SCOTLAND
THE PERFECT PLACE
TO PLAY

#SCOTLANDISNOW

SCOTLAND

WELCOME TO
SCOTLAND
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WELCOME TO SCOTLAND: the small country making a big impact on the global gaming landscape.

Scotland is where you will find excellence in education, a flair for invention and a passion for research. It's a place where great minds connect to produce a dynamic games environment.

We've been at the vanguard of video gaming innovation for over 25 years. In fact, did you know the world's biggest entertainment franchise of all time, Grand Theft Auto, was born in Scotland?

Other global successes include Lemmings, Crackdown and Minecraft for Microsoft, Sony and Nintendo consoles. More recently, Scotland has given the world mobile megahit Angry Birds POP! and the critically acclaimed adventure-puzzler Observation.

These have been borne out of a vibrant, connected games environment, supported by institutions such as Abertay University. The number-one university in Europe for video games degrees for the last seven years, Abertay also recently ranked in the world's top ten universities for postgraduate video games education by the Princeton Review.

By locating in Scotland, you'll access a highly educated, skilled workforce with a strong work ethic. And, with 16 of our 19 universities and higher education institutions offering games-related courses, you can take advantage of a steady stream of tech-savvy graduates with relevant qualifications.

You'll be connected to a culture of innovation and creativity through academic institutions such as Abertay University and the Glasgow School of Art, both of which have an outstanding record of industry collaboration.

Beyond the office, Scotland is a land of great natural beauty and strong heritage, and our warmth and generosity are world-renowned. Our friendly communities offer an exceptional quality of life, while progressive government policies strive to make Scotland an even fairer and better place to live and work for everyone.

We'd love you to join the many global businesses that choose to locate, operate and grow in Scotland alongside our ambitious local companies.

We're here for you throughout the journey – you will be supported before, during and after you locate in Scotland.

Now is the time to invest in Scotland. So, come on in – let's play.

SCOTLAND'S OPPORTUNITY

When it comes to games, Scotland is the ideal place to locate, create and innovate.

ARTIFICIAL INTELLIGENCE

There are opportunities for global companies looking to innovate around artificial intelligence – particularly, machine learning and deep learning – to create more immersive, realistic and personal experiences for gamers. You'll discover a highly diverse and capable company base in a developed and well-connected ecosystem, and will be supported by The Data Lab, Scotland's innovation centre for data and artificial intelligence.

MOBILE GAMING

The new Scotland 5G Centre has put our nation at the forefront of mobile communications innovation. This national hub is supporting growth in the games, virtual reality and interactive entertainment sector through experimental testbed initiatives. Did you know the UK's largest mobile developer, Outplay Entertainment, is based in Dundee? Opportunities exist for companies looking to capitalise on a robust infrastructure for applications including online gaming and livestreaming.

ESPORTS

Scotland has exciting opportunities for companies either active or interested in the rapidly growing esports sector. The city of Dundee, widely recognised as the birthplace of Scotland's gaming industry, is poised to become a national hub for competitive esports, with plans for a 4000 capacity purpose-built arena – the UK's first outside London – at Dundee Waterfront. The project is being supported by Abertay University, which plans to develop a new range of courses related to the global esports job market, meaning you'll have access to a stream of knowledgeable graduates with the specialised skills you need to further your business.
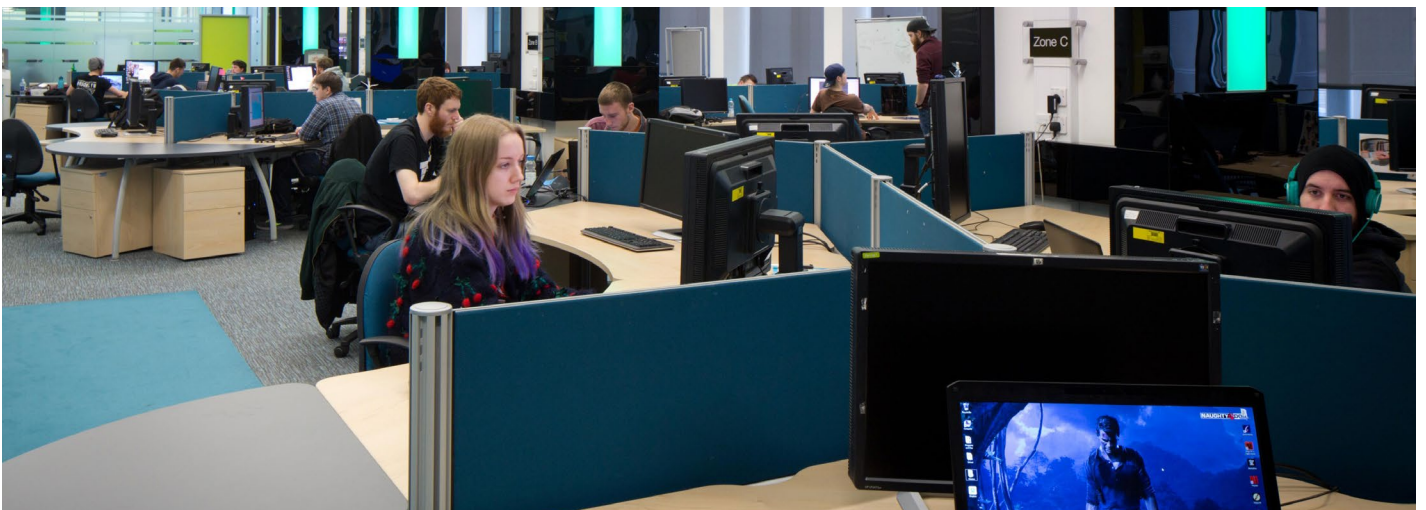
CREATIVE COLLABORATION

By locating in Scotland, you'll be connected to over 300 games development studios seeking out your skills, talent and creativity to complement theirs on a variety of exciting projects. Opportunities exist for companies specialising in areas such as audio engineering, animation, digital design and music production.

A MATURE DEVELOPMENT CLUSTER

When you invest in Scotland, you'll be embedded in a mature games development cluster with a breadth of development scale covering licenced, own IP and middleware. You'll discover new opportunities through access to an already well-established network of tech founders and mentors, and you'll experience a range of existing spillover benefits, including:

- An established network of highly skilled freelancers

- Deconstructed silos – access talent working across the creative industries

- Cultural investment

- Reinvestment of profits

- Political and media recognition

- Internationalisation.

SCOTLAND'S VALUES

Scotland is a progressive, inclusive and sustainable country where collective wellbeing is our top priority – and we want to work with companies like yours that share our values. Together we can enjoy a successful economy that delivers high productivity, high innovation, high levels of technology and high employment for the long term.

OUR VALUES

We're building a greener and fairer future for all, with values based on:

- **SUSTAINABLE AND INCLUSIVE ECONOMIC GROWTH**
  We consider health, happiness, equality and sustainability to be fundamental for a successful economy. You'll benefit from the long-term growth that comes from prioritising our people and our planet, thanks to our focus on collective wellbeing and opportunities for all.

- **NET ZERO**
  When you invest in Scotland, you are choosing to locate in a country which has set global standards for climate change, sending a clear message to your customers about your own green credentials and actions.

- **FAIR WORK**
  Our commitment to create good, green, well-paying jobs means you'll have access to a range of resources, funding and tools to support your fair and flexible working objectives.

When you choose Scotland, you can be part of this exciting future – we'd love to welcome you.

Fair Work

Net Zero

Inclusive Economic Growth

THE RIGHT TALENT FOR YOUR BUSINESS

When you choose Scotland, you'll have the world's best-qualified and highly experienced gaming talent on your doorstep. You'll find one of the largest centres of games development in the UK, employing over 1500 developers and another 3000 people indirectly.

And we're growing. According to the Independent Game Developers' Association (TIGA), the Scottish video games industry grew by 26% between April 2020 and December 2021 – beating the rest of the UK.

You'll benefit from a steady stream of graduates with relevant skills. Abertay University in Dundee launched the world's first named computer games degree and now offers a range of undergraduate and postgraduate courses specialising in video games. Graduates have gone on to work for the biggest names in the industry including Sony, Microsoft and Electronic Arts.

We are also future-proofing skills through digital skills academies which ensure companies like yours have access to the skills you need.

And with school, college and apprenticeship pathways in digital technology and gaming qualifications, our education system is developing a pipeline of talent for your business.

By choosing Scotland for your games project, you'll find a cohort of ambitious, passionate and globally connected leaders, and have access to:

Around **76,000** highly skilled people already working in digital technology roles.

16 universities and higher education institutions offering over **175** computer science/game-related courses, 4 of which are Global Top 250 institutions.

Opportunities to hire someone new or develop existing employees through Modern and Graduate Apprenticeships including Software Development, Cyber Security and Creative and Digital Media.

The **UK's first** Centre for Excellence in Computer Games Education at Abertay University, a founding partner of Sony's PlayStation First programme.

Highly sought-after graduates from specialist university courses such as Computer Gaming Technology and Glasgow School of Art's Games & Virtual Reality programme.

Around **13,000** graduates at universities and higher education institutions each year in IT, engineering and mathematical sciences.

TECHNOLOGY EXPERTISE

Scotland has been at the forefront of technological innovation since the industrial revolution, and this continues at pace today. An ability to continually develop new solutions and products through outstanding academic and industry collaboration makes Scotland an ideal business location.

By locating in Scotland, you can access our expertise in:

- **Data analytics and live ops**
  Scottish companies such as ChilliConnect and DeltaDNA (now owned by Unity Technologies) excel at developing live ops platforms, monetising and analytics to personalise games to optimise revenue streams

- **EdTech**
  Educational gaming creates plenty opportunities to drive innovation, such as Robotical, which uses Marty the Robot to teach electronics, robotics, coding and more, and Skoog Music's assistive technology, bringing coding and music to life for children, parents and teachers

- **Facial animations**
  Scotland is leading the way in developing innovative lip synchronisation, facial expressions and behaviour technology to make characters more lifelike. Speech Graphics, a spinout of the University of Edinburgh's School of Informatics, has won numerous awards for its speech-driven facial animation technology

- **Gamification in healthcare**
  Scotland's strength in life sciences creates plentiful cross-sectoral opportunities. For example, Konglomerate Games' innovative product – designed in partnership with Microsoft – turns the daily chore of physiotherapy exercises for children with cystic fibrosis into a series of fun computer games

- **Microdisplays for VR**
  Microdisplay technology is driving immersive VR innovation in Scotland, with Forth Dimension Displays designing and manufacturing high-resolution near-to-eye microdisplays for military, medical and virtual reality imagers

- **Non-player AI character navigation**
  Scottish companies are creating more immersive, realistic worlds through advanced non-player AI. Edinburgh-based Kythera AI offers a complete AI solution for games, from 2D and 3D animation to automatic markup, spatial query system and advanced behaviours

- **Sound design**
  Based in the Scottish capital, Krotos specialises in software which allows users to easily perform and customise sound. Its award-winning product range, including the Dehumaniser, Reformer, Weaponiser, Igniter and Concept plugins, has become a gaming industry standard

- **Virtual Reality (VR) and Augmented Reality (AR)**
  Project Mobius, a £1 million collaboration between the University of Glasgow and Sublime Digital, is building a pioneering VR education platform to transform learning globally, by allowing higher education institutions to harness the power of learning behaviour data.

> "Scotland represents the fourth-largest games cluster in the UK. Scotland has a critical mass of experienced games developers and renowned universities preparing skilled graduates for the games industry, including TIGA-accredited Abertay University and supportive agencies including Scottish Enterprise and Creative Scotland."

> Dr Richard Wilson OBE
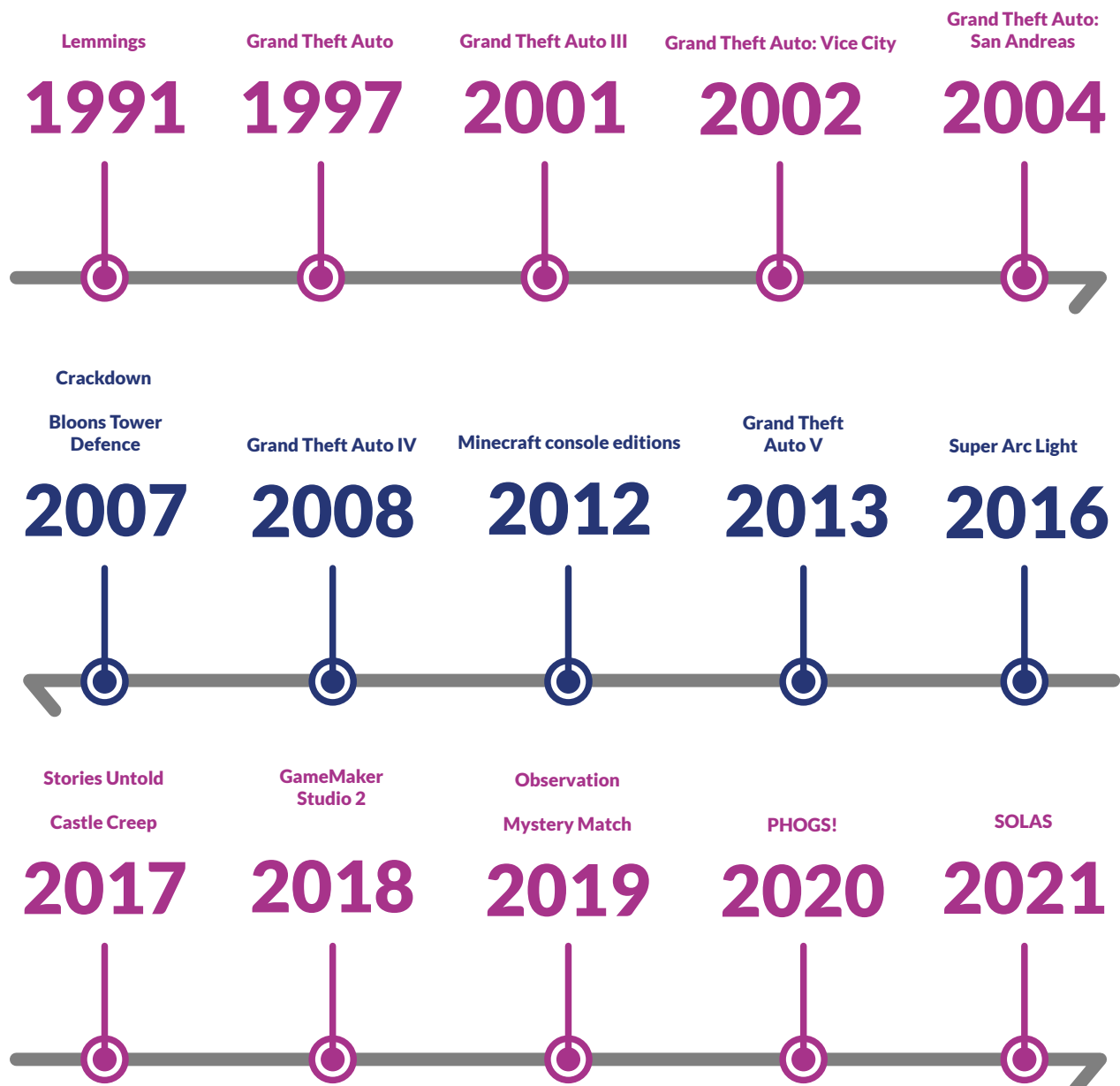> CEO of the Independent Game Developers' Association (TIGA)

A POWERHOUSE OF INNOVATION AND INVENTION

From the refrigerator and television to penicillin and the bionic hand, Scotland has a long tradition of innovation and invention.

The innate Scottish desire to innovate and change the way we work, live and play remains as strong today as it ever has been, as our curiosity and entrepreneurial spirit drive a constant thirst to do things differently.

Close collaboration between business, government and education underpins the games sector in Scotland and there are many examples of innovative partnerships drawing on world-leading research and expertise to develop, design and deploy new processes and technologies across the sector.

Standout deals completed in the first quarter of 2021 include the £94 million raised by Edinburgh-based games developer Build A Rocket Boy, founded by former Rockstar North president Leslie Benzies. The company is currently developing the open-world game Everywhere.

Lemmings	Grand Theft Auto	Grand Theft Auto III	Grand Theft Auto: Vice City	Grand Theft Auto: San Andreas
1991	**1997**	**2001**	**2002**	**2004**

Crackdown Bloons Tower Defence	Grand Theft Auto IV	Minecraft console editions	Grand Theft Auto V	Super Arc Light
2007	**2008**	**2012**	**2013**	**2016**

Stories Untold Castle Creep	GameMaker Studio 2	Observation Mystery Match	PHOGS!	SOLAS
2017	**2018**	**2019**	**2020**	**2021**

CENTRES OF EXCELLENCE

We're investing in the development of innovation centres and centres of excellence to help businesses do incredible things. We make the connections which result in transformational collaborations between industry and academia to support business performance through the rapid and efficient translation of solutions to industrial and scientific challenges – creating even greater value for companies like yours.

Here are just some of the centres of excellence that could help you grow your gaming business:

Emergent Technology Centre
The centre at Abertay University is home to experimental testbed initiatives for games and cyber security and boasts an extended reality (XR) lab for experimentation with room-scale VR, motion tracking and multi-user augmented projects

InGAME
A ground-breaking creative R&D centre driving product, technology and process innovation across the Dundee games cluster, InGAME offers a wealth of opportunities across themes such as usability, data-driven games design and sustainable creativity

School of Simulation and Visualisation (SimVis)
The Glasgow School of Art explores imaginative and novel uses of advanced 3D digital visualisation and interaction technologies. SimVis has a large portfolio of projects with business and industry in Scotland, the UK and Europe, centred on expertise in real-time 3D visualisation, 3D sound, modelling, motion capture and animation

Global Research Innovation Development (GRID) Centre
The centre at Heriot Watt University offers design solutions through its AR, VR and gaming studios. It also houses an Enterprise Hub to support business innovation, promote emerging technology and encourage staff and students to pursue the commercial potential of their creative ideas

The Alan Turing Institute
Pushing boundaries in pioneering technology, the Alan Turing Institute is making huge leaps in data science and artificial intelligence research

The Data Lab
The Data Lab drives Scotland's ambition to be the global leader in data innovation, enabling a network of over 1500 companies, universities and public sector organisations to collaborate

The Bayes Centre
The centre enables both the private and public sectors to enhance their products and services by embracing data science and AI, whether through supporting entrepreneurs and start-up projects or attracting external investments.

> "We're already seeing the benefits of our move to Scotland. The proximity to world-class universities as well as established and vibrant tech and gaming ecosystems allows us to hire a high calibre team. This has accelerated our platform roadmap as we continue to grow the organisation. The whole team is SUPER-EXCITED about the future."

Kristan Rivers
Co-founder and CEO of AdInMo

A SUPPORTIVE BUSINESS ENVIRONMENT

Invest in Scotland and you'll be connected to a culture of design, creativity and innovation within one of the UK's largest centres of games development.

You'll benefit from close connections to the best academic institutions, both in Scotland and abroad, and enjoy access to dynamic industry clusters and potential partners across a range of experienced studios working on mobile, online, educational and console markets.

You'll be supported by professional and industry bodies which make valuable connections to help you grow your business, and you'll find a full calendar of tech meetups, hackathons and events throughout Scotland. In addition to support from UK bodies such as the Independent Game Developers' Association (TIGA), the UK Games Fund, the Association for UK Interactive Entertainment (UKIE) and Innovate UK, by locating in Scotland you will also benefit from the expert support of the following Scottish organisations:

- **Creative Scotland** is the national body that funds and supports the development of Scotland's arts, screen and creative industries and acts as a conduit for cross-sector connection and learning

- **Scottish Game Developers Association** promotes our thriving games development industry and organises regular networking sessions to exchange insights and knowledge

- **The Scottish Games Network** is a focal point and community for Scotland's rapidly evolving interactive entertainment sector, covering academia, business, culture and consumer issues

- **The Scottish Animation Network** raises the profile of all animation produced in Scotland, from graduate films to studio production.

"Scotland is a phenomenal place to both visit and ultimately to live. We have some of the best universities in the world. There's no question that Scotland is one of the most connected places in the world."

Douglas Hare
Founder and CEO of Outplay Entertainment

A GLOBAL GAMING HUB

With a compact geography, engaged and connected industry leaders and active support from the Scottish Government, Scotland has a proven track record of gaming success. You'll benefit from a well-established and well-connected industry ecosystem, allowing you to take your company to the next level.

With clusters in Dundee, Edinburgh, Glasgow and beyond, you can rest assured that you'll find the right match for your company's requirements and the ideal environment for growth.

GLASGOW

is home to a large digital technology cluster, employing almost 34,000 people, and has been named the top cultural and creative centre in the UK. Boasting the top ranking in the UK's core cities for both the number of digital tech students and graduates, Glasgow offers the skills and talent your business needs. Key locations for gaming include:

- **Creative Clyde:** a flourishing riverside community for media, technology and creativity-oriented business ventures

- **The Whisky Bond:** a hive of creativity and productivity across seven floors of studios, offices, coworking and event spaces

- **Tontine:** high-quality and flexible workspaces for businesses in the enabling technology, advanced design and manufacturing and creative economy sectors.

DUNDEE

is renowned for its expertise in digital media and creative industries. Having gained international recognition as a UNESCO City of Design, Dundee has a solid design pedigree which has drawn many games investors to the area. Property options are varied and include:

- **Water's Edge:** offering flexible workspace with an eco-friendly focus, every office and meeting room at Water's Edge is equipped with super-fast scalable broadband and computer-controlled lighting, heating and cooling systems

- **Building 1 at District 10:** specifically designed for creative companies and constructed out of 37 recycled shipping containers, the distinctive building offers 15 office spaces

- **Seabraes Zone:** offering dedicated space for companies in digital media and the creative industries, Seabraes is a hub for Dundee's digital community.

"Dundee today has more games developers per head of population than anywhere on earth."

Chris van der Kuyl
Co-founder and chairman of 4J Studios

EDINBURGH enjoys a growing reputation as a global tech hub. The cultural ecosystem within the Scottish capital is also thriving, fuelled by an increasingly vital, energetic and connected creative community. Property options for your gaming business include:

- **CodeBase Digital Tech Hub:** the UK's largest technology incubator provides unrivalled community support, networking and access to mentors and venture capitalists

- **Techcube:** an integral part of Edinburgh's tech start-up success story, Techcube offers a collaborative business hub environment for fledgling companies to grow

- **WeWork, Edinburgh:** modern offices and coworking facilities in the heart of Edinburgh where you'll benefit from having views of Edinburgh Castle as a backdrop.

CONNECTED
TO THE WORLD

Invest in Scotland and you'll be close to some huge markets. Whether you're heading to London, Europe or the rest of the world, Scotland is well-connected for business travel.

6 AIRPORTS
connecting Europe, Middle East and North America

FAST AND FREQUENT
rail links to all parts of the UK

Daily **DIRECT FLIGHTS TO 150 DESTINATIONS**
worldwide

130 FLIGHTS PER DAY TO LONDON*
with a 1hr flight time

44 MINS journey time **BETWEEN GLASGOW AND EDINBURGH**
by train

Our **INTERNET OF THINGS NETWORK** has reached almost **100% COVERAGE** in Glasgow and Edinburgh, offering businesses access to smart technologies.

95% FIBRE BROADBAND COVERAGE, including all major cities in Scotland.

Our future-proofed fibre network makes Scotland one of the **BEST-CONNECTED PLACES** anywhere in Europe.

Scotland is ranked among the **TOP 30 COUNTRIES** and cities for digital connectivity.

* in ordinary times

GET IN TOUCH
WE'D LOVE TO WELCOME YOU

We aim to make it quick and easy for your business to settle in Scotland so we will help you to identify premises, academic partners and investment opportunities, recruit staff and access funding to upskill your staff, develop new products and services and access growth capital.

Working together, everyone from national government and local authorities to universities and advisors will make the connections which ensure your investment goes smoothly, so that you can focus on growing your business.

To find out why **#SCOTLAND**IS**NOW** for your company or to experience Scotland for yourself, get in touch and we will be happy to help.

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