E-Sport-Bund Deutschland

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Management

ESPORTS REPORT

Self-Perception, Structures and the Future of an Industry in Transition

2026



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Publisher

E-Sport-Bund Deutschland e.V.
Prenzlauer Allee 186
10405 Berlin

Publication Partners

PricewaterhouseCoopers GmbH
Friedrich-Ebert-Anlage 35-37
60327 Frankfurt am Main

Hochschule für angewandtes Management GmbH
Steinheilstraße 4
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Layout and Graphics

ORIGINAL GAMERS COLLECTIVE

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Alte Linner Straße 93-97
47799 Krefeld

FOREWORD



Christopher Flato, **ESBD President**

With the second edition of the German Esports Report, we are continuing a path that met with a strong response last year - both within the industry and beyond. The positive feedback from business, politics, academia, media and the community has shown how great the need is for sound classification, reliable data and structured perspectives on German esports.

Together with our strong partners PwC Germany and the University of Applied Management, we again aim to contribute to making esports in Germany more tangible, more transparent and easier to understand. In this regard, the German Esports Report deliberately sees itself as more than a collection of key figures or market observations. Rather, it is intended to make visible the different perspectives, interests and structural challenges of an industry that continues to be in a dynamic process of development.

This year's edition therefore takes a different perspective: it places the qualitative voices of the industry at the centre. Leading stakeholders from teams, publishers, media, agencies, academia and institutional structures provide insights into their views of the current status quo of esports in Germany. It becomes clear how different expectations, objectives and understandings of roles within the ecosystem can be, but also which shared challenges concern the industry.

This becomes particularly visible in the areas of tension between competition and entertainment, between community and commercialization, between open structures and professional ecosystems, and in the relationship between publishers, teams, associations and institutional stakeholders. Esports is no longer developing solely along traditional growth logics, but increasingly along questions of stability, legitimacy, sustainability and social classification.
At the same time, the past year was marked by an important milestone for German esports: the recognition of non-profit status in the field of esports. This development creates new opportunities for clubs, educational institutions and committed stakeholders to engage with esports in the long term and to build sustainable structures. It is also an important signal that esports is increasingly being perceived as a socially relevant component of modern realities of life.
For precisely this reason, reliable information, empirical analyses and an open dialogue between all stakeholders are needed. This report aims to help not only document stakeholder perspectives but also understand them better and thereby create a basis for sustainable decision-making in politics, business, academia and within the industry itself.

My gratitudes go to all contributors, partners and interviewees who contributed their perspectives, experience and expertise and thereby made this report possible in the first place.

I wish everyone an engaging and insightful reading.

C. Flato

Christopher Flato
President E-Sport-Bund Deutschland e.V.

PRESENTATION OF THE PARTNERS

About the ESBD

As the German Esports Federation (ESBD), we are the central point of contact for politics, society and the public when it comes to shaping esports in Germany. The focus of our work is representing the interests of our members at the political level, promoting framework conditions for the esports industry, and helping to build nationwide structures and opportunities for industry-wide exchange. Through the ESBD Academy, as the German national governing body we also create a sound opportunity for the education and further training of committed coaches. Together with the regional associations in Schleswig-Holstein, North Rhine-Westphalia, Bavaria and Lower Saxony, we represent the interests of around 140 organizations in esports, particularly from grassroots sport, competitive sport and event management.

Further information:
www.esportbund.de.

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About the University of Apllied Management (HAM)

The University of Applied Management is Bavaria's largest private university and offers around 4,000 students at locations throughout Germany (Ismaning, Berlin, Hamburg, Frankfurt, Cologne) a modern, practice-oriented course of study. Our semi-virtual study concept combines the commitment and personal contact of on-campus study with the flexibility and individuality of online study to create a successful hybrid model that enables students to acquire action-oriented competencies in all life situations. Our students benefit not only from the academic and practical experience of our more than 50 full-time professors, but also from the university's immense network of hundreds of lecturers and corporate contacts. With our dedicated team, we impart knowledge and competence with practical relevance at an academic level, both in classic, business-oriented degree programs such as Business Administration and Business Informatics and in specialized disciplines such as esports Management or Fashion & Global Brands and have done so successfully for more than twenty years. As the University of Applied Management, we are deliberately involved in this report as an academic cooperation partner—not only because, with the esports Management degree program, we are responsible for one of the largest academic educational offerings in the industry in the German-speaking world, but also because we recognize the relevance of esports as a phenomenon of society as a whole and of the economy. As an innovative university with a strong practical orientation, we see it as our responsibility not only to observe developments in dynamic future industries, but to actively help shape them—through applied research, empirical data analyses and a comprehensive understanding of the needs of the industry.

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About PwC

Every day, our clients face a wide range of tasks, want to implement new ideas and seek our advice. They expect us to support them holistically and to develop practice-oriented solutions with the greatest possible benefit. That is why we bring our full potential to bear for every client, whether a global player, family business or municipal body: experience, industry knowledge, specialist expertise, quality standards, innovative strength and the resources of our expert network in 149 countries. Trust-based cooperation with our clients is particularly important to us, because the better we know and understand them, the more precisely we can support them. PwC Germany. More than 15,000 dedicated people at 20 locations. Around EUR 3.05 billion in total operating performance. A leading auditing and consulting firm in Germany.

We are pleased to contribute to the ESBD industry report. As PwC Germany, our aim is to further professionalize German esports and provide valuable insights. Sound decisions for a sustainable future require solid data and a deep understanding of the industry. Reports such as this one are therefore of crucial importance for positioning Germany optimally in esports in the future as well.

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Dr. Robin Schroedter

Dr. Robin Schroedter holds a doctorate in psychology with a research focus on decision-making behaviour and personality differences. Alongside his studies, he was a national squad athlete in sabre fencing for six years and achieved success at national and international level. Dr. Schroedter has been part of the ESBD Academy for four years and is involved in the content development of the coach education program there. In his free time, he is a passionate Dota 2 player.





Prof. Dr. Anna Loechner (née Lamsfuß)

Prof. Dr. Anna Loechner (née Lamsfuß) is one of Europe's leading scholars in the fields of gaming, esports, artificial intelligence and marketing. As head of the Gaming and esports department at the University of Applied Management, she has shaped the academic and practice-oriented development of this dynamic future field for years. She completed her doctorate at the Karlsruhe Institute of Technology (KIT) with the highest grade, focusing on esports, AI and target group analysis in digital marketing. .

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Julia Wilner is Senior Manager and Gaming Advisory Lead at PwC Germany. In this role, she supports endemic stakeholders in professionalization and business development, as well as non-endemic companies in strategic and operational questions within the gaming and esports ecosystem.



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INTEL EXTREME MASTERS
WINNERS
WINNERS

INTRODUCTION

Esports is no longer a marginal phenomenon of digital youth culture. Over the past two decades, competitive gaming communities have developed into an international ecosystem that connects professional teams, global tournament organizers, publishers, media platforms, sponsors, associations, educational institutions and the community. Major events fill arenas, competitions are broadcasted around the world, organizations operate increasingly professional, and at the same time new structures are emerging at local, regional and national level that are intended to anchor esports socially, economically and institutionally.

Despite this development, esports remains a field that resists simple classification. On the one hand, it shows clear parallels with traditional sport: competition, training, performance orientation, team structures, tactical preparation, mental strain and fan engagement are central components of professional esports practice. On the other hand, esports differs fundamentally from traditional sport in key respects. The games on which competitions are based belong to privately owned publishers. Rules, competition formats, technical framework conditions and - in some cases - the long-term future of individual titles are therefore not determined by associations or historically grown sport structures, but by companies pursuing their own economic and strategic interests. This very particularity shapes the entire ecosystem.

In addition, esports cannot be understood only as sport or competition. It is also a media product, an entertainment format, a community space, a marketing platform, a digital cultural asset and an economic field of activity. Depending on the perspective, the meanings shift: for professional teams, sporting competition is often central; for publishers, it is the attachment to game worlds and communities; for brands, access to target groups; for media, the translatability of a complex digital phenomenon; and for associations, the question of structure, responsibility and social recognition. This simultaneity of different logics makes esports especially dynamic, but also difficult to grasp.

Against this background, central questions arise as to how the esports industry understands itself. Is esports primarily sport or entertainment? Which self-images shape central stakeholders? Where are their shared basic assumptions and where do contradictions become apparent?

And how do structural framework conditions influence the development and perception of the industry?

The German Esports Report 2026 takes these questions as its starting point. At the centre of this report is the qualitative classification of a system that is still in the process of locating itself. The report asks which interpretations, tensions and expectations for the future become visible within the industry. This involves the relationship between esports and traditional sport as much as questions of governance, legitimacy, professionalization, community, economic viability and social connectivity.

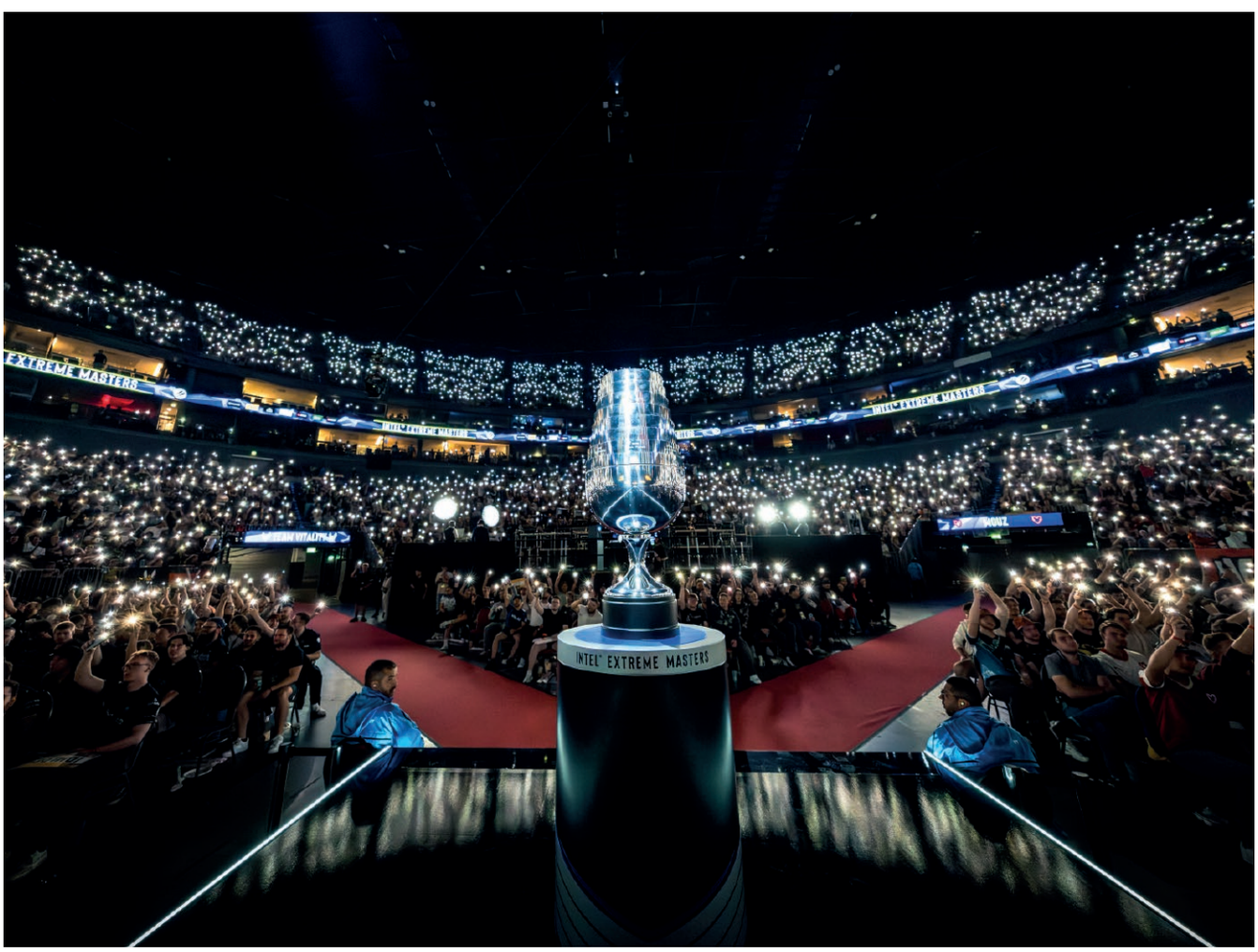
Particularly relevant here is the tension between self-perception and external perception. Within the industry, esports is often described as an established, high-performing and internationally relevant ecosystem. However, outside its own bubble, understanding often remains fragmented. Many people still vaguely associate esports with gaming in general, digital leisure activities or short-lived trends. This discrepancy between actual size, internal complexity and external perception forms a central starting point for the report.

Methodologically, the report is based on qualitative expert interviews with selected stakeholders from different areas of the esports ecosystem. Representatives from professional teams, associations, media, publishers, agencies, event and platform contexts, as well as brands active in esports, were interviewed. The aim was not to present a single perspective as representative but to make the plurality of voices in the field visible. The interviews were evaluated according to academic standards, condensed in terms

of content and prepared in the form of portraits, core ideas and an overarching analysis chapter. In addition, an extended case study takes a closer look at a professional team.

The qualitative analysis makes it possible to identify interpretive patterns, rationales and structural tensions that often remain hidden in purely quantitative analyses. The focus is therefore not only on individual statements, but on recurring themes, contrasts and shared points of reference. The evaluation follows an interpretive approach: central motifs from the interviews were identified, compared with one another and condensed into overarching thematic fields.

The report therefore understands itself as a contribution to the classification of an industry that has long possessed social and economic relevance, but whose institutional form is still emerging. It aims to show how central stakeholders describe esports today, which challenges they identify and which lines of development can be derived from this for the coming years. One thing becomes clear: esports is no longer merely a promise for the future. It is present reality. The decisive question is therefore no longer whether esports will become relevant, but how this relevance can be structured, communicated and responsibly developed further in the future.



JAN DOMINICUS

Chief Business Development Officer at mousesports (MOUZ)



Anyone who speaks with Jan Dominicus about esports quickly notices that this is not about hype, but about structures, competition and long-term development. Dominicus, Chief Business Development Officer at mousesports, is one of the defining figures among German esports organizations. In a leadership role for more than a decade, with previous positions including SK Gaming, he has accompanied the development of the industry for more than two decades from its early days as a niche phenomenon to an increasingly professionalized market environment. This perspective clearly shapes his assessment of the status quo.

Our focus is very clearly on being a sports team. Competition is the core of everything we do.

The core of his understanding is a clearly defined: mousesports does not see itself as an entertainment or content platform but as a professional sports organization. Competition forms the centre of all activities. The ambition to establish itself long term as a permanent fixture in Hamburg's sports environment is an expression of this self-understanding and illustrates the deliberate proximity to traditional sport structures. This attitude is directly reflected in the strategic logic of decision-making. The selection of titles or engagements is not primarily based on short-term trends but on three central criteria: fit with the organization's own community, the strategic direction of the respective publishers and the possibility of sustainable commercialization. The role of publishers in particular occupies a key position. Unlike in traditional sport, esports organizations operate in a system whose basic frame-

In many cases, we react to decisions made by other stakeholders.

Unlike in traditional sport, the playing field in esports has an owner with its own interests.

work conditions are defined externally. Decisions on competition formats, monetization mechanisms or structural adjustments are made by publishers and have a direct impact on teams. Dominicus describes this constellation as one of the central particularities of the industry. In many cases, teams are forced to react to developments instead of being able to actively shape them.

This structural dependency has direct consequences for long-term planning and economic stability. Even central sources of revenue can change at short notice as a result of strategic decisions by individual publishers. Planning security therefore arises less from institutional structures than from assessing the

extent to which the interests of publishers and teams are compatible. Against this background, Dominicus also takes a clear position in the discussion about different competition models. While closed league systems are characterized by fixed structures and greater predictability, he sees the long-term strength of esports rather in open performance-based systems. In his view, these not only enable broader access but also secure the sporting appeal and dynamism of competition.

> ***I believe that an open performance-based system is more exciting and more sustainable in the long term than closed structures.***

At the same time, his perspective makes clear that the industry is still undergoing a transformation process. It lacks the historically grown institutional structures that have emerged in traditional sport over decades. Instead, esports is characterized by dynamism, divergent interests and an ongoing negotiation process between central stakeholders. Dominicus thus describes a system that has not yet stabilized but continues to exist in the field of tension between competition, commercialization and structural development.

Core ideas from Jan Dominicus

- Understands esports as performance-oriented competition, not as an entertainment product
- Clearly positions himself in favour of a sporting logic in esports
- Often sees teams in a reactive role vis-à-vis publishers
- Assesses the industry as structurally not yet mature
- Prefers open, performance-based systems over closed leagues
- Questions models that focus more on predictability than on competition
- Emphasizes the importance of community proximity and sporting identity
- Perceives esports as a system in transition with unresolved structural questions

LEON RIES

Managing Director of the German Sports Youth (dsj) and Executive Board Member for Youth at the German Olympic Sports Federation (DOSB)



Between esports and organized sport, there is neither a clear break nor a simple connection. This is precisely the field of tension in which Leon Ries operates. As a representative of the German Olympic Sports Federation, he approaches the topic not from the perspective of an insider in the scene but from the logic of a system that has organized established structures, responsibilities and values for decades.

It is a view from the outside and, at the same time, increasingly a view of a field that can no longer be ignored. Ries' professional background in organized sport and youth association work clearly shapes his approach.

For us, esports is relevant today above all because it has become part of the lived reality of many young people.

In his remarks, esports appears less as a discipline or market than as a social phenomenon that raises new questions: How do institutions deal with digital environments? What responsibility arises when young people participate in new forms of competition? And what role can or must organized sport play in this? The answers are deliberately nuanced. In this context, the DOSB does not see itself as a central actor within esports structures but as a supporting institution. Advice, classification and orientation are at the forefront, both for its own member organizations and for embedding the topic within a broader social framework.

What is striking here, is the shift in the debate. In Ries' account, the question of whether esports should be recognized as sport is losing importance. Instead, a different perspective comes to the fore: esports has long been part of the lived reality of many people.
This is precisely what creates a need for action, regardless of conceptual categories. This approach also changes the objective. It is less about integrating esports into existing structures than about developing a distinct way of dealing with it. From Ries' point of view, this inclu-

Organized sport can contribute values, orientation and perspectives on movement without fully transferring esports into its own structures.

des in particular conveying values, offering orientation and critically accompanying developments. Issues such as youth protection, addictive potential or the relationship between digital activity and physical movement become central reference points.
At the same time, his analysis of the field remains sober. Ries describes esports as a system that differs from organized sport in essential respects. He emphasizes above all the role of publishers as a structural core feature: while associations set the rules in sport, in esports these

> ***The central structural difference remains that, in esports, the rules are not set by associations, but largely by publishers.***

rules are held by private-sector actors. This constellation shapes power relations, decision-making processes and development paths, while also limiting the influence of traditional sport organizations.

Despite these differences, he recognizes clear parallels. Competition systems, performance logics and organizational structures show clear areas of overlap for him. However, the decisive point is not to translate these commonalities too hastily into sameness. Ries instead advocates a coexistence that can be used productively. Neither complete integration nor clear separation appears useful to him. Rather, he sees potential in a relationship shaped by exchange, adaptation and mutual learning without giving up the internal logic of the respective systems.

His perspective thereby becomes one of the calmer, yet strategically relevant voices in the field. Not because it offers quick solutions. But because it places the structural questions that will decisively influence the future development of esports and organized sport at the centre.

Core ideas from Leon Ries

- Takes the perspective of organized sport
- Describes the approach through social responsibility rather than industry logic
- Focuses on orientation, classification and advice
- Sees esports as part of modern lived reality
- Emphasizes values, youth protection and movement
- Identifies publishers as the central power authority
- Recognizes parallels, but rejects equating the two
- Advocates cooperative coexistence between the two systems

CONSTANTIN RITTMANN

Partner & Country Manager Germany at MYI



A conversation with Constantin Rittmann quickly makes one thing clear: anyone viewing esports from an agency perspective does not think in terms of visions but in terms of models that must work in practice. As Partner and Head of the German market at MYI, Rittmann operates at the intersection of creativity, community and commerce where each continuously influences the others. His perspective is remarkably structured and, in many respects, refreshingly candid. For him, esports is not an ideological project but a system that must be economically sustainable. This mindset is already evident in the way he describes his own role.

MYI positions itself as a creative and event agency with a clear mission: to develop, market and ideally operate esports and gaming formats for brands. At the same time, the company also acts as a rights holder and event organizer, most notably through its operation of Germany's official Rocket League league.

The question we ask most often is: Can we make money from it?

This dual role means that strategic decisions are always evaluated from two perspectives: as a service provider for clients and as the operator of proprietary products and formats. What stands out is the consistent prioritization of economic considerations. Decisions are driven less by normative ideals and more by a central question: Can this generate revenue now or in the future? Even investments that do not promise an immediate return are only pursued if they are expected to facilitate future business opportunities or strengthen strategic positioning, particularly in relation to publishers.

Publishers occupy a key position in Rittmann's interpretation of the industry.

Everything is dependent on money in one way or another, but there is no single central dependency.

They are not merely rights holders but structural actors whose decisions can shape entire ecosystems. At the same time, he challenges traditional assumptions about power within esports. In his view, the industry is not dominated by individual institutions or organizations but rather by those who possess capital and reach. The system is less hierarchical than fragmented, shaped by individual game titles, communities and economic dynamics.

This logic becomes particularly visible in the management of MYI's own league operations. Rittmann describes the development of the Rocket League community as fragile and, at times, even vulnerable. Investments are therefore made not only for commercial reasons but also for strategic purposes: maintaining relationships with publishers, building trust within the community and positioning the organization as part of a more stable long-term ecosystem.

> ***Ultimately, we need to find a consensus between the community, publishers and sponsors.***

What is particularly noteworthy is the central role attributed to the community itself. Alongside publishers and sponsors, the community represents one of the most important influences on decision-making processes. Formats are not developed in isolation but are shaped through close interaction with active community stakeholders. At the same time, this creates a persistent tension. While creative and operational teams often see numerous opportunities for innovation, financial realities impose clear limitations.

This tension between potential and constraint runs throughout Rittmann's broader assessment of esports. It is also reflected in his view of the industry as a whole. He sees esports as a field characterized by structural challenges and heavily influenced by external factors, particularly financial resources, institutional frameworks and fragmented support structures.

His criticism of institutional stakeholders is notably direct. In his view, many decisions are driven by individual interests while coherent long-term strategies remain largely absent. Rather than isolated support initiatives, Rittmann advocates for a coordinated nationwide framework that establishes clear priorities and allocates resources strategically.

At the same time, his perspective is not purely critical but analytically nuanced. He defines esports pragmatically as competitive gaming, regardless of the specific title involved. Within the industry itself, he sees a largely shared understanding of this definition. Differences arise primarily outside the scene, particularly among brands that still struggle to distinguish clearly between gaming and esports.

This distinction becomes especially apparent in practical business operations. For many brands, gaming currently represents the more attractive option due to its broader reach and lower perceived risk. By contrast, esports often requires additional explanation and exists within a more complex environment of stakeholders and expectations.

Rittmann ultimately portrays an industry evolving between two poles: on one side, an entertainment-driven ecosystem; on the other, a performance-oriented competitive environment. Which of these dimensions will dominate in the long term depends largely on the development and market position of individual game titles.

Core Ideas from Constantin Rittmann

- **Views esports through a distinctly economic lens.**
- **Makes decisions primarily based on financial sustainability and business potential.**
- **Sees communities, sponsors, and publishers as simultaneously influential stakeholder groups.**
- **Describes esports as a fragmented ecosystem that is highly dependent on individual game titles.**
- **Takes a critical view of institutional structures and funding mechanisms.**
- **Considers gaming currently more attractive to brands than esports.**
- **Defines esports pragmatically as competitive gaming.**
- **Sees the future of esports developing between entertainment-driven engagement and performance-focused competition.**

KEVIN WESTPHAL

Esports Lead at Eintracht Spandau



Eintracht Spandau has long become more than just a team name within German esports. The organization has evolved into a brand that intertwines competition, community and entertainment so closely that it occupies a unique position in the market. Kevin Westphal operates at the very centre of this construct. As Head of Esports, he is responsible for the organization's competitive gaming division. However, his role in practise extends far beyond that: from budget and roster planning to operational team structures and strategic content-related decisions that would typically fall somewhere between management, content creation and brand leadership. As a result, his perspective on esports is not purely athletic. Instead, he consistently views performance in conjunction with reach, storytelling and organizational realities. This is precisely what makes his perspective distinctive.

The community is not an audience; it is an active part of the system.

Westphal does not describe esports as a self-contained competitive environment, but rather as a system in which competitive success, media presentation, and community engagement are permanently interconnected. In this context, Eintracht Spandau sees itself not merely as an esports organization, but as an actor that actively shapes culture, visibility and a sense of belonging. For Westphal, the brand's extensive reach is not simply a by-product of success but a strategic resource that enables the organization to influence the broader ecosystem and elevate other stakeholders along with it.

At the same time, his comments reveal a strong connection to the operational realities of the business. Decisions are not made in a vacuum but under highly practical constraints: budgets must be planned, rosters financed, organizational structures established and priorities set. The question of how much competitive infrastructure is actually sustainable runs like a common thread through his observations. Whether players train together in a centralized location or work remotely, whether additional sports psychology or physiological support can be provided, and whether travel, boot camps, or media days can be implemented - none of these are minor details in his view. Rather, they are fundamental decisions that determine how professionally a team can truly operate.

Publishers set the rules. That is a fundamental difference from traditional sport.

This operational perspective is paired with a strong awareness of structural dependencies. Publishers and league operators define the framework within which organizations can function. Rules, contract windows, regional requirements and numerous other regulations have a significant impact on strategic decisions. Westphal sees this as one of the fundamental differences between esports and traditional sport. Decision-

making power does not rest solely with teams or leagues but, to a considerable extent, with the rights holders of the respective games.

Nevertheless, he does not portray organizations such as Eintracht Spandau as merely dependent actors. On the contrary, he believes that content, narratives, and community engagement provide meaningful opportunities to exert influence. Not necessarily over the formal rules of the system, but certainly over its perception and attractiveness. Westphal emphasizes that this is one of

> ***For me, esports is an entertainment product that is built on genuine performance.***

Eintracht Spandau's greatest strengths. Not only participating in competition from a sporting perspective, but also enhancing it emotionally through formats, stories, and a recognizable identity.

His remarks also reveal a clear understanding of what esports fundamentally is. For him, esports is an entertainment product built on genuine performance. Competitive excellence remains the foundation, but reach, relevance and commercial success are created through the presentation and storytelling surrounding it. This is precisely why he does not regard the frequent contrast between performance and entertainment as a contradiction, but rather as a functional partnership.

Another notable aspect of his perspective is that he does not exclude questions of values and responsibility. The selection of partners, social responsibility and maintaining a critical distance from certain international developments are just as much a part of strategic decision-making as audience figures or sponsorship interests. In this respect, his perspective differs from a purely market-driven view. The issue is not only what is possible, but also what aligns with the organization's identity and principles.

The result is the portrait of an actor who describes esports from an insider's perspective shaped equally by sporting, economic and cultural considerations. Westphal does not discuss the ecosystem in abstract terms. Rather, he speaks from the experience of making daily operational decisions. It is precisely for this reason that his perspective on the industry feels particularly concrete and grounded.

Core Ideas from Kevin Westphal

- **Views esports as the intersection of sport, content, and community.**
- **Makes decisions shaped by budgets and operational feasibility.**
- **Sees publishers and league operators as the primary framework setters.**
- **Emphasizes the importance of narratives and fan engagement.**
- **Understands esports as an entertainment product built on genuine performance.**
- **Considers reach a strategic resource.**
- **Combines business decisions with clearly defined values and principles.**

CHRISTIAN OESTEREICHER

Director Nations Management at ESL FACEIT Group (EFG)



Some perspectives in esports focus on individual teams, others on communities and still others on brands or associations. Christian Oesterreicher views the ecosystem from a position in which structures must first be created before competition can even take place.

At ESL FACEIT Group, he works on a project that addresses precisely this challenge: the Esports Nations Cup is intended not merely to be another tournament, but to establish a nation-based structure in markets where, in many cases, no reliable foundations currently exist. His perspective on esports is therefore less that of a commentator observing existing systems and more that of an actor tasked with bringing order to a fragmented landscape. This is precisely what makes his viewpoint distinctive.

While established tournaments can rely on existing rankings, well-known organizations, designated contacts and proven processes, a nation-based format begins almost from scratch in many countries. Who is entitled to represent a nation? Who appoints coaches and players? Which partners are legitimate, trustworthy and accepted by the community? Which structures are truly sustainable and which exist only on paper? For Oesterreicher, esports is therefore not only about competition but, above all, about creating legitimacy.

What is particularly striking is the extent to which he insists on transparency and objectivity. Decisions should not emerge from habit, personal relationships, or intuition, but from clear criteria that equally consider the interests of communities, publishers, clubs and players. In an environment where there are no historically established and universally accepted national structures, this question becomes central: Who represents a country and why this particular actor? This perspective reflects a deeper understanding of esports as a system characterized by significant institutional openness, but also by considerable potential for conflict.

Oesterreicher describes a market in which nearly every country brings its own political, organizational and cultural conditions. Some markets possess professional and widely recognized structures, while others are shaped by conflicts of interest, trust issues, or simply a lack of organization. In his view, this makes esports both exciting and challenging: there is tremendous dynamism, but only limited planning certainty.

> ***In esports, every game belongs to someone, and that means the greatest power ultimately lies with the publishers.***

It is at this point that his central diagnosis comes into play. For Oesterreicher, one of the most significant structural characteristics of esports is the power held by publishers. Unlike in traditional sport, the playing field always belongs to someone. Whoever owns the game ultimately controls the key framework conditions.

This does not automatically make esports dysfunctional. On the contrary, he explicitly describes the relationship with publishers as symbiotic. Neverthe-

less, the starting point remains unique: without publishers, there is no competition, no league and no ecosystem.

At the same time, his perspective is not focused solely on power. Sustainability is equally important. He speaks repeatedly about stability, medium-term security and the need to build projects that are not only spectacular at launch but also viable over the long term. This also reflects his scepticism toward a market that has spent years talking about future potential without paying sufficient attention to present realities. In his view, esports is no longer merely a promise of the future. It is already a vast and tangible reality that too often portrays itself as smaller or more diffuse than it truly is.

> ***Esports is already huge today, yet we still talk about it as if it were the future.***

His assessment of public perception is equally noteworthy. Oesterreicher describes esports as a massive bubble that often remains surprisingly invisible outside its own circles. Those who are part of it experience its scale, intensity and relevance. Those who are not often hardly encounter it at all. This coexistence of enormous scale and relative invisibility continues to define the industry in his eyes.

In relation to traditional sport, he adopts a sober and pragmatic position. He does not consider the debate over whether

> ***We are the biggest bubble nobody knows.***

esports should be classified as sport to be the decisive issue. More important, in his view, is the fact that performance requirements, organizational structures and professional standards are already comparable in many respects. Where recognition as a sport would be beneficial, it would primarily be for practical reasons: visas, funding opportunities, institutional access and formal legitimacy.

The result is the portrait of an actor who neither romanticizes nor downplays esports. Christian Oesterreicher argues from a perspective in which international scalability, institutional resilience and long-term structure matter more than short-lived buzzwords. His view of the market is accordingly clear: esports is no longer merely potential. It is already reality. The real challenge now is to organize that reality in a sustainable and resilient way.

Core Ideas from Christian Oestereicher

- **Views esports primarily from a structural and international development perspective.**
- **Emphasizes the importance of transparent selection and governance processes.**
- **Sees publishers as the central actors of power and control.**
- **Understands esports as a highly dynamic field with limited planning certainty.**
- **Places great importance on community acceptance and institutional legitimacy.**
- **No longer regards esports as a promise of the future, but as an established reality.**
- **Describes the industry as large and relevant, yet often invisible outside its own bubble.**
- **Connects the future of esports with sustainability, stability, and long-term structures.**

SAM COOKE

CEO & Co-Founder at The Insights Group



It is often not the loudest voices that describe an industry most accurately. Sam Cooke belongs to those who explain esports not through individual headlines, but through patterns, repetitions and disruptions that only become visible over time. His approach is not operational in the narrow sense, but structural.

Through The Insights Group, he operates at the intersection of media, events and international business formats where the industry observes itself, connects and negotiates its future. Platforms such as esports Radar and initiatives such as Global esports Industry Week are less products in the traditional sense and more spaces in which it becomes visible how esports talks about itself.

Esports is already large today. We simply continue to talk about it as if it were still the future. Scale is, of course, relative and comparisons with traditional sport are often of limited value, particularly when it comes to audience size.

It is from this perspective that Cooke formulates one of his central observations: esports has long since reached a scale that is still not consistently reflected in the way the industry communicates about itself. While arenas are sold out, international events attract millions of viewers and organizations operate on a global scale, the dominant narrative continues to portray esports primarily as a market of the future.

For Cooke, this is not a harmless reflex but a structural mismatch between reality and self-perception. He links this discrepancy to a second, deeper issue: the aftereffects of a market that, at times, developed faster than its underlying

Every game belongs to someone which shapes the entire system.

structures could support. In his view, the years surrounding the major investment boom created expectations that could not be sustained in the long term. Inflated valuations, unclear interpretations of audience reach and overly optimistic assumptions regarding monetization models led to a loss of trust - particularly among external stakeholders. According to Cooke, the consequences of this period continue to shape the industry today.

At the centre of his analysis lies a constant that fundamentally distinguishes esports from traditional sport: the role of publishers. Cooke argues that many of the industry's dynamics can only be understood if this distribution of power is taken seriously. The game does not belong to the system. It belongs to a company. This creates a structural logic that continuously influences all other stakeholders, from teams and tournament organizers to sponsors and commercial partners.

> ***The greatest opportunity does not lie at the very top, but in access and the structures that exist beneath it.***

What is particularly interesting is that Cooke does not evaluate this reality from a normative standpoint. Instead, he approaches it analytically. In his view, Publisher dominance is not a flaw but a structural framework within which esports develops. The key challenge is therefore not to change this structure, but to consistently account for it in strategic decision-making.

From there, his focus shifts decisively toward the future. Not in terms of new visions, but rather in terms of missing foundations. Cooke sees the greatest opportunities for development not at the top of the system, but at its base. This becomes especially evident in his argument for broader access and stronger grassroots structures. The challenge is not merely to organize professional competitions, but to create clear pathways into esports in the first place.

Compared to traditional sport, this gap becomes particularly apparent. Established sports benefit from structured development pathways, coaching systems and institutional standards. In many areas of esports, this reliability is still lacking. For parents, educational institutions and local stakeholders, it is often unclear what entry points, development opportunities and support systems exist. Cooke does not see this uncertainty as a peripheral issue but as one of the industry's most significant structural weaknesses.

As a result, he places considerable emphasis on the role of education. He views the integration of esports into schools and academic institutions as a key mechanism for promoting both social acceptance and sustainable development. His focus extends beyond questions of legitimacy to tangible outcomes: improved accessibility, greater social inclusion and new learning opportunities for young people.

Cooke also approaches the frequently debated question of whether esports should be classified as sport from a pragmatic perspective. For him, the decisive factor is not the symbolic category itself, but its practical consequences. Where alignment with the traditional sports system provides access to funding, infrastructure, or institutional support, it can be beneficial. Where meaningful differences exist, however, those distinctions should be acknowledged just as clearly.

Cooke does not describe an industry that is still waiting to emerge. Rather, he describes an industry that has already ar-

Core Ideas from Sam Cooke

- **Analyses the industry from an observer and platform perspective.**
- **Identifies a mismatch between the industry's actual scale and its future-oriented rhetoric.**
- **Emphasizes the lasting effects of the investment boom and unmet expectations.**
- **Recognizes publisher control as a defining structural characteristic of esports.**
- **Sees key development opportunities at the grassroots and access levels.**
- **Highlights the importance of education and institutional integration.**
- **Identifies shortcomings in standards, coaching structures and clearly defined development pathways.**
- **Evaluates the sport classification debate primarily in terms of its practical value for funding opportunities and structural development.**

HANS CHRISTIAN LUENEBORG

Director Operations & Production Services EMEA at Riot Games



Anyone seeking to understand how esports functions as a system cannot overlook one particular perspective: that of the rights holder. Hans Christian Lueneborg occupies precisely this position. As Director Operations & Production Services EMEA at Riot Games, he is responsible for the operational execution of one of the most central elements of global esports: the spectacle itself.

His teams do not merely produce tournaments. They create the visible surface of a system that reaches millions of viewers week after week, event after event. From Berlin - one of the industry's most important production hubs - esports is orchestrated for the entire European market.

For us, esports is not a standalone business area but part of the overall player experience.

His role extends far beyond technical implementation. Production serves as a strategic intersection between competition, entertainment, brand management and global platform strategy. Broadcast operations, live events, content creation and competitive operations are deeply interconnected, and it is precisely at this point that Riot's understanding of esports becomes apparent: not as a standalone product, but as an integral component of a much larger ecosystem.

This perspective also shapes Lueneborg's broader understanding of esports. For Riot, esports is not an isolated business unit but a tool for strengthening player engagement and expanding the worlds surrounding its intellectual properties. The primary objective is not to maximize esports as an independent industry, but rather to enhance the overall experience connected to Riot's game franchises. This logic leads to clear priorities. Decisions are guided less by short-term market mechanisms and more by long-term principles: player experience, competitive integrity and sustainable ecosystems take centre stage. The goal is not merely to produce events, but to create structures that remain viable for teams, players and partners over the long term.

The experiences of our players are the guiding star behind every decision we make.

At the same time, Lueneborg emphasizes how strongly these structures are shaped by the unique role of the publisher. Riot is not merely an event organizer or platform provider. It is the owner of the game itself. This distinction fundamentally separates esports from traditional sport. In traditional sports, no single entity owns the game. In esports, however, control over rules, formats and long-term development rests in the hands of a limited number of stakeholders.

What is particularly noteworthy is that Riot does not describe this position of power merely as a means of control, but as a responsibility. Standards relating to

> ***The biggest difference compared to traditional sport is that, in esports, someone owns the game.***

fairness, player welfare and economic stability are not external requirements imposed upon the organization. They are embedded within the system itself. As a result, esports becomes a curated environment in which key parameters are deliberately defined and managed.

This approach is also reflected in the design of competitive structures. From international leagues and regional systems to community tournaments, a multi-layered ecosystem emerges that encompasses both elite competition and grassroots participation. It is precisely this interconnectedness that Lueneborg considers essential. Esports is not conceived solely as top-tier entertainment but as a comprehensive system with clearly defined development pathways.

Compared to traditional sport, Lueneborg adopts a nuanced perspective. He sees similarities primarily in the presentation of competition and emotion. Live moments, unpredictable narratives and the display of human performance connect both worlds. At the same time, he highlights fundamental differences, particularly the dynamic nature of digital games. Rules, metas and game environments evolve continuously, forcing both players and production teams to adapt on an ongoing basis.

The possibilities of presentation also differ significantly. While traditional sports broadcasts are constrained by physical limitations, digital environments create entirely new opportunities for storytelling and production. Camera angles, perspectives and narrative techniques are not merely tools for documentation; they can be actively designed and shaped.

In terms of external perception, Lueneborg sees clear progress. Brands and sponsors increasingly view esports not as a niche market but as a gateway to hard-to-reach audiences. Public institutions and cities are also beginning to recognize the economic impact of major events. As a result, esports is becoming increasingly relevant not only culturally but also economically.

His perspective is therefore guided by a clear systems-based logic: esports does not emerge by chance. It is deliberately designed. For Lueneborg, this is the central task: not merely to produce experiences, but to shape an ecosystem that functions both emotionally and structurally.

Core Ideas from Hans Christian Lueneborg

- **Takes the perspective of a publisher representative and rights holder.**
- **Views esports as an integral part of a game's intellectual property rather than an independent business.**
- **Focuses on player engagement and experience design.**
- **Makes decisions based on player experience, integrity, and sustainability.**
- **Recognizes the central structural power position of publishers.**
- **Describes esports as a curated and actively managed competitive environment.**
- **Emphasizes the strong connection between top-level esports and community structures.**
- **Compares traditional sport and esports primarily through the lenses of presentation and emotion.**

NICOLE LANGE

Product Manager Esports at Olympia-Verlag | kicker



For many years, Nicole Lange has focused on a question that often remains in the background of esports discussions: How is the industry actually perceived from the outside and why do so many people still not understand what esports truly is? As the former Head of Esports Editorial at kicker and now Product Manager at Olympia-Verlag, she combines journalistic expertise with strategic product development.

Her work operates not only between editorial departments, platforms and communities, but above all between two distinct worlds: the traditional sports and media landscape on one side and the digital gaming and esports culture on the other. It is precisely this intermediary role that shapes her perspective on the industry.

Nicole Lange views media not merely as observers, but also as translators of a system that often remains difficult for outsiders to access. In her view, the challenge facing esports begins well before the familiar debates about acceptance and legitimacy. It starts at the point where people have never heard of Twitch and do not understand how digital competitions function in the first place.

Her observations paint the picture of an industry that has built enormous audiences and increasingly professional structures yet still operates largely within its own bubble. In her opinion, esports frequently overestimates how familiar its formats, platforms and competitions are to audiences outside the scene. She identifies this as one of the key reasons why esports has become visible without truly becoming part of mainstream society.

Esports is partially integrated in society, but it has not yet become part of mainstream society.

Importantly, her criticism is not directed solely at external stakeholders. Rather, she describes an industry that, for a long time, assumed growth and societal acceptance would emerge naturally. Instead of actively fostering understanding, many stakeholders appeared to expect that media, policymakers and the general public would eventually become interested on their own.

For a long time, the industry assumed: people will eventually understand it on their own.

At the same time, Lange highlights the unique strengths of esports. Unlike traditional sport, media presentation is not merely an accompanying element but an integral part of the product itself. Competition, entertainment, streaming, community engagement, creator culture and digital platforms are inseparably connected. It is precisely this combination that makes esports dynamic, innovative and culturally relevant.

Her assessment of power structures and stakeholder interests within the indus-

> ***Esports is not only about competition but the media presentation is also part of the product itself.***

try is equally nuanced. While she clearly recognizes the dominant role of publishers, she also describes esports as a fragmented ecosystem characterized by multiple parallel interests. Teams, game developers, media organizations, leagues, influencers and communities all pursue different objectives and often hold distinct views of what esports should be.

For Lange, however, this lack of a unified identity is not inherently negative. Instead, she sees it as evidence of an industry that remains in an ongoing process of development and negotiation. It becomes problematic only when individual stakeholders focus exclusively on their own interests and collective structural progress fails to materialize.

This perspective becomes particularly evident in her assessment of professionalization within esports. In her view, the industry still lacks a stable and sustainably viable overarching system in many areas. While traditional sports benefit from clearly defined association and league structures, esports consists of numerous parallel systems that often operate alongside one another rather than together.

Despite these challenges, her outlook remains fundamentally constructive. Nicole Lange sees the current tensions within esports not as a crisis, but as a necessary stage of maturation. The key question for the future, she argues, is whether the industry can successfully transform the combination of competition, entertainment, and community into a sustainable ecosystem that is both economically viable and capable of reaching new audiences.

At the heart of her perspective lies one recurring idea: the future of esports will not be determined solely by prize pools, audience figures, or tournaments. It will depend on whether the industry learns how to explain itself in a way that others can understand.

Core Ideas from Nicole Lange

- **Takes the perspective of a journalistic and media stakeholder.**
- **Views esports simultaneously as a competitive activity, a media product and an entertainment product.**
- **Sees media organizations as playing a critical role in translation and communication.**
- **Criticizes the industry's strong bubble mentality.**
- **Identifies the lack of broader societal understanding as a key structural challenge.**
- **Recognizes publishers as the most influential power holders within the ecosystem.**
- **Describes the industry as shaped by fragmented interests and a lack of overarching structure.**
- **Connects the future of esports to the development of a stable and financially sustainable ecosystem.**

MAXIMILIAN BROEMEL

Head of Esports & Gaming at Eintracht Frankfurt



When Maximilian Broemel speaks about esports, he is not describing an isolated subculture or a short-lived trend. Rather, he paints the picture of a highly dynamic digital ecosystem that increasingly operates at the intersection of sport, entertainment, media economics and community culture. For him, precisely this raises new organizational, economic and societal questions.

As Head of Esports & Gaming at Eintracht Frankfurt, Broemel is responsible for the strategic development of all gaming and esports activities within the club. Since entering the esports sector in 2019, Eintracht Frankfurt has, according to Broemel, developed into one of the most visible and successful esports divisions within the Bundesliga landscape.

Importantly, Broemel does not describe Eintracht Frankfurt's involvement in esports as a mere marketing initiative by a football club. Rather, the organization sees itself as an active participant in the German esports ecosystem - sportingly, socially and politically. This commitment is reflected in political dialogue, educational efforts and active collaboration with a wide range of stakeholders.

From his perspective, it is precisely this institutional background that clearly distinguishes Eintracht Frankfurt from traditional esports organizations. While many dedicated esports clubs emerged from startup-driven or investment-led environments, a historic football club inevitably operates within far more complex organizational structures. Strategic decisions must be coordinated internally, evaluated from a business perspective and aligned with the long-term interests of the club as a whole. According to Broemel, these structural differences fundamentally shape the organization's decision-making processes.

Broemel describes the industry as highly dynamic and strongly influenced by cyclical developments. Individual game titles can gain enormous relevance within just a few years and lose that relevance just as quickly. As a result, organizations must continuously monitor changes in communities, audience reach, viewership figures and platform dynamics.

At the same time, he characterizes esports as a heavily investment-driven environment. This creates a constant tension between competitive performance and economic sustainability.

For us, esports is 50 percent competition and 50 percent entertainment product.

Broemel repeatedly emphasizes that success in esports cannot be measured solely through sporting achievements. Audience reach, community engagement, media visibility and entertainment value are at least as important as competitive results themselves.

While the industry long attempted to legitimize itself primarily through traditional sports logic, Broemel now views esports as a hybrid system situated between competition and digital entertainment. Competitive play remains at its core, but esports is inseparably linked to streaming culture, platform economies,

social media and community interaction.

He describes esports as a complex matrix of interdependencies in which publishers, teams, players, sponsors, communities, platforms and content creators continuously interact with one another. In his view, clear centres of power hardly exist anymore because virtually all stakeholders depend on each other in some way.

> ***We always say that esports is innovative. But in reality, we have mostly been trying to imitate traditional sport.***

At the same time, Broemel explicitly rejects the notion that the industry is currently in crisis. Instead, he sees the present period as a necessary phase of consolidation following the extreme growth and hype years between 2015 and the COVID-19 pandemic. During that period, the industry often attempted to replicate traditional sports and media structures as closely as possible. However, Broemel believes that esports must learn to develop its own forms of presentation and engagement rather than merely imitating traditional sports productions.

> ***It would be perfect if esports eventually just became a normal part of everyday life.***

Despite these challenges, he remains optimistic about the future development of the industry. In his view, esports is already far more deeply embedded in society than it was just a few years ago. At the same time, a generation is growing up for whom gaming and digital competition are a natural part of everyday life.

Consequently, he sees the next crucial step not at the level of professional elite competition, but in broader societal integration. Esports must become more deeply embedded in everyday life through youth development programs, educational initiatives, clubs, school projects and accessible community structures. Only then can a field that is still often perceived as niche evolve into a natural and accepted part of modern sports and leisure culture.

For Broemel, this would represent the true success of esports: the moment when esports is no longer regarded as something exceptional, but simply as a normal component of everyday digital culture.

Core Ideas from Maximilian Broemel

- **Describes esports as a hybrid system combining competition, entertainment and digital media economics.**
- **Distinguishes the decision-making and governance structures of traditional sports organizations from those of startup- and investment-driven esports organizations.**
- **Does not view the industry as being in crisis, but rather in a necessary phase of consolidation and professionalization.**
- **Emphasizes the fundamental transformation of community structures and media consumption through content creators and platform-driven ecosystems.**
- **Expects long-term societal acceptance to emerge not through elite competition alone, but through youth development, grassroots participation and integration into everyday life.**

RONALD TAMMERT

Senior Advisor for Personnel Development; Gaming & Esports Initiatives at Deutsche Bahn (DB InfraGO AG)



At the intersection of railway infrastructure, skilled labour shortages and digital youth culture, Deutsche Bahn has developed an area of focus that, at first glance, seems far removed from traditional recruiting: gaming and esports. It is precisely at this intersection that Ronald Tammert operates. While many companies still view gaming primarily as a marketing trend or sponsorship opportunity, Tammert sees esports above all as a strategic gateway to younger target groups and as a long-term instrument for modern talent development.

Within DB InfraGO AG, Tammert is responsible for initiatives related to talent acquisition and personnel development. Early on, he recognized that conventional recruiting approaches were increasingly failing to reach younger audiences. As a result, gaming and esports were not viewed as short-term marketing campaigns but as a logical response to broader societal changes. In his view, any organization seeking to attract young talent must engage with the realities of their everyday lives. Gaming has long since become a natural part of those realities.

Deutsche Bahn therefore deliberately avoids a traditional sponsorship approach. Instead, the central question is how interests in gaming and esports can be meaningfully connected with professional and personal development. In cooperation with the esports player foundation, the company developed a model that combines vocational training with esports support. Young employees are given the opportunity to participate in a structured scholarship program that allows them to pursue competitive gaming alongside their professional training. For Tammert, this connection is essential: the primary objective is

We need to go where the target audience actually is—and that is gaming.

not reach alone, but the creation of genuine value for the target audience.

This philosophy also shapes his broader view of the role companies should play within esports. In his opinion, many corporate initiatives fail because they treat esports and gaming merely as advertising platforms. Authenticity, however, is the decisive factor. Communities quickly recognize whether a company is simply purchasing visibility or genuinely investing in structures and taking the target audience seriously. For this reason, Deutsche Bahn focuses on long-term community and talent development rather than short-term sponsorship activities.

At the same time, Tammert does not regard gaming and esports solely as external communication tools. Within the company itself, dedicated gaming and community structures are increasingly emerging - from Discord servers and LAN events to internal teams and company sports initiatives. These activities not only strengthen employees' connection to the organization but also foster a modern sense of community within a large corporate environment.

Tammert repeatedly highlights the parallels between esports and traditional competitive sport. In his view, esports is clearly performance-oriented, albeit within a digital framework. Skills such as teamwork, resilience under pressure, communication and time management are essential both in competitive ga-

ming and in professional life. This connection also serves as an important argument when presenting such initiatives to management and other stakeholders within the company.

Tammert describes the societal perception of esports as deeply ambivalent. Many stereotypes remain firmly entrenched, ranging from the image of the isolated "basement gamer" to assumptions that gaming is merely an unproductive form of media consumption. He therefore sees his work partly as a form of educational outreach. Parents, executives and colleagues must first understand that gaming has become a fundamental component of modern culture and that competitive gaming encompasses far more than passive consumption.

He is particularly critical of the structural conditions within the industry itself. In his view, clear development pathways are lacking in many areas of esports. Young talents are often dependent on chance, private support, or personal initiative. He identifies this as one of the greatest weaknesses of the German esports ecosystem.

Dependence on publishers is one of the greatest structural challenges facing esports.

Added to this is the industry's strong dependence on publishers. Rules, competitions and even entire game titles can be altered at any time. This lack of stability significantly complicates long-term planning and the development of sustainable structures.

Despite these challenges, Tammert does not take a pessimistic view of the industry's future. Instead, he sees esports as being in an important phase of development and consolidation. Political developments such as the increasing institutional recognition of esports and discussions surrounding non-profit status represent significant milestones in his eyes. At the same time, he calls for far greater openness from companies outside the gaming industry. Non-endemic brands, in particular, could play a crucial role in helping to establish stable structures and further strengthen the social acceptance of esports.

Ultimately, Tammert views esports as a broader field of societal transformation that extends far beyond entertainment. At the heart of his perspective lies the question of how digital culture, community, talent development and modern working environments can be connected and reimagined for the future.

Core Ideas from Ronald Tammert

- Views gaming and esports as strategic tools for talent acquisition and recruitment.
- Positions esports as a form of competitive performance activity that develops valuable soft skills for the workplace.
- Emphasizes authentic community-building and talent development rather than traditional sponsorship models.
- Considers Germany to be structurally underdeveloped in terms of esports support and development pathways.
- Criticizes the industry's heavy dependence on publishers and the resulting lack of long-term planning security.
- Regards institutional recognition and non-profit status as important milestones for the future development of esports.
- Calls for greater commitment from non-endemic companies to sustainable gaming and esports initiatives.
- Describes esports as a long-term societal and cultural transformation rather than merely an entertainment product.

ROBIN STRYCEK

Board Member for Sport at the German Motor Sport Federation (DMSB)



A racing car requires money, space, infrastructure and often an early commitment to an expensive sporting career. A simulator, on the other hand, fits into a single room. For Robin Strycek, this shift represents one of the most fascinating developments in modern motorsport. As Board Member for Sport at the German Motor Sport Federation (DMSB), Strycek views sim racing not as a gaming trend, but through the lens of a traditional sports governing body.

For us, sim racing is not a game. It is a genuine motorsport discipline.

For the DMSB, sim racing has been officially recognized as a motorsport discipline since 2018 and is therefore far more than simply driving in a virtual environment. It represents a new point of entry into a sport that has historically been defined by high costs, technical complexity and significant infrastructure requirements. The decisive factor for Strycek is its proximity to reality.

In sim racing, circuits, vehicles, driving physics and race situations are replicated with such precision that virtual training and competition formats have evolved far beyond being merely supplementary tools. They can serve simultaneously as an entry point, a training platform and a standalone sporting challenge.

For this reason, the DMSB actively seeks to integrate sim racing into the structures of organized sport. This includes regulations, championship formats, committee work and international coordination with organizations such as the Fédération Internationale de l'Automobile (FIA) and the German Olympic Sports Confederation (DOSB).

The virtual and real worlds are exceptionally close to one another in sim racing.

This federation-driven approach differs significantly from many other areas of esports. While publishers, teams and platforms often shape the competitive landscape in other titles, the DMSB approaches sim racing consistently from the perspective of sporting governance and long-term development. However, this also creates a certain tension. Many sim racers simply want to race - easily, accessibly and without complex regulations. The federation, by contrast, must establish reliable structures ranging from sporting standards to codes of conduct and protective mechanisms.
Strycek identifies this balance as one of the discipline's central challenges.

We must create sporting structures without losing the openness of the community.

The sport must remain open and accessible while simultaneously becoming

more professional, structured, and fair.

Notably, he believes that publishers play a different role in sim racing than they do in many other esports titles. While federations remain dependent on technical platforms - after all, without simulation software there can be no sim racing - many publishers are themselves closely aligned with real-world motorsport and have developed standards that fit well with the governance-oriented approach of sporting federations. As a result, a shared interest emerges in creating realistic, credible and professionally organized competitions.

Nevertheless, Strycek clearly distinguishes sim racing from gaming in a broader sense. For the DMSB, it is not sufficient for a game simply to feature cars and race tracks. What matters are elements such as steering wheels, pedal systems, realistic vehicle dynamics, authentic circuits, licensed cars, setup configurations, tire degradation and damage models. Only through this combination of simulation, physical engagement and sporting comparability does a discipline emerge that the federation recognizes as sim racing.
At the same time, Strycek emphasizes that sim racing should not be viewed merely as a stepping stone into real-world motorsport. Although there are now numerous examples of drivers who successfully transitioned from simulation racing into professional racing series, sim racing possesses its own sporting legitimacy. Those who choose to remain within the virtual discipline should not have to justify that decision.
However, in public perception this recognition is far from universal. Traditional motorsport environments often associate racing with engine noise, the smell of fuel, speed, danger, and physical presence. From this perspective, sim racing can initially appear more abstract, safer, and less heroic. As a result, Strycek observes mixed reactions: scepticism among parts of the traditional motorsport community but increasing acceptance wherever it becomes apparent just how closely simulation and reality can align.

Looking ahead, he identifies two primary priorities. First, access must remain broad and accessible so that sim racing can continue to serve as a cost-effective entry point into motorsport. Second, stronger international structures are required, including European and World Championship formats as well as high-profile international flagship projects. Only through such developments can national-level participation evolve into a genuine sporting pathway for the most talented sim racers.

Strycek's perspective on sim racing is therefore neither romanticized nor defensive. He describes a discipline that opens motorsport to new audiences without replacing it, that leverages digital infrastructure without becoming mere entertainment, and that demonstrates how organized sport can evolve successfully within digital environments.

Core Ideas from Robin Strycek

- Views sim racing as an independent discipline within organized motorsport.
- Emphasizes the exceptional degree of realism between virtual and real-world motorsport.
- Considers clear regulations and sporting structures essential for professional esports competition.
- Recognizes the tension between regulation and low-barrier accessibility.
- Describes the relationship between publishers and federations in sim racing as comparatively cooperative.
- Deliberately distinguishes competitive sim racing from arcade and casual racing games.
- Sees sim racing as an important tool for talent development and the democratization of motorsport.
- Regards international competition structures and flagship projects as critical for further professionalization.

MICHAEL STROHMAIER

Head of esports at Bergische Krankenkasse



Discussions about esports are often framed around the same themes: audience reach, sponsorship, professionalization, or market potential. Michael Strohmaier approaches the topic from a different angle. For him, the primary concern is not the economic development of the industry, but rather the question of what health-related and societal structures must be established now that gaming has become a permanent component of modern lifestyles.

As Head of Esports and Gaming at Bergische Krankenkasse (a German regional health insurance), Strohmaier operates at an intersection that remains relatively underdeveloped within

Prevention also improves performance at the console.

the German esports ecosystem. While traditional sports clubs have long been associated with prevention, health promotion and social responsibility, comparable approaches within gaming and esports are still only beginning to emerge. He sees this both as a structural deficit and as a significant opportunity for future development.

The perspective of Bergische Krankenkasse deliberately differs from traditional sponsorship models. The focus is not on short-term brand visibility among younger audiences, but on the long-term challenge of integrating health promotion into digital leisure and performance cultures. This becomes particularly evident in the competitive environment. According to Strohmaier, concentration, workload management, mental resilience, recovery and nutrition are essential prerequisites for sustained performance. Professional players, in particular, have long understood that performance optimization does not occur solely in front of a screen, but is closely connected to physical and psychological well-being.

Professional esports athletes operate much like traditional elite athletes with structured nutrition, recovery and stress management.

Strohmaier's goal is to transfer these insights more effectively into semi-professional and everyday gaming environments. He explicitly rejects the idea that health promotion should be viewed as a form of moral restriction or educational control. Instead, he sees it as a resource that can enhance both performance and overall quality of life.

At the same time, he openly acknowledges the structural limitations of this approach. Health insurance providers operate within clearly defined legal and financial frameworks. Investments must be directly justifiable in terms of prevention and health promotion. As a result, initiatives within esports cannot be developed independently of broader public health objectives. According to Strohmaier, balancing social responsibility, prevention and public visibility is a defining factor in many of Bergische Krankenkasse's strategic decisions.

His perspective also highlights a broader perception problem facing the industry. In his view, gaming and esports continue to be shaped by deeply rooted stereotypes. Consequently, two competing narratives coexist. Outsiders frequently associate gaming with a lack of self-control, physical inactivity and social isolation.

Within the industry, however, increasingly professionalized structures have emerged that closely resemble those found in traditional sports. Strohmaier identifies the gap between public perception and actual development as one of the central tensions within esports today.

> ***The greatest risk is not gaming itself, but the lack of context and media literacy.***

Notably, his perspective is not purely institutional. Strohmaier himself has many years of gaming experience and was active in the semi-professional scene for a period of time. This personal connection to the community clearly influences his approach. Rather than relying on prohibitions or generalized warnings, he advocates contextualization, media literacy and active support. He is particularly critical of both complete rejection and complete indifference toward the digital environments in which young people increasingly spend their time. Parents, schools and sports clubs therefore have, in his view, a crucial responsibility.

Strohmaier also recognizes several structural challenges within the industry itself. These include unrealistic financial expectations among semi-professional players, as well as a strong dependence on sponsors and publishers. Nevertheless, he remains optimistic about the long-term development of esports. He views the recognition of non-profit status as a major milestone for clubs and organizations, as it creates greater legal certainty and financial stability for the first time.

For Strohmaier, the future of esports lies in the gradual development of resilient and sustainable structures. The key challenge will be to advance professionalization, social responsibility and health promotion simultaneously, while preserving the unique cultural identity of the gaming community.

Core Ideas from Michael Strohmaier

- Approaches esports primarily from a health and prevention perspective.
- Views gaming and esports as important fields of action for health insurance providers.
- Identifies the four key areas of prevention - physical activity, nutrition, relaxation and addiction prevention - as equally relevant within gaming environments.
- Emphasizes the similarities between professional esports structures and traditional high-performance sports.
- Criticizes outdated societal stereotypes surrounding gaming and esports.
- Advocates greater media literacy and educational guidance rather than restrictions and prohibitions.
- Sees clubs and associations as important environments for social integration and orientation.

CLAUDIA MEKELBURG

Executive Advisor Talent Attraction & Employer Branding at BASF



At first glance, the worlds of the chemical industry and the gaming community could hardly seem further apart. On one side stands a global industrial corporation built on decades of established structures; on the other, digital competitive environments, Discord servers, streaming cultures and young communities that organize themselves largely outside traditional institutions. It is precisely at this intersection that Claudia Mekelburg operates. Her work demonstrates how deeply corporate communication, talent acquisition and digital leisure cultures have become intertwined.

For us, gaming and esports are not traditional sponsorship topics. They are spaces in which we can reach people, connect them and engage entirely new audiences.

Through #basfgaming, an initiative she leads together with her colleague Tobias Breuer, Mekelburg pursues an approach that deliberately distinguishes itself from traditional esports sponsorship models. The objective is not primarily visibility on jerseys, tournament stages, or social media channels. Instead, #basfgaming views gaming and esports as cultural and social spaces in which communities, competencies and potential talent pools emerge - spaces that are becoming increasingly relevant for modern organizations.

Within the initiative, Mekelburg is primarily responsible for employer branding, audience engagement and strategic networking. While Breuer focuses more strongly on technological future perspectives surrounding virtual worlds, digital environments and innovation, Mekelburg concentrates on a different question: how gaming can be used to connect people while creating new opportunities for employer communication. The result is a long-term platform designed to strengthen both internal company culture and external talent attraction.

In doing so, #basfgaming intentionally occupies an unusual position within the esports ecosystem. Publishers, teams and tournament organizers are not the central focus. Instead, the initiative positions itself as a bridge between industrial enterprises and the gaming community. At its core lies the conviction that wherever people spend their leisure time, develop interests and form communities, meaningful opportunities for employer engagement also emerge.

This strategic logic is reflected in three primary areas of impact: internal community building, gamification approaches in learning and knowledge-sharing environments and external employer positioning. One particularly striking aspect of Mekelburg's perspective is the extent to which she questions traditional sponsorship logic. Reach alone, she argues, is not enough. Partnerships must be credible, culturally relevant and ideally create tangible value for the community involved. Consequently, collaborations are evaluated less on audience size and more on audience fit, regional relevance, diversity considerations and the potential for long-term relationships.

At the same time, she identifies one of the greatest challenges associated with this approach: its success is often difficult to measure. Unlike performance-driven marketing campaigns, it is rarely possible to determine directly whether

interactions at events or community engagements eventually lead to job applications months later.

Another noteworthy aspect is that Mekelburg herself did not originate from the esports industry. Her deeper engagement with gaming and esports only began through her work on #basfgaming and personal points of contact with the scene. This initial distance continues to shape her perspective today. She describes an experience that many outsiders likely share: without direct exposure to the community, people often underestimate both its scale and its level of professionalism, as well as its broader societal relevance.

> ***Gaming creates connections across countries, teams, and hierarchies, making it a valuable social space within organizations as well.***

From her perspective, two contrasting realities collide. On the one hand, persistent stereotypes of the socially isolated gamer continue to dominate public discourse. On the other hand, she encounters highly organized communities, strong social bonds and a wide range of competencies that extend far beyond playing games. Teamwork, problem-solving abilities, strategic thinking, multitasking and digital literacy are all skills that she believes are becoming increasingly important in modern working environments. When explaining esports to people outside the scene, Mekelburg therefore often relies on comparisons with traditional sports. Organized competitions, teams, leagues and community engagement provide familiar points of reference that make the concept easier to understand. At the same time, she highlights important differences, particularly the dynamic nature of digital platforms, the close connection between communities and participants, and the significant influence publishers exert over competitive environments.

She sees especially strong potential in the social dimension of digital spaces. Whereas traditional club structures are often tied to specific locations, gaming enables the formation of transnational communities. For a globally operating company such as BASF, this creates entirely new opportunities for informal interaction, connecting employees across countries, cultures and organizational boundaries. Looking to the future, Mekelburg remains cautiously optimistic. Outside the esports and gaming scene, unfamiliarity, distance and stereotypical perceptions still dominate. At the same time, however, she observes a clear cultural shift. As generations who have grown up with gaming increasingly move into leadership positions, digital gaming environments are becoming recognized as a natural part of contemporary society.

For Mekelburg, the future of esports will ultimately depend on its ability to achieve long-term societal relevance. The decisive factor will be whether gaming and esports can increasingly be recognized as cultural, social and competency-building spaces - both within organizations and beyond the boundaries of the gaming community itself.

Core Ideas from Claudia Mekelburg

- Positions #basfgaming deliberately beyond traditional sponsorship models, focusing on long-term relationships rather than short-term reach.
- Uses gaming as a tool for employer branding, internal networking and international community building.
- Emphasizes the importance of authenticity, audience fit and credible partnerships within the esports ecosystem.
- Recognizes gaming as a source of valuable competencies for modern workplaces, including teamwork, problem-solving and digital literacy.
- Observes a significant gap between societal stereotypes and the actual professionalism of the industry.
- Expects long-term acceptance to grow as generations raised with gaming increasingly assume decision-making roles.

Case Study

BERLIN INTERNATIONAL GAMING (BIG)

The Perception of Esports and Participation in Sportainment Formats from the Perspective of a Professional esports Team

At the beginning of 2026, esports in Germany was granted non-profit status, giving it access to the same tax benefits and public funding opportunities as traditional sports. This marked a significant step toward greater parity between the two disciplines. At the same time, professional sports clubs such as Eintracht Frankfurt, VfB Stuttgart and Borussia Dortmund have increasingly recognized the potential of esports - particularly in reaching younger audiences - and have been actively involved in the sector for several years. These clubs compete at a high level across various esports titles, introducing esports fans to brands that have traditionally been associated with conventional sports.

One of the most notable recent developments illustrating the convergence of sports and esports is the rise of formats such as the Kings League, Baller League, and Icon League. Often referred to as sportainment, these competitions merge elements of sports and entertainment, bringing together communities from both worlds. In many of these leagues, teams are managed by personalities from professional sports, gaming, and social media. Matches are frequently broadcast on streaming platforms such as Twitch, a platform originally rooted in gaming culture and particularly popular among gamers.

One thing has become increasingly clear: the boundaries between these worlds are continuing to blur. To better understand how esports is perceived by different stakeholders, how this convergence affects both industries and what each side can learn from the other, this case study examines the example of Berlin International Gaming (BIG). The organization recently took a step that remains relatively uncommon for professional esports teams by participating in The Last Flight, a sportainment format centered around darts.

Berlin International Gaming: One of Germany's Most Successful esports Organizations

Berlin International Gaming, commonly known as BIG, is one of the most recognized and successful esports organizations in Germany. Founded in 2017 and headquartered in Berlin, BIG has rapidly evolved from an ambitious newcomer into a firmly established player on the international esports stage.

The historical cornerstone of the organization is its Counter-Strike team, which has been complemented by successful ventures into several other premier esports titles, all competing at the highest international level. Through the Roaring Bears, officially registered in the Berlin Association Register in 2023, BIG also established one of the first official fan clubs in German esports. The organization benefits greatly from this fan support, particularly at prestigious home events such as IEM Cologne.

BIG continues to expand its involvement across various esports titles while maintaining a strong commitment to nurturing young talent and providing world-class professional structures. Most recently, the organization decided to explore an entirely new area: sportainment. In 2026, BIG participated in The Last Flight, a darts league that combines professional darts players, creators and esports organizations. For a professional esports organization, this represented a significant first.

In an interview with Daniel Finkler, CEO of Berlin International Gaming, we discussed the self-perception and external perception of esports, the motivations behind participating in sportainment formats, and the lessons that esports and traditional sports can learn from one another.

SELF-PERCEPTION AND EXTERNAL PERCEPTION OF ESPORTS

Interview with Daniel Finkler, CEO of BIG



Can you briefly introduce Berlin International Gaming and yourself?

We founded BIG to provide a home for German esports and with the ambition of building a German team capable of achieving success both nationally and internationally. In doing so, we modelled ourselves after established sports clubs with a strong national identity and an international outlook.

Next year, we will celebrate our tenth anniversary. I have served as CEO, co-founder, and shareholder since 2017. My primary focus is on strategic decisions regarding the long-term development of BIG, identifying new business opportunities and ensuring sustainable growth.

What criteria guide your strategic decisions in esports?

For every decision we make, we ask ourselves whether it strengthens our core business, which is clearly esports, complemented by gaming-related activities.

Because we have pursued an entrepreneurial approach from the beginning rather than building the organization primarily through investor funding, we must operate sustainably from a business perspective. We follow a conservative strategy and closely monitor our cost structure.

We only pursue diversification in areas that align closely with our business model, such as boot camps, merchandise, or e-commerce. Any expansion must remain sufficiently connected to our core activities to complement them rather than distract from them.

What tensions or trade-offs arise in these decisions?

The primary conflict lies between maximizing competitive success and achieving financial profitability. Only a small number of organizations successfully balance both objectives.

Another challenge concerns the balance between national and international markets. If the German talent pool is still developing, organizations must recruit internationally without losing their German identity.

There is also a trade-off between entertainment and competitive focus. We clearly position ourselves as a sports club, meaning competitive performance always takes priority over factors such as audience reach. However, creator collaborations outside league competition complement our activities effectively, as our partners appreciate the additional exposure they generate.

How do you define esports and how do you explain it to people outside the industry?

Esports is organized, competitive competition conducted in a digital environment at a professional level.

When speaking with people outside the industry, I often use comparisons to traditional sports. Instead of employing professional football players, we employ athletes who compete in various digital disciplines at major tournaments with substantial prize pools. The primary difference is simply the medium.

For me, esports falls under the broader umbrella of sport because, much like chess, it is fundamentally a mental sport while also involving physical components such as hand-eye coordination and reaction speed. This comparison remains one of the strongest arguments within the context of the German Olympic Sports Federation (DOSB). Furthermore, following the 2025 Tax Amendment Act, esports has, since the beginning of 2026, been explicitly treated in the same manner as chess under German tax law.

Where do discrepancies exist between self-perception and external perception in esports?

Within an organization, it is easy to assume that you are highly relevant and widely known because of media coverage, social media presence and audience reach.

The discrepancy becomes apparent when you ask someone outside the gaming and esports community, "Do you know BIG?" and receive a "No" in response. Although we are one of the most recognized esports organizations in Germany, we are not necessarily known outside the community.

That is understandable, but it can still be surprising because the internal perception is often very different.

ESPORTS AND TRADITIONAL SPORTS: IS SPORTAINMENT THE FUTURE?

BIG participates in the creator-driven darts league The Last Flight. What attracted you to the format?

It allows us to enter entirely new territory beyond the traditional gaming environment.

This challenge brings fresh momentum without changing our identity. Our objective remains the same: to win.

The format also creates attractive opportunities for our partners and the feedback we have received has been overwhelmingly positive. We contribute our expertise in content creation and marketing from the esports sector while remaining open to learning from traditional sports. One particularly interesting aspect is that many of the required skills are surprisingly similar, regardless of whether the competition is digital or physical. Whether you are aiming at a monitor or a dartboard, ultimately both involve hitting a target.

How do you assess the future of sportainment formats?

I believe the coming years will bring a period of consolidation. It is unlikely that multiple competing leagues within the same sport will coexist successfully over the long term.

Most likely, one dominant league will emerge in each country. Nevertheless, I remain optimistic about the future. Attractive digital products can be created with relatively modest capital investment and advances in AI technology are making content production increasingly efficient.

Ultimately, the strongest formats will survive. Rather than an endless proliferation of leagues, we will likely see a limited number of powerful brands establish themselves alongside traditional sports.

Can esports and traditional sports learn from each other?

Absolutely.

Formats such as the Icon League and Kings League demonstrate that maintaining a presence on platforms like Twitch is an effective way to reach new audiences.

Esports can learn from traditional sports primarily in the area of infrastructure. Traditional sports benefit from decades of established structures that provide planning certainty and allow organizations to focus on their core activities. Membership systems and fan clubs, for example, remain comparatively underdeveloped in esports.

Conversely, traditional sports can learn

from the direct and authentic interaction that esports organizations maintain with their communities. Formats such as The Last Flight actively involve viewers in the experience, creating a level of spontaneity and engagement that feels fresh and distinctive.

Esports has established a strong presence on Twitch, YouTube, TikTok and Instagram, while traditional sports are still catching up in some of these areas. The boundaries between the two worlds are increasingly blurred, as many esports organizations adopt practices from traditional sports while football clubs continue to launch and expand esports divisions.

Will esports and traditional sports continue to converge over the long term?

Both sectors have their own legitimacy and unique strengths.

There are already numerous examples of convergence, including VfB Stuttgart and Eintracht Frankfurt in the Prime League, Real Madrid's involvement in Brawl Stars and the partnership between SK Gaming and 1. FC Köln in EA FC.

There is not yet a perfect integration model, but gradual convergence is clearly taking place.
The key question is whether deeper collaboration could accelerate the growth of the broader sport-entertainment industry. If both sides invest more heavily, they could connect their respective audiences - younger esports fans and older, higher-spending sports fans - creating significant additional value for advertisers and partners.

Traditional sports can learn from esports in the area of community engagement, while esports can gain valuable insights into media operations and content strategies from traditional sports. The potential for further development is undoubtedly substantial.

CONCLUSION

Overall, it is evident that both the esports industry and traditional sports are undergoing significant transformation. Each sector is identifying new channels and markets that it seeks to develop strategically. Notably, this process is driven less by competition and more by an increasingly collaborative relationship. Both industries possess unique strengths from which the other can benefit in meaningful and lasting ways.
Esports can particularly benefit from the established structures of traditional sports. These include long-term planning certainty, proven membership models and the physical presence of traditional sporting events, which create powerful emotional connections between fans and organizations.

Traditional sports, meanwhile, face the challenge of continuing to engage younger audiences. This is an area in which gaming and esports have developed considerable expertise over many years, particularly through the authentic and consistent use of digital platforms such as Twitch and YouTube.

Traditional sports can draw valuable lessons from this evolution. Livestream formats that do not require expensive television production enable authentic community engagement and actively involve audiences in the experience. Within livestreaming, the focus is not solely on audience size but also on "time with brand" - the amount of time viewers spend engaging with a brand within a particular format.
This creates a deep connection to personalities and brands that is difficult to achieve through traditional media channels alone.
Even closer collaboration between sports and esports offers considerable potential. Joint formats and strategic partnerships could significantly amplify the mutual learning effects identified throughout this study. Partnerships such as the involvement of 1. FC Köln in SK Gaming demonstrate how long-term integration between traditional sports organizations and esports teams can be structured. These examples show that meaningful cooperation can extend far beyond isolated initiatives and generate tangible value for both sides.

At the same time, it remains to be seen how sportainment formats will evolve in the coming years. The Baller League, for example, is currently pausing its activities in Germany to focus on international markets. Daniel Finkler also emphasized that further consolidation is likely across the industry.
It is reasonable to expect that a small number of major sportainment brands will establish themselves successfully, while smaller formats face increasing pressure. As a result, the question of which brands can secure a sustainable long-term position will become one of the most fascinating developments at the intersection of sport, esports and digital entertainment.

Results

HOW THE ESPORTS INDUSTRY UNDERSTANDS ITSELF

The qualitative analysis of the expert interviews provides valuable insights into how key stakeholders within the esports industry describe esports, which underlying logics they consider most influential and which tensions they believe will shape its future development. The focus is therefore not on how the community is perceived from the outside, but rather on how the industry describes itself through the perspectives of teams, publishers, tournament organizers, media organizations, sponsors and stakeholders from politics, associations, education and healthcare.

Key Finding

The industry does not describe esports as a one-dimensional sports, media, or entertainment product. Instead, it is understood as a hybrid ecosystem that combines competition, community, business interests and societal relevance.

Esports as a Hybrid Sphere of Meaning

The interviews reveal a clear pattern: from the perspective of the stakeholders interviewed, there is no single, universally shared understanding of esports. Rather, esports emerges as a hybrid system in which competition, entertainment, community, economic interests and social functions operate simultaneously. Differences between stakeholders lie less in whether these dimensions are relevant and more in how strongly individual actors prioritize them.

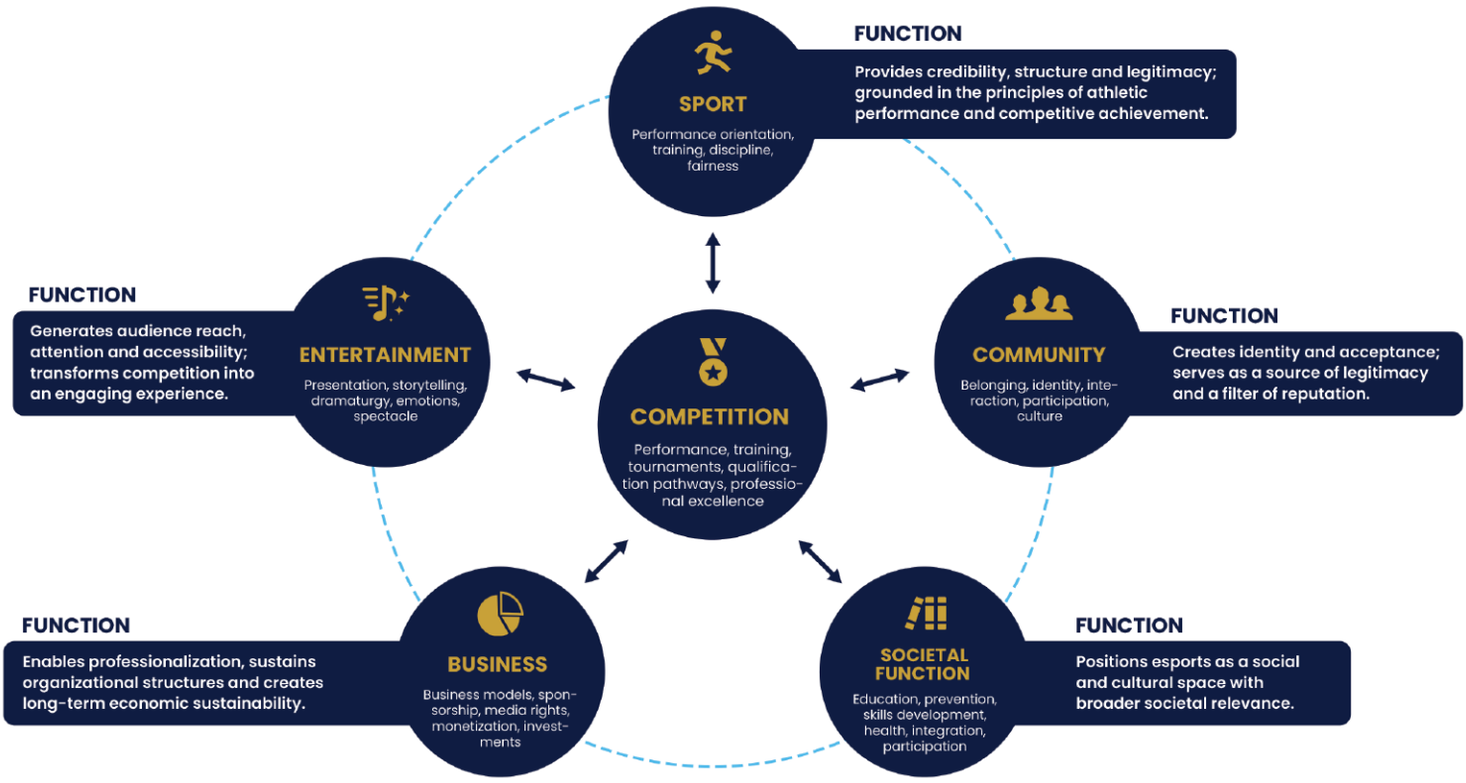
The common denominator across nearly all perspectives is competition. Teams, publishers, tournament organizers, media organizations and institutional stakeholders consistently describe esports first and foremost as a competitive practice defined by performance, training, tournaments, qualification pathways and professional excellence. Organizations such as MOUZ, BIG and Eintracht Spandau, in particular, frame esports primarily through sporting achievement and competitive logic. At the same time, even stakeholders outside performance-oriented organizations view competition as a fundamental prerequisite for professional visibility and credibility.

The primary distinction emerges when esports is interpreted beyond its competitive function. The frequently cited public dichotomy between sport and entertainment is only partially reflected in the interview material. According to many stakeholders, competition creates credibility, while entertainment creates reach. Eintracht Spandau, for example, describes esports as an “entertainment product built upon competitive sport,” while Riot Games characterizes esports as a combination of a UEFA Champions League final and a music festival. Competitive performance remains the core of esports’ identity, while media presentation serves as its essential extension.

The community occupies an equally central role. Across the interviews, the community is rarely portrayed as a passive audience. Instead, it functions as a source of resonance, a filter of reputation and an informal mechanism of legitimacy. Sponsorship activations, creator collaborations and communication strategies are repeatedly evaluated according to whether they resonate with the community. Visibility can be purchased; cultural credibility cannot.

At the same time, nearly all stakeholders openly describe esports as an economic system. Commercialization is rarely perceived as being in conflict with competition. On the contrary, it is largely viewed as a prerequisite for professional development and long-term sustainability. However, the industry’s self-understanding increasingly extends beyond commercial considerations and competitive performance alone. Stakeholders from education, healthcare and institutional sectors, in particular, increasingly view esports as a social and cultural space that can foster media literacy, mental well-being, teamwork and talent development.

Figure 1: The Hybrid Semantic Framework of Esports
The Interconnection of Core Dimensions in the Self-Understanding of Esports



Overall, the findings demonstrate that, from the industry's perspective, esports is neither purely sport nor purely entertainment, neither solely business nor solely community. Rather, it functions as a hybrid system whose unique dynamics emerge precisely from the interaction of these different logics.

Institutional Logics and Decision-Making Rationales

The interviews demonstrate that esports is shaped by a variety of institutional rationalities. While teams, publishers, tournament organizers, media organizations, sponsors and institutional stakeholders often pursue similar overarching objectives, they interpret professionalism, success and future development through fundamentally different lenses.

Teams and clubs primarily frame esports through the dimensions of performance, competition and economic sustainability. Competitive success remains the foundation of organizational legitimacy. However, sporting achievement alone is no longer sufficient to build sustainable structures. As a result, audience reach, content creation and community engagement have increasingly become necessary complements to competitive performance.

Publishers, by contrast, operate according to a more systemic logic. For stakeholders such as Riot Games, the primary focus is not the performance of individual competitors, but rather the long-term stability and health of the ecosystem as a whole. Audience retention, brand development, competitive integrity and the sustained relevance of the game itself represent key decision-making criteria. Within this framework, competition is viewed less as an end in itself and more as a tool for fostering long-term fan engagement.

Tournament and league operators operate between these two perspectives. They must ensure competitive quality and sporting credibility while simultaneously generating audience reach, sponsor value and compelling event experiences. As a result, competitions are understood not only as sporting events but also as platforms for entertainment, engagement and commercial activation.

Sponsors and media organizations follow a distinct rationale of their own. Audience reach alone is often considered an

insufficient measure of success. Relevance is instead created through cultural resonance, alignment with community values and authentic activation strategies. Institutional stakeholders and health organizations further expand this perspective by emphasizing social responsibility, prevention, education and talent development.

Esports therefore does not operate according to a single decision-making model. Rather, different stakeholders simultaneously pursue and balance competitive excellence, ecosystem development, commercial viability and societal legitimacy. It is precisely the coexistence of these diverse institutional logics that characterizes the complexity of the esports ecosystem.
Der E-Sport folgt damit keinem einheitlichen Entscheidungsmodell. Vielmehr organisieren unterschiedliche Akteure Wettbewerb, Ökosystementwicklung, wirtschaftliche Anschlussfähigkeit und gesellschaftliche Legitimation parallel.

Power, Governance, and Dependencies

The interviews describe a governance system characterized by asymmetrical distributions of power. At its centre lies the unique role of publishers, who control the game itself, the competitive environment, the rules and regulations, access to participation and, in many cases, the key commercial mechanisms of the ecosystem.

As a result, publishers perform functions that, in traditional sports, would typically be distributed across multiple independent institutions. From the industry's perspective, publishers provide stability through the establishment of competitive structures, professional broadcast standards, global scalability and investment capacity. At the same time, however, this concentration of power creates dependencies for teams, tournament organizers and media stakeholders. Stability is generated through control and control inevitably limits participation in decision-making processes.

A second centre of power emerges through economic dependencies. Teams and event organizers frequently identify sponsorship as their most important source of revenue. Consequently, audience reach, brand partnerships and community growth acquire significant strategic importance. Professionalization therefore remains closely linked to economic resilience and the ability to establish durable commercial partnerships.

At the same time, the community functions as an informal governance actor within the ecosystem. Decisions regarding sponsorship agreements, creator collaborations and competitive formats are repeatedly influenced by anticipated community reactions. Reputation and legitimacy are not created solely through formal institutions but are also socially negotiated and continuously reinforced through community acceptance.

International investment structures - particularly those associated with Saudi Arabia and the Esports World Cup - are viewed with a degree of ambivalence. Stakeholders with a stronger business orientation tend to emphasize the contributions such investments make to professionalization, infrastructure development and global visibility. Other stakeholders, however, point to potential risks related to political influence, increasing dependency and the further concentration of power within the industry.

Overall, esports continues to professionalize within a framework of asymmetric power relationships. The long-term stability of the ecosystem will depend largely on how effectively economic development, governance structures and stakeholder participation can be balanced in the future.

The Ambivalent Comparison with Traditional Sport

The interviews reveal that esports simultaneously uses traditional sport as both a point of reference and a point of differentiation. Sport functions less as a definitive identity for esports and more as a reference model through which competition, professionalism and societal relevance can be explained and understood.

Teams, tournament organizers and institutional stakeholders in particular frequently draw on comparisons with traditional sport when discussing training methodologies, competition formats, or performance requirements. These comparisons help make esports more accessible and understandable to policymakers, media representatives, sponsors and the general public.

Figure 2: Sport–Esports Comparison Model
Similarities, Key Differences and Strategic Areas of Convergence



At the same time, the analogy is deliberately limited. While esports adopts many sporting principles, it ultimately operates according to its own rules and structures. Several interviewees emphasize that ownership structures, platform dynamics, community culture and the integration of entertainment create fundamental differences between esports and traditional sports. Unlike conventional sporting disciplines, esports is directly tied to intellectual property. Games are owned by publishers, who control the rules, competitive ecosystems and access to participation.

Nevertheless, the performance logic of esports remains highly comparable to that of traditional sport. Training routines, mental strain, competitive pressure, team coordination and performance optimization are repeatedly described using terminology commonly associated with elite athletic competition.

The comparison with traditional sport therefore serves an important legitimizing function. At the same time, however, it carries the risk of obscuring the unique characteristics that define esports. From the perspective of the industry, the binary question of whether esports is or is not a sport ultimately fails to capture the complexity of the phenomenon.
Instead, the more relevant question is in which contexts esports functions in a sport-like manner and where its distinct digital, economic and cultural logics must remain visible and be understood on their own terms.

External Perception and Legitimacy

The interviews indicate that societal legitimacy remains a key prerequisite for the continued development of esports. Despite increasing professionalization, esports is still frequently associated with stereotypical perceptions outside its own communities and institutions, including social isolation, physical inactivity and gaming addiction.

However, several interviewees describe these perceptions less as a result of deliberate rejection and more as a consequence of limited familiarity with the industry. Professional events, stadium-based competitions, media exposure and brand partnerships all contribute to gradually reshaping public perception. Visibility creates legitimacy, but only when it is translated

into forms that are accessible and understandable to broader audiences.
The interviews also reveal clear generational differences. Younger audiences increasingly regard digital gaming and competitive gaming cultures as a normal part of everyday life, whereas older generations often remain more sceptical. At the same time, several stakeholders expect societal acceptance to increase gradually as digitalization continues to shape everyday social and cultural practices.

Institutional legitimacy remains closely linked to questions of formal recognition. The ability to obtain non-profit status, access public funding and achieve political recognition is repeatedly identified as a major challenge. As a result, comparisons with traditional sport are often employed strategically to establish legitimacy and institutional compatibility in the eyes of policymakers, public authorities and established organizations.

At the same time, the perceived social value of esports is becoming increasingly important. Themes such as media literacy, mental health, talent development and prevention broaden the understanding of esports beyond competition and entertainment alone. From the perspective of the stakeholders interviewed, legitimacy is therefore not created solely through audience reach or commercial success, but through the ability of esports to demonstrate meaningful societal relevance and integration.

Stabilization Rather than Growth

One of the central findings of the interviews is that the future of esports is increasingly being described not in terms of growth, but in terms of stabilization. While audience expansion and market growth remain important, they are no longer viewed as the industry's dominant objectives.

Several stakeholders point out that the early phases of the esports market were characterized by inflated growth expectations. In many cases, professionalization progressed more rapidly than economic consolidation. As a result, professionalization should not automatically be equated with stability.

Teams, tournament organizers and publishers consistently emphasize the need for resilient and sustainable business models. Sponsorship remains a critical source of revenue, but sta-

Figure 3: Esports Stabilization Framework
Core Dimensions and Success Factors for the Long-Term Stability of Esports



keholders increasingly argue that it should be complemented by additional income streams, including memberships, media rights, creator-driven economies, digital products and recurring revenue models.

A second key theme concerns talent development. Sustainable professionalization is no longer understood solely in terms of competitive performance. Instead, it increasingly encompasses health, mental well-being, stress management, media literacy and broader social development. In this perspective, the long-term success of esports depends not only on producing elite competitors, but also on fostering healthy and sustainable pathways for participation and growth.

At the same time, several interviewees highlight coordination challenges among stakeholders. Long-term stabilization appears achievable only if publishers, teams, sponsors, institutions and tournament organizers cooperate more closely and establish more reliable forms of governance. Cultural integration, regional structures and partnerships with educational institutions are likewise becoming increasingly important components of a sustainable ecosystem.

From the perspective of the industry, the future of esports will therefore be determined less by its capacity for growth than by its resilience - economically, organizationally, culturally and socially.

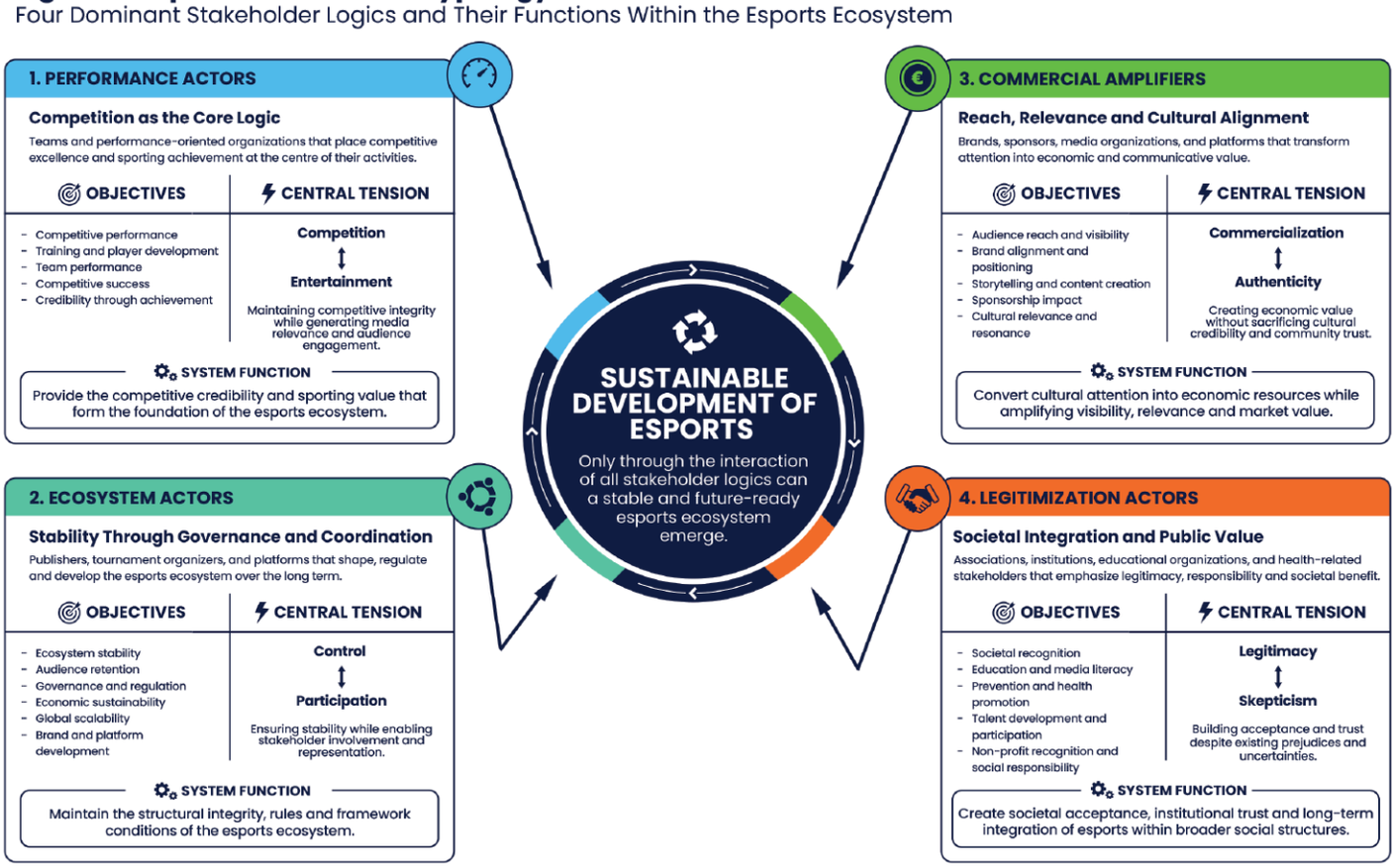
Cross-Cutting Tensions

The interviews reveal that the central challenges facing esports stem less from a lack of professionalization than from competing expectations within the same ecosystem. Esports emerges as a field characterized by productive tensions that shape its ongoing development.

The first major tension concerns the relationship between competition and entertainment. Competition creates credibility, while entertainment generates reach and audience engagement. An excessive focus on either logic risks undermining the other. Competitive integrity can be weakened if entertainment becomes the sole priority, while audience growth and visibility may suffer if the focus remains exclusively on sporting performance.

A second tension arises between publisher control and stakeholder participation. Centralized governance structures provide stability, consistency and invest-

Figure 4: Esports Stakeholder Typology Model
Four Dominant Stakeholder Logics and Their Functions Within the Esports Ecosystem



ment security. At the same time, they limit the influence and decision-making power of other stakeholders within the ecosystem. This creates an ongoing balancing act between efficient governance and broader participation.

A similarly ambivalent relationship exists between community and commercialization. Sponsorship, partnerships and economic development remain essential for the sustainability of the industry. However, commercial activities must also be perceived as culturally authentic and legitimate by the community. Financial success alone is insufficient if it comes at the expense of credibility and community trust.

Another important tension exists between professionalization and fragility. Esports often presents itself as a highly professional industry, featuring sophisticated competitions, international events and advanced organizational structures. Yet many stakeholders remain economically dependent on a limited number of revenue sources and operate within ecosystems that can be structurally vulnerable. Professional appearance does not automatically guarantee long-term resilience.

Finally, the interviews highlight a tension between legitimacy and societal scepticism. Professionalization alone is not enough to secure broader acceptance. Public understanding, trust and societal relevance remain essential prerequisites for long-term legitimacy. Even as esports continues to mature, it must still address misconceptions and demonstrate its value beyond its own communities.

From the perspective of the industry, the future of esports depends less on eliminating these tensions than on managing them successfully. The long-term sustainability of the ecosystem will be determined by its ability to maintain a productive balance between these competing forces.

Typology of Stakeholder Logics

The interviews make it clear that esports is not a homogeneous field characterized by a shared set of objectives. Instead, different stakeholders address different challenges. And it is precisely this diversity of purposes that generates the dynamics of the ecosystem.

Teams primarily operate according to a performance logic. Competition, training and sporting credibility are at the centre of their activities. Within this framework, performance serves as the primary source of legitimacy.

Publishers and tournament organizers function more as ecosystem actors. Their priorities focus on audience retention, governance, competitive structures and the long-term stability of the overall ecosystem. While competitive performance remains important, it is viewed within the broader context of sustaining and developing the system as a whole.

Brands, media organizations and sponsors act as commercial amplifiers. Their primary concerns are audience reach, cultural relevance, brand alignment and community fit. Success is measured not only by visibility but also by the ability to connect authentically with target audiences and communities.

Institutional stakeholders from politics, education, associations and healthcare follow a legitimization logic. Within this perspective, societal responsibility, prevention, education, public value and institutional compatibility become the dominant considerations. Esports is viewed not only as a competitive or commercial activity, but also as a social and cultural phenomenon with broader implications for society.

Esports therefore functions not because all stakeholders pursue the same objectives, but because different rationalities fulfil different functions within the ecosystem. Many of the conflicts observed within the industry can thus be understood less as signs of dysfunction and more as the natural outcome of competing systems of goals and incentives.

It is precisely the coexistence of these diverse interests that makes esports both dynamic and structurally complex. The industry's development is shaped not by consensus, but by the ongoing interaction between stakeholders whose priorities differ, yet whose activities remain deeply interconnected.

Conclusion: How the Industry Understands Itself

The analysis of the expert interviews demonstrates that there is no single, unified understanding of esports within the industry. This diversity is, in itself, a defining characteristic of the eco-

system. The stakeholders interviewed do not describe esports exclusively as a sport, nor primarily as an entertainment, media, or technology product. Instead, esports emerges as a hybrid system in which competition, entertainment, community, economic logics and societal functions operate simultaneously.

One pattern connects nearly all perspectives: competition forms the common core of the industry's self-understanding. Teams, publishers, tournament organizers, media organizations, sponsors and institutional stakeholders consistently refer to performance, training, professional excellence, tournament structures and competitive integrity as the foundation of esports. The interviews suggest, however, that the central question within the industry is less whether esports qualifies as a sport and more how competition can be organized, made visible and developed into a sustainable economic model over the long term.

At the same time, the interviews make clear that the industry does not view competition and entertainment as opposing forces. Competition generates credibility, identification and performance orientation while entertainment creates reach, attention, and cultural relevance. From the perspective of the stakeholders, the value of esports emerges precisely from the combination of competitive performance, media presentation and digital experiential engagement.

The community is not primarily described as a passive audience but rather as an active component of the ecosystem: a space of resonance, a source of legitimacy and a co-creator of culture. It is important to note, however, that this finding reflects the perspective of the industry stakeholders interviewed. How spectators and community members themselves perceive this role remains an open question and should be examined separately in future research.

Furthermore, the interviews reveal an ambivalent relationship with professionalization and economic development. Growth remains an objective, but it is increasingly linked to sustainability. Several stakeholders describe a shift away from short-term scaling strategies toward long-term stabilization through more resilient business models, stronger partnerships, more professional governance structures and greater planning security.

Overall, the interviews portray an industry that does not define itself through clear-cut categories, but through its ability to productively combine different logics. The Esports Report 2026 therefore highlights how the industry interprets its present and negotiates its future: as a professional, culturally relevant and structurally hybrid ecosystem situated at the intersection of competition, entertainment, community, business and societal transformation.

Note on the Interpretation of the Findings

The findings presented are based on qualitative expert interviews with representatives of the esports industry. As such, they reflect the self-perceptions and interpretive frameworks of key stakeholders within the ecosystem.

No direct conclusions can be drawn from these findings regarding the actual perceptions of spectators, fans, or broader community groups. These perspectives will be examined through a complementary community survey in future research.

Methodology of the Qualitative Analysis

The study is based on a multi-stage qualitative content analysis of expert interviews conducted with key stakeholders from the German esports ecosystem, including teams, publishers, tournament organizers, media organizations, sponsors and institutional actors.

The interviews were transcribed and systematically analysed using MAXQDA. In the first stage, each interview was examined individually, resulting in institution-specific profiles of the respective stakeholders. Subsequently, the interview data were coded, categorized thematically and condensed into a hierarchical coding framework through a structured qualitative content analysis.
Cross-case comparisons, code matrices and pattern analyses were then employed to identify overarching similarities, differences, tensions and stakeholder logics. These findings provide a comprehensive description of how the esports industry understands itself and how it interprets its own developmental dynamics from the perspective of its key actors.

Looking Ahead

BETWEEN SELF-REFLECTION AND SUSTAINABLE DEVELOPMENT

Esports in Germany has reached a decisive stage in its development. The findings of this report reveal an industry that no longer needs to prove its relevance. At the same time, many of its long-term structures are still in the process of formation. Today, esports is neither a niche phenomenon nor fully embedded within mainstream society. It has already become an integral part of contemporary media, sports, youth and business culture. However, the institutional, economic and societal frameworks that will shape the coming years have yet to fully consolidate.

A central finding of this report is that there is no single, unified understanding of esports. Rather, the industry describes itself as a hybrid ecosystem in which competition, entertainment, community, economic interests and social responsibility operate simultaneously. This ambiguity is not a weakness but a defining characteristic of esports. It explains both its dynamism and many of its inherent tensions. While teams often place competitive performance and sporting success at the centre of their activities, publishers tend to think in terms of game worlds, intellectual property strategies and player engagement. Media organizations, agencies, sponsors and institutional stakeholders, in turn, evaluate esports through the lenses of audience reach, communicative effectiveness, economic sustainability and societal relevance.

Looking ahead, the decisive challenge will be whether the industry can successfully combine these different logics in a productive manner. Esports will not thrive if it is understood exclusively as a sport, exclusively as entertainment, or exclusively as a marketing platform. Its strength lies precisely in the intersection of these dimensions. Competition creates credibility; entertainment generates reach; community fosters engagement and belonging; business models provide professional sustainability; and societal integration enables long-term legitimacy.

The role of publishers will remain particularly influential. Unlike traditional sports, the playing field in esports belongs to private rights holders. This structural characteristic shapes rules, competition formats, access, monetization and planning security. For teams, tournament organizers, sponsors and associations, this means that long-term development will always depend, at least in part, on decisions made beyond their direct control. The future of esports will therefore depend significantly on how sustainable and constructive the relationships between publishers and other stakeholders become. Reliable frameworks, greater transparency in decision-making processes and models that prioritize sustainable ecosystem development over short-term reach will be essential.

The report also demonstrates that the industry is gradually moving from a growth-oriented logic toward a stability-oriented one. After years of ambitious expectations, significant investment and at times overly optimistic narratives about the future, attention is increasingly shifting to different questions: Which structures are sustainable in the long term? Which business models are resilient? How can youth development, education, clubs and local initiatives be more effectively integrated? How can trust be established among policymakers, businesses, parents, educational institutions and the wider public? This shift reflects a growing level of maturity. An industry that seeks not only to grow but to endure must engage with questions of governance, standards, responsibility and sustainability.

The recognition of esports as a non-profit activity in Germany creates new opportunities in this regard. It has the potential to provide important momentum, particularly within clubs, educational initiatives and structured youth development programs. This creates an opportunity to embed esports more firmly within broader societal contexts and to establish pathways beyond elite-level competition. The foundation of esports - clubs, local communities, universities, schools,

coaches, volunteers and grassroots development structures - will be critical for the future. Without robust entry points and development pathways, professionalization at the highest levels remains fragile.

The relationship between esports and traditional sport will also continue to evolve. The interviews demonstrate that a simple equation of the two is neither accurate nor productive. Esports shares important characteristics with traditional sport, including competition, performance, training, team structures and emotional fan engagement. At the same time, it operates according to its own logic through digital platforms, publisher control, community dynamics and media presentation. Consequently, the more relevant question is not whether esports is "like sport", but rather how the two fields can learn from one another. Sportainment formats, club-based initiatives, collaborative educational programs and new forms of digital fan engagement already illustrate that the boundaries between the two are becoming increasingly permeable.

Nevertheless, a significant challenge remains in terms of public perception. Within the industry, esports is often experienced as large-scale, professional and socially relevant. Outside its own communities, however, this image has not yet become universally established. The gap between internal significance and external perception will remain one of the industry's most important challenges. Esports must continue to explain what it is, what values it represents, which competencies it fosters and what contributions it can make to society, the economy and culture.

The overall picture that emerges is therefore diverse, ambivalent and ultimately positive. German esports benefits from strong stakeholders, highly engaged communities, growing institutional recognition and a remarkable capacity for innovation. At the same time, it requires greater reliability, deeper structural foundations and a clearer common language.

The future of esports lies in the industry's ability to harness the strengths of its diversity and to work collaboratively with its various stakeholders toward the development of sustainable and resilient structures. If it succeeds in combining competitive excellence, digital culture, economic viability, community engagement and social responsibility, esports in Germany will evolve from a dynamic industry in development into a permanently established component of modern sports and media culture.



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The Esports Report 2026 explores how experts from a wide range of stakeholder groups within the esports industry perceive current developments across the ecosystem. At its core are questions surrounding both the industry's self-perception and its external perception. In doing so, this year's report provides stakeholders from business, politics, and society with qualitative insights into the diverse perspectives that shape the esports landscape.

Drawing on in-depth qualitative analyses, the report offers a comprehensive view of the industry's current state of mind. It identifies both key challenges and emerging opportunities. The Esports Report 2026 contributes to the development of knowledge about esports, fosters dialogue among stakeholders and supports the continued professionalization and stabilization of esports in Germany.

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