

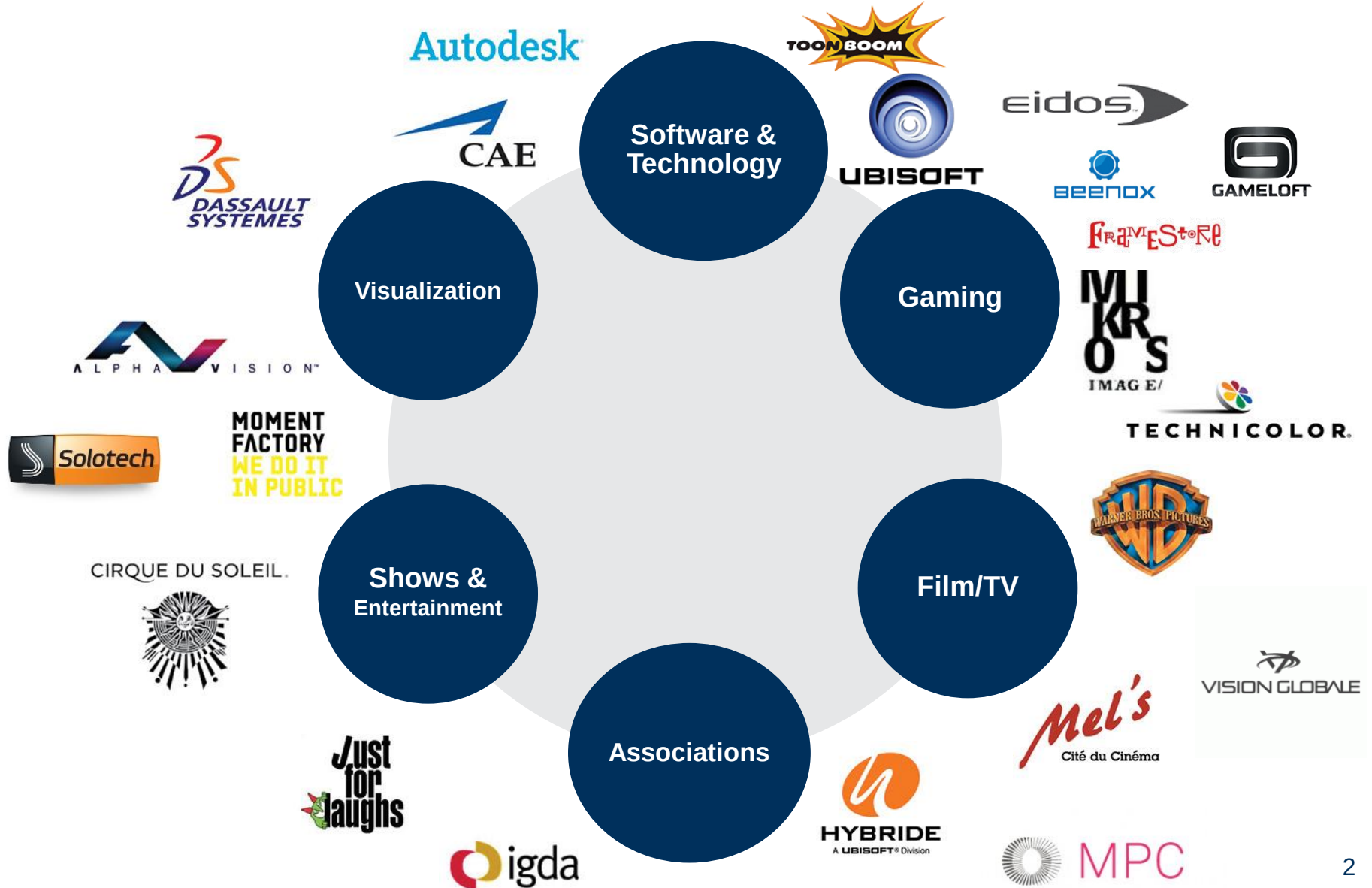


MULTIMEDIA

QUÉBEC'S DIGITAL MEDIA INDUSTRY: TALENT AND CREATIVITY



Quebec's Digital Media Industry





Quebec's Gaming Industry

Third-largest cluster worldwide





Key Players

Company	Workers
Ubisoft	2,700
Eidos Montreal	450
Behaviour Interactive	500
Gameloft	420
Frima Studio	360
Beenox Studios	330
Warner Brothers Int. Ent.	325
Ludia	200



Quebec's Gaming Industry

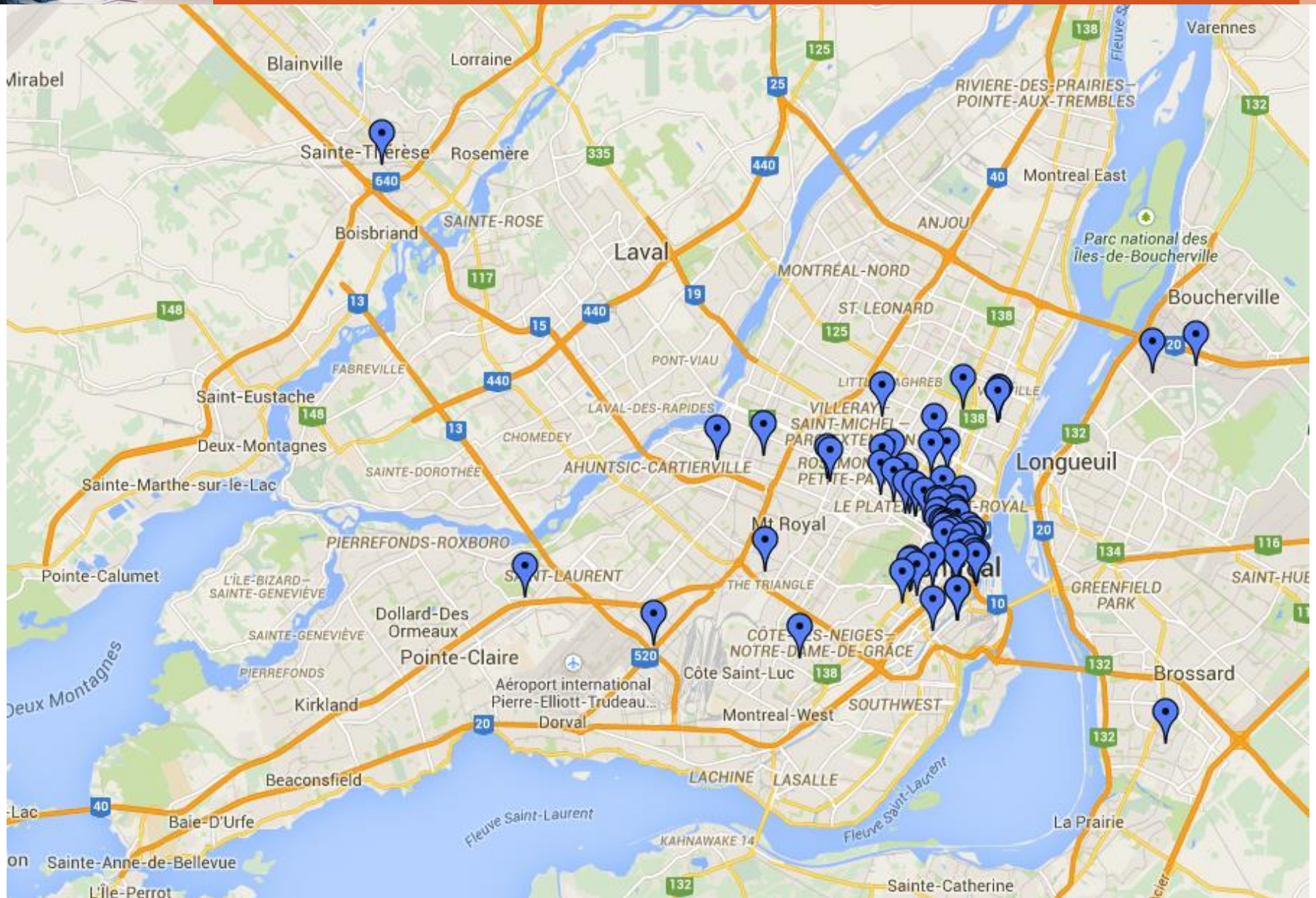
About **100** companies

Close to **9,000** jobs

Growth of nearly **700%** since 2002



Montreal's Gaming-Related Studios



Relevant Associations

Business Network



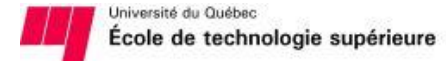
Gaming association



Annual event



Universities



Other





Gaming Tax Credits

Multimedia Title Development – Video Games

- Refundable Tax Credit of 24% on Labour
- +6% Tax Credit French Premium
- No promotional material development (Advergaming)
- 50% of subcontracts
- New definition of labour :
 - Design and development
 - Community building
 - Game Master
 - Tech support
 - Updates/ New versions



E-Business Tax Credit

Development of E-Business Tax Credit

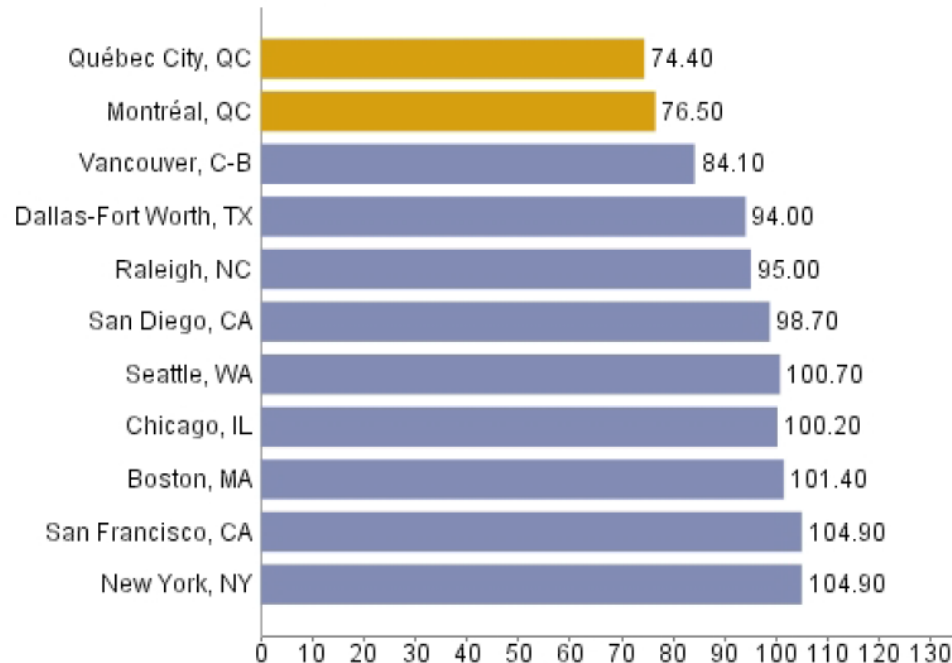
- Available to Key Sectors: Software Development, ICT Services, Microelectronics and FinTech, Especially Companies Developing/Serviceing IT Systems or Publishing Software
- Refundable Tax Credit 24% of ICT Staff Salaries
- Administered Internally by IQ
- Need 6+ ICT Full-Time Employees
- No Cap on Number of Eligible Employees
- Tax Credit Capped at 20 000\$ per Full-time Employee



Comparison of Annual Operating Costs

COMPARISON OF TOTAL ANNUAL COSTS - NORTH AMERICAN CITIES

Video Game (Index US=100)



Source: KPMG's Guide to International Business Location Costs, 2014 Edition



Gaming Diversity

Consoles/PCs	Ubisoft Eidos Montreal Beenox WB Games
Mobile games	Frima Studio Gameloft Sava Transmedia
QA/testing/localization	Bug-Tracker Babel Media
Online games	Sarbakan Ludia
Middleware	DTI Software Autodesk Toon Boom Animation
Animation/VFX	Vision Globale Hybride
Audio	Game On Audio Audiokinetic



Notable Games

Ubisoft Montréal is the largest independent video game development studio in the world.



Notable Games

***Deus Ex:*
Human Revolution**
from Eidos Montréal,
a Square Enix
company

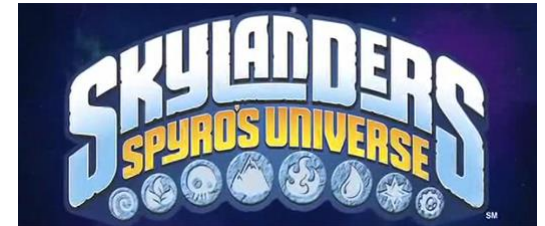
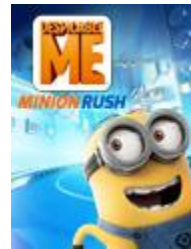
**2.9 million
copies sold**

**Eidos Montréal, a Square
Enix company, was named “Studio
of the Year” by *Edge* magazine**

**Winner of more than 40 prizes
for *Deus Ex***



Notable Games





Conclusion

