je trouve que c'est bien déjà qu'on ait ces studios-là, mais je trouve juste qu'on a clairement le potentiel d'avoir des plus grands studios comme ceux proposés au Canada. Mais pour cela, il va clairement falloir un plus grand support financier sinon ça sera impossible. Et le fait qu'on n'ait pas de grand studio de développement ça clairement un impact sur la génération de revenue. C'est sûr que si on avait des grands studios de développement comme dans les pays voisins typiquement la France, l'Allemagne, l'industrie du gaming Suisse aurait déjà un plus grand impact Ensuite, niveau éditeur, je mettrai aussi un 5. C'est simple, aujourd'hui nous n'avons plus de grand éditeur en Suisse. Et la raison pour laquelle ils préfèrent partir à côté c'est parce que ça coûte beaucoup trop cher d'avoir des bureaux ici, ça coûte beaucoup trop cher d'avoir des employés ici. Le fait qu'on n'a pas de grand éditeur ça complique un les choses parce la cela veut dire pour le financement on devra beaucoup se fier au	I'd give it a 5. You have to be careful, it's true that we have a lot of studios. I don't know if you've talked to some of them, but they'll tell you that they make video games, but not just video games. In other words, they do software development, they do other things on the side, because often just making video games doesn't allow them to survive. They make ads, they make little apps for Migros, things like that. And most of them have to be very diversified to survive. We have a few big studios as you probably know them, like Giant Software, Urban Games, but there really aren't that many of them. And this complicates the task enormously. They don't have the biggest studios of their size in Switzerland. It would have been nice if big studios like Nintendo, Microsoft, Sony and Ubisoft had focused on studio development in Switzerland. At the moment we have Electronic Arts, they have their European headquarters in Geneva, rue du Molar. But if you go there, there'll be a marketing department, there'll be a sales department, there'll be an accounting department, but there's absolutely no development The fact that we don't have any big development studios in Switzerland is a real shame. Because if we had development studios, we could have people giving courses. They could be people taking on interns. It could give motivation and ideas to other studios. They could collaborate with studios in Switzerland, with small developers, telling them, "We'll develop this part, you do that, you do that, you do that. And all these collaborations, all this synergy doesn't exist. We're often contacted by people who tell us they'd like to work in the video game industry, where they can do an internship, where they can work, how they can find courses and so on. And then we often tell them, if you want to do an internship, there are small independent studios, but if you want to work in a bigger studio, you'll automatically have to go abroad. After that, I think it's great that we already have these studios, but I just think that we clearly have the potential to have bigger studios like those proposed in Canada. But for that to happen, we're clearly going to need greater financial support, otherwise it'll be impossible. And the fact that we don't have a major development studio clearly has an impact on revenue generation. Of course, if we had major development studios like those in neighboring countries such as France and Germany, the Swiss gaming industry would already have a greater impact.

	financement extérieur, et pour les petits développeurs Suisse souvent ce n'est pas facile. Ça complique un peu plus les tâches. Ca aurait plus simple s'il était en Suisse, car l'écosystème est assez petit on se connait tous, peut qu'il aurait plus soutenu, il y aussi le facteur humain, quand tu réalises un projet tu préfères que ton éditeur soit à proximité de toi, je trouve que c'est plus pratique. C'est dommage qu'on n'ait pas quelques gros éditeurs pour le financement en Suisse. Ça te faciliterait un peu plus les tâches. Ça aurait été bien d'avoir quelques éditeurs en Suisse, parce qu'au final ils ont des taches assez importantes. C'est eux qui vont financer, publier et commercialiser les jeux. Et souvent quand vous avez des éditeurs locaux ils comprennent mieux les préférences et la culture de leur marché. C'est eux qui vont un promouvoir les jeux vidéo en Suisse et nous il nous manque un peu cet aspect. C'est assez discret. Il fut un temps où Ubisoft était présent, mais ils ont pris la décision de complètement fermé ses bureaux en Suisse pour se relocaliser en Allemagne. Pareil, Microsoft a fermé sa division Xbox en Suisse pour la garder uniquement en Allemagne. Mais Ubisoft et Microsoft avaient juste des bureaux ici, ils ne faisaient pas le financement. Avoir des studios de jeux vidéo en Suisse c'est bien, mais il nous faut des studios plus influents. Actuellement, il y a peu d'offres de travail, ce qui limite les opportunités pour les jeunes diplômés. Si nous avions de grands studios, ils pourraient offrir des cours, prendre des stagiaires, et inspirer d'autres studios. Ils pourraient aussi travailler avec de petits développeurs en Suisse, travailler sur des projets plus ambitieux, ça permettrait à nos talents de se développer. Malheureusement, ces collaborations manquent aujourd'hui, ce qui est dommage. Ensuite niveau éditeur c'est assez dommage qu'on n'ait pas d'éditeur local. Ça serait quand même une force frappe pour l'industrie Suisse d'avoir quelques éditeurs qui ont de l'influence en Suisse. Ça montrerait qu'on a chaine de valeur complète. Les éditeurs, c'est eux qui vont vraiment financer, commercialiser ton jeu, si on avait quelques gros éditeurs ça aurait apporté un peu de visibilité parce qu'un éditeur a beaucoup d'impact. Ensuite niveau distributeur, on a des distributeurs, des fois ce n'est même pas des distributeurs de base, c'est-à-dire qu'on a en Suisse des systèmes de distributeurs comme Alzo, Ingram, Techdata, qui sont des distributeurs au niveau suisse qui vont distribuer énormément de produits dont les jeux vidéo. Tali par exemple, ça a toujours été historiquement un grand distributeur de jeux vidéo. Mais ce sont des gens à la fin qui ont juste un réseau, qui vont recevoir les jeux et puis qui vont les mettre dans les rayons dans les magasins. Et même pour eux, cette partie comme les ventes ont tellement chuté, c'est quelque chose qui devient de plus en plus minimal. Je ne pense pas que la vente de jeux vidéo en physique va s'arrêter. Mais elle se réduit fortement. On voit aujourd'hui, il y a des jeux qui ne sortent même plus en format physique, il y a des jeux qui n'existent qu'en format digital. Et puis des fois, quand ils ont du grand succès, tout à coup plus tard, on va aussi des fois en sortir en format physique parce qu'ils ont bien marché en format digital. Aujourd'hui, les éditeurs ne veulent pas prendre de risques d'imprimer des galettes en se disant qu'elles ne vont peut-être jamais se vendre. Et puis l'autre chose, c'est quand vous avez une chaîne de distribution, quand vous vendez en direct, vous avez plus de marge parce que vous	Next, regarding publishers, I would also give it a 5. It's simple, today we no longer have a major publisher in Switzerland. And the reason they prefer to move next door is because it's much too expensive to have offices here, it's too expensive to have employees here. The fact that we don't have a major publisher complicates things because it means for financing, we will have to rely a lot on external funding, and for small Swiss developers, this is often not easy. It complicates tasks a bit more. It would have been simpler if they were in Switzerland, as the ecosystem is quite small and we all know each other, maybe they would have been more supportive, there is also the human factor, when you are working on a project you prefer to have your publisher close to you, I find it more practical. It's a shame we don't have a few major publishers for funding in Switzerland. It would make tasks a bit easier. It would have been nice to have a few publishers in Switzerland, because in the end they have quite important tasks. They are the ones who will finance, publish, and market the games. And often when you have local publishers, they better understand the preferences and culture of their market. They are the ones who will promote video games in Switzerland, and we are missing this aspect a bit. It is quite discreet. There was a time when Ubisoft was present, but they decided to completely close their offices in Switzerland to relocate to Germany. Similarly, Microsoft closed its Xbox division in Switzerland to keep it only in Germany. But Ubisoft and Microsoft just had offices here, they did not handle financing. Having video game studios in Switzerland is good, but we need more influential studios. Currently, there are few job offers, which limits opportunities for recent graduates. If we had large studios, they could offer courses, take interns, and inspire other studios. They could also work with small developers in Switzerland, work on more ambitious projects, which would allow our talents to develop. Unfortunately, these collaborations are lacking today, which is a shame. Then, regarding publishers, it's quite unfortunate that we don't have a local publisher. It would be a real asset for the Swiss industry to have a few influential publishers in Switzerland. It would show that we have a complete value chain. Publishers are the ones who will really finance and market your game, if we had a few major publishers it would have brought some visibility because a publisher has a lot of impact. Then, regarding distributors, we have distributors, sometimes they are not even basic distributors, meaning that in Switzerland we have distributor

	êtes contact direct avec le consommateur final mais quand vous devez passer par un distributeur qui va prendre 10% de marge après vous allez donner ça à un magasin qui va prendre encore 30% de marge sur le prix de vente voilà ça fait réfléchir. Du coup, si je devais une donner une note pour la chaîne de valeur, je donnerais un 1.5 en étant généreux. C'est vraiment vis à vis des studios que j'estime qu'on devrait faire mieux. Il manque quelques choses. L'absence de gros studio nous fait ressentir cette absence de synergie. Et comme, je vous l'ai dit c'est vrai qu'avec des grands de studios de développement c'est plus facile de faire un un Rainbow Six, un Farming Simulator, un jeu qui pourrait faire un grand impact.	systems like Alzo, Ingram, Techdata, which are distributors at the Swiss level that distribute a lot of products including video games. Tali, for example, has always been historically a major distributor of video games. But these are people who in the end just have a network, who will receive the games and then put them on the shelves.
QP02A	Déjà comme je vous l'avais dit avant, vis à vis des studios, on a beaucoup de studios mais nous n'avons pas de grand studio de développement et ceci a un grand impact. Ensuite, au niveau des écoles, ça s'améliore. On a de plus en plus d'écoles qui proposent des programmes qui permettent aux jeunes de s'orienter vers la création. Il faut aussi voir dans la création de jeux vidéo, il y a plusieurs possibilités. Il y a des gens qui vont faire du son, il y a des gens qui vont faire des scénarios, il y a des gens qui vont faire des projets. Mais c'est vrai qu'en Suisse, on n'a pas vraiment des cursus qui permettent de construire des équipes de création de jeux vidéo qui sont optimales, puis c'est souvent mal considéré. On est encore dans un pays où on doit faire des vrais métiers, entre parenthèses, genre travailler dans une banque ou faire de l'économie ou des choses comme ça, parce que qu'on dit qu'on veut créer des jeux vidéo, les gens te regardent bizarrement. Du coup, niveau formation je dirai qu'on on est assez bien. Car techniquement quelqu'un qui souhaite devenir un développeur va aller à l'EPFL, il va aller dans des institutions reconnues qui vont lui donner un excellent niveau. Après c'est plus en termes d'infrastructures, de gestion de projets, de création de jeux vidéo. Il y a une école, je ne sais pas si vous connaissez, la Swiss Game Academy sur Fribourg, qui dispense des cours une fois par année sur comment créer des jeux vidéo, et ce sont souvent des développeurs indépendants qui viennent, qui donnent ces cours, et certains professeurs de l'école d'ingénieurs aussi. Et là, on voit qu'il y a un niveau de compétence qui est très élevé. Au niveau de la qualité de l'éducation, l'autre avantage aussi qu'on a en Suisse, c'est que la grande majorité de l'éducation qu'on a est, entre parenthèses, gratuite, payée par les impôts. Mais on a la chance de pouvoir offrir un niveau d'éducation qui est extrêmement élevé. Un jeune qui veut aller à l'EPFL, il peut y aller, et puis il peut avoir un niveau de formation qui est extrêmement élevé, sans que ça coûte à ses parents 4 ans de traite à payer ou mettre la maison près à la banque. Mais on est encore loin, mais j'estime que si on se concentrait davantage sur les formations ça pourrait être un de nos plus grand point fort. Ensuite, en ce qui concerne le soutien du gouvernement canton. Il y a les institutions, les institutions nationales, comme justement un Pro Helvetia par exemple. Ils ont un programme Swiss Games qui a commencé en 2010 à promouvoir justement le subside dans le jeu vidéo. On a des soutiens étatiques, mais franchement le soutien offert actuellement n'est clairement pas suffisant. On est encore très loin des types de bourses et de soutien qu'on peut trouver dans d'autres pays. Je	As I mentioned before regarding studios, we have many, but we lack major development studios, and this greatly impacts us. Education is improving; we're seeing more programs that guide young people towards creation. However, in Switzerland, we don't really have curriculums that optimally build video game creation teams, and it's often underappreciated. We're still in a country where 'real jobs' are preferred, like working in a bank or in economics. When you say you want to create video games, people look at you strangely. In terms of education, we're doing quite well. Someone who wants to become a developer can go to EPFL or other recognized institutions that provide an excellent level of education. But when it comes to infrastructure, project management, and game creation, there's room for improvement. There's the Swiss Game Academy in Fribourg, for example, which offers annual courses on how to create video games, often taught by independent developers and some engineering school professors. The competency level here is very high. Another advantage in Switzerland is that most of our education is virtually 'free', funded by taxes, allowing us to offer a very high educational standard. A young person can attend EPFL without causing financial strain on their family. However, we're still far off, but I believe if we focused more on education, it could become one of our strongest points. Regarding cantonal government support, there are national institutions like Pro Helvetia, which has the Swiss Games program that started in 2010 to promote subsidies in video gaming. We have state support, but honestly, it's not enough. We're still far behind the grants and support you can find in other countries. This is one of our weak points. I think in recent years, we've provided more support, but compared to countries like Germany or France, we're still far behind because we haven't fully grasped the importance of this industry. In France, they have different models; for instance, Ubisoft can

	pense que c'est un de nos points faibles. Je pense que ces dernières années, on a apporté un peu plus d'aide à ce niveau-là, mais je pense encore que par rapport à d'autres pays comme l'Allemagne, où la France, on est encore très loin derrière parce qu'on n'a pas encore vraiment saisi l'importance de cette industrie. Alors, après c'est sur la France, ils ont des modèles différents. C'est-à-dire qu'Ubisoft va parler avec la France et va leur dire, avec le gouvernement français, leur dire on a 30 000 employés dans le monde grâce à nous, l'industrie. Ils ont un autre poids que nous. Nous s'est beaucoup plus compliqués, on n'a pas le même impact. Mais, vous voyez ce problème vient, typiquement du fait qu'on n'a pas de grand studio de développement en Suisse. Si on avait des plus grands studios on pourrait déjà avoir un plus grand impact. C'est pour ça que je pense que des pays comme la France ou l'Allemagne ont quand même un temps d'avance sur nous et c'est pour ça que beaucoup de gens s'exportent vers ces pays-là quand ils veulent vraiment se développer dans l'industrie, parce qu'ils ont quand même un écosystème qui est bien plus complet que la Suisse. Et c'est vrai qu'un bon écosystème joue énorme un rôle, surtout pour une industrie comme le jeux vidéo. Ensuite niveau festival on est assez bien. Alors globalement où on a gros problème c'est vraiment vis à vis des studios et le gouvernement. Je donnerai un 2.5	show the French government the significant employment they provide globally, giving them more influence. It's much more complicated for us; we don't have the same impact. This issue largely stems from our lack of major development studios in Switzerland. If we had larger studios, we could have a greater impact. That's why countries like France or Germany are ahead of us, and why many people move there to develop in the industry because they have a much more complete ecosystem. And when it comes to festivals, we are doing quite well. Overall, where we really have a problem is with the studios and the government. I would give it a 2.5.
QP03A	Je donnerai un 2 pour l'effort. Mais on est encore loins, comparer aux autres pays. Vous voyez, des pays comme le Canada soutiennent les studios lorsqu'ils se développent, ils leur font payer moins d'impôts, ils les aident au niveau du développement, ils payent les salaires, les charges. Il leur donne vraiment les moyens. Il y a une grosse contribution financière Et puis il y a tout un environnement, quand vous arrivez dans un pays comme la France ou le Canada, où il y a déjà beaucoup de studios qui sont en place, il y a des infrastructures, vous pouvez collaborer avec eux. Ici en Suisse, vous êtes un peu seul, difficile, c'est des micro-micro-territoire. Il y a la partie romande, la partie suisse-allemande. En plus, c'est encore plus dur de collaborer, on n'a même pas la même langue. L'idéal, ce serait vraiment que le gouvernement fasse un gros effort sur le plan économique mais aussi sur le point politique. Là, on voit aujourd'hui, je crois qu'il y avait le canton de Vaud, ou même Pro Helvetia, ils offrent, je ne sais plus, je crois que c'est 40 000 francs pour aider à développer. C'est bien, mais quand vous avez une dizaine de personnes qui travaillent, vos 40 000 francs, ils vont partir très vite. Ça ne vous permettra pas de tenir très longtemps. Il faut aussi des aides qui permettent, quitte à ce que ce soit de la participation, en disant ce que fait un éditeur. L'éditeur dit, nous on vous finance, mais on va prendre 30%, 40% du bénéfice pour se rembourser ce qu'on vous aura avancé pendant ces quelques années. C'est le même mode de fonctionnement qu'il faudrait avoir. Et comme je vous l'ai dit auparavant, mais il n'y a pas une vraie volonté de l'État aujourd'hui de reconnaître le jeu vidéo comme le fait l'Europe, de dire que le jeu vidéo c'est une	. I would give it a 2 for effort. But we are still far behind compared to other countries. You see, countries like Canada support studios as they grow, offering them tax breaks, development assistance, and even covering salaries and social charges. They really provide the means with significant financial contributions. Then there's the environment you find in countries like France or Canada, where there are already many studios established with infrastructure in place, allowing for collaboration. Here in Switzerland, you're somewhat on your own; it's tough, as it's a micro-micro territory. There's the French-speaking part, the Swiss-German part, and collaborating is even harder when you don't share the same language. Ideally, the government would make a significant effort economically and politically. Just today, I think it was the canton of Vaud, or maybe Pro Helvetia, they offer, I'm not sure, I think it's 40,000 francs to help with development. That's great, but when you have a team of ten people working, those 40,000 francs will go very quickly. It won't last long. We also need aids that allow for participation, similar to what a publisher does. A publisher says, we'll finance you, but we'll take 30%, 40% of the profits to reimburse what we've advanced over these years. That's the kind of model we need. And as I've mentioned before, there isn't a real willingness from the state to recognize video games as Europe does, to say that video gaming is a

	priorité dans notre chaîne, et puis on va tout mettre en place pour aider le développement. Ça en Suisse, on ne l'a pas encore.	priority in our industry, and then put everything in place to help development. That's something we don't yet have in Switzerland.
QP04A	Oui, ça quand même un grand impact. Je donnerai un 4. Alors, ça dépend. Il y a beaucoup de jeux AA ou AAA qui sont des échecs. Mais, c'est vrai que très souvent quand un jeux AA ou AAA marche, qu'un jeu de ce calibre est réussi et bénéficie d'un bouche-à-oreille positif, les revenus qu'il peut générer sont colossaux. Et l'autre avantage avec ces types de jeux, c'est qu'une fois ce type de jeux a bien marché, chaque année, ils vont ressortir une nouvelle série du jeu avec un petit add-on au jeu. L'exemple parfait c'est Fifa. Nous en Suisse, on a un Farming Simulator. Presque chaque année, ils sortent une nouvelle version. Et c'est fou parce que chaque année le jeu génère encore plus de revenue que la version précédente. Alors, oui cela ne fait aucun doute que ces jeux comme vous le dites AA, AAA games génèrent beaucoup de revenue. Alors, est-ce que le profit est énorme ? Ça, c'est une autre question. Mais vous voyez, le fait qu'ils puissent sortir une franchise du jeu, ça a un énorme potentiel commercial. À chaque nouvelle sortie, ils peuvent capitaliser sur la notoriété de la franchise. Du coup, je suis assez convaincu que tôt ou tard, ça va générer énormément de revenus et un profit qui peut être assez colossal.Nous, en Suisse c'est simple, nous n'avons pas de AAA games. Pour développer des jeux AAA games, il faut des gros studios, ca peut aller de 100 à 400 personnes, c'est impossible de faire ceci actuellement en Suisse parce on a pas de grands studios de développement, tout coûte beaucoup trop cher, et on a pas grand soutien du gouvernement. La plupart du temps, quand on voulait développer un jeu qui va avoir du succès, il faut avoir une grosse équipe, il faut développer le jeu. Et ça, ça demande des ressources qu'on n'a pas forcément ici. Mais Farming Simulator, c'est le contre-exemple comme quoi c'est parfaitement possible, même avec un concept qui peut sembler bizarre, de réussir à créer un grand jeu. Ils ont commencé tout petit, mais aujourd'hui on peut clairement catégoriser Farming Simulator comme un AA games. Du coup pour revenir a votre question, c'est vrai qu'en Suisse la majorité des jeux qu'on produit ce sont des indies games, mais il faut pas négliger. un Minecraft c'est bien un indies games ; Typiquement des jeux suisse qui ont bien marché, on peut citer « FAR », « Transport Fever». Mais, c'est vrai que ça serait quand meme plus simple de faire un plus grand impact avec un AA games, mais pour ça il va falloir de plus grands studios de développement et pour ceci il va falloir un plus grand soutien du gouvernement. Ah, si on commence à produire plus de jeux de niveau AA ou AAA en Suisse, ça pourrait vraiment changer la donne pour l'économie du secteur. Vous voyez les jeux de ces niveaux demandent beaucoup de ressources, tant en termes de développement que de marketing. Donc, ça pourrait attirer des capitaux importants dans le pays, ce qui est toujours bon pour l'économie Suisse. Vous voyez ça pourrait créer des emplois. On parle de postes pour des développeurs, des designers, des artistes, des spécialistes en marketing, et bien d'autres. Ça peut vraiment booster le marché de l'emploi local. Plus d'opportunité pour nos talents aussi, mais ça encouragerait aussi la collaboration. Et puis, il y a l'impact sur le rayonnement international. Si un jeu suisse arrive à percer sur la scène mondiale, ça met la Suisse sur	Yes, it definitely has a big impact. I would give it a 4. It depends, though. There are many AA or AAA games that fail, but when an AA or AAA game succeeds and gains positive word-of-mouth, the revenues it can generate are enormous. Another advantage with these types of games is that once they succeed, they often release a new series each year with a little add-on to the game. A perfect example is Fifa. Here in Switzerland, we have Farming Simulator. Almost every year, they release a new version. And it's crazy because each year the game generates even more revenue than the previous version. So yes, there is no doubt that these games, as you say, AA, AAA games generate a lot of revenue. Whether the profit is huge, that's another question. But you see, the fact that they can release a game franchise has enormous commercial potential. With each new release, they can capitalize on the franchise's notoriety. So, I'm quite convinced that sooner or later, it will generate a lot of revenues and potentially a significant profit. In Switzerland, it's simple, we don't have AAA games. To develop AAA games, you need large studios, it can range from 100 to 400 people, it's impossible to do this currently in Switzerland because we don't have large development studios, everything is very expensive, and we lack substantial government support. Most of the time, when we wanted to develop a successful game, it requires a large team and significant resources, which we don't necessarily have here. But Farming Simulator is the counter-example that shows it's perfectly possible, even with a concept that might seem odd, to create a great game. They started small, but today we can clearly categorize Farming Simulator as an AA game. So, to come back to your question, it's true that in Switzerland the majority of games we produce are indie games, but you shouldn't underestimate them. A game like Minecraft is indeed an indie game; typical Swiss games that have done well include "FAR" and "Transport Fever". But, it's true that it would be simpler to make a bigger impact with AA games, but for that, we need larger development studios and more government support. Ah, if we start producing more AA or AAA-level games in Switzerland, it could really change the game for the sector's economy. You see, games of these levels require a lot of resources, both in terms of development and

	la carte comme un acteur sérieux dans l'industrie du jeu vidéo. Ça peut encourager d'autres entreprises à investir ici, et pas seulement dans les jeux vidéo. Vous voyez ça pourrait dynamiser toute l'économie du secteur, en attirant plus d'investissements et en créant des opportunités d'emploi.	marketing. Thus, it could attract significant capital to the country, which is always good for the Swiss economy. You see it could create jobs. We're talking about positions for developers, designers, artists, marketing specialists, and many others. It can really boost the local job market. More opportunities for our talents as well, but it would also encourage collaboration. And then, there's the impact on international visibility. If a Swiss game breaks through on the global scene, it puts Switzerland on the map as a serious player in the video game industry. It could encourage other companies to invest here, and not just in video games. You see it could energize the entire sector's economy by attracting more investments and creating job opportunities.
QP05A	Ça clairement un gros impact, je mettrai un 5. Alors, je pense que c'est surtout le facteur économique le plus grand problème. L'exemple que je vous ai donné avec Ubisoft, c'est qu'au bout d'une année, ils se sont rendu compte qu'ils ne seraient pas profitables avec le coût des bureaux en Suisse. Tout coûtait cher, les bureaux coûtaient cher, les employés coûtaient cher, les temps de développement étaient complexes. Donc ils ont tiré la prise et ils ont rouvert leur bureau en Allemagne. Ils se sont rendu compte que c'est plus avantageux ailleurs, qu'il y a probablement des pays comme l'Allemagne ou la France qui offrent aussi des conditions particulières parce qu'ils veulent attirer des développeurs. Peut-être ils leur donnent, je ne sais pas, 5 ans, 10 ans sans impôts, je ne sais quoi comme condition. Financièrement, ils auraient les moyens d'ouvrir un bureau chez nous, ces grands bureaux. Mais ils se rendent compte que ça leur coûte 2 à 3 fois plus cher que s'ils ont le même bureau quelques kilomètres plus loin en Allemagne ou en Suisse ou en France. Il n'y a pas de raison stratégique d'avoir un bureau en Suisse. Les barrières d'entrée pour la Suisse sont relativement élevées. Aujourd'hui, si je devais me lancer dans le développement d'un jeu vidéo, je travaillerais plutôt depuis un autre pays que depuis la Suisse, très clairement. Parce que c'est compliqué, vous savez, quand vous lancez un jeu, vous ne savez pas si vous allez faire le prochain Minecraft ou si vous allez juste faire un jeu à laquelle personne voudra jouer. Donc, ça demande aussi beaucoup d'investissements. Et, ce n'est pas évident de le faire dans un environnement comme la Suisse qui, justement, n'offre pas davantage en particulier à part d'être centrale à l'Europe, c'est toujours le gros argument. Ah oui, mais on est centrale à l'Europe, c'est facile d'aller partout. Oui, la France et l'Allemagne ne sont pas tellement hors champs non plus et ils ont beaucoup plus de studios de développement là-bas.	It definitely has a significant impact; I would rate it a 5. I think the biggest issue is the economic factor. The example I gave you with Ubisoft is that after a year, they realized they wouldn't be profitable due to the high costs of offices in Switzerland. Everything was expensive — the office space, the employees, and the development times were complex. So, they pulled the plug and reopened their office in Germany. They realized that it's more advantageous elsewhere, that there are probably countries like Germany or France that also offer special conditions because they want to attract developers. Maybe they offer them, I don't know, 5 years, 10 years without taxes, or some other kind of condition. Financially, they would have the means to open an office in our country, these big offices. But they find out that it costs them 2 to 3 times more than if they had the same office a few kilometers away in Germany or in France. There's no strategic reason to have an office in Switzerland. The barriers to entry for Switzerland are relatively high. Today, if I were to get into video game development, I would rather work from another country than from Switzerland, very clearly. Because it's complicated, you know, when you launch a game, you don't know if you're going to make the next Minecraft or if you're just going to make a game that nobody will want to play. So, it also requires a lot of investment. And, it's not easy to do in an environment like Switzerland, which doesn't offer any particular advantages other than being central in Europe, which is always the big argument. Oh yes, but we're central to Europe, it's easy to go everywhere. Yes, France and Germany aren't really out of the field either, and they have many more development studios there.
QP06A	C'est clairement un gros challenge pour nous. Je donnerai un 5. C'est parce que les offres sont limitées, vous n'avez pas trop d'opportunité. Vous pouvez travailler dans des petits studios indépendants, mais si vous voulez travailler dans un plus grand studio, des projets ambitieux, vous allez devoir partir à l'étranger. Vous n'avez pas de possibilité de le faire en Suisse. C'est pour ça	It's clearly a big challenge for us. I would give it a 5. It's because the opportunities are limited; there aren't many options available. You can work in small independent studios, but if you want to work in a larger studio on more ambitious projects, you'll have to go abroad. There's no possibility to do that

	qu'il nous faudrait des plus grands studios, un plus grand hub	in Switzerland. That's why we need larger studios, a bigger hub.
QP07A	Oui, je pense que c'est vraiment un point à améliorer. Je mettrais un bon 4 sur 5. Souvent, les développeurs suisses sont hyper talentueux pour créer des jeux, mais ils leur manquent des compétences en business. Ils oublient souvent des trucs essentiels comme la monétisation. Par exemple, ils font un super jeu mais ne réfléchissent pas à des stratégies de prix ou à comment le vendre. Aujourd'hui, le marketing, c'est crucial. Ils doivent aussi penser à collaborer avec des influenceurs ou des streamers pour donner plus de visibilité à leur jeu. Un autre point important, c'est de participer à des événements de l'industrie pour réseauter et présenter leur travail. Ils doivent savoir rédiger des propositions attractives pour obtenir des financements ou des partenariats. Et pour ceux qui n'ont pas de financement, il est crucial de savoir comment vendre leurs projets, élaborer des business plans et trouver des modèles de financement. Il y a vraiment toute une partie de développement commercial qu'ils doivent maîtriser pour réussir dans l'industrie. Et c'est vrai qu'ils négligent souvent ces aspects, et peut-être que les écoles devraient aussi inclure plus de cours sur le business, ça pourrait vraiment aider.	Yes, I think it's definitely a point that needs improvement. I would give it a solid 4 out of 5. Swiss developers are often extremely talented at creating games, but they lack business skills. They often overlook essential elements like monetization. For example, they might make a great game but not think about pricing strategies or how to sell it. Today, marketing is crucial. They also need to consider collaborating with influencers or streamers to increase their game's visibility.Another important point is participating in industry events to network and showcase their work. They need to know how to write compelling proposals to secure funding or partnerships. And for those who don't have funding, it's crucial to know how to sell their projects, develop business plans, and find financing models. There's really a whole aspect of business development they need to master to succeed in the industry. And it's true that they often neglect these aspects, and maybe schools should also include more business courses, which could really help.
QP08A	C'est difficile de donner des chiffres exacts. Tout dépend vraiment de la qualité du jeu. Mais, si je dois donner une fourchette ça peut aller de 300'000 à 1'000'000 CHF. La production de vidéos de qualité est assez coûteuse. Alors, ici, on a des aides étatiques que ça soit vis à vis des cantons ou de Pro Helvetia, mais c'est vraiment le minimal. Ils vont te donner quoi 40'000 CHF, avec ça tu ne peux absolument rien faire. Je sais qu'il y a pas mal des studios qui ont vraiment dû prendre des mesures drastiques, tel que sacrifier des mois de salaires ou encore faire des emplois à temps partiel, juste pour pouvoir financer leurs projets. Le financement d'un jeu ici ça peut vite devenir compliqué. Développer un jeu, ça peut coûter entre 300'000 et un million de CHF et si tu n'as pas un bon investisseur ou un éditeur qui te finance le projet ça devient vite compliqué. Souvent, les devs doivent se rabattre sur des moyens de financement comme le financement participatif, il y a pas mal de studios qui ont dû faire ça.Et puis, quand vous regardez ce qui se passe chez nos voisins comme en France, en Allemagne, Angleterre eux, ils bénéficient d'un vrai soutien pour les jeux vidéo. Ils n'injectent pas des petites sommes, vous voyez. Nous, on pourrait totalement faire pareil, mais tout dépend du gouvernement ici. Quand vous avez un bon soutien financier, ça ouvre des portes, ça vous permet de pousser la qualité de vos jeux un cran plus haut. Je donnerai un 1.5 pas plus.	It's hard to give exact figures. It really depends on the quality of the game. But if I have to give a range, it could be from 300,000 to 1,000,000 CHF. Producing quality videos is quite expensive. So, here, we have state aids from the cantons or Pro Helvetia, but it's really the minimum. They'll give you something like 40,000 CHF, with which you can't really do anything. I know there are quite a few studios that have really had to take drastic measures, such as sacrificing months of salaries or even taking part-time jobs, just to fund their projects. Funding a game here can quickly become complicated. Developing a game can cost between 300,000 and a million CHF, and if you don't have a good investor or a publisher to finance the project, it quickly becomes complicated. Often, developers have to resort to funding methods like crowdfunding; a lot of studios have had to do that. And then, when you look at what's happening in neighboring countries like France, Germany, England, they really receive solid support for video games. They don't inject small sums, you see. We could totally do the same, but it all depends on the government here. When you have good financial support, it opens doors, it allows you to push the quality of your games up a notch. I would give it a 1.5, no more.
QP09A	Oui, cela ne fait aucun. Ça clairement un grand impact. Reconnaître l'industrie du jeu vidéo comme leur valeur culturelle c'est une chose et puis être prêt à investir de l'argent pour le développer, ça c'est une autre chose. Cette deuxième étape, on n'y est pas encore. Vous parlez des chiffres du jeu vidéo, de ce que ça génère, de la taille de l'industrie. C'est quelque chose d'absolument incroyable. Vous voyez ces dernières années l'Europe s'est rendu compte de l'importance de	Yes, it's clear. The lack of recognition and investment in the video game industry as a cultural value has a significant impact. Recognizing the video game industry as a cultural asset is one thing, and being ready to invest money to develop it is another. We haven't reached this second step yet. You talk about the figures of the video game industry, what it generates, the size of the industry.

	cette industrie et à quel point il faut aider, soutenir, développer les cerveaux, développer les infrastructures. Parce que, ils se sont rendu compte que demain, l'industrie du jeu vidéo ça pourrait être une des premières formes de revenus d'un pays. Typiquement, je sais qu'ils ont mis en place un accord entre les pays européens pour encourager les studios de développement à rester en Europe, ou à revenir s'ils étaient partis. Vous voyez, le but c'était vraiment de rendre l'Europe plus attractive pour ces studios, parce qu'ils ont vu que de plus en plus de studios cherchaient des opportunités ailleurs. Vous voyez l'Europe s'est vraiment rendue de l'importance de cette industrie. Malheureusement ce n'est pas tant le cas en Suisse et je trouve que c'est dommage parce qu'on a clairement le potentiel pour mieux y faire.	It's absolutely incredible. In recent years, Europe has realized the importance of this industry and how much it needs to support and develop the talent and infrastructure. They realized that tomorrow, the video game industry could be one of the primary forms of revenue for a country. Specifically, I know that they've set up an agreement among European countries to encourage development studios to stay in Europe, or to return if they had left. The goal was really to make Europe more attractive for these studios because they saw that more and more studios were looking for opportunities elsewhere. Europe has really realized the importance of this industry. Unfortunately, this is not so much the case in Switzerland, and I think that's a shame because we clearly have the potential to do better.
QP10A	Il nous faudrait un plus grand soutien du gouvernement, niveau politique et économique, un peu similaire à ceux offerts par le Canada actuellement. Le Canada, a mis en place diverses mesures pour encourager le développement de studios de jeux vidéo dans leurs pays, tels que des réductions des taxes pour pousser le développement. Je sais typiquement qu'à Montréal, Ils offrent des crédits d'impôt généreux pour les entreprises de jeux vidéo, et ceci leur permet de couvrir une bonne partie de leur frais de productions. Et pour les subventions, c'est vraiment des gros montant. Avec les subventions reçues ici tu ne peux absolument rien faire. Il devrait clairement améliorer sur ce point, et suivre le modèle suivi au Canada. Parce que le Canada, tout comme la Suisse reste un pays où le coût de la vie reste assez chère et pourtant ils ont réussi. Mais pour ça il faudra une plus grande reconnaissance du gouvernement	We need greater support from the government, both politically and economically, similar to what Canada currently offers. Canada has implemented various measures to encourage the development of video game studios in their country, such as tax reductions to boost development. Specifically, in Montreal, they offer generous tax credits for video game companies, which helps cover a significant portion of their production costs. And the subsidies are really substantial. The subsidies we receive here in Switzerland can't really do anything significant. We definitely need to improve in this area and follow the model adopted in Canada. Because Canada, like Switzerland, is a country where the cost of living is quite high, yet they have managed to succeed. But achieving this will require greater recognition from the government.
QP11A	Non, parce que le mobile, c'est devenu beaucoup trop compliqué aujourd'hui. Le marché a tellement changé que maintenant, vous pourriez penser que ça va coûter moins cher, mais en fait, il faut des investissements massifs. Ça peut coûter aussi cher qu'un jeu de pc, console. Et il y a tellement de barrières à l'entrée, c'est juste beaucoup trop compliqué. Et je pense qu'il ne faut pas se mettre à changer de plateforme juste parce qu'on pense que ça peut rapporter plus d'argent. Ce n'est même pas vrai. Il y a vraiment plus d'argent à faire sur les jeux de console et PC. En plus, c'est un marché beaucoup plus compétitif où les jeux sont souvent gratuits, donc il faut investir énormément en publicité sinon votre jeu passe complètement inaperçu. Et ça demande de constamment alimenter le contenu sur les plateformes.	No, because mobile has become far too complicated today. The market has changed so much that now, you might think it would be cheaper, but actually, it requires massive investments. It can cost as much as a PC or console game. And there are so many barriers to entry, it's just way too complicated. And I think we shouldn't just switch platforms because we think it might make more money. That's not even true. There's really more money to be made in console and PC games. Plus, it's a much more competitive market where games are often free, so you have to invest a lot in advertising or your game will go completely unnoticed. And it requires constantly feeding content on the platforms.
QP12A	Alors, oui la reconnaissance du gouvernement va clairement faire une grosse différence. Comme je vous l'ai dit auparavant, il nous faudrait un plus grand soutien du gouvernement, niveau politique et économique, similaire à ceux offerts par le Canada actuellement. Comme je vous l'ai dit le gouvernement Canada, a mis en place diverses mesures pour encourager le développement de studios de jeux vidéo dans leurs pays, tels que des réductions des taxes pour pousser le développement. Je sais typiquement qu'à Montréal, Ils offrent des crédits d'impôt généreux	Yes, government recognition would definitely make a big difference. As I've mentioned before, we need more substantial support from the government, both politically and economically, similar to what Canada is currently offering. The Canadian government has implemented various measures to encourage the development of video game studios in their country, like tax reductions to boost development. For example, in Montreal,

	pour les entreprises de jeux vidéo, et ceci leur permet de couvrir une bonne partie de leur frais de productions. Et pour les subventions, c'est vraiment des gros montant. Avec les subventions reçues ici tu ne peux absolument rien faire. Il devrait clairement améliorer sur ce point, et suivre le modèle suivi au Canada. Parce que le Canada, tout comme la Suisse reste un pays où le coût de la vie reste assez chère et pourtant ils ont réussi. Le gouvernement Canadien a cru à l'industrie. Aujourd'hui c'est devenu un pôle mondial de développement de jeux vidéo. Ubisoft a des studios Electronic Arts, les studios FIFA sont développés en Canada. Je veux dire, il y a une réalité qui dit qu'effectivement, on peut générer des millions, voire des milliards. Mais pour ça, il faut s'en donner les moyens et il faut croire en l'industrie. Et ça va prendre du temps. Ensuite, je pense qu'il faudrait qu'on se concentre davantage sur l'éducation, les formations, c'est notre gros point fort. Je pense qu'on a un niveau qui est excellent, ça pourrait être intéressant que certaines écoles se spécialisent au niveau européen pour attirer des gens, ça pourrait après amener des studios à se déployer, à se développer. A mon avis ça doit passer par l'éducation, c'est le point le plus fort qu'on peut mettre en avant. Parce que à l'heure actuelle, elle est bien, mais elle pourrait devenir une éducation de référence. On a l'avantage d'avoir trois langues européennes en Suisse, plus l'anglais. Il y a beaucoup d'écoles qui donnent des cours en anglais aussi. A l'EPFL, il y a plein de cours en anglais. Je pense qu'on aurait des niveaux pour faire des post-grad, qu'on devienne une référence pour les gens qui veulent devenir développeurs dans le domaine du jeu vidéo. Je pense clairement qu'en termes d'éducation on peut faire très très bien on peut faire dans l'excellence. Et ça ça pourrait améliorer les revenus ici en Suisse. Parce qu'après, les studios se mettraient à se développer, ça deviendrait une plus grande culture. Il y en a qui se dirait, on va ouvrir des studios en Suisse, on va directement prendre les cerveaux des gens qui viennent se former ici. Moi, je pense qu'il faut commencer par l'éducation. C'est comme ça qu'on développe les choses. Je suis convaincu que pour générer plus de revenus ca va passer par l'éducation, moi je pense que c'est le maillon qui va entraîner le reste, c'est à dire qui va entraîner la volonté que Les studios vont venir s'établir, vont se développer, vont avoir plus de gens, de main d'œuvre, devenir un pôle. La Suisse a toujours été forte pour l'innovation et pour les cerveaux, il faut être réaliste. Maintenant, il faut trouver un moyen de les garder là et de les développer encore plus. À travers l'éducation, à travers le développement, il faudrait que la Suisse devienne un pôle européen pour la formation des métiers du jeu vidéo. C'est quelque chose qu'on pourrait faire, on a les infrastructures pour, on a les écoles, on a les trois langues, quatre langues avec l'anglais dans lesquelles on peut dispenser ça. À part l'italien et l'espagnol qu'on n'a pas, on couvre une grande partie de l'Europe. Voilà mais ce sera un point où on devrait plus se développer je pense. Vous savez, au niveau de l'exportation, aujourd'hui, ça se	they offer generous tax credits to video game companies, which help cover a significant portion of their production costs. And the subsidies are really substantial. The subsidies we receive here are minimal—you can't really do much with them. We definitely need to improve in this area and follow the model Canada has adopted. Like Switzerland, Canada is a country where the cost of living is quite high, yet they have succeeded because the Canadian government believed in the industry. Today, it has become a global hub for video game development. Ubisoft and Electronic Arts have studios there; FIFA games are developed in Canada. I mean, there's a reality that shows you can generate millions, even billions. But for that, you need to invest the resources and believe in the industry. It will take time. Then, I think we should focus more on education and training—it's our strong point. I think we have an excellent level of education, and it would be interesting if some schools specialized at the European level to attract people, which could then lead to studios expanding and developing. In my opinion, it must go through education, which is the strongest point we can highlight. Because currently, it's good, but it could become a reference in education. We have the advantage of having three European languages in Switzerland, plus English. Many schools also offer courses in English. At EPFL, there are plenty of courses in English. I think we have levels for post-graduate education, we could become a reference for people who want to become developers in the video game field. I clearly think that in terms of education we can do very, very well; we can excel. And that could improve revenues here in Switzerland. Because then, studios would start to develop, it would become a bigger culture. Some would say, let's open studios in Switzerland, we'll directly take the brains of people who come to train here. I think it starts with education. That's how you develop things. I'm convinced that to generate more revenue, it will go through education, I think that's the link that will lead to the rest, that is, it will lead to the willingness for studios to come and set up, to develop, to have more people, more workforce, to become a hub. Switzerland has always been strong in innovation and for brains, we have to be realistic. Now, we need to find a way to keep them here and develop them even more. Through education, through development, Switzerland should become a European hub for training in video game professions. It's something we could do, we have the

	fait déjà. Giant Software, c'est vendu dans le monde entier, etc. Mais il faut qu'on ait des jeux à exporter. Puis pour qu'on ait des jeux à exporter, il faut qu'on ait des studios. Puis pour qu'on ait des studios, il faut qu'il y ait de la formation et de l'éducation pour motiver aussi les gens à le faire. Il faut devenir un centre de compétence. Quand vous regardez ce qu'on a comme succès, vous dites, ben voilà, Farming Simulator, ça a marché, Far, il y a 3-4 petits jeux. Ce n'est pas évident de donner confiance. Le gouvernement, c'est comme une banque. Quand vous allez lui dire, ben voilà, il faut avancer 20 milliards pendant 5 ans pour développer l'industrie du jeu vidéo parce que ça va en générer 40 derrières, il va dire, t'es sûr pour les 40 ? Ouais, je ne sais pas trop. C'est un peu la même problématique. C'est un investissement de la part du gouvernement pour permettre à l'industrie de se développer et de générer par la suite des retours qui seront plus importants. Mais pour ça, il faut qu'ils y croient.	infrastructure for it, we have the schools, we have the three languages, four with English in which we can offer it. Aside from Italian and Spanish that we don't have, we cover a large part of Europe. But this is a point where we should develop more, I think. You know, at the level of exports, today, it's already happening. Giant Software is sold worldwide, etc. But we need to have games to export. And to have games to export, we need to have studios. And to have studios, there needs to be training and education to also motivate people to do it. We need to become a center of competence.When you look at our successes, you say, well, Farming Simulator, it worked, Far, there are 3-4 small games. It's not obvious to give confidence. The government is like a bank. When you go to them and say, look, we need to advance 20 billion for 5 years to develop the video game industry because it will generate 40 behind, they'll say, are you sure about the 40? Yeah, I'm not so sure. It's the same problem. It's an investment on the part of the government to allow the industry to develop and subsequently generate greater returns. But for that, they have to believe in it.

Appendix 3 – Interview transcription - Respondent B

Code	Response
QP01B	Yes for sure, it has a big impact. I will give kind of 5. Because, having a large video game development studio is important because it greatly enhances the visibility and recognition of the video game industry within the country. You see, when you have a big studio, you're going to attract both local and international talent who are eager to work on ambitious and innovative projects. You know big studios have the capacity to produce high-quality games that succeed on the international market, and this really helps to strengthen the reputation of the video game industry in Switzerland. So for sure, the fact that we don't have big studios in Switzerland, in a way makes the industry stagnate. Swiss talent, they're more likely to look for opportunities abroad because the opportunities here are quite limited, right? And this leads to a brain drain which then limits the development of advanced skills within the country. And you know, in a way this is also why we have a lot of trouble convincing the government. At the moment, I feel like they don't see the full potential of this industry. If we had a few big studios, the scale would undoubtedly be different. It's a bit of a circle, you know? If they could see the economic impact of a thriving game development scene, they might be more inclined to support it. And the fact that we don't have major publisher is also a big impact. I will give 4. Because a lot of our game creators just aren't experienced enough to negotiate with the top publishers outside of Switzerland. Often, our less experienced studios end up signing with these publishers who don't really care about the quality of the games. They just want to pump out as many titles as possible to see if anything hits. We learned this the hard way with our first game. These publishers, they just throw everything at the wall to see what sticks, and if something does, they make a profit, but they don't care about the rest. You know, to be successful, what you really need is to work with good publishers, like Devolver Digital or Raw Fury, who actually care about the games and their developers. But to get noticed by such publishers, Swiss studios need to step up their game and gain some recognition. One idea I have is maybe we could start a new Swiss-based publisher, maybe get some funding from cultural sources like Pro Helvetia but focus this new outfit on publishing. Rather than just handing out grants, this entity would actually manage the production and distribution of games. Think of it as 'Pro Helvetia Publishing'. It could be a real game-changer, supporting Swiss games from start to finish, without worrying about language or regional differences. It'd be like an incubator for Swiss game developers, helping them launch their first, maybe even their second games, without falling into the trap of bad deals. This kind of approach could really protect Swiss developers, helping them gain the experience they need and navigate the early stages without the heavy costs or risk of getting exploited. Right now, without this kind of support, too many talented folks just throw in the towel and switch careers because they think making it in game development in Switzerland is just too tough and expensive. Having a Swiss-centered publisher could totally change the game for us, giving us the backing and experience we need to compete on an international level. I will give a 2 . So basically, if you look at the value chain in the Swiss gaming industry, it's pretty much nonexistent. We have the studios, but like you mentioned, most of these places aren't just making games. Then it's tough to create awareness here. There's no big publisher based in the country, which is a huge gap. Distribution isn't the biggest issue nowadays because almost everything is done online. So really, studio development and publishing are the critical pieces missing. And here in Switzerland, there's definitely a lack in these areas, which obviously impacts the revenue and the industry in general in Switzerland. It's a cycle that really affects the whole ecosystem here.
QP02B	You know, I think it all starts with the educational system here. We've got schools like the one in Lausanne, Zurich, where engineers who can easily transition into the gaming industry get trained, but they usually end up coding for someone else's game design, not creating the games themselves. Becoming a game designer is a whole different story because that role demands a lot of experience across various

	domains, not just technical skills. It's really something you grow into from experience—your own ideas and understanding of game rules and dynamics. I've been in the industry nearly ten years now, and I'm just starting to feel like I can handle game design. If you want to work in gaming more broadly, you need to start in your chosen field, whether that's as a musician, an actor, or whatever else, and then likely move out of Switzerland because the local industry isn't big enough to support specialized roles like a motion capture actor. The real challenge in Switzerland, though, is that every job seems to require a formal diploma. If you want to prove you can manage a team based on your experience, they'll still ask for a diploma in team management. That's frustrating because it overlooks real, practical experience in favor of formal education, which isn't always necessary, especially in creative fields like game development. We really lack curricula that help us build optimal video game creation teams, and I think that's a real shortfall. There's also a significant gap, especially on the business side of things. Developing a game is great and all, but there's a whole business aspect that often gets overlooked, and that's a major issue here. Maybe we need to shift our focus more toward that aspect. It's crucial to understand that creating a video game isn't just about the technical aspects; there's a whole business layer to it that's often neglected. We need a curriculum that addresses both — helping upcoming developers not only make games but also understand how to market them, manage contracts, negotiate with publishers, and navigate the financial aspects of the gaming industry. You know, the issue we faced with publishers, I honestly, this is the kind of stuff that should be taught in school. But the problem right now is that the educational focus is solely on the development part, not on the business side of things. I also feel in Switzerland, traditional careers are valued more, and game development is often seen more as a hobby than a real job. It's quite different from Japan, where game developers are highly valued. There, students graduate with loads of opportunities, including internships in studios, which makes a huge impact. Here in Switzerland, it's a different story. It's tough for game developers to advance without that kind of infrastructure. If we had big studios, maybe it would be different. There'd be more synergy, more opportunities for growth and collaboration within the industry. But as it stands, we're quite far from that. So, I believe that we have very good schools like ZHdk, EPFL. I have no doubt about their quality. But even with these top-notch institutions, I think we can push things further. We definitely have the opportunity to tweak and enhance our educational programs to better align with the needs of the Swiss video gaming industry. There's a ton of potential waiting to be tapped into. If we can adjust our curriculums to focus more on the practical skills needed in gaming, like business acumen, game design, and technological innovation, we could really boost the industry locally and make our mark on the global stage. Then regarding the help of the government, you have institution like Pro Helvetia, in Switzerland, the most you might get is around $40,000 or $50,000 if you've already secured some funding from another publisher. And for creating a prototype, you might get about $20,000. It's definitely a help, more like a bonus really, but it's far from sufficient. You can't fully fund game production with that kind of money. It's just not feasible. We definitely need more, especially in a country like Switzerland. For festivals, we've got some great ones like Gamesweek in Zurich. It's a fantastic event where you can meet a lot of publishers and other industry folks, so it really is a valuable opportunity. So, the overall So, I would say the overall ecosystem isn't too bad; I'd give it a 2.5. There are quite a few areas where we can improve. If we make these improvements, the Swiss video game industry could definitely have a much stronger influence in the global gaming scene. Specially if we improve the government support, because it is the one which will help us to improve our studio and our education
QP03B	I think like they help, but the help doesn't help really. You know, like for example, the pre-production is, as I said, 20k maximum per. So, it's twenty k. And they want the money to not be used for salaries. And so that's strange for me. It's like, okay, so we, how we live, how we work on that, then if that's not the money we can use. So, you have some strange stuff that maybe if someone will explain me clearly, I will understand. But I think if you want really to help a production, you need more money. not for one, but like for ten and try and, try and try and put the money on like ten years and say, okay, for ten years we will put 1 billion. I don't know. And so every year you have, I don't know, 1 million cubs. I don't know. That makes 10 million a year. Let's say 10 million a year. So on this 10 million a year, you have, maybe ten big company and, it's too much, probably too much. But like, you have ten big company and 20 little company, and the ten big companies receive each, 300,000. And the small company receive 100,000. And then you have some cash, that is here for promotion or whatever. And then at start, Switzerland is

	losing money. But because those ten and those 20, you have companies that are growing and maybe they do a hit and they do millions and so they can hire new people. Then, the circle will work only with them. At one point, ten years after, you will have, like, maybe ten big companies that, does enough money that doesn't get out of Switzerland because they receive money from Switzerland, and they are happy to receive some tax stuff or whatever. You know, be gentle with the. With the swiss people instead of be gentle with Nestle and other people, you know, I mean. Yeah. And then, and then after ten years, all the money they put, like, it would create works in this field and maybe, a lot of people would become teachers, and they will create new publishing stuff and then the country will be able to let go because it works. But, like, I don't think by giving some craps. At first it was good when really it has nothing in Switzerland. It was nothing in Switzerland. You know, like, you only try your first game, and you receive 20,000. It's like, oh, shit. Yeah, I didn't. I worked for six months without any money. Now I can finally buy a new computer, or like, I can finally have this buy this license of unity that I was in, I wasn't able to use. So, I think now that we are in beat middle and that you have a lot of littered studio, it's not enough anymore. But when you say, Maria, that is 200,000 and stuff, you really have to help.
QP04B	I will give a 4. Definitely, the fact that we don't have many big AA or AAA game productions here does put a cap on how much money the Swiss video game industry can make. When you look at the big picture, the games that really rake in the cash and grab headlines globally are those high-budget AA or AAA titles. Here in Switzerland, we're mostly known for smaller, indie games. While they're creative and cool, they just don't pull in the same kind of dough as the bigger games do. We definitely make good indie games making a lot of money, like 'Wandering Village' and 'FAR', no doubt about that. These titles show that we have the talent and the creativity needed. However, if we had a few AA games that hit globally, I believe it could propel the Swiss industry to another level. For example, games like 'The Witcher 3' or 'Call of Duty' not only generate massive sales but also create a huge buzz that lasts for years. That kind of buzz helps to draw in more investment and talent, which fuels the industry even more. if Switzerland started focusing more on AA or AAA games, it could really change the economic situation of the Swiss video gaming for sure. But to to be honest, AA games fit our current setup and resources better than AAA games. Because AAA will be quite expensive. But AA game is feasible. So, by going for AA, we can create high-quality games that bring fresh, trendy ideas to the table. And then if the game is critically acclaimed by the public that can quickly boost the industry. You see this wouldn't just boost our earnings but also enhance our standing on the international scene so that's interesting. Also, more people will work on the game, it will encourage collaboration with talent, with countries, you see there will be a true synergy, and that's quite good, because it something I feel that we are missing right in our industry.
QP05B	I'd give it a 5, honestly. The high cost of living in Switzerland really impacts the video game industry significantly. You see, the salaries we need to pay here are pretty steep. For example, you might pay an engineer around 8,000 francs a month, but with that kind of money, you could hire two engineers in Japan. So yeah, it's a huge issue. And then there's the fact that Swiss Francs only go so far here, and nowhere else. That's why the industry really needs strong local support if we're going to push forward. If not, then you need to be a good hit and probably move outside of Switzerland. At what point? I think a lot of companies that will do hits might move outside of Switzerland if they are not supported. Yeah, because like it's like starting a game in nightmare mode. That's probably one of the most challenging problems.
QP06B	Yeah, I totally agree that one of the biggest challenges in the Swiss video game industry is the drain of educated and talented developers finding positions abroad or focusing on commissioned software rather than developing their own projects. I'd rate this issue as a 5 because it's quite significant. The ecosystem back home just doesn't support game developers enough. There's this prevailing attitude that game development isn't a 'real' career. People are steered towards safer tech fields, like app development, which are seen as more legitimate or stable in Switzerland. Unfortunately, the current policies don't really support the growth of our industry enough. There aren't many opportunities, so if you want to progress, work on bigger projects, you're almost forced to look elsewhere. Also, if you want to be an indie developer, honestly, you might be better off doing it in another country. I've been living in Japan for several years now, and the difference is night and day. You know in Japan, I think it's not difficult to find work, then is it a good work? Maybe not. Is it the work that you like? Maybe not. But it would be at least something related to video games, that's why I like Japan.
QP07B	Absolutely. Take the situation with publishers, for example. Often, they'll offer contracts that aren't in the best interest of developers—they're not really looking out for us, you know? We definitely need to be cautious. It highlights a broader issue: there's a real gap in our understanding of marketing and the ins and outs of self-publishing. We absolutely need to deepen our knowledge in these areas. So

	yes, I fully support the idea of integrating more business-oriented courses into our training programs. It's essential if we want to navigate this industry successfully and make informed decisions.
QP08B	Developing a video game in Switzerland can be pretty costly. It all depends on the type of game you're looking to make. Costs can range from around 100,000 to over 1,000,000 CHF or more, depending on the scale and complexity of the project. When it comes to funding, it's very hard. The available financial support doesn't quite match up with what you might see in other countries. For instance, the maximum you might expect from Pro Helvetia is around 40,000 CHF, which, honestly, doesn't stretch far in the grand scheme of game development. When you compare that to places like Canada, France, where developers might receive around 200,000 CHF, it's a stark difference. As for the government's role in funding, I'd also give it a low score, maybe a 2 out of 5. The contribution is just the bare minimum.
QP09B	Absolutely, there's no doubt about it. The lack of government recognition really puts a damper on the potential growth of the Swiss video game industry. It almost feels like the country doesn't fully grasp what this industry could contribute, both financially and culturally. But then again, considering Switzerland is one of the most expensive countries in the world, there might be this mindset that we don't really need to explore new territories. We've got our staple industries like banking and engineering; those are our safe zones. Take a look at other countries, though, like South Korea. eSports there have turned into a massive economic force, and you see the government really stepping up, supporting and nurturing these industries. But here in Switzerland, it's a different story. Even in areas like football, or arts and movies, we're not exactly leading the pack. A lot of our creative talent ends up moving abroad, like to the US, where there are more opportunities. Over here, we tend to stick to the tried and true. Now, if our government decided to really lean in and support the gaming industry, recognize its potential and invest in it, I truly believe we'd witness a significant transformation. As it stands, the industry is struggling because it's missing that kind of solid governmental support. Just a little more involvement could really make a difference and help the Swiss video gaming scene flourish. Honestly, the government really needs to step up with the funding. What we're getting now is so minimal, it's almost laughable. You can't do anything significant with the amount they provide. Given how expensive it is to live and operate in Switzerland, this lack of substantial financial support is one of the main reasons we don't see big studios setting up here, or producing big-budget AA games. If we're serious about making a change in the industry, the government really needs to rethink their approach and implement more favorable measures. One thing they could do is offer better tax incentives. They could also consider contributing a small percentage towards staff salaries, which would be a huge help. Measures like these would make it more feasible for game development companies to operate in Switzerland despite the high costs. Without such changes, it's hard to see why any major game development players would choose to come here. Everything is just so expensive, and without significant government support to offset these costs, setting up studios in Switzerland just isn't an attractive option. We need the government to make these favorable changes; otherwise, we'll continue to lag behind other countries that are more proactive in nurturing their gaming sectors.
QP10B	Yeah, definitely. The high cost of living here in Switzerland is a huge challenge, especially when you're trying to do something new or independent. When you're not sure if you can cover your basic expenses like food, housing, and transportation, it's tough to take risks on new projects. You end up having to work a lot just to manage those costs, which leaves little room for anything else. For example, if you want to go from Fribourg to Lausanne to meet someone in your field, it could set you back 100 francs just for the trip and food. That's a lot for just trying to network or collaborate. So, a lot of people might choose to stay in their own town, which really limits your opportunities to connect and share ideas with others in the same industry. What we really need is a way to reduce these basic living costs, or maybe some kind of support for independent workers, like maybe subsidizing travel for professional purposes. This would make it so much easier to collaborate and take on new projects without the constant worry about finances. And yeah, another big thing is having a common space where everyone in the gaming industry can meet and

	network. Not just an online forum, but a real, physical space where spontaneous meetings and collaborations can happen. But lowering the cost of living would be the first step to getting more people to take the risks that can lead to big things. It's all about making it easier to meet up, share, and work on projects together without the financial strain holding us back.
QP11B	Honestly, I feel it's not the best strategy to focus on the mobile market. Yeah, we're good at creating apps and all that stuff, so it might seem interesting at first glance. But actually, when you really dive into it, the mobile space is just incredibly competitive. Think about it thousands of new games hit mobile platforms every week, while platforms like Steam see far fewer. This means you're constantly battling to even get noticed. Plus, the economic model of mobile games isn't exactly friendly for developers like us who might not have huge resources. You're expected to invest heavily upfront and then keep pouring money into continuous content updates. That's a tough gig, especially here in Switzerland where we might not have the same level of resources as bigger studios in other countries. So, while mobile gaming has its appeal, the reality of competing in that saturated market can be pretty daunting.
QP12B	Yes, everything will depend on the government. They should clearly invest more money in the industry like I said before otherwise is going to be complicated. To create more revenue, we need better games. And to create better games, we need more money at first and money that is wisely spent in the game industry. That's why in the game industry, for the developer, because all the other stuff, the esports stuff, the events, the goodies, the whatever comes will only come from a hit, a big hit that is recognized internationally. And to be able to do that, you need to help be better and maybe train them to not do shitty contract first. So that's why I think maybe if not an international publisher, then an international in between, that would search money for the developers and help them make good deals directly, not just giving the money, you know, and having we have those kind of, you have those kind of companies in the world actually. so I think that's the solution. To have all the international, publisher or the national pro officer not giving you money, but helping you, make good deals with if they can. Because now I think they are, they have less experience than developers in that field, you know. But that would be a solution because the solution to make money is to create first some heat, some products that are valuable internationally and make a lot of money already. We need few games which are worldwide hit in order to boost the industry. The big budget game, probably AA game is already good. Yeah. Okay. AAA game is really, really difficult. I think AA games is already good, if you can do that also, a lot of people are searching for that. and to go that even us, like we feel we could start to think about it. But I think we need more experience and more, people inside. So the goal is to make, valuable games, not only one, like having, let's say five or ten studios that thrive enough to be able to take new people. And even, how you say, intern, you know, and those interns then have experience and better experience than they do better stuff and understand how it works. And then they do their own company after five years. And, you know, but for that, you need to help for real. Not just put like, it's good to have a little bit of money. It helps, but it doesn't push you up. We almost finished our company almost died lately. and for now not. And I asked Pro Helvetia, do you have any plan for companies that work? Well, did some game have still a lot of stuff in their, like how you say, in their shelf, but that might just because of one miss that might just be blown up and they don't, you know, that would be something. So you have a company that works well, but for one reason, like 2023, because it's crisis, whatever. And then, the country doesn't have, okay, we lend you that money to be able to survive until next year. But, in exchange, you need to sign a contract, definitely, you know, what. Good, quality of games. First, I think for the country, what is necessary is good quality of games. Then it sells for the, for the, for us, the sales is necessary not only for us, for the money, but to show other publishers that we already did one game that felt, well, that's really valuable, that's really necessary. And so when you have this card in hand, then you can sign with more publishers and therefore be independent from the country. But if the country want to help, they need to help to make at least one or two quality qualitative games, that make the Tajo or the person having their, I would say business card it's kind of your first business card. It's your first game. That is at least have a good critique on the media. Yeah. like that. They make you train somewhere else and then you come back trained, and then you are sure to have a work when you come back in Switzerland, and therefore you can share your experience. That could be another thing, you know, be sure to have a work for the people who have experience and therefore, like, keep, keep your talent. That's the goal. Keep your talent inside, give them a work. Why I didn't cave before? I want to come back in Switzerland. But, like, why I don't come back? I'm not sure

	to have a salary enough for my family every day for a year because it's a shitty situation. So, yeah, definitely government help. I think, yeah, that's one. And the other one for the government is to keep their talent and find ways for their talent to not go abroad or to go abroad to learn, but then be able to come back. Because if you go abroad, then you have the salary that is less than Switzerland and you can come back because the work doesn't exist and, you know, exist outside. So, you need to find a way to make them come back. So that's why, for example, my publisher idea is like, if you have a publishing company that is paid by Switzerland, then you can make them come back because the people that have experience can work in this publishing stuff and help other making great games. And the money here never stops because it's an annual grant that you have to pay salaries for those people to come help the other developers. You know what I mean? So that is an idea. But like, I think for me is the best idea right now.

Appendix 4 – Interview transcription - Respondent C

Code	Response	Translation
QP01C	À Schaffhausen, on a Urban Games, et chez Giant Software, même s'ils externalisent pas mal, c'est aussi un acteur significatif. Dans la région zurichoise, on trouve beaucoup d'équipes, surtout des petites équipes de 5 à 10 personnes, qui créent régulièrement des jeux vidéo. À Neuchâtel, il y a aussi Miniclip, qui est une structure assez importante. Alors oui, on a ces structures qui sont implantées sur le territoire suisse, mais la grande question c'est : comment les retombées de leur présence sont-elles redistribuées à la population ? Est-ce que ça crée des emplois ? Est-ce que ça génère des revenus ? C'est vrai qu'en Suisse, il nous manque de gros studios de développement qui conçoivent des jeux. Historiquement, on a vu des grands noms comme Electronic Arts, Ubisoft et d'autres venir s'installer en Suisse, mais c'était surtout pour y placer des bureaux administratifs. Ça a donc principalement mobilisé des compétences financières ou administratives. Ça n'a pas vraiment dynamisé le milieu des développeurs et développeuses en Suisse. Clairement, on ressent un manque de studios de développement ici, et ça impacte beaucoup. On parle de ceux qui créent des emplois, qui génèrent des revenus, et qui stimulent vraiment le secteur ici. Bien sûr, on a pas mal de studios, mais très peu arrivent à remplir ces critères. C'est sûr que ça a un impact. On aurait vraiment besoin de plus de gros joueurs pour booster l'industrie et montrer ce qu'on peut faire ici. L'impact serait de 4. L'absence d'éditeurs en Suisse, c'est vraiment un gros problème, je dirais même que l'impact est entre un 4 et un 5. Parce que ne pas avoir d'éditeur, ça complique énormément les choses. Avoir quelques gros éditeurs dans le pays, ça serait un énorme avantage, parce que les éditeurs, ça change la donne. Quand t'as des grands studios et des éditeurs dans le pays, ça accélère pas mal de processus.C'est vraiment dommage qu'on n'ait pas quelques éditeurs locaux avec une grande présence ici en Suisse, ça aurait vraiment aidé nos développeurs suisses. Parce que, avoir un éditeur dans le pays, ça booste l'industrie locale. Ça ne veut pas dire qu'ils ne prendraient que des projets suisses, mais ça faciliterait beaucoup les choses. À cause de ça, pour le financement des projets, on doit soit chercher des éditeurs à l'international, soit opter pour d'autres méthodes comme le financement participatif, ce que beaucoup de nos développeurs suisses ont fait. En tout, ça rend la tâche de financement d'un projet beaucoup plus compliquée et ça prend plus de temps. La chaîne de valeur de l'industrie suisse du jeu vidéo, franchement, elle est assez incomplète. Ce qui nous manque vraiment, ce sont les gros joueurs. C'est clairement notre point faible. C'est pour ça qu'on n'arrive pas encore à avoir une grande influence dans l'industrie du jeu vidéo, mais bon, on commence à voir du progrès petit à petit. Je donnerais un 2, parce qu'on a quand même quelques studios qui font des choses vraiment intéressantes. Ils sont super innovants, donc c'est bien.	In Schaffhausen, we have Urban Games, and at Giant Software, even though they outsource a lot, they're also a significant player. In the Zurich area, there are many teams, especially small teams of 5 to 10 people, who regularly create video games. In Neuchâtel, there's also Miniclip, which is quite a substantial setup. Yes, we have these structures established in Switzerland, but the big question is: how are the benefits of their presence redistributed to the population? Does it create jobs? Does it generate revenue? It's true that in Switzerland, we lack large development studios that create games. Historically, we've seen big names like Electronic Arts, Ubisoft, and others set up in Switzerland, but it was mainly to place administrative offices. Thus, it mainly mobilized financial or administrative skills. It hasn't really energized the Swiss developer scene. Clearly, we feel a lack of development studios here, and it significantly impacts us. We're talking about those who create jobs, generate revenue, and truly stimulate the sector here. Of course, we have quite a few studios, but very few meet these criteria. That definitely has an impact. We really need more major players to boost the industry and show what we can do here. The impact would be a 4. The lack of publishers in Switzerland is really a major problem, I would even say that the impact is between a 4 and a 5. Because not having a publisher complicates things tremendously. Having a few major publishers in the country would be a huge advantage because publishers change the game. When you have large studios and publishers in the country, it speeds up many processes. It's really unfortunate that we don't have a few local publishers with a significant presence here in Switzerland, it would really help our Swiss developers. Because having a publisher in the country would boost the local industry. It doesn't mean they would only take on Swiss projects, but it would make things much easier. Because of this, for project funding, we either have to look for publishers internationally or opt for other methods like crowdfunding, which many of our Swiss developers have done. Overall, it makes the task of funding a project much more complicated and time-consuming.Frankly, the value chain of the Swiss video game industry is quite incomplete. What we really lack are the big players. This is clearly our weak point. That's why we haven't yet been able to have a significant influence in the video game industry, but we are starting to see progress gradually. I would give it a 2 because we still have

		some studios that are doing really interesting things. They are super innovative, so that's good.
QP02C	Je te donnerai un 2, parce qu'il y a vraiment encore beaucoup à faire. Si tu regardes la taille de la Suisse et que tu la compares avec d'autres industries culturelles, comme le cinéma, tu vois que le jeu vidéo a un potentiel incroyable. Chaque année, l'industrie se développe, elle devient de plus en plus attractive. Mais en même temps, on se rend compte que c'est aussi une industrie qui est limitée par les particularités de la Suisse, comme les barrières linguistiques qui compliquent l'implémentation et la communication, sans parler des limites financières, les problèmes de salaires, etc. Et tout ça pousse l'industrie suisse du jeu vidéo à se replier, un peu comme dans le cinéma suisse, où on ne voit pas de productions à 300 millions avec des équipes de 800 personnes. On a tout ce qu'il faut ici : les écoles, les studios, les événements. Mais tout pourrait vraiment décoller si on avait plus de budget. Et le gros problème, ce sont les aides gouvernementales. Si tu compares avec d'autres secteurs en Suisse, l'industrie du jeu vidéo est vraiment à la traîne. Il manque cette reconnaissance du gouvernement, et ça pèse lourd. Même pour notre écosystème, même si on a d'excellentes écoles qui forment au game design, au game art, comme le Ceruleum, les Maîtres du Monde, la ZHdk, il y a encore beaucoup trop de fuite de cerveaux. Si t'es un développeur ambitieux, c'est super difficile de faire toute ta carrière ici en Suisse. Notre écosystème tient la route, mais avec le potentiel de l'industrie, on pourrait vraiment faire des trucs incroyables.	I'd give it a 2 because there's still so much to do. If you look at the size of Switzerland and compare it with other cultural industries like cinema, you see that video gaming has incredible potential. Every year, the industry grows and becomes more attractive. But at the same time, we realize that it's also an industry limited by Switzerland's unique features, like linguistic barriers that complicate implementation and communication, not to mention financial limits, salary issues, etc. All this pushes the Swiss video game industry to retract somewhat, much like Swiss cinema, where you don't see $300 million productions with teams of 800 people. We have everything we need here: schools, studios, events. But everything could really take off if we had more budget. And the big problem is governmental aid. If you compare it with other sectors in Switzerland, the video game industry is really lagging behind. It lacks governmental recognition, and that weighs heavily. Even for our ecosystem, even though we have excellent schools that offer game design and game art programs, like Ceruleum, Les Maîtres du Monde, and ZHdk, there's still too much brain drain. If you're an ambitious developer, it's super difficult to spend your entire career here in Switzerland. Our ecosystem is functional, but with the industry's potential, we could really do incredible things.
QP03C	Alors on est encore très loins des autres pays. Je donnerai un 2. Surtout si on compte la situation économique de la Suisse, on a clairement les moyens de faire mieux. Le développement d'un jeu vidéo coûte très très cher, si tu compares avec les autres pays typiquement la canada, je sais qu'à Montréal ils sont énormément soutenus, sur beaucoup de point, sur le financement du jeu, C'est pas des petites sommes. Ils sont beaucoup plus généreux, tu vois il y a des aides financières directes sous forme de subventions pour aider à couvrir les des coûts de développement des jeux. ils soutiennent les développeurs locaux de jeux vidéo par des réductions d'impôts	We're still far behind other countries. I'd give it a 2. Especially considering Switzerland's economic situation, we clearly have the capacity to do better. Developing a video game is very expensive, and if you compare it with other countries, like Canada, I know that in Montreal they receive substantial support in many areas, including game financing. It's not small amounts. They are much more generous; you see, there are direct financial aids in the form of subsidies to help cover the costs of game development. They support local video game

	et des primes de recrutement de personnel. Ici c'est très compliqué. Mais ça commence à venir mais ça prend beaucoup temps.	developers with tax cuts and recruitment bonuses. Here, it's very complicated. But changes are starting to happen, although it's taking a lot of time.
QP04C	Compliqué comme question. Je dirai un « 3 ». En Suisse, on a un des jeux européens les plus importants, qui rapporte le plus de revenus, qui est le jeu Farming Simulator, la série Farming Simulator, qui a été créée par Giant Software. Localisé dans la région de Zurich mais avec aussi des branches, une branche en Europe de l'Est et puis une branche en Allemagne. Mais voilà, la maison mère est en Suisse et ça c'est un titre évidemment très très important, c'est un titre qu'on a tendance à oublier mais qui rapportent énormément, notamment en Europe de l'Est et autres. C'est un jeu double « AA ». On a aussi des titres à grand succès, on a à Schaffausen, Urban Games qui a sorti Transport Fever 1 et 2, qui rapportent aussi, qui génèrent aussi énormément d'argent. Et puis, Du côté de la région zurichoise, on a beaucoup d'équipes, on a aussi des revenus qui sont générés par énormément d'équipes, alors plutôt des équipes de taille petite en fait, entre 5 et 10 personnes, typiquement vous avez le jeu Wondering Village à Zurich, ça génère pour une équipe de 10 personnes plusieurs millions. Ce n'est pas le triple A qui rapporte de l'argent. Ça, c'est ce qu'ils essaient de vous faire croire en réalité. Mais ce n'est pas pour rien qu'ils n'arrêtent pas de virer des gens, de reprendre des gens ou alors ça rapporte de l'argent à des actionnaires ou en gros, vous alimentez en fait une machine capitaliste. Mais le véritable revenu, il est dans des projets comme Vampire Survivor. Là, c'est des revenus. C'est comme dans le cinéma. Le film le plus rentable de l'histoire du cinéma, c'est Blair Witch. Si vous pensez vraiment en revenus, si vous pensez que, qu'est-ce qui est rentable ? Ce qui est le plus rentable, c'est de faire un truc qui ne coûte pas grand-chose et qui tout à coup devient le child boy du monde entier. Mais après, c'est vrai que quand il y a un grand jeu qui explose comme Farming Simulator, ça donne la visibilité quand même à l'industrie suisse. Mais, il faut le lier au contexte Suisse. C'est-à-dire que les gens ont peu eu l'habitude, dans les pratiques des joueurs et des joueuses, on a peu eu l'habitude de nationaliser le jeu auquel on joue. Parce qu'il y a un peu cet a priori que c'est soit un jeu japonais soit un jeu américain. Il y a peut-être plein de gens qui ne savent pas qu'effectivement leur Battlefield 2 en fait c'est fait en Suède. Enfin voilà, on a eu tendance un peu à faire une sorte, c'est ce qu'on appelle histoire hégémonique, on a eu tendance à faire une sorte d'histoire hégémonique du jeu vidéo qui considère qu'il n'y a que le pôle. Etats-Unis et le pôle Japon principal et puis qu'on est dans une espèce de mouvement de balancier où avant le crash d'Atari c'était les Etats-Unis et puis après il y a eu le Japon. Alors qu'en réalité c'est beaucoup plus complexe que ça, on a vraiment des jeux qui sont produits à l'international et puis il y a plein de gens peut-être qui ne savent pas, ils sont en train de jouer à un jeu mobile et en fait c'est un jeu qui est produit au Vietnam. Même si peut-être les gens dans leur tête ils imaginent que c'est produit aux Etats-Unis, en fait peut-être c'est produit au Vietnam ou aux Philippines. Du coup, pour répondre à votre question, je dirais oui, ça a un impact, mais peut-être pas directement sur les revenus, plutôt sur la visibilité. C'est vrai que les jeux de catégorie AA ou	It's a complicated question. I'd give it a "3". In Switzerland, we have one of the most important European games that generates significant revenue, which is Farming Simulator, created by Giant Software. Based in the Zurich region but also with branches in Eastern Europe and Germany. Yet, the headquarters are in Switzerland, and this title is incredibly important. It's a game that people tend to overlook, but it brings in a lot of revenue, especially in Eastern Europe. It's a double "AA" game. We also have other successful titles; in Schaffhausen, Urban Games released Transport Fever 1 and 2, which also generate a lot of money. In the Zurich area, there are many teams generating significant revenue, typically small teams of about 5 to 10 people, like the game Wondering Village in Zurich, which brings in millions for a team of 10. It's not the triple-A games that make money. That's what they want you to believe. But there's a reason they keep firing and rehiring people, or it makes money for shareholders, you're essentially fueling a capitalist machine. But the real revenue is in projects like Vampire Survivor. That's where the money is. It's like in the cinema. The most profitable film in cinema history is Blair Witch. If you really think about revenue, the most profitable thing is to create something that costs little but suddenly becomes a global phenomenon. But yes, when a big game like Farming Simulator explodes, it does give visibility to the Swiss industry. But it needs to be tied to the Swiss context. People aren't used to nationalizing the games they play. There's a bias that it's either a Japanese or an American game. Many might not know that their Battlefield 2 was actually made in Sweden. So, to answer your question, yes, it has an impact, but maybe not directly on revenue, more on visibility. Category AA or AAA games create much more buzz and provide visibility that could greatly benefit Switzerland. But for it to be effective, we really need to highlight that these games are developed here. We need to localize the games more. Typically, very few people know that Farming Simulator is a Swiss game. But yes, it impacts that we don't produce more "AA" games because "AAA" is impossible. With these kinds of games, there's often more collaboration with talent from other countries, which creates certain dynamics. That's where it gets interesting. It could not only highlight local skills but also attract more international investments and partnerships, which in turn could boost the entire

	AAA font beaucoup plus de buzz, ils apportent une visibilité qui pourrait vraiment bénéficier à la Suisse. Mais pour que ça ait un effet, il faudrait vraiment qu'on mette en avant le fait que ces jeux sont développés ici. Il faut plus localiser les jeux. Typiquement, très peu de gens savent que Farming Simulator, c'est un jeu Suisse. Mais, oui ça un impact qu'on ne sorte pas plus de jeux « AA » parce que « AAA » c'est impossible. Avec ces types de jeux, il y a souvent plus de collaboration avec des talents venant d'autres pays, ce qui crée une certaine dynamique. C'est vraiment sur ce point que ça devient intéressant. Ça pourrait non seulement mettre en lumière les compétences locales, mais aussi attirer plus d'investissements et de partenariats internationaux, ce qui, à son tour, pourrait booster l'ensemble de l'industrie du jeu vidéo en Suisse. Parce que ce sont des projets beaucoup plus ambitieux, ils créent une sorte de hub, tu vois. C'est vraiment la force de ces projets. Ils rassemblent des gens, des idées, des ressources, et ça finit par générer une véritable synergie. C'est vrai qu'il manque cette dynamique. C'est une dynamique qui peut vraiment transformer l'industrie locale et mettre en lumière le potentiel créatif de la Suisse sur la scène internationale, du coup c'est vrai que c'est intéressant sur ce point.	Swiss video game industry. Because these are much more ambitious projects, they create a sort of hub, you see. That's the strength of these projects. They bring people, ideas, and resources together and generate real synergy. It's true we're missing that dynamic. Such dynamics could truly transform the local industry and showcase the creative potential of Switzerland on the international stage, so it's certainly interesting from that perspective.
QP05C	Ah ouais, pour l'impact des coûts de vie élevée sur l'industrie du jeu vidéo en Suisse, je donnerais un 5 sans hésiter. C'est vraiment un des plus gros défis ici. On est dans l'un des pays les plus chers au monde, et clairement, ça ne facilite pas les choses pour une industrie qui est autant créative et artistique. Prends l'exemple des grands noms comme Electronic Arts ou Ubisoft. Ils ont débarqué en Suisse, monté des bureaux administratifs, mais tu vois, ils n'ont pas tenu longtemps. Le truc qui revient tout le temps, c'est le coût des salaires, le coût de la vie ici. Ça rend super difficile de maintenir des opérations de grande envergure, surtout dans une industrie où les marges peuvent déjà être serrées. Donc ouais, c'est un énorme impact, et c'est un vrai challenge pour nous.	Oh yeah, regarding the impact of high living costs on the video game industry in Switzerland, I'd give it a solid 5 without hesitation. It's one of the biggest challenges here. We're in one of the most expensive countries in the world, and clearly, that doesn't make things any easier for an industry that's as creative and artistic as this one. Take the example of big names like Electronic Arts or Ubisoft. They came to Switzerland, set up administrative offices, but you see, they didn't last long. The thing that always comes up is the cost of salaries, the cost of living here. It makes it super difficult to maintain large-scale operations, especially in an industry where margins can already be tight. So yeah, it's a huge impact, and it's a real challenge for us.
QP06C	Je donnerais un 2. C'est clairement l'un de nos plus gros défis. On a plein de talents qui se forment ici, mais beaucoup finissent par partir travailler à l'étranger, comme chez Ubisoft à Montréal ou Annecy, ou même à Paradox Interactive en Suède. Ce qui serait idéal, c'est que ces talents puissent un jour revenir en Suisse avec toutes les compétences qu'ils ont acquises à l'étranger. Mais pour ça, il nous faut une industrie solide ici même. À l'heure actuelle, il y a vraiment une grosse fuite de cerveaux parce que les opportunités sont plus grandes ailleurs. C'est dommage, parce qu'on devrait vraiment valoriser et utiliser ces compétences développées. C'est pour ça que nous à la SGDA on se bat pour obtenir plus de programmes de soutien. On essaie d'augmenter les possibilités avec plus de subsides et de soutien financier pour rendre la situation des développeurs et développeuses moins précaire. ... Parce qu'en fait, c'est très rare que notre premier jeu soit génial et puis rapporte énormément d'argent. C'est plutôt au fil de la construction d'un portfolio, vous allez devenir aussi de meilleur en meilleur, et tout à coup, il y a un jeu qui va cliquer, et là, boum, vous allez stabiliser votre studio, et puis vous allez pouvoir continuer à créer, à produire. On apprend évidemment à	I'd give it a 2. It's definitely one of our biggest challenges. We have a lot of talent being trained here, but many end up going abroad to work at places like Ubisoft in Montreal or Annecy, or even at Paradox Interactive in Sweden. Ideally, it would be great if these talents could one day return to Switzerland with all the skills they've acquired abroad. But for that, we need a strong industry right here. Currently, there's a significant brain drain because the opportunities are greater elsewhere. It's a shame because we really should be valuing and utilizing these developed skills. That's why we at the SGDA are fighting to get more support programs. We're trying to increase the options with more subsidies and financial support to make the situation less precarious for developers. ... Because in fact, it's very rare that our first game is great and brings in a lot of money. It's more about building a portfolio, you'll also become better and better, and suddenly,

	devenir de meilleur en meilleur, comme vous avez un cinéaste ou une cinéaste qui va apprendre à faire des films de plus en plus intéressants. Donc pour ça il faut stabiliser quoi. Et pour stabiliser ça veut dire qu'il faut qu'on ait quand même la culture, qu'on aille des soutiens au niveau cantonaux. On doit pouvoir offrir cette stabilité, ce qui signifie qu'on a besoin de plus de soutien au niveau cantonal et fédéral. C'est comme un cinéaste qui apprend à réaliser des films de plus en plus captivants au fil du temps. Pour arriver à un tel niveau, il faut des structures de soutien solides.	there's a game that will click, and then, boom, you'll stabilize your studio, and then you can continue to create, to produce. We obviously learn to become better and better, just like a filmmaker learns to make more and more interesting films. So for that, we need to stabilize. And to stabilize means we need to have the culture, we need supports at the cantonal level. We must be able to offer this stability, which means we need more support at the cantonal and federal level. It's like a filmmaker who learns to make increasingly captivating films over time. To reach such a level, solid support structures are needed.
QP07C		
QP08C	Si vous voulez faire un jeu vidéo plus ou moins qualitatif, vous êtes quand même facilement, très facilement dans un budget à demi-million. Après, les jeux qu'on produit là, en Suisse, on est beaucoup dans des jeux entre 700 000 et 1 million de budget. Un jeu suisse indépendant avec une équipe d'entre 5 à 10 personnes, on est sur à peu près ce genre de somme. Si vous prenez des jeux comme Terraformers ou Nocturnal, on est plutôt sur la fourchette haute quand on arrive vers le million. Mais il faut quand même facilement compter entre 600 000 et 700 000 francs. Imaginez des salaires sur 2-3 ans d'une équipe de 4-5 personnes. Au niveau du soutien il y a le canton de Vaud d'abord qui a ouvert le feu, maintenant on a Genève qui donne de l'argent, Zurich qui s'y met aussi un peu gentiment et autres. Au niveau national, on a Pro Helvetia qui a aussi mis en place un programme de soutien depuis 2010, ça a vraiment été la plus grande aide. Cineforum, enfin voilà, on a différentes possibilités, mais ça reste des sommes qui sont à l'heure actuelle encore assez ridicules par rapport à ce que coûte le jeu vidéo et par rapport aussi à ce que reçoivent les autres arts, en fait. Si vous comparez à la musique ou à la danse, je vous fais une comparaison. Nous, dans le Canton de Vaud, le jeu vidéo à 50 000 francs, je crois que c'est 2 millions pour la Musique. 50 000 francs par année, et puis c'est sur concours. C'est un concours, c'est 50 000 francs en plus divisé en deux à trois jeux, en fait. Donc en fait, vous gagnez 15 000 francs. C'est des cacahuètes pour le développement d'un jeu vidéo. Si vous voulez faire un jeu vidéo plus ou moins qualitatif, vous êtes quand même facilement, très facilement dans un budget à demi-million.	If you want to make a somewhat quality video game, you're easily looking at a budget of half a million. The games we produce here in Switzerland are often in the range of 700,000 to 1 million. For an independent Swiss game with a team of between 5 to 10 people, we're talking about that kind of sum. If you take games like Terraformers or Nocturnal, we're more on the upper end of that range, close to a million. But you still have to count on spending between 600,000 and 700,000 francs. Imagine the salaries for a team of 4-5 people over 2-3 years. In terms of support, the canton of Vaud was the first to start, now we have Geneva contributing funds, and Zurich is also getting involved a bit more gently, among others. On a national level, Pro Helvetia has also set up a support program since 2010, which has really been the biggest help. Cineforum, well, there are different options, but the sums are still quite ridiculous compared to what video games cost and also compared to what other arts receive. If you compare it to music or dance, I'll give you a comparison. In the Canton of Vaud, video games get 50,000 francs, I believe it's 2 million for music. 50,000 francs a year, and it's competitive. It's a competition, and that 50,000 francs is also split between two to three games, actually. So in fact, you win 15,000 francs. It's peanuts for developing a video game. If you want to make a somewhat quality video game, you're easily looking at a budget of half a million.
QP09C	Clairement. Ça nous empêche clairement sur plusieurs points. Ça nous empêche d'avoir un vrai un hub pour l'industrie du jeux vidéo en Suisse. C'est à dire des plus gros studios, ou nous talents pourraient apprendre, croître et par la suite développer des jeux vidéo. A cause du manque de soutien, le marché est très fermé on est un obligé de se débrouiller et ce qui fait qu'on a des hits de temps en temps alors qu'avec un plus grand soutien ça aurait été différent.	Absolutely, the lack of support really hampers us in several ways. It prevents us from having a real hub for the video game industry in Switzerland. That means bigger studios where our talents could learn, grow, and eventually develop video games. Due to this lack of support, the market is very closed off; we are forced to manage on our own, which results in occasional hits when with more substantial support, things could have been different.
QP10C	les challenges c'est réussir à augmenter encore plus, à mon sens les challenges c'est réussir en fait à encore plus se fédérer, en tout cas vraiment du côté des studios en fait, c'est-à-dire créer des espaces où	Absolutely, the challenge lies in further fostering unity and collaboration, especially among studios. The goal is to create spaces where we can support

	on s'entraide encore plus, comme on est des petites structures en fait c'est vraiment réussir pour moi beaucoup des choses qui pourraient dynamiser quand même la scène, c'est ce qui est déjà en train de se passer du côté Zurich, c'est vraiment de faire des hubs où les studios se retrouvent, où ils échangent, d'avoir vraiment du matchmaking, de l'échange professionnel, du partage de connaissances, en particulier pour les nouvelles venues et les nouveaux venus pour le plus possible rendre compétitifs les développeuses et les développeurs. L'expression qu'on utilise beaucoup, c'est « fail faster ». C'est-à-dire, évidemment, ce sont nos erreurs qui vont nous rendre meilleurs. Faire en sorte que les nouveaux venus et les nouvelles venues, le plus vite possible, apprennent ce qu'il faut éviter, et aussi sortent rapidement leurs premières œuvres pour qu'ils aient une bonne idée de ce que c'est que de sortir un jeu vidéo, et qu'après, on arrive à améliorer.	each other even more. Given that we are mostly small structures, the real success for me would be to energize the scene significantly, which is already beginning to happen around Zurich. We're talking about creating hubs where studios can meet, exchange ideas, engage in professional matchmaking, and share knowledge. This is particularly important for newcomers to help them become competitive quickly. A common phrase we use is "fail faster." Essentially, it's through our mistakes that we improve. We need to enable newcomers to learn what to avoid as quickly as possible and to get their first projects out swiftly, so they have a real sense of what it takes to release a video game and then continue to enhance their craft from there.
QP11C	Non, c'est ce qu'on a fait au début, puis les développeurs ne veulent pas ça, en fait. Donc, non, je pense que vous n'aurez pas de solution miracle. Vous êtes sur une scène artistique, vous ne pouvez pas tout rationaliser non plus. Les développeurs, les artistes vont créer ce qu'ils ont envie de créer. Donc de dire qu'il faut qu'ils fassent des jeux mobiles, bah non parce que vous êtes sur un marché encore plus compétitif qui est gratuit, qui vous demande d'alimenter constamment le contenu sur des plateformes assez instables où Apple change tout le temps ses politiques, ses politiques d'accompagnement de confidentialité.	No, that's what we tried at first, but the developers don't want that. So no, I don't think you'll find a miracle solution here. You're in a creative industry, you can't just rationalize everything. Developers and artists are going to create what they want to create. So to say they should make mobile games—no, because that's an even more competitive market that's mostly free, which requires constant content updates on fairly unstable platforms where Apple keeps changing its policies, including privacy policies.
QP12C	Oui, clairement, la reconnaissance et le soutien du gouvernement font toute la différence. On ne peut rien faire sans eux. Ça va être difficile de pousser l'industrie plus haut sans ce déclic du gouvernement. Il nous faudrait des plus grands studios de développement qui créent de l'emploi et génèrent des revenus. Mais sans le soutien du gouvernement, ça va être très compliqué. Ensuite, je pense qu'il devrait y avoir encore plus de hubs, comme ce qu'ils sont en train de faire à Zurich, pour vraiment avoir des espaces où différentes structures et studios peuvent se retrouver, échanger des compétences, parfois même accueillir des jeunes et les mentorer. Un autre point important, c'est ce qu'on fait actuellement avec la SGDA : il faut vraiment qu'on augmente sensiblement le soutien annuel de l'Office de la Culture à l'association. Actuellement, on reçoit quelque chose comme 25, 30 000 francs par an, ce qui est ridicule par rapport aux autres associations de niveau national. Ça doit augmenter pour augmenter aussi notre nombre de membres et donc notre budget. L'enjeu avec le jeu vidéo, c'est sa représentation au niveau politique. Il y a encore des gens qui ne voient pas l'intérêt de soutenir ce secteur avec des sommes importantes, donc c'est un travail de longue haleine. Chaque année, l'Office de la Culture attribue un budget aux associations reconnues d'intérêt national, mais pour la SGDA, ce budget est encore très bas, en dessous de 30 000 francs, alors que d'autres associations reçoivent jusqu'à 800 000 francs.	Yes, clearly, government recognition and support make all the difference. We can't do anything without them. It will be difficult to push the industry further without this government trigger. We need larger development studios that create jobs and generate revenue. But without government support, it will be very complicated. Next, I think there should be even more hubs, like what they are doing in Zurich, to really have spaces where different structures and studios can come together, exchange skills, sometimes even welcome young people and mentor them. Another important point is what we are currently doing with the SGDA: we really need to significantly increase the annual support from the Office of Culture to the association. Currently, we receive something like 25,000 to 30,000 francs per year, which is ridiculous compared to other nationally recognized associations. It needs to increase to also grow our membership and therefore our budget. The challenge with video games is their representation at the political level. There are still people who do not see the value in supporting this sector with significant amounts, so it is a long-term effort. Every year, the Office of Culture allocates a budget to nationally recognized associations, but for

	Si cet argent était disponible pour la SGDA, cela signifierait la possibilité de mettre en place des processus de soutien, de redistribuer de l'argent à la scène, d'organiser de meilleurs événements, d'améliorer nos Swiss Game Awards pour créer plus de visibilité à l'intérieur du pays. Plus de soutien signifie plus d'entraide entre nous et une stabilisation de l'industrie. Il doit aussi y avoir un soutien au niveau des cantons pour stabiliser leur propre terreau industriel. Et à mon avis, c'est là que réside la troisième réponse : continuer à lutter au niveau municipal et cantonal pour sensibiliser les politiciens à intégrer le jeu vidéo dans leur agenda politique et dans les processus de soutien. Par exemple, à la Loterie Romande, il n'y a toujours pas de ligne sur le jeu vidéo, ce qui est quelque chose que nous devons travailler à changer à la SGDA, mais comme nous sommes tous bénévoles et personne n'est payé, ça prend le temps que ça prend. Voilà ce qui est important : se créer un portfolio auprès d'un public et que ce public nous accompagne tout au long de nos jeux. Des studios comme Stréphone Studio et Urban Games, et même Giant Software avec Farming Simulator, réussissent parce qu'ils sortent de nouveaux titres et à chaque nouveau titre, ils ont fidélisé une communauté qui continue à acheter. Il ne faut pas penser selon la logique de la poule aux œufs d'or, du méga succès, parce que ça, c'est quelque chose que vous ne pouvez pas anticiper. Tout l'enjeu, à mon sens, est vraiment dans la stabilisation : avoir des gens, des artistes, qui puissent continuer à pratiquer leur art sur une longue période. Toutes les politiques devraient aller dans ce sens, pour stabiliser l'industrie.	the SGDA, this budget is still very low, below 30,000 francs, while other associations receive up to 800,000 francs. If this money were available to the SGDA, it would mean the possibility of implementing support processes, redistributing money to the scene, organizing better events, improving our Swiss Game Awards to create more visibility within the country. More support means more mutual assistance among us and a stabilization of the industry. There must also be support at the cantonal level to stabilize their own industrial base. And in my opinion, this is where the third answer lies: continue to fight at the municipal and cantonal levels to raise awareness among politicians to integrate video games into their political agenda and support processes. For example, at the Loterie Romande, there is still no line item for video games, which is something we need to work on changing at the SGDA, but since we are all volunteers and no one is paid, it takes the time it takes. That's what's important: creating a portfolio with the public and having that public accompany us throughout our games. Studios like Stréphone Studio and Urban Games, and even Giant Software with Farming Simulator, succeed because they release new titles and with each new title, they have built a community that continues to buy. You shouldn't think in terms of the golden goose logic, of mega success, because that's something you can't anticipate. The whole challenge, in my opinion, really lies in stabilization: having people, artists, who can continue to practice their art over a long period. All policies should aim in this direction, to stabilize the industry.

Appendix 5 – Interview transcription - Respondent D

Code	Response	Translation
QP01D	Oui, alors si tu regardes, c'est deux, trois gros. Et ensuite, franchement, je ne sais pas. 20 moyens et puis après beaucoup beaucoup de petits quoi. Mais qui peuvent faire des choses géniales quoi. Après la question aussi de nouveau c'est, c'est quoi un studio ? Est-ce que c'est quelqu'un qui crée un jeu mais qui potentiellement se vend pas ? enfin tu vois, comment est-ce que tu... c'est quoi tes critères pour le définir ? est-ce que c'est des jeux qui... est-ce que c'est des studios qui vivent du jeu ou pas ? voilà, là j'allais dire... enfin je lance le truc comme ça, je... c'est une. Voilà... par exemple Digital Kingdom, voilà, on verse des salaires, on est 10, on verse des salaires tous les mois, etc. et puis on tourne quoi... Tu vois nous à Digital Kingdom C'est donc une activité qui est scindée si tu veux en deux mais autour du même cœur de métier qui est le jeu. Il y a une activité de mandat à peu près à hauteur de 80% avec ce qu'on appelle du Serious Game. Donc des jeux à but éducatif, formation, prévention, marketing et commercial. Donc en plus de l'aspect ludique, on transmet un message autre que 100% ludique. Et l'autre partie ça serait la partie indépendante, tu vois. Mais, tu vois sur les 10 ans de boîte, du Digital Kingdom, on peut dire que 94% des revenus de l'entreprise, ce qui fait vivre l'entreprise, ce sont les mandats. Sur c'est 10 ans on a fait 3 jeux C'est plutôt Swordship, notre dernier, qui a fait un peu de revenus. Mais pas du tout en positif dans le sens où c'est un projet qu'on estime je sais plus maintenant dans les 400 000 si on avait dû vraiment estimer ce que ça nous a coûté. On est limite au CAF avec les revenus que ça a généré. Et quand je parle de revenus, je parle de et puis là en termes de revenus vente en fait pour le moment pour nous c'est zéro dans la mesure où on est avec un système de recoupes c'est à dire que le contrat qu'on a signé avec l'éditeur d'abord se rembourse de ses investissements et ensuite s'il y a de la plus-value ça retombe dans notre poche mais à l'heure actuelle on n'y est pas du tout quoi donc si tu veux enfin voilà pour vous On ne fait pas de revenus avec le jeu vidéo 1D. Ça nous a permis de travailler une partie financée, mais la majeure partie de notre travail sur le jeu vidéo 1D, c'est de l'investissement en temps. Et puis à l'heure actuelle, c'est à fond perdu parce que ça ne génère pas de revenue. Mais tu vois, on fait de l'argent avec le mandat, du coup nous ça va. Mais à côté t'as des t'as des indés qui font des jeux et puis qui ne gagnent pas de sous avec et ils... et qui se payent sur leur 60% de travail à côté, un travail sécurité. Là, par exemple, je sais qu'il y a des indés qui font des jeux, ils sont profs dans des écoles à côté. Alors ils bossent quand même dans le jeu parce qu'ils sont profs en game design, en développement, en artistes, etc, tu vois ce que je veux dire. Du coup tu vois c'est compliqué. En Suisse on n'a pas de gros studios, genre un studio AA. Et oui ça un énorme impact sur chaine de valeur et sur l'industrie en général. Je dirais entre 4 et 5.	Yes, so if you look, there are two or three big ones. And then, frankly, I don't know. 20 mediums and then a lot of really small ones. But they can do amazing things. Then again, the question again is, what is a studio? Is it someone who creates a game but potentially doesn't sell? I mean, you see, how do you... what are your criteria for defining it? Are they games that... are these studios living off the game or not? Well, there I was going to say... well, I throw this out there, I... it's one. Well... for example, Digital Kingdom, you see, we pay salaries, we are 10, we pay salaries every month, etc. and then we turn... You see us at Digital Kingdom It is therefore an activity that is split if you will in two but around the same core business which is the game. There is a mandate activity of about 80% with what we call Serious Game. So games for educational purposes, training, prevention, marketing, and commercial. So in addition to the playful aspect, we transmit a message other than 100% playful. And the other part would be the independent part, you see. But, you see over the 10 years of the company, of Digital Kingdom, we can say that 94% of the company's revenues, what keeps the company alive, are the mandates. Over these 10 years we have made 3 games It is rather Swordship, our last, which made a little revenue. but not at all positive in the sense that it is a project that we estimate I don't know now in the 400,000 if we had to really estimate what it cost us. We are at the break-even point with the revenues it generated. And when I talk about revenues, I'm talking about and then in terms of sales revenues for the moment for us it's zero in the sense that we are with a system of recoupes that is to say that the contract we signed with the publisher first reimburses its investments and then if there is a surplus it falls into our pocket but at the moment we are not there at all so if you want well here for you We do not make revenues with the 1D video game. It allowed us to work on a part funded, but the major part of our work on the 1D video game, it's an investment in time. And at the moment, it is lost because it does not generate revenue. But you see, we make money with the mandate, so we're okay. But next to you have indies who make games and then who don't make money with them and they... and who get paid on their 60% of work on the side, a security job. There, for example, I know there are indies who make games, they are teachers in schools on the side. So they still work in the game because

	Ensuite pour les éditeurs, je dirais un 2.5. Parce que je n'ai pas comme ça l'impression de dire que s'il y avait des éditeurs en Suisse, ce serait beaucoup plus simple, secteur qui est complètement mondialisé, où il y a plein de studios, il y a des éditeurs, etc. Là, les problématiques, elles sont plutôt supranationales et aussi liées quand même à l'écosystème mondial du jeu, par exemple, on voit que tout le monde souffre et on voit que les éditeurs souffrent, donc la conséquence c'est de se dire que notre prochain projet, il y a peut-être moins de chances qu'il soit facilement pris qu'un autre, quand bien même on a des super bonnes reviews de sursorties. C'est quand même un gros problème de commercialisation. Après si tu ne trouves pas d'éditeur, là il y a un plus gros problème. Le fait qu'il n'y a pas d'éditeur fait que tu ne peux pas faire de la publicité pour ton jeu. C'est bien de faire un bon jeu, mais si les gens ne sont pas au courant, tu ne vas pas loin. Si tu n'as pas de force de frappe marketing com, n't'y arriveras pas quoi. Donc après voilà, est-ce que si tu avais un éditeur suisse, est-ce que ça changerait quelque chose ? L'idée c'est d'avoir un éditeur point, enfin j'allais dire, parce qu'après l'éditeur il ne va pas forcément vendre, enfin il ne va pas vendre qu'en Suisse par exemple. Enfin voilà, peut-être c'est à ce niveau-là que je…Là, c'est tout l'inverse. Donc voilà, il faut aussi penser que signer un tout premier jeu, c'est plutôt compliqué quoi. Donc il faut avoir 2-3 jeux derrière soi, il faut avoir quand même un truc de qualité, il faut montrer qu'on a l'air solide, qu'on a une bonne équipe, qu'on est sérieux, etc. Et du coup, ça fait beaucoup de job en amont avant de pouvoir aller talker à la porte d'un éditeur. Donc peut-être là qu'un éditeur suisse, il te connaît un peu, peut-être qu'il pourrait te faire confiance plus vite, parce qu'il te connaît, il sait comment tu bosses, il sait qui t'est, etc. mais en final, il faut quand même apporter beaucoup de preuves avant qu'on lâche du fric. Et donc ça, qu'il soit suisse ou pas suisse, ça ne change pas grand-chose. Mais c'est aussi pour dire qu'il y a tellement de travail avant, et c'est justement là que peut-être les aides, elles peuvent être sur des débuts de projet, genre des subventions pour le métier, etc., quand on vaut... C'est l'idée de ces financements. Mais là, malheureusement, ils sont trop faibles par rapport au travail réel. De ce que c'est créer un jeu. Par exemple, un Swordship, c'est 4 ans de boulot. Et puis, on a été financé que sur la dernière année. Donc, on a beaucoup investi. Donc, il faut avoir les capacités d'investir, et En Suisse, tu ne peux pas trop de parler de chaîne de valeur parce que on soit on aurait que les studios qui rentrairaient dans cette catégorie. Les studios, ils sont très fragmentés dans le sens que la plupart ne font pas que du gaming. Ensuite, on n'a pas de publisher en Suisse. Et, distribution, aujourd'hui tout se fait online et c'est beaucoup plus rentable. Du coup je donnerai un 2.	they are teachers in game design, development, artists, etc, you see what I mean. So you see it's complicated. In Switzerland, we don't have big studios, like an AA studio. And yes, it has a huge impact on the value chain and on the industry in general. I would say between 4 and 5. Then for the publishers, I would say a 2.5. Because I don't have the impression that if there were publishers in Switzerland, it would be much simpler, a sector that is completely globalized, where there are plenty of studios, there are publishers, etc. There, the problems are rather supranational and also related to the global ecosystem of the game, for example, we see that everyone is suffering and we see that the publishers are suffering, so the consequence is to say that our next project, there may be less chance that it will be easily taken than another, even though we have super good reviews of outs. It's still a big marketing problem. After if you don't find a publisher, there's a bigger problem. The fact that there is no publisher means that you can't advertise your game. It's good to make a good game, but if people aren't aware, you won't go far. If you don't have a strong marketing com force, you won't make it. So after that, whether you had a Swiss publisher, would it change anything? The idea is to have a publisher, period, I was going to say, because after the publisher he will not necessarily sell, well he will not sell only in Switzerland for example. Well, maybe it's at that level that I... There, it's the complete opposite. So, you also have to think that signing a first game is rather complicated. So you have to have 2-3 games behind you, you have to have something of quality, you have to show that you look solid, that you have a good team, that you are serious, etc. And so, it takes a lot of job
QP02D	Oui, dans l'écosystème, il y a tous ceux qui font des jeux, mais pour moi, il y a les gros studios, les studios moyens et les indépendants. En Suisse, comme tu l'as dit, c'est surtout des studios indépendants. On a quelques studios qui font des jeux incroyables, mais c'est vrai qu'on n'a pas de grand studio de développement en Suisse. Au niveau de la Confédération, concrètement, Pro Helvetia dépend de la Confédération. Donc, le financement qui vient de Pro Helvetia, et maintenant de Cineforum, qui est aussi un fond de la Confédération indirectement, finance historiquement le cinéma mais s'intéresse maintenant aussi aux vidéos, à la réalité virtuelle, etc., surtout	Yes, in the ecosystem, there are all those who make games, but for me, there are the big studios, medium studios, and independents. In Switzerland, as you said, it's mostly independent studios. We have a few studios that make incredible games, but it's true we don't have a big development studio in Switzerland. At the federal level, specifically, Pro Helvetia is dependent on the Confederation. So, the funding that comes from Pro Helvetia, and now from Cineforum, which is also a fund from the Confederation indirectly, has historically financed

	aux expériences qui sont plutôt narratives, ce genre de choses. Et puis, au niveau cantonal, il y a effectivement des choses. Mais ça reste, pour ainsi dire, étatique, c'est le strict minimum. Vu notre situation économique, on peut clairement faire mieux. Au niveau de la formation, on a beaucoup d'écoles, on a l'EPFL, la ZHdk, les PFZ qui font de la formation, il y a Cyril et Homme, il y a les Maîtres du Monde, il y a aussi la SAE à Genève, etc. Pour moi, c'est la partie formation. Mais il faut dire qu'actuellement, je ne suis pas sûr et je ne pense pas que les gens formés en Suisse vont trouver beaucoup de joie en Suisse. Il y a quand même beaucoup de gens qui vont s'expatrier en France, au Canada, aux États-Unis, en Espagne, parce que les opportunités sont limitées ici. Je donnerais un 2. Parce que franchement, je ne sais pas trop te dire. Il y a un aspect où on peut faire des choses parce qu'il y a quand même une certaine richesse économique. D'un autre côté, il y a quand même pas mal de points. Ça peut être un bon spot, typiquement pour les festivals et tout. Mais je pense qu'on pourrait clairement mieux faire sur tout ce qui est aide, l'implication du gouvernement. Nous avons beaucoup de studios mais est-ce qu'ils ont beaucoup d'impact? Honnêtement, je dirais non. Pour moi aussi, le fait que des gens se tournent vers le crowdfunding, c'est parce qu'il n'y a pas beaucoup d'autres opportunités. Surtout peut-être en ce moment. Du coup, il y a des débuts mais on est clairement loin de l'excellence.	cinema but is now also interested in videos, virtual reality, etc., especially in experiences that are more narrative in nature. And then, at the cantonal level, there are indeed initiatives. But it remains, so to speak, state-run, which is the bare minimum. Given our economic situation, we could clearly do better. In terms of education, we have many schools, we have EPFL, ZHdk, PFZ that offer training, there's Cyril and Homme, there are the Masters of the World, there's also SAE in Geneva, etc. For me, that's the training part. But I must say that currently, I'm not sure, and I don't think that people trained in Switzerland will find much joy in Switzerland. There are still many people who will emigrate to France, Canada, the United States, Spain, because the opportunities here are limited. I would give it a 2. Because honestly, I'm not too sure what to tell you. There's one aspect where we can do things because there's still some economic wealth. On the other hand, there are quite a few points. It could be a good spot, especially for festivals and everything. But I think we could clearly do better in terms of aid, government involvement. We have a lot of studios, but do they have much impact? Honestly, I would say no. For me, the fact that people are turning to crowdfunding is because there aren't many other opportunities. Especially maybe right now. So, there are beginnings but we are clearly far from excellence.
QP03D	Je compare juste à la France parce que je connais un peu plus. Je ne sais pas, 2. Comme je t'ai dit tout à l'heure, il y a assez peu d'aide ici en Suisse. En termes de fonctionnement, de charge, etc. Donc si tu regardes un peu là où on fait nos vidéos dans le monde, c'est aussi parce qu'il y a des endroits où il y a des facilités, le gouvernement aide beaucoup plus. Il y a des facilités au niveau du financement et de l'aide à l'implantation. Après, oui, ça serait plus simple pour nous, mais c'est des questions politiques après. Qu'est-ce qu'on finance ou pas ? Et puis d'ailleurs, à ce niveau-là, le canton de Vaud est le premier à financer directement, mais c'est symbolique. C'est 50 000 balles, ce n'est rien du tout. Et encore, c'est couplé en petits bons. Disons qu'il y a quand même un côté, je pense, où s'est assez compliqué en Suisse. Pour démarrer, peut-être une des problématiques, c'est qu'il n'y a pas beaucoup de structures d'aide. Par exemple, en termes de financement, mais en termes aussi de facilité. Par exemple, pas de charges, pendant 1-2 ans, ils ne vont pas payer de charges sociales, etc. Ils vont pouvoir aussi avoir des aides, des financements des régions, des départements, de l'État, etc. Et tout ça, c'est des choses qu'on a un petit peu, mais beaucoup moins que dans d'autres pays où, si tu veux, on est moins subventionné. Et donc à ce niveau-là, pour démarrer des gros projets, c'est plus lourd parce qu'il faut déjà avoir les sous, etc. Et puis comme je te dis aussi, le coût de la	I'm just comparing with France because I know it a bit better. I'd give it a 2. As I told you earlier, there's not much help here in Switzerland. In terms of operation, charges, etc. So, if you look at where we make our videos around the world, it's also because there are places where there are facilities, the government helps a lot more. There are facilities in terms of financing and help with implantation. After that, yes, it would be simpler for us, but these are political questions after all. What do we finance or not? And then, at that level, the canton of Vaud is the first to finance directly, but it's symbolic. It's 50,000 francs, it's nothing at all. And even that, it's tied up in small vouchers. Let's say that there is still a side, I think, where it's quite complicated in Switzerland. To start, perhaps one of the problems is that there aren't many support structures. For example, in terms of financing, but also in terms of ease. For example, no charges for 1-2 years, they're not going to pay social charges, etc. They will also be able to have aid, financing from regions, departments, the state, etc. And all that, these are things we have a little, but much less than

	vie fait qu'embaucher 10 développeurs et 10 artistes et 3 game designers, c'est plus compliqué. Du coup, ça, je pense aussi que ça fait aussi que dans ce sens-là, il y a pas mal de petits, c'est plutôt des gens qui font ça à côté et qui ont du temps et qui font ça à côté. Et du coup, alors ça n'empêche pas des beaux succès et tout, mais ils sont plutôt rares. Et c'est vrai qu'avec soutien du gouvernement on pourrait beaucoup plus de chose. Tu vois ici tout est compliqué, que ca soit niveau financement d'un jeu, le coût de vie en général, il faut pas oublier que dans l'un des pays les plus chers au monde, du coup ca aide pas. Mais pour répondre à la question je donnerai un 2. Parce que considérant la situation économique de la Suisse, qui est l'un des pays les plus riches du monde, le niveau de soutien et de facilité offert actuellement c'est presque le strict minimum. Tu vois des pays comme la France, l'UK, ils mettent en place des politiques actives pour encourager l'industrie du jeu vidéo par des subventions conséquentes, des incitations fiscales, et des programmes de soutien qui facilitent vraiment le développement des entreprises du secteur. Tandis qu'en Suisse, ça reste assez timide, les aides sont assez minimes, et c'est assez décevant car, avec les ressources économiques dont dispose la Suisse, il y a un potentiel énorme.	in other countries where, if you want, we are less subsidized. And so at that level, to start big projects, it's heavier because you already have to have the money, etc. And then as I also tell you, the cost of living makes hiring 10 developers and 10 artists and 3 game designers more complicated. So, I think that also means that in this sense, there are quite a few small ones, it's rather people who do this on the side and who have time and do it on the side. And so, it doesn't prevent great successes and all, but they are rather rare. And it's true that with government support we could do a lot more. You see here everything is complicated, whether it's the financing of a game, the cost of living in general, you must not forget that in one of the most expensive countries in the world, so it doesn't help. But to answer the question I would give a 2. Because considering the economic situation of Switzerland, which is one of the richest countries in the world, the level of support and facility currently offered is almost the bare minimum. You see countries like France, the UK, they implement active policies to encourage the video game industry through substantial subsidies, tax incentives, and support programs that really facilitate the development of companies in the sector. While in Switzerland, it remains quite timid, the aids are quite minimal, and it's quite disappointing because, with the economic resources that Switzerland has, there is enormous potential.
QP04D		
QP05D	Ça n'aide clairement pas, je mettrais un 5. Ça a un très gros impact. Moi, je pense quand même que ça complique un peu les aspects business. C'est sans doute une des raisons pour lesquelles les grands studios ne veulent pas s'implanter ici. Parce que tout coûte trois fois plus cher qu'en France. Tu vois, ça leur coûterait moins cher d'aller dans des pays comme l'Allemagne ou la France. C'est vraiment cher de développer un jeu ici. Tu sais, les salaires des employés sont un gros poste de dépense. Dans le jeu vidéo, tu as besoin de plein de compétences différentes : ingénieurs, graphistes, designers, programmeurs... Imagine que tu as une équipe de 100 personnes à payer, ça monte très vite en flèche. Je pense qu'une des manières, c'est d'aller voir ailleurs et trouver des partenariats. Ou alors d'avoir la possibilité de financer les choses d'une autre manière. Tu peux t'associer avec quelqu'un d'un autre pays comme ça, ça coûte moins cher pour produire le jeu et il y a une association suisse.	It clearly doesn't help, I'd give it a 5. It has a huge impact. I think it complicates the business aspects a bit. It's undoubtedly one of the reasons why big studios don't want to set up here. Because everything costs three times more than in France. You see, it would be cheaper for them to go to countries like Germany or France. It's really expensive to develop a game here. You know, employee salaries are a big expense. In video games, you need a lot of different skills: engineers, graphic artists, designers, programmers... Imagine you have a team of 100 people to pay, it quickly shoots up. I think one way is to look abroad and find partnerships. Or to have the ability to finance things in another way. You can partner with someone from another country so it costs less to produce the game and there is a Swiss association involved.
QP06D	Un 4. Il n'y a pas assez d'emplois. La Suisse n'offre vraiment pas assez de postes dans le secteur pur du jeu vidéo. Après, tu as des gens qui vont peut-être se diriger vers la VR, le développement, l'art, mais même là, ça n'embauche pas massivement. Et en ce moment, surtout, on voit plutôt des boîtes qui ferment dans le monde et qui libèrent des seniors venant de grands studios sur le	I'd give it a 4. There simply aren't enough jobs. Switzerland really doesn't offer enough positions in the pure video game sector. Then, you have people who might go into VR, development, or art, but even there, it's not hiring massively. Especially right now, we mostly see companies

	marché du travail. Donc oui, le secteur du jeu vidéo en Suisse, ça n'offre pas beaucoup d'opportunités, parce qu'il n'y a pas vraiment de gros studios qui tournent et qui génèrent des revenus. La plupart des gens partent à l'étranger parce que ça coûte moins cher et c'est plus simple quand t'es indépendant ; le coût de la vie est nettement moins élevé qu'en Suisse. Tu sais, être développeur de jeux vidéo, c'est un métier artistique qui demande beaucoup de temps. Imagine juste si tu es indépendant et que ton jeu prend deux ans à développer, survivre en Suisse devient presque impossible. C'est beaucoup trop cher. C'est pour ça que beaucoup préfèrent partir à l'étranger, où l'écosystème est beaucoup plus complet et soutenu, dans des pays comme le Canada, les États-Unis, le Japon, ou la France. Ces pays offrent un environnement plus favorable où les créateurs peuvent se permettre de prendre le temps nécessaire pour développer leurs projets sans la pression financière écrasante qu'on retrouve en Suisse.	around the world closing and releasing senior employees from big studios into the job market. So yes, the video game sector in Switzerland doesn't offer many opportunities, because there aren't really any big studios that are operational and generating revenue. Most people go abroad because it's cheaper and simpler when you're independent; the cost of living is significantly lower than in Switzerland. You know, being a video game developer is an artistic profession that requires a lot of time. Just imagine if you're independent and it takes two years to develop your game, surviving in Switzerland becomes almost impossible. It's way too expensive. That's why many prefer to go abroad, where the ecosystem is much more complete and supported, in countries like Canada, the United States, Japan, or France. These countries offer a more favorable environment where creators can afford to take the time needed to develop their projects without the overwhelming financial pressure found in Switzerland.
QP07D	Ah oui, clairement. Je dirais même un 4. Les développeurs en Suisse, ils sont vraiment doués pour la création de jeux, c'est sûr. Mais souvent, ce qui leur manque, c'est le côté business. Et ça, ça les brime vraiment, ça limite leur capacité à tirer le maximum de ce qu'ils pourraient faire. De nos jours, sortir un bon jeu, c'est bien, mais ça ne suffit pas. Il faut savoir gérer une équipe, être fort en négociation, toutes ces compétences clés pour, par exemple, décrocher un deal pendant un salon international du jeu vidéo. Pour convaincre un éditeur, faut vraiment avoir ces connaissances business. La compétition, c'est quelque chose de fou, surtout sur des plateformes comme Steam où des dizaines de jeux sortent chaque jour. Tu peux rapidement te retrouver perdu dans la masse. Et c'est là que le marketing et la communication prennent toute leur importance. Si tu n'as pas une stratégie solide pour mettre en avant ton jeu, peu importe sa qualité, il risque de passer totalement inaperçu. C'est exactement pour cette raison qu'on a décidé de travailler avec un éditeur pour notre jeu, Swordship. Nous, on est bons pour développer le jeu, mais le marketing, ce n'est pas vraiment notre fort. On entend souvent dire qu'il faut investir autant dans le marketing que dans le développement du jeu lui-même. Imagine, pour un jeu qui coûte, disons, entre 300 000 et 500 000 CHF, tu dois prévoir un budget marketing équivalent. Il ne faut vraiment pas sous-estimer ça. Il faut des gens qui savent comment utiliser toutes ces ressources pour que le jeu rencontre le succès. Bien sûr, il y a des jeux qui cartonnent et qui marchent super bien, mais c'est rare et ça ne représente pas la norme. Par exemple, notre jeu Swordship a reçu d'excellentes critiques, mais ça n'a pas suffi pour booster les ventes automatiquement. C'est vraiment une combinaison de facteurs complexes, et sans une bonne compréhension du côté business, beaucoup de développeurs se retrouvent avec des projets qui n'atteignent pas le succès qu'ils mériteraient.	Absolutely, I'd even say a 4. Swiss developers are really skilled at creating games, that's for sure. But often, what they lack is the business side. And that really holds them back, limiting their ability to maximize what they could achieve. These days, releasing a good game is great, but it's not enough. You need to know how to manage a team, be strong in negotiations—all these key skills for, say, securing a deal at an international video game event. To convince a publisher, you really need these business insights. Competition is crazy, especially on platforms like Steam where dozens of games are released every day. You can quickly get lost in the crowd. And that's where marketing and communication become crucial. If you don't have a solid strategy to promote your game, no matter how good it is, it's likely to go completely unnoticed. That's exactly why we decided to work with a publisher for our game, Swordship. We're good at developing the game, but marketing isn't really our strong suit. It's often said that you should invest as much in marketing as in the game development itself. Imagine, for a game that costs, say, between 300,000 and 500,000 CHF, you should budget an equivalent amount for marketing. You really can't underestimate this. You need people who know how to utilize all these resources so that the game is successful. Of course, there are games that hit big and do extremely well, but that's rare and doesn't represent the norm. For example, our game Swordship received excellent reviews, but that wasn't enough to automatically boost sales. It's really a combination of complex factors, and without a good understanding of the business side, many developers end up with projects that don't achieve the success they deserve.

QP08D	Notre jeu « Swordship », il a coûté un peu près 400, 500 000. et puis ça donne une échelle mais par rapport à ce qui est sportif mais sinon c'est difficile de te donner quoi que ce soit comme info parce que ça dépend on peut produire un jeu avec 400 000 balles ou peut-être 60 000 et encore et puis on peut aller jusqu'à nos limites quoi donc c'est difficile mais ce qu'on peut dire par contre c'est qu'effectivement si on est dans des structures d'IPS, ARN, etc. on va avoir des coûts qui sont plus élevés parce qu'on est en Suisse et qu'on ne peut pas payer les gens 3 000 balles par mois ou 4 000 balles. Mais honnêtement aujourd'hui Il faut au minimum compter 300 000, 400 000 balles pour un bon jeu. Pour qu'il se démarque etc, sinon ca devient très compliqué, il y a tellement qui sortent. Et honnêtement la contribution du gouvernement, elle est du strict minimum. Tu vois pour développer un bon jeu dans un délai de temps, il te faut quand même une équipe, ta un salaire verser etc. Et honnêtement la contribution du gouvernement, c'est vraiment le strict minimum. Je donnerai un 2 parce qu'ils font quelque chose mais ce n'est clairement pas suffisant.	Our game "Swordship" cost about 400,000 to 500,000 CHF. That gives a scale, but otherwise, it's hard to give you any specific information because it depends—we can produce a game for 400,000 or maybe even 60,000 CHF, but then we might be pushing our limits. It's tricky, but what we can say is that indeed, if we are in IP or RNA structures, the costs are higher because we're in Switzerland and we can't pay people just 3,000 or 4,000 CHF per month. But honestly, these days you have to count on at least 300,000 to 400,000 CHF for a good game, one that stands out. Otherwise, it becomes very complicated; there's so much coming out. And honestly, the government's contribution is the bare minimum. You see, to develop a good game within a timeframe, you need a team, you have salaries to pay, etc. And honestly, the government's contribution is really the bare minimum. I'd give it a 2 because they're doing something, but it's clearly not enough.
QP09D	Oui, j'estime que le manque de reconnaissance au niveau gouvernemental a un impact réel sur le potentiel de croissance de l'industrie du jeu vidéo en Suisse. Si on avait des mesures plus souples et un soutien plus marqué, que ce soit au niveau de la formation ou en donnant plus d'importance à l'industrie, l'industrie du jeu vidéo suisse pourrait vraiment avoir plus d'impact. C'est sûr, avec un peu plus d'encouragement et de reconnaissance de la part du gouvernement, notre secteur pourrait décoller et rivaliser davantage sur la scène internationale. On a du talent et des idées ici, mais sans un soutien adéquat, il est difficile de les transformer en succès commerciaux.	Yes, I believe that the lack of recognition at the governmental level has a real impact on the growth potential of the video game industry in Switzerland. If we had more flexible measures and stronger support, whether in terms of education or giving more importance to the industry, the Swiss video game industry could really make a bigger impact. For sure, with a bit more encouragement and recognition from the government, our sector could take off and compete more on the international stage. We have talent and ideas here, but without adequate support, it's difficult to transform them into commercial successes.
QP10D	J'ai quand même l'impression le plus gros challenge ici le manque de reconnaissance du gouvernement et le coût de vie en Suisse. Tu vois dans les autres la contribution du gouvernement a joué a énorme rôle pour le succès de l'industrie. Tu vois, vu que ça a été beaucoup aidé, ou c'est encore beaucoup aidé, ça fait qu'il y a plus de studios qui s'installent, il y a un écosystème qui est plus propice, donc il y a plus de monde, donc il y a plus de chances qu'il y ait un studio qui se démarque, il y a plus de chances qu'il y ait des gros studios, il y a plus de chances qu'il y ait des hits mondiaux. Donc oui, je pense qu'à un moment, à ce que ça se développe, quoi. Est-ce qu'avec ça sont venues les formations, etc. En Suisse, jusqu'à il n'y a pas longtemps, on n'avait pas de formation qui était liée aux jeunes. Alors qu'en France, ça fait 20 ans, plus même, déjà dans les années 95, 2000, il y a déjà des boîtes, des écoles qui formaient des artistes, des développeurs, des game designers, etc. C'est clair que peut-être le retard, niveau culture, niveau formation, niveau volonté politique.	I feel like the biggest challenges here are the lack of government recognition and the cost of living in Switzerland. You see, in other countries, government contributions have played a huge role in the success of the industry. Because it has been and continues to be heavily supported, there are more studios setting up, creating a more conducive ecosystem. This means more people, which increases the chances of a studio standing out, of having big studios, and of achieving global hits. So yes, I think it's something that needs to develop over time. And with that development, training programs have emerged. In Switzerland, until recently, we didn't have training programs specifically related to video games. Whereas in France, for over 20 years now, even as early as the mid-90s to 2000, there were already companies and schools training artists, developers, game designers, and so on. It's clear that there's a lag here in terms of culture, education, and political will.
QP11D	C'est possible, mais il faut beaucoup d'argent. Le plus gros problème, c'est qu'il y a trop de conditions, ce n'est pas aussi facile qu'on pourrait le croire. Dans le segment mobile, il y a trop de concurrence, donc à moins d'avoir	It can be a possibility, but you need a lot of money. The biggest problem is that there are too many conditions,it's not as easy as you might think. In the mobile segment, there's too

	une excellente équipe publicitaire et un peu de chance, la plupart des jeux sortis sur mobile passent complètement inaperçus. Je dirais qu'il est préférable de créer des jeux de meilleure qualité sur console et sur PC vous avez plus de chances de réussir, honnêtement.	much competition, so unless you have a great publicity team and some luck, most games released on mobile go completely unnoticed. I'd say it's preferable to make better quality games on console and PC you have a better chance of success, honestly.
QP12D	Oui alors le gouvernement sera clairement l'acteur qui va décider un peu la suite de l'industrie. Parce que à l'heure actuel, c'est-à-dire financer le divertissement, ça a toujours été pour le grand public une question. Il y a des gens qui préféraient qu'on finance les retraites, et ils ont raison aussi, mais voilà. Du coup, l'intérêt aussi, c'est de dire qu'il y a un impact économique. Il y a des emplois, il y a des entreprises qui peuvent jouer aussi sur cet aspect-là. Aujourd'hui, on voit l'impact économique de l'industrie du jeux vidéo dans les autres pays. Ça crée de l'emploi, des revenues. Tu vois si le gouvernement aidait pour un 1 ou 2 grands studios en plus en Suisse, ça changerait énormément la donne. Après il nous faudra des jeux qualitatifs, des hits mondiaux. Tu sais ca va assez vite. Il suffit de quelques hits mondiaux et boom l'industrie est lancée. Parce l'industrie a énormément du potentiel, mais comme les opportunités sont limitées on stagne. Du coup, c'est sûr il faudra un énorme soutien du gouvernement. Mais des vrais soutiens, que ça soit sur le financement, charges sociales comme ils ont un peu en France. Typiquement, tu sais le gouvernement il pourrait payer un certain pourcentage des salaires des employés, des charges. Je pense peut-être aussi qu'il faut qu'on se concentre dans l'aspect de formation, il peut aussi avoir un impact.	Yes, the government will clearly play a crucial role in shaping the future of the industry. Currently, funding entertainment is a contentious issue for the general public. Some people would rather see the money go towards pensions, and they're not wrong either. But the point is, there's an economic impact to consider as well. There are jobs and companies that can benefit from this sector. Today, we see the economic impact of the video game industry in other countries. It creates jobs and revenue. If the government were to support one or two major studios in Switzerland, it would make a huge difference.We would also need high-quality games, global hits. You know, it can happen quickly. Just a few global hits, and boom, the industry is off. The industry has enormous potential, but because opportunities are limited, we stagnate. So, it's clear we need significant government support. But real support, whether it's through financing, social charges like they do in France. For example, the government could cover a certain percentage of employee salaries and social charges. I also think we need to focus on the aspect of training, which can have a significant impact as well.

Appendix 6 – Interview transcription - Respondent E

Code	Response
QP01E	The lack of big studio has a big impact. I will give kind of 4. We've got some good indie studios, but we don't have any big ones. There's Giant Software but that's the only one. We're definitely missing a few big studios, which would be great for the economy. Plus, it'd be easier to ask the government for help if we had 2-3 big studios making an impact in the country. You know having a big game development studio is important because it creates jobs, brings revenue, contribute to the economy so that's good. You know the lack of the big studio is one of the reasons why our Swiss developers prefer to go abroad. Because they can't find work here or the projects aren't ambitious enough for them So, they prefer to go abroad. I will give a 2. The fact that we dont have a publisher here in Switzerland isn't a big problem. It makes it a bit harder because you cannot just walk into somebody's office. But ways are like, it's still a very short way to Germany where you have, big publishers like Ubisoft that have big offices there, multiple studios, and so on. So I don't think, and especially nowadays with gaming obviously being a very digital space, I think if you have a good game and you have a good strategy, I think that's the more important part. You can get those meetings you can go to like, we are very lucky that Gamescom is the biggest. Now that e three has gone, Gamescom is going to be the biggest brand for gaming publishers for years to come. And you can meet everyone there. I will say a 2. We have some good studios nothing more. But like I said before we are missing some major studios, even we for our talent it will be good, because you know this creates a hub for networking and collaboration, where developers from different studios can share ideas, learn stuffs from each other, and potentially forge new partnerships I feel like we are missing this synergie, so that's kind of sad. We don't have big publisher. We have Nintendo is in Switzerland. That's pretty much the only office that still exists. but they are mainly focused on marketing the games from outside and going at events. So basically, the value chain is quite incomplete.
QP02E	That's a toughie. I will give 2.5. At least we have few indie developers so that's good. I think we should definitely have 2- 3 big studios in order to compete this ecosystem. We have good institution. The ZDK is super. It's great. Also, you have the institutions like Sae, so we produce very good game developers, so we are able to produce good games, like small games. But for them, like, to make it, a job, and a living out of it is tough. If they want to stay in Switzerland. Concerning the like governmental, funding, I think that's, that's probably one of the toughest parts, why we cannot produce more frequently big games, if you like. That's where we should improve.
QP03E	I will give something like 2. If I compare with Germany there is huge difference, We are basically also active in Germany, and so therefore I'm reading a lot of the german news and basically their government funding is a huge industry, right. You have even big studios receiving multiple millions, for projects. So, the government's really trying to bring studios to Germany that produce great games so to help the the nation to become like a gaming state. And we don't really have that in Switzerland.
QP04E	I will say a 3. Because just because you produce a big aaa game, it doesn't mean that you're going to be profitable. I think where Swiss Studios in general are pretty good is create something on a small scale, but do it really well and then have lots of success on just a smaller scale. Because you are a smaller studio, you don't need that much revenue to survive. I think one of the best examples of that is Stray Fawn Studio, with their game Wandering Village. they e now released multiple games. each one became bigger than its predecessor. So, as you probably have already seen on your research, getting Steam wish listed is super important, for the small studios. And they use so many small growth hacks, and that helps them to become a bigger player in the indie dev studios. And then with each game they have a bigger audience, and they deliver high quality and that could be like the start of becoming a

	bigger studio. But I think, that comes a bit with the artsy part. Many of the studios also do not want to become like, it's not their main goal because if you want to produce aaa game, you need to have big investment into your studio. And that comes with expectations from the investors. and it also comes with a lot of pressure. But for sure it has an impact because it makes lot of buzz, lof of visibility for the indsutry and these types of games are played all over the world. These types of games can make a lot of money, but they also cost a lot to develop. Right now, it's just not realistic for us to create AAA games. We don't have the funds or capacity, and it would be way too expensive. But focusing on AA games is a much better idea. There are already a few AA games being developed in Switzerland, but I think AA games are really well-suited for our industry. A few successful AA hits could bring a lot of visibility and give the industry a real boost. And you know the great thing about aa games is that if they become hits, you can develop a loyal audience and even create a franchise. A perfect example is the Swiss game Farming Simulator. They release a new version every year, like FIFA, and each one is well-received by their audience. This shows the potential of AA games to build a dedicated fan base and provide consistent revenue.
QP05E	I will give a 5. It is one of our main challenges. Everything here is so expensive here. Whether you're starting your own business or developing a game, the costs are significantly higher. Switzerland just isn't the most ideal place for this industry. This high expense has a major impact on the gaming sector, especially for young developers. It's not easy to get started when everything costs so much.
QP06E	Yes, it is a big problem, I will give a 5. We have good institution, so we produce very good game developers but unfortunately, we are not able to keep them in the country because the opportunity are very limited. Again, it is mainly due to the fact we don't have the government support, the high cost living is high, and the lack of big studios. So they preferred to go abroad and it is understandable but that's kind of sad for our industry.
QP07E	Yes, I think there is a big lack. The issue is of 4. I think that devs need, to think about how they want to monetize the game, like earlier. So, even at the start of this company, like what is their target group, who is their target customer? many of them just do it for themselves because they would like the game. That's obviously great. but then you also need to know how to market to those people like you. because, yeah, just pushing ads for indie games is hard because many of them have ad blockers. I think it's definitely like getting to know how to reach the people that want to play your game. And I think it can really go back to what I said with the case of Stray Fawn. Know, how like what makes indie game successful and try to implement as many things of that, in a way that makes sense, for your game and then try to actually reach. Now talk about your game. If you're making, if you're creating something good, let people know that it's there because most people will not have waited for another game because there's just so many options. So yeah, find, find your ust's, and make sure that people know about them. And then maybe find good, also some influencers that are really a good fit to promote your game. And then maybe you can get a steam, engine rolling.
QP08E	if you want to have a good indie game, I probably gonna need like 300 to 400,000 minimum. And the contribution of the gouvernement is maximum of 50k. This amount is clearly is not enough. That's probably one of the biggest problem for the developer right. The problem with Pro Helvetia is they don't write big checks. So basically how it works, if I'm not mistaken,is that you can get like you can apply and you get a little bit of funding. For example, if you have if you have an angel investment, they match it, right? So if you find someone that gives you like fifty k to invest into your game, then they will also invest 50k. so it's less this. Well, we do you come as a developer to the state and say, well, I want to like to do this game, please give me money. first you basically have to find an investor from the private sector and convince this person that has that needs the financial return, otherwise they would not invest. and then the government says, okay, if you found someone that likes the idea and thinks they can make money back, then we give you also some money. So it's tougher.
QP09E	Yes, unfortunately I feel like they don't care that much about the swiss video gaming industry. It is pretty sad because the other countries have already recognized the potential of this industry and here I feel like they are missing an opportunity. For sure if we could get the government recognition it could really boost the swiss video gaming industry and solve

	couple of challenges that we are facing right now. They should support more like. First they should provide more substantial funding because with the fund receive right we can't do anything like the one received in Germany . They can offer tax incentives for studios, payement of wages. The Germany gouvernement is so supportive, it is also because they already have an industry, so it makes it easier to invest as the government you already have lots of successes, but also because their structure is just different and they like to give out more funding for initiatives.The swiss should believe in industry like Germany
QP10E	To generate revenue in Switzerland itself? yeah, I think for that the publishers are not here. That is a challenge because, if you have a brand manager, for a big game that is sitting in Germany, and he or she is responsible for Germany, Austria, and Switzerland, and maybe they sit in Berlin. So, like 800 km away, they maybe are never in Switzerland themselves. they don't really know the swiss market, the Swiss culture, they have 80% of the revenue, if it's per capita, the same spending, ah, sitting in Germany. So doing something specific like doing activations, in Switzerland, it's just, yeah, they don't really think about it. So, if you go to German cities and there's a big game release, you will have, cool, you will see many ads, you will see maybe tramways being branded, etcetera. and in Switzerland you don't really have any of that, right. So, I think that how mainstream gaming culture is becoming, is being hindered. So, the more pop pop culture like it is, the easier it is to generate revenue. So, I think there you have this issue and on the other hand, it's just a socio economic, point that we Swiss people, we are a bit conservative, and I think we here it is still compared to other nations like France and Spain especially, being a gamer is not something that you speak out about that much. It changed a lot. Like looking back from my time, in school, in high school compared to now, I think games like Fortnite changed a lot and the upcoming of Twitch. But yeah, so now you have the parents like they grew up when they game with their children. So, I think some of the growth will just come organically and take some time. But the cultural acceptance of gaming in Switzerland, is one of the main factors as well. That the further we progress there, the more revenue gaming is going to generate.
QP11E	I don't think so. It's true that the mobile market generates the most revenue, the free-to-play model requires very strict marketing strategies to be successful. Plus, the competition is much tougher. I believe Swiss developers should stick to what they're doing now, focusing on PC and console games. It's working well for them, and I think there's no need to shift focus to the crowded mobile market.
QP12E	For the Swiss gaming industry to become a more influential player and generate more revenue globally, government support will be crucial. They need to believe in the industry, much like Germany has done, and invest money into it. Once we have their recognition, it will help solve several challenges we're facing right now. The government should create a better environment to attract big studios to set up here. This will, in turn, boost the entire industry. On our side, we should keep focusing on making high-quality games, particularly good indie games and aa titles. We need to release games more frequently because the current release frequency is too long. If we can produce a few worldwide hits, it will automatically give a significant boost to the industry. But to do this, we need the government's support. They should invest more and provide funding like Germany does. Essentially, we need political and economic backing to truly thrive and make a mark on the global market.

Appendix 7 – Interview transcription - Respondent F

Code	Response	Translation
QP01F	Oui, je pense que le fait qu'on a pas de grands studios a un grand impact. Je donnerai un 5 sur 5. Moi, je pense là aussi que la Suisse, dans le gaming, est un petit peu en arrière. Honnêtement, je pense que si on avait au moins 3 ou 4 grands studios ici, ça changerait la donne. Ça permettrait d'avoir plus de personnes qui travaillent à 100% dans l'industrie et qui accumulent de l'expérience. Parce qu'aussi en Amérique, il y a beaucoup de studios qui ont été fondés, d'autres studios. Il y a des studios, des petits studios qui ont été fondés par des employés d'IT Software qui ont créé Doo. ou de Blizzard qui ont créé World of Warcraft. Il y a des employés qui ont arrêté de travailler, ils ont fondé leur studio, mais ils ont eu vraiment le know-how, créer et manager un studio, parce que c'est pas que faire de la programmation, c'est pas que faire des graphiques, c'est aussi de manager un business. Et je crois que c'est ça aussi le problème ou un des problèmes que les gens n'ont peut-être pas assez d'expérience dans le management de comment je fais un business parce qu'on doit avoir le temps, on doit gagner de l'argent et c'est là, c'est vraiment, c'est comme des start-up comme on connaît dans pour toute l'économie. Ce genre d'expérience, c'est précisément ce qui manque ici en Suisse. D'après ce que mes collègues me disent, il semble qu'il y ait un véritable déficit d'expérience qui je pense est en partie dû à l'absence de grands studios. On manque de cette synergie qui se crée naturellement quand il y a des grands studios dans le pays. Tu sais ça va au-delà de la simple production de jeux ; il s'agit de savoir gérer un business, de savoir naviguer dans les complexités du marché, et surtout, d'avoir cette capacité de lancer et de gérer des projets d'envergure sans devoir toujours chercher à l'étranger. Je donnerai un 4 sur 5. Le fait qu'on ait pas de Publisher ici en Suisse, je trouve que ça pose un problème. Je crois que c'est aussi, un point qui force les gens	Yes, I think the fact that we don't have major studios has a big impact. I would give it a 5 out of 5. I also think that Switzerland is a bit behind in gaming. Honestly, I think if we had at least 3 or 4 big studios here, it would change everything. It would allow more people to work 100% in the industry and gain experience. Because in America, there are many studios that were founded by employees from other studios. There are small studios founded by employees of id Software, who created Doom, or Blizzard, who created World of Warcraft. These employees left to start their own studios, but they really had the know-how to create and manage a studio. It's not just about programming or graphics, it's also about managing a business. And I think that's one of the problems here; people don't have enough experience in business management. You need time and money, and it's like any startup in any industry. This kind of experience is precisely what's missing here in Switzerland. From what my colleagues tell me, it seems there's a real deficit of experience, partly due to the absence of big studios. We lack the synergy that naturally comes from having large studios in the country. It goes beyond just producing games; it's about knowing how to manage a business, navigate market complexities, and launch and manage large-scale projects without always having to look abroad. I would give a 4 out of 5. The fact that we don't have publishers here in Switzerland, I think that's a problem. I believe it's also a point that forces people to look for publishers in other countries. And, well, I don't work with publishers, so I can't say for sure, but I've heard from Swiss developers that publishers also want to make money. And sometimes it's not easy to work with publishers who are not in Switzerland or are abroad. So, that can cause problems. If there were more publishers in Switzerland,

	de chercher des publishers dans les autres pays. Et puis, moi, je ne travaille pas avec des publishers, je ne connais pas, je ne peux pas dire des choses concrètes, mais j'ai déjà entendu aussi des développeurs suisses. Les publishers, eux aussi, ils veulent gagner de l'argent. Et des fois, ce n'est pas facile de travailler avec des publishers qui ne sont pas en Suisse ou qui sont à l'étranger. Alors, ça peut avoir des problèmes. Comme ça, je pense, s'il y aurait plus de publishers en Suisse, c'est bien possible que les studios indie aient plus de succès et deviennent plus grands. Ça, c'est certainement un point. En fait où ca pose un problème, c'est qu'un publisher qui est en Amérique, si tu veux vraiment faire des discussions, des choses que tu as discutées. Moi, personnellement, je pense que c'est toujours plus pratique de se voir, de passer. Il ne faut pas travailler ensemble chaque jour, mais d'avoir un petit peu le contact. Je pense aussi qu'il faut avoir la confiance chez quelqu'un. Il faut avoir la confiance dans un publisher parce que c'est ce que j'ai déjà entendu des gens qui m'ont dit. Je ne sais pas si c'est vraiment les détails, mais qui a déjà eu des problèmes avec des publishers aussi à cause du paiement. Et si tu as un publisher, c'est le publisher qui dit comment le jeu doit être en finale. Et ça, c'est peut-être ce que le développeur a peut-être une autre vision. Alors regarde, ça peut avoir tout compris. Et je pense, si j'ai mon publisher qui est peut-être à Zurich et à Bern, je passe, on discute, et puis ça va peut-être, tout simplement, si c'est le publisher qui est à New York ou en Mexique, de vraiment trouver une solution. Mais je ne veux certainement pas dire que les publishers en étranger, il n'y a pas aussi des bons publishers qui ont eu du succès. C'est certainement difficile à trouver ces publishers, c'est ça. En fait, c'est le facteur humain, ça complique un peu le facteur humain. Je mettrai un 2. Parce que nous avons seulement des studios de développement et rien de plus. Il nous manque des grands studios de développement et des publishers. Tu vois, quand je compare avec ceux qu'ils ont chez nos voisins comme la France et l'Allemagne, je trouve que	it's quite possible that indie studios would have more success and grow larger. That's definitely a point. The issue is that if you have a publisher in America, and you want to have discussions, it's more practical to meet in person. You don't need to work together every day, but having some contact is important. You also need to trust someone. I've heard from people that they've had issues with publishers regarding payments. And if you have a publisher, the publisher has the final say on how the game should be. The developer might have a different vision. If my publisher were in Zurich or Bern, I could visit and discuss things, and it might be simpler than if the publisher were in New York or Mexico. But I'm not saying there aren't good foreign publishers who have been successful. It's just hard to find these publishers. It's the human factor that complicates things. I would give a 2. Because we only have development studios and nothing more. We lack major development studios and publishers. When I compare with what our neighbors like France and Germany have, I find that the value chain of the industry is nonexistent here. And of course, that impacts the industry and overall revenues.

	la chaîne de valeur de l'industrie est inexistante ici. Et forcément, ça a un impact sur l'industrie et les revenus en général.	
QP02F	Moi je pense que c'est déjà pas mal comme c'est maintenant. Il y a vraiment, il y a aussi les salons comme la Fantasy Basel, il y a la Popcon à Zurich, il y a, ça existe aussi des petits events, il y a aussi différents de salons où vraiment les développeurs pubs s'exposaient, mais aussi le networking. Et je pense aussi que là, l'association des développeurs de jeux, la SGDA, font aussi toujours des events avec les Swiss Games Day à Zurich, où j'y étais l'année dernière. Moi je pense que c'est déjà pas mal comme c'est maintenant. Il y a vraiment, il y a aussi les salons comme la Fantasy Basel, il y a la Popcon à Zurich, il y a, ça existe aussi des petits events, il y a aussi différents de salons où vraiment les développeurs pubs s'exposaient, mais aussi le networking. Et je pense aussi que là, l'association des développeurs de jeux, la SGDA, font aussi toujours des events avec les Swiss Games Day à Zurich, où j'y étais l'année dernière. Mais j'ai eu l'impression, il n'y a pas eu vraiment beaucoup de gens. Alors, je ne sais pas, Il y a des occasions d'y aller, et puis aussi les Strayform qui ont là le Swiss Game Hub à Zurich, ils font chaque fin du mois, ils font comme un game tasting, où tous les développeurs peuvent y aller, montrer leurs projets. Mais je pense qu'il n'y a pas toujours tout le monde qui y va, Et pour moi, il y a assez de choses où on peut vraiment faire des choses. Je pense pas que le gouvernement doit faire des choses parce qu'il y a vraiment les gens privés ou les studios privés qui organisent. Je pense peut-être que le gouvernement ou le canton peut faire peut-être donner un petit peu de l'argent ou financier des events, pourquoi pas, parce que c'est aussi un petit peu de la culture, mais c'est aussi du business, tu sais, c'est vraiment peut-être faire en fait, la profession de développer le jeu. Niveau formation en Suisse, on a largement le potentiel de faire mieux. Alors, moi aussi, j'ai un enfant, il a maintenant, il a 16 ans, il a cherché qu'est-ce qu'il veut faire plus tard ? Alors, il peut faire informaticien ou électricien ou je ne sais pas quoi, mais vraiment, quelqu'un qui dit, je veux développer des jeux, ça, ça n'existe pas. Alors peut-être ça sera aussi une possibilité de faire aussi aux écoles de montrer à toi, si tu aimes bien jouer des jeux, que tu as aussi la possibilité de créer ton jeu. Il y a les studios là et là et là en Suisse où tu	I think it's already pretty good as it is now. We have conventions like Fantasy Basel and Popcon in Zurich. There are also smaller events and various conventions where developers and publishers can network. The SGDA (Swiss Game Developers Association) regularly organizes events like the Swiss Games Day in Zurich, which I attended last year. There are opportunities to go to these events, and places like the Swiss Game Hub in Zurich hold monthly game tastings where developers can showcase their projects. I think there are enough opportunities for networking and showcasing games. I don't think the government needs to do much more because private individuals and studios are already organizing these events. However, the government or cantons could maybe provide some funding for these events, as it's part culture and part business. This could help professionalize game development further. In terms of education, Switzerland has a lot of potential to do better. My child is 16 and trying to figure out what to do in the future. They could become an IT specialist or an electrician, but someone saying they want to develop games? That doesn't really exist here. Maybe schools could show that if you like playing games, you also have the possibility to create them. There are studios here in Switzerland where you can do that. It would be good to show young people the opportunities in game development. There are higher education programs in Zurich and Lucerne for game design, so the opportunities are there. Perhaps not everyone knows how to pursue this path, and that's part of the issue. In short, the lack of government involvement means that very few people choose to train in the game industry here in Switzerland, which is a shame. We encourage our young people to go into more traditional fields like business or medicine. We have excellent technical schools like EPFL and ZHdK, but the game industry isn't seen as an ideal career choice in Switzerland, largely due to the government's lack of promotion of the industry. Yet, as you know, it's a growing sector. It's true that we might need a few big studios with successful international titles to really

	peux faire ça. Ça ce serait peut-être une possibilité de déjà montrer aux jeunes qu'on peut faire, parce qu'on peut faire des études à la haute école, à Zurich, à Lucerne, il y a les études de game design, alors ça existe. Comme ça, je pense qu'il y a déjà beaucoup de choses qui existent, mais peut-être pas tout le monde le sait, comment on doit faire. Tu vois, en gros, le manque d'implication du gouvernement fait que très peu de gens choisissent de se former dans l'industrie du jeu vidéo ici en Suisse, et c'est vraiment dommage. On encourage beaucoup nos jeunes à se diriger vers des études plus traditionnelles, comme le commerce ou la médecine. Bien sûr, on a d'excellentes écoles techniques comme l'EPFL ou la ZHdK, mais malheureusement, l'industrie du jeu vidéo n'est pas vraiment vue comme un choix de carrière idéal en Suisse. Et ça, c'est en grande partie à cause du gouvernement qui ne fait pas assez pour promouvoir cette industrie. Pourtant, comme tu le sais, c'est un secteur qui est en pleine expansion. Et c'est vrai, on a peut-être besoin de quelques gros studios et qui ont du succès avec des bons titres de jeu international pour vraiment dire, ouais, là, on a vraiment des super studios aussi en Suisse. Là, je pense que si on aura ça, si un studio a vraiment un très grand succès avec un jeu et continue avec ça, on peut vraiment dire que c'est des entreprises sérieuses. Ce n'est pas que pour s'amuser, c'est vraiment des entreprises sérieuses. Parce qu'en Amérique, en Allemagne, en France, c'est comme ça depuis 20 ans déjà. C'est vraiment développer des jeux. L'industrie. En Suisse, on est là un petit peu en arrière, mais je pense que c'est en train de venir parce qu'aussi aux écoles, il y a les possibilités de faire des études sur ça. En ce qui concerne le soutien de l'état, je trouve que c'est un de nos point faibles. Malheureusement je trouve qu'il n'aide pas assez. Il pourrait faire mieux.	show that we have great studios in Switzerland. If we had that, if a studio had a big success with a game and kept it up, we could show that these are serious businesses. In America, Germany, and France, this has been the case for 20 years. They take game development seriously. In Switzerland, we're a bit behind, but I think it's coming because the educational opportunities are there. Regarding government support, I find it's one of our weak points. Unfortunately, I don't think the government helps enough. They could do better.
QP03F	Oui, là, je pense, avec mon expérience que j'ai eue maintenant avec l'État, avec Pro Helvetia, je trouve qu'ils pourraient faire beaucoup. Je donnerai 2 sur 5. Parce que j'ai eu l'impression, parce que je me suis appliqué et j'ai dit j'ai déjà de l'expérience dans l'industrie, j'ai déjà développé d'autres choses et puis je pense aussi pourquoi pas qu'ils ont plus d'argent de l'État parce que l'État, ils ont beaucoup d'argent, c'est clair, il doit payer d'autres choses, il y a aussi d'autres projets mais je pense que c'est pas que de la culture Parce que si je vois un artiste qui fait de la culture, où tout le monde se demande	Yes, with my experience dealing with the state and Pro Helvetia, I think they could do much more. I'd give it a 2 out of 5. When I applied for funding, despite my industry experience and having developed other projects, I felt like the support was lacking. The government has a lot of money, obviously, they have other priorities, but game development isn't just about culture. It's also a business. If you look at other artists, sometimes their work is considered pure culture, which can be subjective. But game development is a mix of

	qu'est-ce qu'il a fait maintenant, ouais, c'est qu'on peut trouver comme on veut. Les artistes, des fois, ils sont un petit peu spécial. Et je pense, le développement des jeux, c'est vraiment aussi un business. Ce n'est pas que de l'art. Ce n'est pas que de la culture. Mais c'est aussi de soutenir des gens avec des idées. Et puis, il y a aussi un site commercial. Comme ça, Je pense que ce serait mieux que l'État aussi donne un petit peu plus d'argent pour des projets comme ça, comme tu as dit, dans les autres pays où ils font ça. Ça pourrait aussi être comme des crédits spéciaux, des crédits à zéro intérêt où tu peux payer dans trois ans ou quatre ans, tu peux rembourser vraiment pour supporter les studios qui viennent commencer. Là, pour moi, ça m'aurait aidé si j'avais pu avoir un crédit ou j'aurais été pondé aussi de l'État à quelque part. Ça m'aurait certainement aidé à construire le business.	art and business. It's about supporting people with ideas and also tapping into the commercial aspect. It would be better if the government allocated more funds for such projects, like other countries do. This could include special loans or zero-interest credits that you can pay back in three or four years. Such support would really help new studios get started. For me personally, if I had access to a loan or state funding, it would have definitely helped in building my business.
QP04F	Je dirai un 4. Je pense que ça un énorme impact en générale sur l'industrie du jeu vidée en Suisse. Ça serait une excellente idée de réaliser plus de jeux de catégorie double aa en Suisse. Ça ouvrirait des portes. Parce que tout le monde a l'impression des grands jeux de succès, ça vient d'Amérique ou d'Allemagne. J'ai même eu la semaine dernière, j'ai parlé avec quelqu'un à la Fantasy Basel. On a parlé, ils ont dit, il y a une personne qui a dit, ouais, il y a aussi des grands jeux comme le simulateur d'agriculture de Giants, Software. Et puis, ils n'ont pas su que c'était des développeurs suisses. Ils pensaient que c'était Allemagne ou Américain. Parce que c'est vraiment comme ça, comme tu dis, l'absence vraiment des titres triple A ou double A, ça a un impact. Comme ça, tout le monde a l'impression que les jeux, ça, ça vient de l'Amérique et on a l'impression qu'il n'y a que des jeux indie en Suisse. Alors, comme je l'ai dit déjà dit tout à l'heure, ça serait bien d'avoir deux ou trois studios. Mais je pense, s'il y en avait plus de AA studios et games, les gens diraient plus à leur enfant, en Suisse, il y a des développeurs de jeux, alors pourquoi pas s'intéresser pour un job de développement comme programmateur ou artiste en Suisse. Alors moi je pense, s'il y avait plus de grands studios, les gens auraient plus d'intérêt de parler ou de discuter peut-être aussi avec leurs enfants. Ouais, si t'es intéressé à faire des jeux, je connais un studio. Il y a un studio à Berne, à Zurich ou à Lausanne.	I would say a 4. I think it has a huge impact on the Swiss video game industry in general. It would be an excellent idea to produce more double-A games in Switzerland. This would open up new opportunities. Everyone thinks successful big games come from America or Germany. Just last week, I was talking to someone at Fantasy Basel. They mentioned big games like Giants Software's Farming Simulator and didn't realize it was developed by Swiss developers. They thought it was German or American. This perception exists because we lack big titles like double-A or triple-A games. As I said earlier, having two or three big studios would make a difference. But I believe that if there were more double-A studios and games, people would start recognizing that game development is a viable career in Switzerland. More parents might encourage their kids to pursue jobs as programmers or artists in the Swiss game industry. If we had more big studios, people would be more inclined to discuss and promote game development careers. They could say, "If you're interested in making games, I know a studio in Bern, Zurich, or Lausanne."
QP05F	Je donnerai un 5 sur 5. C'est un gros challenge. Dans l'industrie indie, si tu n'as pas vraiment un hit, si ça ne va pas viral et tu as des milliers de personnes qui jouent ton jeu,	I would give it a 5 out of 5. It's a huge challenge. In the indie industry, if you don't have a hit that goes viral with thousands of players, you almost make no money at the beginning. It's hard to work on a project and

	en fait, tu gagnes presque pas d'argent au début. Et puis, c'est difficile de vraiment travailler sur un projet et de vraiment gagner de l'argent. Et c'est aussi parce qu'en Suisse, les frais de vie, c'est haut, par rapport aussi dans d'autres pays. Si on compare avec d'autres pays, même en France ou en Allemagne, les frais de vivre ici avec des assurances et tout, si tu veux encore faire des vacances, si tu as des enfants ou je ne sais pas quoi. Je ne parle même pas d'acheter une maison. Même pas moi, j'ai la possibilité d'acheter une maison et je sais comment c'est. Il y a beaucoup de frais et pour la même chose, la même qualité de vie dans un autre pays, ce sera beaucoup plus facile. Mais le vendre des jeux et d'avoir succès avec les jeux, c'est si tu es en France ou en Suisse ou en Allemagne, c'est partout la même chose en fait. Je ne peux pas charger pour mon jeu Indie 40 francs parce que je dis j'habite en Suisse. Ça, ça ne fonctionne pas. je peux charger 10 francs ou 15 francs, et tout ce qui est au-dessus de 15 francs, ça doit vraiment être un bon jeu indie. Et puis si c'est un gars qui a développé ça en Chine ou en Pologne, avec peut-être 10 fois moins de frais que moi j'avais, je ne peux pas charger plus de prix pour un jeu indie. Par rapport, il n'y a pas d'importance où je l'ai développé. Comme ça, je vois ça quand même un petit peu aussi comme problème parce que je connais des gens-là que j'ai fait connaissance, qui développent aussi des jeux, ils ont vraiment, ils ont ces problèmes. Il y en a qui essayent de travailler à 100% sur le jeu, mais ils habitent à la maison, ils n'ont presque pas de frais. Alors, c'est quand même un challenge d'avoir ça. Surtout quand tu es un studio indépendant, je pense que les coûts ici en Suisse, c'est cher. Même pour déclarer ton entreprise, après tu dois payer des taxes. Tu n'es même pas sûr de gagner des revenus pendant 3-4 ans parce que tu n'es pas sûr que ton jeu marche. Et à côté, tu as des frais fixes. Ça coûte cher. Et puis d'avoir vraiment du succès avec des jeux indie, c'est quand même… Ça n'a pas l'importance dans quel pays tu es. C'est toujours difficile parce que sur Steam, je crois qu'il y a chaque mois, il y a des dizaines de nouveaux jeux qui viennent. Et puis, la majorité, on voit ça dans les statistiques. Les jeux de Steam, tu n'as vraiment que peut-être 5 ou 10 % des jeux indie qui ont vraiment du succès. Et comme ça, tu ne peux aussi pas calculer. Tu ne peux pas dire je vais développer une année, je reçois d'une banque, je reçois peut-être 100 000 francs, je vais faire le développement, et après, je vais le vendre, et puis ça va être un succès. Ça, c'est... Tu ne peux pas... Ouais, c'est... J'ai le prédit du futur. C'est difficile, et je pense, dans le segment indie, c'est très, très difficile	actually make a profit. And in Switzerland, the cost of living is high compared to other countries. Even compared to places like France or Germany, living expenses here with insurance and everything else are steep. If you want to take vacations or have children, it's tough. Buying a house is out of the question. I know how it is, and it's expensive. To achieve the same quality of life elsewhere would be much easier. Selling games and having success with them is the same whether you're in France, Switzerland, or Germany. You can't charge 40 francs for an indie game just because you live in Switzerland. It doesn't work that way. You can charge 10 or 15 francs, and anything over 15 francs has to be a really good indie game. If someone develops a game in China or Poland with much lower costs than mine, I can't charge a higher price just because I'm in Switzerland. This is a problem I know from talking to other developers who face the same issues. Some try to work full-time on their games but live at home with almost no expenses. It's a challenge, especially for indie studios, because costs in Switzerland are high. Even setting up your company and paying taxes is expensive, and you might not make any revenue for 3-4 years because you're unsure if your game will succeed. Meanwhile, you have fixed costs. To have success with indie games is tough no matter which country you're in. On Steam, every month, there are dozens of new games, and only about 5-10% of indie games really succeed. You can't predict which game will be a hit. You can't just get a bank loan of 100,000 francs, develop for a year, and expect success. It's impossible to predict the future. It's very hard to make a lot of money in the indie segment. That's why my strategy now is to develop several games simultaneously.

	de vraiment gagner beaucoup d'argent. C'est pour ça, ma stratégie, c'est de développer plusieurs jeux, maintenant.	
QP06F	Oui, je dirai qu'à l'heure actuelle la fuite de nos talents restent un très gros challenge, du coup je dirai un 5. Parce que si tu veux vraiment avoir de l'expérience, collectionner de l'expérience, tu dois y aller à l'étranger, dans des grands studios. Ici, les opportunités sont limitées. Après, j'espère que les gens qui ont été là-bas reviennent ici et qui créent leurs studios comme ça se fait aussi dans les autres pays. Comme j'ai déjà dit, il y a beaucoup de studios qui ont été fondés des gens qui étaient dans d'autres gros studios et peut-être ça serait quelque chose aussi qu'on pourrait faire en Suisse avec des conditions attractives pour créer des studios, des entreprises dans le secteur de gaming.	Yes, I would say that currently, the brain drain remains a very big challenge, so I would rate it a 5. Because if you really want to gain experience, you have to go abroad to work in large studios. Here, the opportunities are limited. I hope that people who have been abroad will return and create their own studios, as is done in other countries. As I've already mentioned, many studios have been founded by people who worked in other big studios. This is something we could also do in Switzerland with attractive conditions for creating studios and companies in the gaming sector.
QP07F	Oui, c'est je trouve qu'il y grand manque sur ce point. Je donnerai un 4. Le côté business est très important le know-how, créer et manager un studio, parce que l'industrie du jeux vidéo c'est pas que de développer des jeux vidéo. Aujourd'hui' il faut aussi savoir manager un business, savoir planifier, faire des recherches sur les trends, préparer un plan pour la commercialisation. Sinon à la sortie de son jeu, ton jeu il va vraiment passer inaperçu. Et comme je l'ai dit avant je crois qu'un des problèmes que les gens n'ont peut-être pas assez d'expérience dans le management de comment je fais un business parce qu'on doit avoir le temps, on doit gagner de l'argent et c'est là, c'est vraiment, c'est comme des start-up comme on connaît dans pour toute l'économie. Tu vois genre d'expérience, c'est précisément ce qui manque ici en Suisse. Parce que moi, je suis programmateur depuis 20 ans et j'ai aucune idée du marketing, aussi les médias sociaux. Je ne m'y connais pas très bien. Aujourd'hui pour avoir du succès le côté marketing il est important, il faut que tu dédie de l'argent pour le marketing. Il faut que t aille une bonne capacité de négociation. Souvent les gens ils disent, oui, le gouvernement doit plus donner de l'argent. Moi, je pense que d'être... développeurs de jeux, c'est aussi être un businessman. On doit faire du business. Ce n'est pas recevoir de l'argent de n'importe où. Il faut un petit peu calculer. Il faut chercher de l'argent et essayer aussi de terminer les jeux. Parce que j'ai constaté qu'il y a beaucoup de studios, de petits studios, qui sont déjà depuis trois ans, quatre ans, au même projet, parce qu'ils ont pas les moyens, où ils ont mal géré leur budget.	Yes, I find there's a big gap in this area. I would rate it a 4. The business side is very important—the know-how to create and manage a studio—because the video game industry isn't just about developing games. Today, you also need to know how to manage a business, plan, research trends, and prepare a marketing plan. Otherwise, when you release your game, it will really go unnoticed. As I mentioned before, one of the problems is that people may not have enough experience in managing a business. You need time, and you need to make money. It's really like startups in the broader economy. This type of experience is precisely what's missing here in Switzerland. I've been a programmer for 20 years, and I have no idea about marketing or social media. I don't know much about those areas. Today, to be successful, the marketing side is crucial. You need to allocate money for marketing. You need to have good negotiation skills. Often, people say, yes, the government should give more money. But I think being a game developer also means being a businessman. We need to do business. It's not about getting money from anywhere; we need to plan, seek funding, and try to complete the games. I've noticed many small studios are stuck on the same project for three or four years because they lack the resources or have poorly managed their budgets.

QP08F	Moi, je donnerai un 2. Alors, ça c'est très difficile à dire, je ne peux pas parler aussi pour d'autres projets parce que je n'y connais pas assez. Ça dépend si tu fais le jeu à 100%, si c'est vraiment, tu dis je fais maintenant le jeu, alors tu dois payer un salaire ou si tu fais un jeu à côté de ton travail, et tu dis, le temps que j'investis, c'est comme un hobby. En fait, c'est moi qui ai fait comme ça. J'ai mon boulot. J'ai toujours essayé de faire peut-être une heure ou deux heures par jour. Des fois, je n'ai fait rien. Des fois, j'ai travaillé le week-end. Alors, je n'ai pas compté mes heures. Je peux parler de mon premier projet que j'ai fait. Je n'ai vraiment pas compté mes heures, mais j'ai eu des prêts pour faire des graphiques. La musique, des illustrations, et ça c'est peut-être environ des 8 000 à 10 000 francs que j'ai investi pour faire des choses que je ne pouvais pas faire moi-même. Mais si je compte le temps que j'ai investi, ça aurait été plus haut si j'avais payé un salaire Si je dis une demi-année, si j'aurais vraiment... J'ai développé le jeu dans deux ans. Et j'ai... J'ai fait ça à côté de mon job. Alors, je pense, si j'avais tout fait à une fois, j'aurais peut-être eu six mois ou huit mois. Et si j'aurais dû payer un salaire, oui, j'aurais dû, je ne sais pas, plus ou moins, avoir vers les 50, 60 ou... 70 000 francs pour payer le salaire avec les ressources que j'ai payé alors je pense peut-être vers les. Je dis vers les 60 000 francs, si j'aurais aussi payé un petit peu plus ou moins, ça aurait été un petit peu moins que ce que je gagne maintenant, mais pour vivre, je dis comme ça, pour avoir un salaire. Si t'es un team, si t'es encore trois personnes ou deux personnes, tu dois payer leur salaire pour une année. Alors là, ouais, tu peux compter, c'est vraiment, c'est beaucoup de frais. Alors là, je pense que Le premier projet que les gens développent, c'est vraiment, ils ont un job et ils font ça à côté de leur travail. Et puis, un des samedis, dans la soirée, et comme ça, c'est difficile à compter. Et si tu calcules une année full-time development avec peut-être trois personnes, tu dois avoir 150, 200, 1 000 francs. Pour développer un jeu. Si tu veux vraiment payer les salaires normaux qu'on puisse vivre en Suisse, avec toutes les assurances, l'AVS et tout, alors là, oui, ça compte. J'ai demandé de l'aide à Pro Helvetia pour le financement mais malheureusement ils ne m'ont rien donné. J'ai demandé une deuxième fois en fait à Post Production Grant. Parce que j'ai fini mon jeu et je demandais un budget pour faire de la pub et du marketing. Et là, en ce moment, je n'ai plus rien entendu. Ils sont en train d'évaluer. Je ne sais pas si ça va donner quelque chose. A	I would rate it a 2. It's very hard to say, and I can't speak for other projects because I'm not familiar with them. It depends on whether you work on the game full-time, meaning you have to pay a salary, or if you work on it alongside your job, treating the time you invest as a hobby. That's what I did. I have my job, and I tried to spend an hour or two per day on the game. Sometimes I did nothing, sometimes I worked on weekends. I didn't count my hours. For my first project, I didn't really keep track of my hours, but I did take out loans to pay for graphics, music, and illustrations. That cost me around 8,000 to 10,000 francs for things I couldn't do myself. But if I count the time I invested, it would have been higher if I had to pay a salary. If I had done everything at once, it might have taken six to eight months. If I had to pay a salary, I might have needed around 50,000 to 70,000 francs to cover salaries and resources. So, if I had done it full-time, it would have been roughly around 60,000 francs. If you're a team of two or three people, you need to cover their salaries for a year, which can be quite costly. That's why most people develop their first project while keeping their day job and working on it in their free time. If you calculate full-time development for a year with three people, you'd need 150,000 to 200,000 francs to develop a game. This is to pay normal salaries that allow living in Switzerland, including insurance and other costs. I asked Pro Helvetia for funding, but they didn't give me anything. I applied a second time for a Post Production Grant, requesting a budget for advertising and marketing after finishing my game. I haven't heard back yet; they are still evaluating. So far, I have financed everything myself. This makes things complicated because the government doesn't provide support. But I understand that they can't just give money to anyone who installs Unity and writes a design document, claiming they'll finish their game in two years without any experience. That's why my strategy is to finish one or two games first, even through self-publishing, to demonstrate that I can complete a project. This might make it easier to receive funding in the future, either from the government or other institutions. I believe they also look at the type of game and whether it's innovative. My game was a simple 2D platformer without any

	l'heure actuelle, j'ai toujours financé tout moi-même en fait.Alors c'est vrai que ça complique les tâches parce que le gouvernement ne t'aide pas. Mais, je les comprends aussi. On ne peut pas donner de l'argent à n'importe qui qui a installé Unity et qui a fait un design document et qui va dire, oui, je vais terminer mon jeu dans deux années avec ça et ça et ça, qui n'a pas d'expérience. Comme ça, je dis, si on crée un jeu, peut-être un deuxième que tu as vraiment fini, aussi avec Self Publishing, je pense que ça va être plus facile aussi de recevoir de l'argent Si ce soit du gouvernement ou peut-être des instituts qui donnent ça. Alors comme ça, c'est aussi ma stratégie, en fait, de vraiment terminer un ou avant le deuxième jeu. Comme ça, je peux dire... Regardez, j'ai développé moi-même dans deux ans, j'ai développé un jeu, alors c'est possible. Ce n'est pas qu'un document sur un PDF avec une idée, c'est vraiment un produit que je peux vendre. Alors là, peut-être les chances seront mieux de recevoir. C'est ça. Je crois qu'il regarde aussi un petit peu c'est quoi comme genre. Le jeu, est-ce que c'est un petit peu innovatif ? Parce que là, mon jeu, ce que j'ai fait, c'était un platformer 2D tout simple. Il n'y a pas vraiment eu de choses innovatives. C'est un jeu, ou un jeu, c'est bon, mais il n'y a pas eu vraiment des choses spéciales. Alors, j'imagine que c'était peut-être là une raison qu'ils ont dit, ah non, c'est un jeu pas trop spécial, comme ça, on ne va pas supporter	groundbreaking features. That might be why they decided not to support it, as it wasn't seen as special enough.
QP09F	Oui. Tu vois, en gros, le manque d'implication du gouvernement fait que très peu de gens choisissent de se former dans l'industrie du jeu vidéo ici en Suisse, et c'est vraiment dommage. On encourage beaucoup nos jeunes à se diriger vers des études plus traditionnelles, comme le commerce ou la médecine. Bien sûr, on a d'excellentes écoles techniques comme l'EPFL ou la ZHdK, mais malheureusement, l'industrie du jeu vidéo n'est pas vraiment vue comme un choix de carrière idéal en Suisse. Et ça, c'est en grande partie à cause du gouvernement qui ne fait pas assez pour promouvoir cette industrie. Pourtant, comme tu le sais, c'est un secteur qui est en pleine expansion. C'est dommage, parce que la Suisse a vraiment beaucoup de talent dans le domaine du jeu vidéo, mais à cause du manque de soutien, de nombreux talents ne sont pas remarqués. Et je pense clairement que a empêché le pays de se faire une place plus importante sur la scène mondiale. C'est vraiment dommage, car avec un peu plus de soutien, je suis convaincu que la Suisse pourrait vraiment briller dans ce domaine.	Yes, you see, the lack of government involvement means very few people choose to train in the video game industry here in Switzerland, and that's really unfortunate. We encourage our young people to pursue more traditional studies, like business or medicine. Of course, we have excellent technical schools like EPFL or ZHdK, but unfortunately, the video game industry is not really seen as an ideal career choice in Switzerland. And this is largely due to the government not doing enough to promote this industry. Yet, as you know, it's a rapidly expanding sector. It's a shame because Switzerland has a lot of talent in the video game field, but due to the lack of support, many talents go unnoticed. I clearly think this prevents the country from making a more significant mark on the global stage. It's really unfortunate because with a bit more support, I'm convinced that Switzerland could truly shine in this domain.

QP10F	C’est le manque de soutien.	
QP11F	Je pense que ce serait une mauvaise idée. Ce n'est pas aussi simple que ça en a l'air. J'ai voulu me lancer sur le marché des jeux mobiles moi-même, mais je me suis vite rendu compte que c'est un marché ultra compliqué. Il y a vraiment très peu de chances que ton jeu soit un succès. Surtout si tu es un petit développeur, ton jeu va complètement passer inaperçu. Sur mobile, honnêtement, je crois qu'il y a au moins plus de 100 jeux qui sortent chaque semaine. Pour te démarquer dans cette masse, il te faudra quand même un budget conséquent pour que tu devras investir dans les publicités. Et honnêtement, les pourcentages que tu touches ne sont vraiment pas intéressants. J’ai vraiment l'impression que ce sont vraiment les plateformes comme Apple et Google qui en profitent le plus. Alors si vous avez un gros budget pourquoi, mais sinon je pense que c’est une mauvaise idée.	I think it would be a bad idea. It's not as simple as it seems. I wanted to enter the mobile game market myself, but I quickly realized that it's an extremely complicated market. There are very few chances that your game will be successful. Especially if you're a small developer, your game will go completely unnoticed. On mobile, honestly, there are at least over 100 games released every week. To stand out in this crowd, you would need a significant budget to invest in advertising. And honestly, the percentages you earn aren't really attractive. It feels like it's mainly platforms like Apple and Google that benefit the most. So, if you have a large budget, maybe, but otherwise, I think it's a bad idea.
QP12F	Oui c’est sûr. Moi, je suis convaincu que développer l’industrie du jeu vidéo en Suisse, il nous faut absolument le soutien du gouvernement, c’est ça qui va faire la différence sur plusieurs points. Après il faut d’un tout. Tu vois ce que je veux dire, de bonne formation, quelques gros studios, quelques bons jeux, des publishers. Mais, pour tout un ça il faut un plus grand soutien du gouvernement. Typiquement, ça m'aurait vachement aidé d’avoir un crédit ou si l’Etat m’avait aidé dans le financement. Ça m'aurait certainement aidé à construire le business. Il faut vraiment être plus souple avec les mesures, plus souple avec les taxes sur les entreprises ou sur les entreprises nouvelles qu'on les laisse vraiment faire. Et je pense aussi que c'est vraiment, comment dire, il faut avoir des gens innovatifs, qui ont une bonne formation, mais qui ont aussi des idées. Parce que, si je reviens sur Giant Software, qui sont à l’heure actuelle, je pense, ce sont les plus grands en Suisse, eux, ils n'ont pas eu de l'argent du gouvernement. Eux, ils ont tout fait eux-mêmes. Alors, on peut dire que c'est vraiment possible de créer une grande entreprise sans avoir des argents, du gouvernement. En fait, c'est un business comme tous les autres business. Alors, je pense qu'on doit investir aussi dans l’éducation, il faut qu’on encourage les jeunes à devenir développeur de jeux vidéo. Alors, il faut des software engineers qui, peut-être aussi, là où j'ai fait des études on pourrait peut-être faire des spécialisations en direction de création de jeux. C'est ce qui existe maintenant à Zurich. On peut faire ça dans plus d'universités. Là, c'est peut-être aussi à l'aspect politique. On peut vraiment dire qu'il faut plus de possibilités de	Yes, I’m convinced that developing the video game industry in Switzerland absolutely requires government support; that will make a difference in several areas. It takes a combination of things: good training programs, a few large studios, some good games, and publishers. But for all this, we need greater government support. For example, having access to a loan or state financing would have helped me significantly in building my business. We need more flexible measures, more lenient taxes on new businesses, allowing them to thrive. It’s essential to have innovative people with good training and great ideas. For instance, Giant Software, currently the largest in Switzerland, achieved success without government funding. They did it all on their own. So, it’s clear that it’s possible to create a large company without government money. Essentially, it’s a business like any other. We should invest in education and encourage young people to become game developers. We need software engineers and specialized programs geared toward game creation. Currently, you can study game design in Zurich, but we should expand this to more universities. It’s partly a political issue; we need more educational opportunities in this sector. The government should create an environment where young people can become excellent game developers. Right now, that’s not the case. The career of a game developer isn’t very appealing in Switzerland, which is a shame given the industry’s potential. Even if

	formation dans ce secteur. Il faut que le gouvernement créé un environnement dans lequel les jeunes peuvent devenir un bon développeur de jeu vidéo. A l'heure actuel ce n'est pas trop le cas. Le métier de développeur de jeu vidéo ne fait pas trop rêver en Suisse, et ça c'est dommage vu le potentiel de l'industrie. Et même s'ils se forment ici, à l'issue de leur formation, ils préfèrent partir à l'étranger. On n'a pas vraiment l'occasion de profiter pleinement de nos talents. Et comme on l'a dit il faudra qu'on fasse plus de projets double aa, tu vois ça apporte de la visibilité, ça crée de l'emploi, un buzz, parce qu'à l'heure actuelle notre industrie il est assez discret. Il nous plus de visibilité, plus de collaboration. Et vraiment, les studios qui ont vraiment du potentiel, qui ont déjà créé quelques jeux, Il faut les laisser faire, en fait, et pas les mettre des pierres dans la route avec des impôts, des taxes, je ne sais pas quoi, qui sont trop hauts. Vraiment les laisser faire. Et aussi, je pense que le soutien de l'État avec de l'argent, c'est une pièce de puzzle importante, mais ce n'est pas que ça. C'est vraiment. Il faut être innovatif, il faut vraiment être, comme j'ai déjà dit, un petit peu business man et puis vraiment avoir un goal de terminer les jeux et de recommencer le prochain projet. Là, je pense que c'est vraiment différentes pièces de puzzle qui sont importantes. Et aussi pour les studios, l'important, ce n'est pas de faire un jeu et partir quand tu vois que c'est un échec, mais c'est de faire plusieurs projets, être stable, stabilisé. Même si tu échoues, il faut continuer. Tu fais des mandats, tu essaies de faire un portfolio et ensuite, tôt ou tard, tu auras de la chance, d'attirer un publisher. Il y a un bonne vidéo YouTube de quelqu'un qui est dans le milieu. La vidéo s'appelle « How to sustain a game industry without having one success ». Alors, il a créé différents jeux sans succès, mais chaque jeu il a terminé les jeux et chaque jeu génère un petit revenu et maintenant il a plusieurs jeux et puis si on compte tous les jeux tous les revenus comme ça il peut vivre de ça mais il n'a pas eu de succès comme Minecraft ou Angry Birds ou je ne sais pas quoi comme ça je pense que c'est vraiment ça la stratégie parce qu'on sait jamais peut-être qu'on a de la chance il y a un youtubeur qui trouve ton jeu après ça va viral et puis tu as vraiment beaucoup de succès. Mais je pense que la stratégie, c'est vraiment d'avoir de l'endurance et de rester à créer des jeux. Et surtout pas négliger ce côté businessman comme je l'ai fait avec mon premier jeu. C'est vraiment ça qui va déterminer le succès de ton jeu.	they train here, graduates often prefer to go abroad. We don't really get to fully benefit from our talents. Additionally, we need to undertake more AA projects. These bring visibility, create jobs, and generate buzz. Our industry is currently quite low-profile. We need more visibility and collaboration. Studios with real potential that have already created a few games should be allowed to operate without excessive tax burdens or other obstacles. Support from the state with funding is one piece of the puzzle, but it's not the only one. Innovation and business acumen are also crucial. Developers need to be goal-oriented, complete their projects, and then move on to the next. It's also important for studios to stay persistent. The key is not to abandon the effort after one failure but to keep producing multiple projects and maintain stability. Even if you fail, you have to keep going, do some contract work, build a portfolio, and eventually, you might attract a publisher. There's a good YouTube video called "How to sustain a game industry without having one success." The creator made various games without any major hit, but each game generated some revenue. Now, with multiple games, the combined income is enough to live on. He never had a massive success like Minecraft or Angry Birds. The strategy is to have endurance and continue creating games. Don't neglect the business side, as I did with my first game. That's what will determine your game's success.

Appendix 8 – Interview transcription - Respondent G

Code	Response	Translation
QP01G	Alors, oui, l'impact est énorme. Je donnerai un 5. Il est énorme parce qu'en fait, c'est un écosystème, c'est-à-dire que tu as besoin de studios qui sont sains pour créer des gens et des employés qui vont pouvoir rester sur le marché suisse, tu vois. Mais des gros studios Nous, ce qui se passe, par exemple, c'est que dans la région, on doit être peut-être en Romandie, deux studios qui vivent au moins 30% du jeu vidéo, je pense. Et donc c'est impossible pour les employés, par exemple, de tourner entre les boîtes, ce qui fait que les gens ne restent pas et partent. Et donc ça fait déjà qu'on a un problème à ce niveau-là, donc on n'a pas, on va dire, de cercle vertueux, ce qui fait qu'on manque d'écoles, on manque de moyens, on n'a pas d'éditeurs et d'autres structures assez grandes dans des genres différents pour que les gens se spécialisent. Et donc, en fait, ce manque de main-d'œuvre crée une sorte de boucle qui va créer une sorte de fuite des cerveaux permanentes. Je donnerai un 2. Actuellement nous n'avons pas d'éditeur en Suisse. Là on a juste Nintendo Suisse, mais eux ils ne font pas d'édition, ils font que de la promotion. En fait, au niveau publishing, on n'a pas de publisheur ici. Par contre, on a des filiales de grandes marques qui font de la promotion locale. C'est-à-dire que Nintendo, par exemple, ils font les stands dans les events à la Polyland, au comptoir suisse, tout ce truc-là. C'est vraiment des divisions marketing. Il n'y a pas de publishing au sens où tu as un centre financier qui finance des projets. Après Mais je pense que le fait qu'il n'y pas de grands éditeurs ici en Suisse ca n'a pas de grands impact.Je dirais que ça change pas grand chose parce que nous on va, moi j'ai fait financer plusieurs de mes jeux en France et donc en France il y a une proximité culturelle très forte etc donc je pense pas que moi ce qui est comment dire	Yes, the impact is huge. I would give it a 5. It's enormous because it's an ecosystem – you need healthy studios to create a workforce that can stay in the Swiss market. But with big studios, what happens is, for example, in the region, there might be only two studios in Romandie that live at least 30% off video games. So it's impossible for employees to move between companies, which makes people leave. This results in a lack of a virtuous cycle, which means we lack schools, resources, publishers, and other structures large enough in different genres for people to specialize. This lack of workforce creates a permanent brain drain loop. I would give it a 2. Currently, we don't have any publishers in Switzerland. We only have Nintendo Switzerland, but they don't do publishing; they only do promotion. At the publishing level, we don't have a publisher here. However, we have branches of big brands that do local promotion. For instance, Nintendo does stands at events like Polyland, the Swiss Fair, and things like that. They are really just marketing divisions. There is no publishing in the sense of a financial center that funds projects. But I think the lack of major publishers here in Switzerland doesn't have a big impact. I would say it doesn't change much because, for example, I have had several of my games financed in France, where there is a strong cultural proximity. So, I don't think it necessarily hinders the development of the industry. In fact, we don't really have a value chain in Switzerland. We have development studios, and that's about it. We have one large studio in Zurich, which is Giants, and that's it. We don't have publishers, distributors, producers, or intermediary companies. We only have part of the chain. When I talk

	je pense pas que c'est ce qui nuit forcément au développement de l'industrie. Bah en fait on n'a pas de chaîne de valeur réellement en Suisse, c'est-à-dire qu'on a des studios de développement et parts, on a un énorme studio à Zurich, qui est Giants, et c'est tout. En réalité on n'a pas d'éditeurs, on n'a pas de distributeurs, on n'a pas de producteurs, on n'a pas de boîtes d'intérêt, tu as de middlemen, etc. Donc on n'a qu'une partie de la chaîne en fait. Et quand je te parle de distributeur, je te parlais au sens du publishing. Parce que oui, tu peux vendre tes jeux à la FNAC. On a plusieurs jeux suisses, on est plusieurs socios suisses à vendre à la FNAC, mais tu passes toujours de toute manière par une autre boîte qui est à l'étranger pour faire… Et là, pour le retail, tu vois, il n'est pas fait ici. Du coup pour la chaine, elle est assez inexistante. Du coup je mettrai un 2 pour la chaine de valeur. C'est-à-dire qu'effectivement, on a quand même le principal qui est des studios, mais on n'a juste pas tout le reste. Et c'est vrai que si tu compares avec un pays comme la France, on est encore loin. C'est sûr que ça un impact sur la croissance de l'industrie. Là ce qui nous faudrait c'est vraiment 2, 3 gros studios en plus. Des studios qui marchent bien, qui ont de l'influence, tu vois.	about distributors, I mean in the sense of publishing. Yes, you can sell your games at places like FNAC. Several Swiss studios sell at FNAC, but you always have to go through another company abroad for retail. So, the chain is quite nonexistent here. I would give the value chain a 2. We have the main part, which is studios, but not the rest. Compared to a country like France, we are still far behind. This definitely impacts the industry's growth. What we really need are 2 or 3 more big studios. Studios that are successful and influential.
QP02G	Je donnerai un 2. Parce qu'on peut clairement faire mieux. Comme toujours, il y a des éléments qu'on pourrait améliorer, mais c'est surtout au niveau des studios, c'est-à-dire que tu as besoin de studios qui sont sains pour créer des gens et des employés qui vont pouvoir rester sur le marché suisse. Ensuite au niveau de l'aide étatique on pourrait clairement faire mieux. Et, au niveau des écoles, je trouve qu'il y a peu d'écoles de jeux vidéo et elles sont très centralisées, c'est-à-dire que les quelques écoles qu'on a, elles sont à zurich, notamment la plus grosse école est à Zurich, la plus qualitative, et on n'a que des petites écoles ici à part ou à la limite la SEA Genève, mais qui ne forment pas tant de gens que ça. Donc, je dirais qu'il faudrait qu'on améliore aussi sur le maillon éducatif. Par contre, je le comprends. C'est normal parce que tu ne vas pas ouvrir une école quand il n'y a pas de studio derrière. Mais pour ouvrir des plus	I would give it a 2 because we can clearly do better. As always, there are areas that could be improved, but especially when it comes to studios – you need healthy studios to create employees who can stay in the Swiss market. At the state aid level, we could clearly do better. Regarding schools, I find that there are very few video game schools, and they are very centralized. The few schools we have are in Zurich, with the largest and most qualitative one being there, and only small schools elsewhere, like SEA in Geneva, but they don't train that many people. So, I would say we need to improve the educational link as well. However, I understand this. It's normal because you wouldn't open a school without studios behind it. But to open bigger studios, you need government support, especially in a country like Switzerland; otherwise, you won't make it. That's why it's a challenge.

	grands studios, il te faut le soutien du gouvernement surtout dans un pays comme la Suisse, sinon tu ne t'en sors pas. C'est pour ça que c'est un chic.	
QP03G	Je mettrais un bon 2 sur 5, tu vois. Parce qu'au vu des capacités financières de la Suisse, c'est ridicule quand même. C'est-à-dire que je te donne quelques exemples pour moi qui n'ont pas beaucoup de sens. Il y a des aides massives pour le cinéma ou pour le théâtre, etc., qui sont des disciplines qui ne sont pas vraiment rentables ou peu rentables. Et on est encore à un vingtième, un trentième de ça pour les aides pour le jeu vidéo, alors que nous, on crée activement. Ce n'est pas pour faire de la comparaison, de la compétition, parce que moi, je viens de là-bas de base, tu vois. Mais par contre, tu vois bien que ça pourrait être mille fois mieux en termes d'investissement parce que nous, on crée énormément d'emplois. Il y a un dynamisme économique autour du jeu vidéo. C'est un énorme marché. Malheureusement, les mesures prises ne sont clairement pas suffisantes. Il y a une vraie volonté de se bouger. Mais, en même temps, pas plus, parce qu'ils pourraient faire énormément plus avec ce qu'on a actuellement en termes de ressources en Suisse. Et ça pourrait réellement booster l'industrie. Et si tu compares avec les autres pays typiquement l'Angleterre, la France, le Canada, on est encore très loins, j'ai l'impression qu'on laisse passer une bonne opportunité.	I would give it a solid 2 out of 5, you see. Considering Switzerland's financial capabilities, it's ridiculous. Let me give you some examples that don't make much sense to me. There are massive aids for cinema or theater, which are disciplines that are not very profitable or barely profitable. Yet, we get a twentieth or thirtieth of that for video game aids, even though we actively create. This isn't to make comparisons or compete because that's where I originally come from. But you can clearly see that it could be a thousand times better in terms of investment because we create a lot of jobs. There's economic dynamism around video games. It's a huge market. Unfortunately, the measures taken are clearly insufficient. There's a real willingness to move, but not beyond that because they could do so much more with the resources we currently have in Switzerland. And it could really boost the industry. If you compare with other countries like England, France, or Canada, we are still very far behind. It feels like we are missing out on a great opportunity.
QP04G	Bien sûr. Fortement même. Je dirai un 5. Il y a quelques incursions. Là, il y en a un projet qui s'est lancé à Genève, Beautiful Light. qui est on va dire un presque premier projet de double A. Il a pris pas mal d'attractions donc ça pourrait être un moteur. mais oui en réalité c'est toujours pareil comme dans tous les marchés au final c'est qu'il faut des très très grands qui vont ruisseler sur des petits et en fait de ces petits on va créer un petit écosystème autour mais vu qu'on n'a pas ces grands acteurs tu vois on peut se comparer à des pays tu vois qui ont la même population que nous avec quasiment le même niveau de vie comme la Suède la Suède qui a quasiment la même population et le même niveau de vie que nous bah tu vois ils ont réussi à faire parce que ils ont deux trois énormes studios type Dice, King, etc. et donc eux ont réussi justement à créer une grosse industrie juste parce qu'ils ont trois, quatre acteurs hyper massifs. Dice, par exemple, ça emporte avec lui la moitié de l'industrie suédoise. Du coup, ça clairement un gros impact qu'on n'ait pas de grands studios dans le pays, des studios qui font des réalisation AA, AAA games. C'est important d'avoir des studios de ce gabarit.	Of course, absolutely. I would say a strong 5. There have been some incursions. For instance, there's a project that was launched in Geneva called Beautiful Light, which is almost a first double-A project. It has gained quite a bit of traction, so it could be a driving force. But yes, in reality, it's always the same as in all markets in the end: you need very big players who will trickle down to smaller ones, and from these smaller ones, you create a small ecosystem around. But since we don't have these big players, we can compare ourselves to countries with similar populations and almost the same standard of living, like Sweden. Sweden, with almost the same population and standard of living as us, has managed to do it because they have two or three huge studios like Dice, King, etc. And they have managed to create a large industry just because they have three or four massive players. Dice, for example, supports half of the Swedish industry. So, it clearly has a big impact that we don't have large studios in the country, studios that produce double-A and triple-A games. It's important to have studios of this caliber.

	Parce qu'en fait, il faut imaginer que l'écosystème, il se crée toujours de la même manière, tu sais, il y a genre 2-3 gros studios qui arrivent, et en fait, de ces gros studios, il y a des gens qui ont été formés à l'intérieur, qui décident de se lancer en solo, et en fait, ils se lancent en solo avec des petites structures, et en fait, ils continuent à freelance entre les gros studios, puis en fait, il y a des gens qui sortent de ces studios et qui créent des structures dans le marketing, etc. Et en fait, c'est très souvent des... ça découle des gros studios et des gens qui partent, quoi. Tu peux typiquement prendre l'exemple de la Pologne, qui avec le project « Witcher », ils ont réussie a créé toute une industrie	Because the ecosystem always forms in the same way, you know, there are like 2-3 big studios that come in, and from these big studios, people who have been trained within decide to go solo, and they start small structures. They continue to freelance among the big studios, and there are people who leave these studios and create structures in marketing, etc. It often stems from these big studios and people who branch out. You can typically take the example of Poland, which, with the project "Witcher," managed to create an entire industry.
QP05G	Oui, absolument, le prix a vraiment un impact majeur, je lui donnerais un 5 sans hésiter. C'est assez évident, surtout quand on regarde des projets d'envergure qui sont nés à l'étranger mais portés par des Suisses, que ce soit la France, au Canada, ou ailleurs. En fait, c'est assez simple à comprendre. Prenons le Canada par exemple : là-bas, le coût de la vie est 3 à 4 fois moins cher qu'en Suisse. Avec le même budget, tu peux donc développer un jeu 3 à 4 fois plus ambitieux. En plus de ça, tu auras des aides dix fois plus grandes de l'État parce qu'ils sont plus investis dedans. Et si on considère que le niveau moyen des employés, en termes de formation et d'éducation, est supérieur grâce à des expériences dans des entreprises renommées comme Ubisoft, on se retrouve avec un cercle vertueux pour la production de jeux. Ici, en revanche, les choses sont nettement plus difficiles, tout est plus coûteux et les soutiens moins généreux. C'est simple on est un petit pays qui coûte cher on n'est pas dans l'euro en plus ce qui fait qu'on est très perdant au niveau des taux de change très régulièrement et on coûte très cher et donc ça fait que développer des jeux ici c'est plus compliqué parce que tu n'as pas les écoles et tu n'as pas les structures et en même temps ça coûte plus cher qu'ailleurs et tu perds au taux de change et donc en fait tu n'as aucun avantage d'être ici à part aimer la Suisse on va dire ce qui est déjà cool donc on va dire que c'est un cercle qui s'auto-alimente comme ça et donc c'est un cercle dans lequel on n'est pas encore sorti je pense qu'il faudra du temps.	Yes, absolutely, the cost really has a major impact, I would give it a 5 without hesitation. It's quite evident, especially when we look at large-scale projects that were born abroad but carried by Swiss people, whether in France, Canada, or elsewhere. It's quite simple to understand. Let's take Canada for example: there, the cost of living is 3 to 4 times lower than in Switzerland. With the same budget, you can therefore develop a game that is 3 to 4 times more ambitious. Additionally, you'll get ten times more support from the state because they are more invested in it. If we consider that the average level of employees, in terms of training and education, is higher due to experiences in renowned companies like Ubisoft, we end up with a virtuous circle for game production. Here, however, things are much more difficult, everything is more expensive and the supports are less generous. It's simple: we are a small, expensive country not part of the Eurozone, which means we often lose out on exchange rates, making everything more costly. Developing games here is more complicated because you don't have the schools, you don't have the structures, and at the same time, it costs more than elsewhere, and you lose out on exchange rates. So, there's no real advantage to being here, except for loving Switzerland, which is cool but not sufficient. It creates a self-sustaining circle, and it's a circle we haven't broken out of yet. I think it will take time.
QP06G	Oui malheureusement, c'est clairement un de nos plus gros challenge. Je donnerai un 5. La manière dont le gouvernement aborde l'industrie du jeu vidéo ici, ça nous pousse vraiment à penser à partir. En fait, c'est presque comme si ça encourageait le départ. Malheureusement, je trouve que les politiques	Yes, unfortunately, it's clearly one of our biggest challenges. I would give it a 5. The way the government approaches the video game industry here really pushes us to think about leaving. In fact, it almost feels like it encourages leaving. Unfortunately, I find that the current policies do not sufficiently support

	actuelles ne soutiennent pas suffisamment le développement de notre industrie. Parce qu'en fait, je donne des exemples. Vu que l'État suisse nous considère comme une discipline artistique et non pas technologique, par exemple, en fait, il ne nous affilie pas à des choses comme le EPFL, par exemple. Et donc, il n'y a pas de suite logique entre les écoles, la tech, l'innovation et le jeu vidéo. Et donc, on est laissé complètement sur le côté. Pour te donner quelques exemples, à chaque fois que je suis allé voir des accélérateurs à l'époque, maintenant la boîte à 10 ans, sur les dernières années, on nous dit que le jeu vidéo c'est pour les enfants comme le dessin animé, merci au revoir. Alors qu'en fait, tu es là, oui mais il y a peut-être des choses à faire avec l'EPFL, le ETH, l'HEG. Parce que nous, par exemple, ce qui nous empêche aussi de monter, c'est qu'on manque beaucoup de business. On manque de gens, par exemple, d'HEC qui viennent dans les studios faire du biz dev. Et en fait, la France, la Suède, etc., ils font activement ces liens-là. Parce qu'en fait, vu qu'ils essaient de faire un développement industriel, ils créent ces liens entre les structures. Et nous, ça ne se crée pas. Et oui comment je t'ai avant tu as besoin de studios qui sont sains pour créer des gens et des employés qui vont pouvoir rester sur le marché suisse, tu vois. Et nous malheureusement à l'heure actuelle nous n'avons pas de gros studios, ça va être difficile pour eux s'ils veulent vraiment se développer, travailler sur de gros projets, c'est très difficile de faire ça ici, parce que ta pas trop d'opportunité. Et si t'est un développeur indépendant qui a des rêves, des ambitieux et que tu te lances ici, à moins que t 'est bien soutenu financièrement c'est très compliqué, parce que le coût de vie il est énorme et le gouvernement ne fait pas des mesures spéciales pour toi. C'est pour ça que très souvent les nouveaux diplômés, des personnes talentueux préfèrent partir à l'étranger car là-bas, ils peuvent se développer, ils ont beaucoup plus d'opportunité, des plus gros projets. Tu vois si ta la chance de travailler avec un Rockstar, un Ubisoft, tu ne vas clairement pas hésiter une seule seconde, et c'est assez normal. Et, souvent, des pays comme la Suède, la France, ils sont aussi plus soutenus financièrement et politiquement et ça fait vraiment toute la différence. Surtout, quand tu commences ta carrière.	the development of our industry. For example, the Swiss government considers us as an artistic discipline rather than a technological one, so we are not affiliated with institutions like EPFL. Therefore, there is no logical connection between schools, tech, innovation, and video games. We are completely left on the sidelines. To give you some examples, every time I approached accelerators in the past – now the company is 10 years old – they told us that video games are for kids, like cartoons, thank you and goodbye. However, there might be things to do with EPFL, ETH, and HEG. What also prevents us from growing is the lack of business expertise. We lack people from HEC who come into studios to do business development. Countries like France and Sweden actively create these links because they are trying to develop an industry, they build these connections between structures. Here, we don't. As I mentioned before, you need healthy studios to create employees who can stay in the Swiss market. Unfortunately, at the moment, we don't have big studios, and it's going to be difficult for them if they really want to develop and work on big projects. It's very hard to do that here because there aren't many opportunities. If you're an independent developer with big dreams and ambitions starting out here, unless you have strong financial support, it's very challenging because the cost of living is high and the government doesn't make special provisions for you. That's why very often new graduates and talented people prefer to go abroad where they can develop more opportunities and work on bigger projects. If you have the chance to work with Rockstar or Ubisoft, you won't hesitate for a second, and that's quite normal. Additionally, countries like Sweden and France receive more financial and political support, which makes all the difference, especially when you're starting your career.

QP07G	Oui, je dirai un 4 sur 5. Surtout au niveau du prototype financier, au-delà du jeu. Je pense qu'en Suisse on sait faire des jeux maintenant. Se dire que, par exemple, je pense sur deux axes. Un, que l'État aide, poste, après 7 ans, les studios à dire « ok, si vous êtes sûr, on va dire, le edge de réussir, tu vois, on vous soutient pour ces derniers sprints » et que les studios, là c'est aussi un effort de tous de notre part, c'est d'arrêter de vouloir faire des jeux uniques, tu sais, et se lancer aussi dans des suites où intégrer un peu plus les business models dans nos réflexions, tu vois. Parce que je sais que pour côtoyer tous les devs, on a tous cette sale tendance de ne pas vouloir du tout parler business sauf que ça reste un produit culturel et que si tu ne penses pas à ton business en amont, tu perds beaucoup d'opportunités. Des trucs tout bêtes par exemple, tu décides de faire un jeu, tu ne penses pas du tout au marketing de ton jeu, tu ne penses pas du tout à créer des choses visuellement dans ton jeu qui vont faire vendre. Et donc, tu vois, c'est des réflexions que tu dois avoir si tu veux que ça buzz et que tu veux qu'on le voit partout, que Steam te le mette en avant ou Nintendo, etc. Et il y a tout un aspect aussi de développement de partenariat. Tu ne peux pas juste faire ton jeu, il faut que tu ailles sur les salons, que tu ailles faire des propositions, que tu montes des business plans, que tu montes des modèles de financement ou des modèles de revenus chers, etc. Il y a toute une partie biz dev qui doit être faite. En gros, tu peux créer un jeu cool et tout, mais il y a aussi surtout comment tu le finances et les modèles de financement que tu utilises. Et nous, ici, on a tendance à prototyper des bons jeux, mais on n'a pas tendance à parler de comment est-ce que tu le finances, quels sont les modèles, parce qu'en fait, par exemple, c'est plutôt des gens type HEC qui ont ce genre de connaissances. Et vu qu'il y a très peu encore de gens de ce profil-là, c'est ça qui crée ce genre de situation. Nous, je sais par exemple qu'avant qu'on amène notre premier producteur dans la boîte, pendant des années, on passait complètement à côté de ça. Et ce qui nous a permis d'avoir de la croissance, c'est justement d'amener quelqu'un qui venait du management et du business dev et qui nous a complètement radicalement changé. C'est parce que nous, je pense, c'est encore une question de culture, parce qu'on forme des pays de banquiers et c'est un peu mal vu d'être peut-être dans le gaming. Enfin, ils	Yes, I would say a 4 out of 5. Especially regarding the financial aspect beyond just the game itself. I think in Switzerland, we know how to make games now. But we need to focus on two main points. First, the government should help studios that are close to succeeding. They could provide support for those final stages. And second, from our side, we need to stop wanting to make unique games all the time. We should consider making sequels or integrating business models more into our thinking. Because, you see, interacting with all the devs, we all have this bad habit of not wanting to talk about business at all. But it remains a cultural product, and if you don't think about the business side from the start, you lose a lot of opportunities. Simple things like deciding to make a game without thinking about its marketing, without creating visually appealing elements that will sell. You need to have these considerations if you want your game to buzz, to be seen everywhere, for Steam or Nintendo to feature it. There's also the aspect of developing partnerships. You can't just make your game, you need to go to conventions, make proposals, create business plans, and develop financial models or revenue models. There's a whole biz dev part that needs to be done. In essence, you can create a cool game and everything, but there's also how you finance it and the models you use. Here, we tend to prototype good games, but we don't tend to talk about how you finance them, what the models are. For instance, this knowledge is more common among people with business degrees like HEC. And since there are very few people with that profile, it creates this kind of situation. I know, for example, that before we brought our first producer into the company, we completely overlooked this for years. What allowed us to grow was bringing in someone from management and business development, which radically changed our approach. I think it's still a cultural issue because we come from a country of bankers, and maybe being in gaming is seen negatively. They view it more as a geek world, in my opinion. And this perception needs to change, starting with the government. We're not recognized enough, you see it's always the same problem.

	voient plus ça comme un monde du geek, j'ai l'impression. Alors que ça, ça passe par le gouvernement, je pense. On n'est pas assez reconnus. Tu vois toujours le même problème	
QP08G	C'est impossible à dire parce que ça dépend vraiment du type de jeu, mais je peux te dire pour les nôtres, en tout cas. Tu prends un toboggan, tu vas avoir pour 1,1 million pour faire le jeu. Et la contribution de l'État, c'est 40 000 CHF. ils te donnent 40'000 CHF tout d'un coup et c'est terminé. Par contre, moi, ça fait plusieurs années que je n'ai plus le droit à l'aide parce qu'on est sorti de la période vu que nous, on a plus de 10 ans maintenant. Du coup, tu vois que sur un jeu 1,1 million, leur contribution c'est 40'000 CHF, c'est absolument. Tu ne peux rien faire avec une telle somme. La contribution est très minimale, c'est juste pour montrer qu'ils ont contribué à quelques choses mais voilà rien de plus quoi. En fait, le gros problème c'est qu'ils sont encore à vouloir chercher leur marque. Mais vraiment, ils essayent. Je pense que le problème ne vient pas de Pro Helvetia, parce qu'eux, tu vois, ils sont super motivés. Eux, ils font tout ce qu'ils peuvent avec ce qu'ils ont. Le souci vient plutôt du niveau fédéral. En vrai, je pense que c'est simplement parce qu'on a un magnifique pays que j'adore, mais on est un peu lent sur certains sujets. On pend beaucoup de temps à saisir les opportunités. Pour le financement d'un jeu, ça se passe de plusieurs manières, on va dire, ça peut dépendre aussi où on va et de différents types de jeux, mais oui, un des schémas traditionnels c'est faire un prototype de son jeu sur plusieurs mois voire années pour certains, aller sur un salon, rencontrer plusieurs éditeurs jusqu'à ce que quelqu'un ait dans son portfolio ou son catalogue une ouverture pour ce type de jeu et donc vont nous financer. Quand ta un éditeur qui te finance le jeu, c'est beaucoup plus simple, parce que ta les moyens, il va s'occuper du commercialiser ton jeu. Une fois que ta un peu tes preuves dans l'industrie ta fait quelques projets, t'arrive à avoir la confiance d'un investisseur. Mais, c'est vrai que les premiers projets, c'est très compliqué. De toute façon, c'est toujours une question d'argent parce que le marketing, ça coûte hyper cher. Donc, tu vois, typiquement pour notre dernier on s'est associé avec un bon éditeur, on a eu des versions physiques, on a eu des bons features et tout, et on a travaillé avec un assez grand éditeur, et même là, tu vois, même eux, ils étaient à court de ressources au bout d'un moment, tu vois. Donc	It's impossible to give a definitive answer because it really depends on the type of game, but I can tell you about ours, at least. For example, a project like "Toboggan" would cost around 1.1 million CHF to develop. The government's contribution is 40,000 CHF. They give you 40,000 CHF all at once, and that's it. In my case, I haven't been eligible for this aid for several years now because we've been in business for more than 10 years. So, you see that for a 1.1 million CHF game, their contribution is just 40,000 CHF, which is absolutely insufficient. You can't do much with such a small amount. The contribution is very minimal; it's just to show that they've contributed something, but it's nothing substantial. The main issue is that they're still trying to find their footing. However, they are trying. I think the problem doesn't come from Pro Helvetia, because they're super motivated and do everything they can with what they have. The issue is more at the federal level. Honestly, I think it's just because we have a wonderful country that I love, but we're a bit slow on some issues. We take a lot of time to seize opportunities. For financing a game, it can be done in various ways, depending on where you go and the type of game. One traditional route is to create a prototype of your game over several months or even years, attend a trade show, and meet with several publishers until you find one who has an opening in their portfolio for your type of game and is willing to finance it. When you have a publisher financing your game, it's much easier because you have the means, and they will handle the commercialization of your game. Once you've proven yourself in the industry with a few projects, you can gain the trust of an investor. But, it's true that the first projects are very challenging. It's always a question of money because marketing is extremely expensive. For our latest project, we partnered with a good publisher, had physical versions, good features, and worked with a fairly large publisher. Even then, they ran out of resources at some point. This shows how even a large group with big AAA games faces resource limitations. So, you can imagine for a dev studio, it costs a fortune. When you don't have substantial funding

	ça te montre aussi à quel point même un grand groupe, et pourtant, tu vois, ils avaient des immenses jeux et triple A etc.., tu vois. Donc tu t'imagines pour un studio de dev, ça coûte les yeux de la tête, quoi. Et quand ta pas un grand financement derrière, tu dois prendre des risques comme tu te verses pas de salaire pendant un certain temps, ou ils travaillent à côté et ensuite ils investissent leur économie dans leur projet, il y a le crowd-funds. Il y a vraiment de tout. C'est vrai que le financement c'est compliqué. Mais si ta un très bon prototype, tu vas dans un salon et tu peux le convaincre. Mais, c'est sûr que même pour développer un prototype ça un coût et là typiquement ça serait intéressant d'avoir l'aide du gouvernement, typiquement.	behind you, you have to take risks like not paying yourself for a while, working a side job, and then investing your savings into your project. There's also crowdfunding. There are many ways to approach it. It's true that financing is complicated. But if you have a very good prototype, go to a trade show, and can convince someone, you might succeed. However, developing a prototype also has costs, and that's where government support would be really helpful.
QP09G	Oui, très clairement. C'est ce que je te disais avant avec le fait que la manière dont ils nous perçoivent conditionne la manière dont on peut collaborer. Et donc, tant qu'on sera vu comme un petit truc à côté, personne ne prendra ça au sérieux. Et c'est dommage parce qu'au final, ce qu'on fait tous, c'est qu'on engage massivement à l'étranger. On a une fuite même des revenus au-delà des cerveaux. La majorité de la team est à l'étranger. Elle est en France, par exemple. C'est dommage. Du coup, ça clairement un impact. Cela ne fait aucun doute que pour pouvoir développer l'industrie, il faudra un plus grand engagement du gouvernement, sinon ça va être compliqué de développer l'industrie.	Yes, absolutely. As I mentioned earlier, the way they perceive us determines how we can collaborate. As long as we're seen as a small, insignificant sector, no one will take it seriously. And that's a shame because, in the end, what we're all doing is heavily relying on foreign talent. We're not only experiencing a brain drain but also a revenue drain. The majority of our team is based abroad, for example, in France. It's unfortunate. This clearly has an impact. There's no doubt that to develop the industry, we will need greater government involvement. Without it, it will be very challenging to grow the industry.
QP10G	-	-
QP11G	Je ne pense pas que c'est pas une bonne idée, surtout pour les petits développeurs, c'est un marché très compliqué. Si tu veux, à la base, on a débuté dans le mobile et on y est resté plusieurs années. On a débuté dans le mobile premium, donc payant. On y est resté jusqu'en 2019, jusqu'à l'arrivée de l'Apple Arcade. On a travaillé avec Apple, on a fait un jeu en collab avec eux pour le lancement de leur service. On était au line-up du projet. Et donc ça a été nos premières années, c'était simplement business assez simple, le business model du mobile premium. Et en gros, on a décidé de quitter le mobile parce qu'en fait, quand on a vu ce qui se passait avec l'Apple Arcade, donc un changement de paradigme au niveau du marché, on a décidé de pivoter parce qu'en fait, on était en train de se déplacer vers du marché freemium parce qu'en fait, Apple notamment, qui a été 95% de notre source de revenus, tu vois, pour nous, on aurait dit que ça ne payait pas énormément en premium. En fait, on avait des soucis parce qu'Apple, évidemment, quand ils ont voulu pousser son service, ils ont voulu cacher tous les jeux premium du store. Et donc, en fait, ça devenait quasiment impossible d'avoir de la visibilité sans être dans l'Apple	I don't think it's a good idea, especially for small developers, because it's a very complicated market. Initially, we started in mobile and stayed there for several years. We began with premium, paid mobile games. We stayed until 2019, until the arrival of Apple Arcade. We worked with Apple and developed a game in collaboration with them for the launch of their service. We were part of the line-up for the project. In our early years, it was quite simple business-wise with the premium mobile model. However, we decided to leave the mobile market because of the paradigm shift with Apple Arcade. Apple, which was 95% of our revenue source, wasn't paying much for premium games. They started hiding all premium games from their store to push their service, making it almost impossible to gain visibility without being on Apple Arcade. The problem was we didn't want to depend on Apple Arcade because we knew it wouldn't perform well, which turned out to be true. The revenue wasn't based on the number of players but was a fixed amount defined by Apple. This

	Arcade. Et le problème, c'est qu'on ne voulait pas être dépendant de l'Apple Arcade parce qu'on savait que ça n'allait pas très bien marcher, ce qui fut le cas. Et donc, les revenus n'étaient pas basés sur le nombre de joueurs que tu avais. C'était un revenu fixe qui était défini par Apple. Et ce revenu, en fait, en trois ans, il a été divisé par 15 peut-être. et donc on savait que c'était pas sustainable de rester là-dessus, donc on a pivoté avec ce jeu-là justement, on a réussi à récupérer les droits, on a pivoté vers le jeu console et PC quoi. Mais honnêtement je dirai non . parce que aujourd'hui le marché du mobile, c'est devenu ingérable. Le marché a tellement changé que maintenant, il faut des investissements massifs. Je peux te donner un truc tout bête, mais vu qu'on a commencé là-dedans, c'est que tu vois, au tout début, quand on faisait du mobile, tu avais 5, 3, 4, 5 devices à tester, tu vois. Maintenant, tu as tellement de versions d'iPad, d'iWatch, d'iPhone, d'iPod, etc., que même si tu veux sortir sur Apple, il te faut que tu achètes 50 à 60 appareils, tu vois, et que tu aies des tests réguliers pour faire tourner une app, tu vois. Et en fait, c'est juste la barrière à l'entrée est devenue, tu vois. Elle est trop forte quoi.	revenue decreased significantly over three years, by about fifteen times. So, we pivoted to console and PC gaming, recovering our rights to our game in the process. Honestly, I would say no to mobile gaming today. The market has become unmanageable and requires massive investments. For example, at the beginning, you needed to test on just 3 to 5 devices. Now, you have so many versions of iPads, iWatches, iPhones, iPods, etc., that even if you want to release on Apple, you need to buy 50 to 60 devices and conduct regular tests to ensure the app runs smoothly. The barrier to entry has become too high.
QP12G	En fait, je pense que c'est vraiment globalement, déjà, je pense l'État surtout. Comme je disais, je pense que l'État doit vraiment prendre la décision de s'investir dans l'industrie, une fois que l'État aura décidé d'investir au plus haut niveau, vraiment traiter le domaine comme un autre, je pense que là, ça réglera le problème. Je pense qu'il va y avoir une opportunité qui va se lever, c'est simplement il faut un soutien de l'État continu, et si l'État , je pense qu'on a les talents largement, il y a une vraie culture suisse, tu vois, il y a une forme d'excellence en Suisse, je pense en tout cas, des écoles comme le ETH, le EPFL et tout ça, je pense que si la Suisse donne plus de moyens et crée plus de liens, ce serait la recette pour que ça décolle. Et surtout que la Suisse décide de traiter le jeu vidéo comme un des domaines de l'innovation. Surtout la tech, tu sais. Comme tu aurais FinTech, mais tech, biotech, gaming, tu vois. Et là, ça changerait complètement le paradigme. Ça changerait sur plusieurs axes. Tout d'abord, ca changerait la donne sur le plan financier, parce que les enveloppes sont beaucoup plus grandes pour ces domaines-là. deux sur le coaching, ils ont accès, moi j'ai fait des formations à l'EPFL en justement en CTI donaxesc tech normal et il y a du coaching de malade tu vois avec des gens au niveau du business de malade et en fait tu vois rien que ça nous on passe complètement à côté de cette connaissance et après il y a la mise en relation c'est-à-dire que par exemple si tu prends	Actually, I think the main issue is the state's involvement. As I mentioned before, the government really needs to decide to invest in the industry. Once the government decides to invest at the highest level and treat the sector like any other, I think that will solve a lot of problems. There will be an opportunity arising with consistent state support. We have a lot of talent here, and there's a true Swiss culture of excellence, especially with schools like ETH and EPFL. If Switzerland provides more resources and fosters more connections, that would be the recipe for success. Switzerland needs to treat video games as one of the innovation sectors. Think of it like FinTech, Biotech, and Gaming. This would change the paradigm completely. Financially, the funding for these sectors is much larger. Additionally, there's the coaching aspect. I've taken courses at EPFL, and the business coaching is exceptional. We miss out on this kind of expertise. And then there's networking. Institutions like Swissnext promote Swiss tech, biotech, and medtech globally, but they don't promote video games. As I mentioned earlier, we need larger studios. Having big gaming studios in Switzerland

	Swissnext ou toutes les institutions suisses qui promeut la tech suisse tu vois ou la biotech medtech etc elle est partout dans le monde et elle est très forte tu vois et ben en fait elle promeut pas le jeu vidéo. Après, comme je t'ai dit, il nous faudrait des plus grands studios. Avoir des grands studios de gaming ici en Suisse, ça changerait vraiment la donne. Imagine un peu : plus d'influence sur la scène internationale, la possibilité de lancer des jeux qui pourraient devenir des hits mondiaux. Si on avait deux ou trois gros studios, ça pourrait vraiment booster l'industrie du jeu vidéo chez nous, et ça prendrait pas longtemps à démarrer un peu comme ce fut le cas avec la Suède. Tu vois la Suède elle a quasiment la même population et le même niveau de vie que nous bah tu vois ils ont réussi à faire parce que ils ont vraiment eu deux trois énormes studios type King studio, Mojang etc. et donc eux ont réussi justement à créer une grosse industrie juste parce qu'ils ont quelque acteurs hyper massifs. Dice, par exemple, ça emporte avec lui la moitié de l'industrie suédoise. Du coup, ça clairement un gros impact qu'on n'ait pas de grands studios dans le pays, mais pour que ça marche, il nous faut vraiment plus de reconnaissance et un plus gros coup de pouce du gouvernement. Parce que c'est impossible de faire un projet de ce type à l'heure actuel parce que tout coûte beaucoup trop cher en Suisse. Des grands studios, ça veut dire plus d'emplois, plus d'opportunités, et franchement, ça pourrait donner un sacré coup de boost à notre économie, surtout avec le potentiel qu'a l'industrie du jeu vidéo aujourd'hui. Et puis, quand t'as des gros studios, c'est quand même plus simple d'avoir de la reconnaissance et l'aide du gouvernement. Ils voient le succès, ils voient les retombées économiques, et du coup, ils sont plus enclins à soutenir l'industrie.Après, tout peut se créer d'un petit truc tout bête. Moi, je suis très positif sur le fait que peut-être dans une année ou deux, on va d'un coup avoir un gros succès massif qu'on n'attendait pas, et d'un coup, ça va booster l'industrie. Un point qui serait important c'est la stabilisation des studios. Nous, dans notre board, on a plusieurs personnes de l'industrie, notamment un Canadien, tu vois. Et justement, il nous expliquait que c'était comme ça qu'il fallait faire et c'est pour ça que nous, par exemple, là, on est en train de stabiliser une ligne de prod où on a la suite de notre dernier jeu, tu vois. On commence à faire des suites maintenant pour stabiliser économiquement le studio et pour pouvoir voir sur 5-10 ans avec de la croissance, multi-projets, etc. Je pense que stabiliser, ouais, c'est la prochaine grosse étape pour beaucoup des studios, ouais. Et que la Suisse pourrait nous aider à faire ça, d'ailleurs.	would really change things. Imagine the influence on the international scene and the potential to launch games that could become global hits. If we had two or three big studios, it would really boost our gaming industry, similar to what happened in Sweden. Sweden, with a similar population and standard of living, managed to establish a massive industry with a few huge studios like King and Mojang. Dice alone represents half of the Swedish gaming industry. The lack of big studios here has a huge impact. For this to work, we need more recognition and a bigger push from the government. It's impossible to undertake such projects currently because everything is too expensive in Switzerland. Big studios mean more jobs, more opportunities, and it could significantly boost our economy given the potential of the gaming industry today. Plus, when you have big studios, it's easier to gain recognition and support from the government. They see the success and economic benefits, and they're more inclined to support the industry. I remain optimistic that in a year or two, we might have a massive, unexpected success that will boost the industry. Stabilizing the studios is also crucial. In our board, we have several industry professionals, including a Canadian who explained that stabilization is key. We are currently working on stabilizing our production line by developing sequels to our last game. We are starting to create sequels to stabilize the studio economically and to plan for 5-10 years with growth and multiple projects. Stabilization is the next big step for many studios, and Switzerland could help us achieve that.

Appendix 9 – Interview transcription - Respondent H

Code	Response
QP01H	I think it would be really impactful to have those big studios here. It would raise awareness that the gaming industry actually exists in Switzerland. When you look at countries like the United Kingdom or France, they have a much bigger and more present gaming market, and there's a lot of awareness around it. Today, the countries that are the most influential in the video gaming industry all have a few big studios. We are definitely missing that here in Switzerland. Having a few big AA studios would be really good. I would rate this need a 4 out of 5. For publishers, I feel it's also a problem. It's not the biggest issue, but it would definitely be easier if we had Swiss publishers. They would understand us better, know how we work, and they'd be close by, so if something goes wrong, we could meet them directly. It's about having that local connection and understanding, which would make things a lot smoother. So having an insight publisher would mean that, I don't know, the youth in the industry would need to struggle less to, you know, kickstart their studio and basically start developing games instead of looking for funding in other countries. If I am not wrong I think Stray Fawn Studio is aiming to get into publishing, so that could be really interesting for the industry. We definitely need more publishers here in Switzerland. So I will give a 3. I feel like we are struggling to get awareness and I think one of the main reason is that the value chain is quite inexistant. If you compare with France that has value chain which is much more complete than us, or Germany. I will give a 2. I think we definitely need some big studios and it will be good to have some impactful publisher inside the country.
QP02H	Honestly, the ecosystem isn't bad; I'd give it a 2.5 out of 5. We've got some good schools and a few really solid video game festivals. But where we really need to step up, in my opinion, is with government support. There's a clear lack of contribution from the government, and it's holding the industry back globally.
QP03H	I feel like here the government doesn't participate that much. That's probably the biggest issue. For example, if you take the UK or Germany, their governments contribute so much more. They've invested a lot of money and provide much more support to their developers than we get here in Switzerland. Here, we are kind of limited by the lack of support. In those countries, they typically help finance game development, offer better tax incentives, and support studios in many ways. They often cover a percentage of salaries during game development. They have support systems that we just don't have here. I'd give it a 2 out of 5.
QP04H	I will give a 4. It has a big impact . I think it will definitely raise awareness. However, I don't think that AAA is the best solution. It's good to have one or two big titles, like your Witcher or GTA, but beyond that, AAA production can be tricky. Things can go very wrong with AAA projects, and having many AAA studios isn't necessarily the solution. I believe the focus should be more on AA studios and AA games, the middle ground where people feel comfortable and don't have to push out low-quality games just to pay the thousands of people working for them. It's a balance between economics and politics, but it's complicated. So here we have some indie developer so I think it will be very good if we have few AA studios, it will be the perfect mix.
QP05H	I think it has a huge impact. I'd rate it a 5. Everything here is two to three times more expensive than in other countries. So, this makes it really tough for indie developers and small studios to survive. Developing a game costs us a lot more because of the high salaries and other expenses. So, yeah, it's clearly a big challenge.
QP06H	Yes, that's true. I'd rate this issue a 4 out of 5. When you are developer basically you are businessman. You need to think about everything. It's true that a lot of people neglect one of the most important parts, which is the marketing aspect. We're often too focused on

	developing a good game. Creating a good game that gets positive reviews is great, but if nobody buys it, your project will be a big failure. So you need to consider all these factors. That's a very important point. In the current situation, developers need to have business skills because the market is so competitive and saturated. You need good leadership, and you need to be good in negotiation and marketing to survive, especially if you're self-publishing.
QP07H	well, you know, it's not cheap, I would say. I would say that I don't know, it could be somewhere between, well, you take in account the number of years you work on a project, right? And the number of people, and you need to arm yourself with patience and think that you need to support yourself for, let's say, three to four years and other people. And let's say you have a core team of three people for four years who do the math. It's not cheap. It's not at all cheap. So, we would move already far away from 200,000. It's much more than that. I will say approximately 400,000 for a good game. Depending on the gaming it can be 1 million as well. Well, as I said before, I think we should get more funding. So even if Pro Helvetia and other organisms, support us, I have to say that the money is not at all reaching even the minimum of the 400,000 that you sell before. It's just a help. It's not a means to develop a game. And this is where I think, again, maybe big spenders should look at us, and maybe those big spenders could be influenced by government and by some governmental, decisions. What are those? I don't know. It's not my domain, politics and sociology. But it's clear that we need more attention from the government. We need more attention from the people who have the money.
QP08H	well, you know, it's not cheap, I would say. I would say that I don't know, it could be somewhere between, well, you take in account the number of years you work on a project, right? And the number of people, and you need to arm yourself with patience and think that you need to support yourself for, let's say, three to four years and other people. And let's say you have a core team of three people for four years who do the math. It's not cheap. It's not at all cheap. So, we would move already far away from 200,000. It's much more than that. I will say approximately 400,000 for a good game. Depending on the gaming it can be 1 million as well. Well, as I said before, I think we should get more funding. So even if Pro Helvetia and other organisms, support us, I have to say that the money is not at all reaching even the minimum of the 400,000 that you sell before. It's just a help. It's not a means to develop a game. And this is where I think, again, maybe big spenders should look at us, and maybe those big spenders could be influenced by government and by some governmental, decisions. What are those? I don't know. It's not my domain, politics and sociology. But it's clear that we need more attention from the government. We need more attention from the people who have the money.
QP09H	Yes, definitely. I think the government should pay more attention to this industry. The term "games" might not sound serious to some people, but it's a significant industry with a lot of potential. The government should be more focused on funding and creating a friendlier environment for new companies, maybe offering tax exemptions or reductions for the first few years. When I started my own company, Violet Saints, I didn't find any options for paying less in taxes as a newcomer. I think It would really help if the government made it easier for indie developers and beginners by offering some financial relief and incentives.
QP11H	I think it is not a good idea for swiss developers to focus more on the mobile market just because it is the highest segment. The business model is so complicated and it is highly competitive market. If you have enough money why not ? Otherwise it is going to be complicated to distinguish from that market. But I believe that a studio should do what they're good at. I strongly believe in making products that represent you and not doing stuff just because it works well for others, especially in the game market. This is how copycats appear, and quality goes down. If you love making mobile games, have a passion for them, and understand how they work, then be a great studio that does mobile games. But if you don't know much about mobile games and no one in your team does, and you just decide to copy what successful studios do, then I think that's a bad idea.

QP12H	Definitely. I believe that government support will be the key element for pushing our industry to the next level. If the government becomes more supportive, similar to those in Germany or the UK, we have a high chance of attracting some big studios to set up here. But to make that to happen, the government needs to provide huge economic and political support, such as offering more funds, covering salary payments, and providing better incentives. You know, Switzerland is one of the richest countries in the world, and the government has the potential to make a significant impact if they decide to invest in this industry. With stronger government backing, we could develop a better ecosystem and potentially establish a few big studios here in Switzerland. This could transform Switzerland into a true video gaming hub. And as we discussed, we should on producing high-quality games, especially more AA games, this would help us to gain global awareness and visibility. You just need a few big worldwide hits, and I am confident that the government will then recognize the Swiss video gaming industry more. To achieve this, we need to keep pushing and creating great games to attract attention. This will encourage the government to take us seriously and provide the necessary support to help newcomers grow in this industry. One of the most important aspects is ensuring that young developers feel safe and motivated to create games in Switzerland. And we should make sure that they stay here. But for that, we need a robust Swiss video gaming ecosystem and in order to achieve that we need the support of governement