

Proceedings, conclusions and  
recommendations from the first

# GAMES POLICY SUMMIT

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## Abstract and Executive Summary

This comprehensive report synthesizes key insights from presentations by industry experts focused on the European games industry at the first-ever Games Policy Summit. It explores critical themes including funding innovation, reforming support systems, and leveraging public funding to foster industry growth. Discussions among presenters and Summit participants also delved into regulatory challenges, policy evolution, and strategic initiatives aimed at enhancing innovation and competitiveness within Europe's games industry.

The report further underscores the importance of collaborative action among stakeholders to address systemic challenges and capitalize on emerging opportunities. It highlights the dynamic evolution of Europe's gaming landscape and emphasizes the need for cohesive strategies that align governmental objectives with entrepreneurial dynamics. Overall, the report may serve as a roadmap for policymakers and industry leaders navigating the complexities of the European games industry, fostering resilience, innovation, and sustainable growth.

The authors' view that a clear European strategy for the games sector is desirable was strengthened much in the Summit process. Such a strategy is necessary to unleash the full potential of this very successful industry, for us to reap its full benefits of exports, jobs, digital growth, innovation and the soft-power reach of European values.

The Summit process generated proposals for 17 actions, mostly related to 1) regulation and measures to establish a level playing field in global competition, 2) coherent and appropriate funding systems, stressing especially the need for funding new entrants, as well as 3) information gathering and dissemination, especially concerning global markets. The information and communication needs are by our experts regarded as relatively low-cost and not very urgent. The actions regarding new and improved games-centric funding systems are by our experts regarded as needing most of any resources allotted, and that this is also quite urgent.

## Introduction

On the day before the 20<sup>th</sup> anniversary of Europe's largest games developer conference, Nordic Game, a totally new games event took place, bringing together industry, government, academia and civil society. The first Games Policy Summit was held, with representatives of games development from the local companies of Malmö, Sweden, to Brazil, joined by games researchers from ludology to psychology as well as a diversity of games ecosystem actors, from cluster project managers to private fund managers.

Just a couple of years ago the games industry seemed an unstoppable force, churning out games at an accelerating rate, still non-cyclical and recession-proof, with a seemingly endless supply of venture capital. This culminated during the Covid pandemic, driving an unprecedented fast growth. But current high interest rates, and demand returning to its pre-pandemic levels, led to instability in the financial markets behind the games business, which resulted in widely published studio closures and massive layoffs. So now we face these new challenges, but at the same time the importance and potential of our games industry has finally reached wide recognition. Because of this, policy makers from local, regional, national, Nordic and European levels sought the advice of the industry itself on how to best support it, in the form of this first summit meeting.

Under the moderation of Prof. Dr. Malte Behrmann from the bbw Hochschule of Berlin, industry-wide topics were addressed by a large panel of speakers and participants in a round table format lasting the whole afternoon. With a strict time-limit of five minutes per speaker, the audience was allowed ample time for questions, comments and discussions on every topic regarding the current state and future of the gaming industry. The density of views exchanged, and perspectives debated was thus kept very high.

## Methodology

The topics and resulting outcome of the summit were very much co-created with our expert audience. The inspirational, in part intentionally provocative, invitation (see Appendix I) was first distributed to the 14,000 recipients of Nordic Game's world-wide distribution newsletter, as well as through partners like EGDF, the BSG Go! project and more, and widely disseminated in relevant groups on LinkedIn.

A sign-up survey page ensured the expertise and relevance of the invited participants, while they were asked for not only subjects, they would like to have addressed, but on subjects they themselves would be ready to cover in a 5–10-minute presentation.

The selection committee (Prof. Dr. Malte Behrmann, Tobias Sjögren and Jari-Pekka Kaleva) found that the subject matter coalesced around three key themes, namely strategies for industry support, European games in a global context and policy for games industry clusters. The summit was based on 42 submissions of which the finally selected 17 came through a partly anonymous two-step procedure. The selection was made on factual relevance of the contributions for the subject, the profile of the speaker and the potential.

As the applicants all turned out to be quite relevant, in both background and problem formulation, it was finally decided to invite everyone, even if this was beyond the venue capacity, as we didn't expect them all to show up. But they did. (Appendix II lists all the Summit participants.)

The Summit workshop was moderated by Prof. Dr. Malte Behrmann for the first and third session and Tobias Sjögren for the second session and consisted of three sessions of first five to six concise presentations, followed by a moderator-led panel debate among the presenters, inviting interaction with the audience.

The documentation in this report is based on transcripts of recordings of the entire proceedings, collated by the editors. The recommendations were generated in a grounded theory-like approach, where the analysis of key points made and individual conclusions, along with the session discussion consensus, continued until no significant contribution was found to the formulated action points.

Finally, the generated recommendations were put before 48 experts, in a Likert-scale survey format, to seek out indications on priorities for existing and new European games industry policy measures, that is priorities both in terms of timing and of resource allotment. Of the 48 contacts, 10 gave vacation messages, and of the remainder 22 responded within the short time allowed, less than a week.

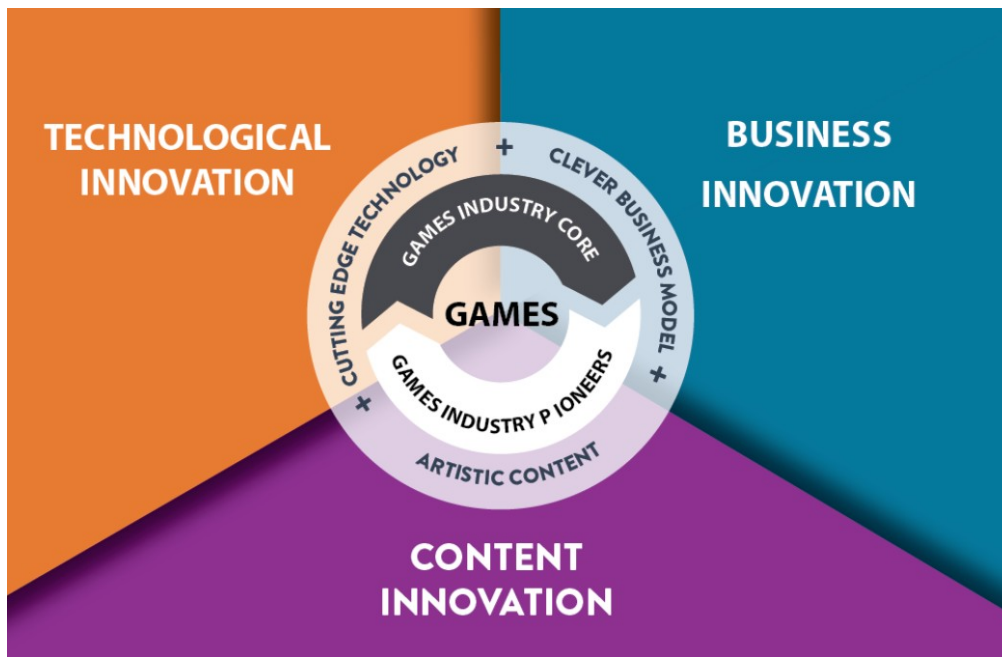
## Session 1 – Current strategies for supporting the games industry: *What should the EU and its member states do now?*

### Presentation by Jari-Pekka Kaleva

Jari-Pekka Kaleva delivered a comprehensive speech focusing on the challenges and opportunities in funding innovation within the European games industry. The speech then pivoted to discuss the critical components of innovation in gaming: creative content, technological advancements, and innovative business models. Kaleva underscored the pivotal role of content in driving technological progress, citing historical examples such as the evolution of personal computer processing power and internet speeds due to demand from gaming and video streaming.

#### Key Points

1. **European Funding Landscape:** Kaleva outlined the complexities of accessing funding across artistic, technological R&D, and business innovation sectors within Europe. He emphasized the need for a unified framework that supports all facets of game development, integrating diverse funding instruments to foster holistic innovation.
2. **Industry Collaboration:** Highlighting the importance of industry involvement, Kaleva advocated for funding instruments tailored to the specific needs of game studios. He stressed the necessity of industry professionals contributing as reviewers to ensure funding supports impactful projects rather than merely fulfilling application quotas.



3. Market Relevance and Impact: Kaleva urged for funding instruments that facilitate market experimentation and real-world application of gaming content and tools. He emphasized the importance of learning from both successes and failures to enhance project outcomes and achieve significant market impact.

4. Transparency and Learning from Failure: Addressing project reporting practices, Kaleva called for transparency in acknowledging project failures as opportunities for learning and improvement. He advocated for a culture that embraces failure as a pathway to delivering more effective and impactful projects.

### Conclusions

In conclusion, Jari-Pekka Kaleva's speech provided a strategic overview of the challenges and solutions in European game industry funding. By advocating for a cohesive and industry-driven approach to funding, Kaleva emphasized the potential for significant innovation and market impact within the gaming sector.

### Presentation by Jesper Kristensen

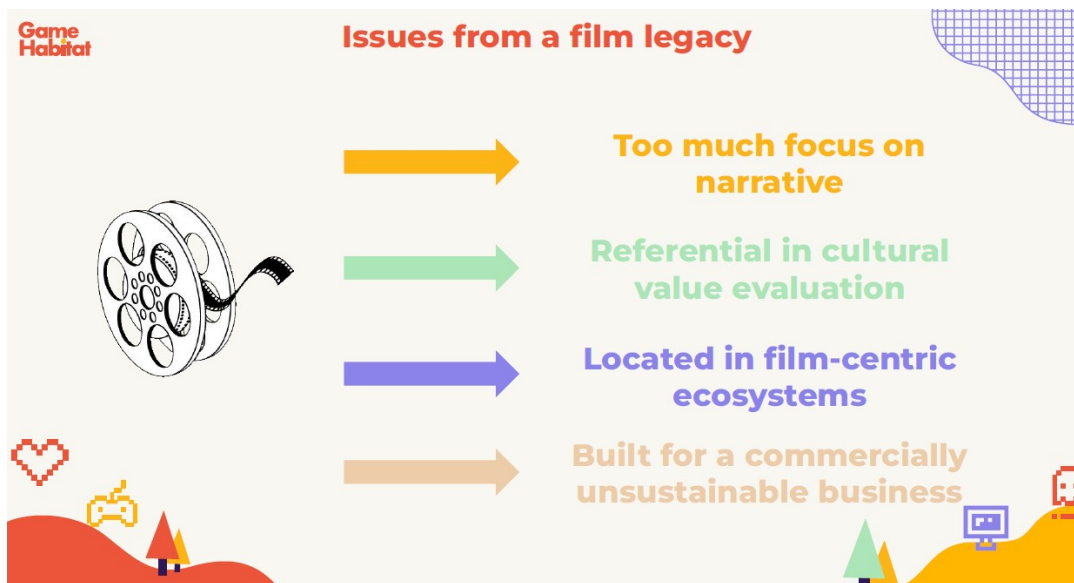
Jesper Kristensen delivered a speech proposing reforms to the European game funding support system, focusing on challenges faced by individual developers. His perspective emphasized the imbalance within current funding structures, particularly highlighting the dominance of cultural support over business and innovation perspectives.

### Key Points

1. Imbalance in Funding Support: Kristensen critiqued the current European game funding system, noting that Creative Europe, while accessible, primarily supports games from a cultural perspective. He argued that this imbalance neglects the importance of supporting successful game businesses and ensuring ownership rights remain within Europe.

2. Legacy Challenges: He attributed these issues to Creative Europe's roots in film funding, which imposes limitations inherited from its narrative and cultural evaluation criteria. Kristensen argued that these criteria often hinder innovative and commercially viable game projects that do not fit traditional cultural references.





3. Ecosystem Challenges: Kristensen highlighted the challenge of Creative Europe's association with film-centric ecosystems. He noted that local representatives often lack expertise in gaming, which affects the quality and relevance of support provided to game developers.

4. Proposal for Reform: Kristensen proposed establishing a new game-centric support system independent of film-centric legacies. His proposal advocates for defining new criteria and vocabulary specific to gaming to encompass business innovation, cultural value, and content creation without the constraints of legacy models.

### Conclusions

In conclusion, Jesper Kristensen's speech advocated for a fundamental reform of European game planning support to better serve the needs of individual developers and the gaming industry as a whole. By proposing a new support system tailored to the unique challenges and opportunities of gaming, Kristensen aims to foster a more vibrant and sustainable gaming ecosystem in Europe.

### Presentation by Benjamin Noah Maricak

Benjamin Noah Maricak delivered a speech focusing on the impact of public funding on the development of the video game industry in Croatia, highlighting initiatives by the Croatian Audio Visual Center (CAVC). His speech emphasized the role of public funding in supporting small and independent game developers amidst the dominance of larger players in the industry.

## CROATIAN AUDIOVISUAL CENTRE PUBLIC CALL FOR THE DEVELOPMENT AND PRODUCTION OF VIDEO GAMES (2021 - )



- Launch date: October 2021
  - Over 40 projects funded so far
  - The majority are studios with teams up to 5 people
  - Diverse profile of games that are relevant to Croatia's audiovisual industry
  - All genres and platforms
- 
- Public funding has shown to be a very effective support instrument for game developers in Croatia
  - Denmark, Belgium, Norway, Switzerland, France, Australia, and other countries worldwide have established public funding for video games

### Key Points

1. **Role of Croatian Audio Visual Center (CAVC):** Merichak introduced CAVC as a government-backed agency tasked with fostering the audiovisual industry in Croatia, encompassing film, TV, and video games since a legislative change in 2018. He discussed CAVC's initiative to fund the development and production of video games starting from 2021, supporting various stages from vertical slices to demos and alphas.

2. **Need for Public Funding:** Merichak highlighted the necessity of public funding due to the challenges faced by smaller developers in accessing seed and development capital. He noted that while Croatia has significant players in the industry, they absorb much of the talent and resources, making it difficult for emerging developers to secure funding for their projects.

3. **Diversity in Supported Games:** The speech underscored the diversity of games supported by CAVC, spanning all platforms and genres. Projects funded must contribute to Croatia's cultural identity while also showcasing innovation in technology or game design. Merichak provided examples, such as unique plugins for animation and games inspired by Croatian cultural heritage or innovative technologies.

4. **Gaming Incubator Bismarck:** Merichak highlighted the success of the Gaming Incubator Bismarck, Croatia's first gaming incubator funded through EU, national, and local partnerships. Situated near Zagreb, the incubator aims to become a regional hub for gaming, supporting startups and fostering industry growth with facilities including an esports arena and gaming industry accelerator.

5. **Broader European Context:** The speech concluded by placing Croatia's efforts in the broader European context of public funding for the gaming industry. Merichak referenced successful models in countries like Denmark, Belgium, and Norway, where public funding has significantly contributed to industry growth and sustainability.

### Conclusions

In conclusion, Benjamin Noe Merichak's speech provided a comprehensive overview of how public funding has nurtured the video game industry in Croatia through initiatives led by the Croatian Audio Visual Center. By supporting diverse projects and fostering an ecosystem that includes incubators and regional hubs, Croatia aims to sustainably grow its gaming industry alongside larger European counterparts.

## Presentation by Oscar Wemmert

Oscar, representing the Dataspelscentrum, delivered a passionate speech addressing the lack of public funding for games in Sweden. As a veteran game developer with over 25 years of experience, Oscar highlighted the importance of recognizing games as an art form and cultural expression deserving of governmental support.



### Key Points

- 1. Role of Dataspelscentrum:** Oscar introduced the Dataspelscentrum as a national organization dedicated to game creators, emphasizing its role in fostering games as cultural and artistic entities within Sweden.
- 2. Absence of Public Funding:** The speech lamented Sweden's notable absence of public funding dedicated specifically to games. Despite the Swedish gaming industry's commercial success and cultural impact, Oscar argued that games are overlooked in existing support systems for culture, research, innovation, and business.
- 3. Competitive Disadvantage:** Oscar presented data illustrating Sweden's position as one of the few countries lacking robust public funding for games. He underscored that without appropriate support structures, Sweden risks a competitive disadvantage compared to nations that provide tax breaks and direct funding for game development.
- 4. Call for National Strategy:** The speech advocated for the implementation of a national strategy to support the game industry in Sweden. Oscar referenced initiatives such as the Game Habitat survey and discussions on establishing a National Game Institute, drawing parallels to successful models in other countries.
- 5. EU Recognition and Potential:** Oscar highlighted the European Court of Justice's recognition of video games as complex creative works, stressing the need for Sweden to capitalize on this potential by establishing comprehensive public funding mechanisms.

## Conclusions

In conclusion, Oscar's speech urged stakeholders and policymakers in Sweden to address the lack of public funding for games. By advocating for a national strategy and learning from successful models in other countries, Oscar emphasized the potential for Sweden to enhance its gaming industry's growth and innovation while solidifying its cultural and economic impact on a global scale.

- Countries with strong public support
- Countries with established public support
- Countries with public support strategy in development

European public funding overview, according to information publicly shared and information from Creative Desks in 2021. It only gives a visual idea of the public support and is likely to evolve.



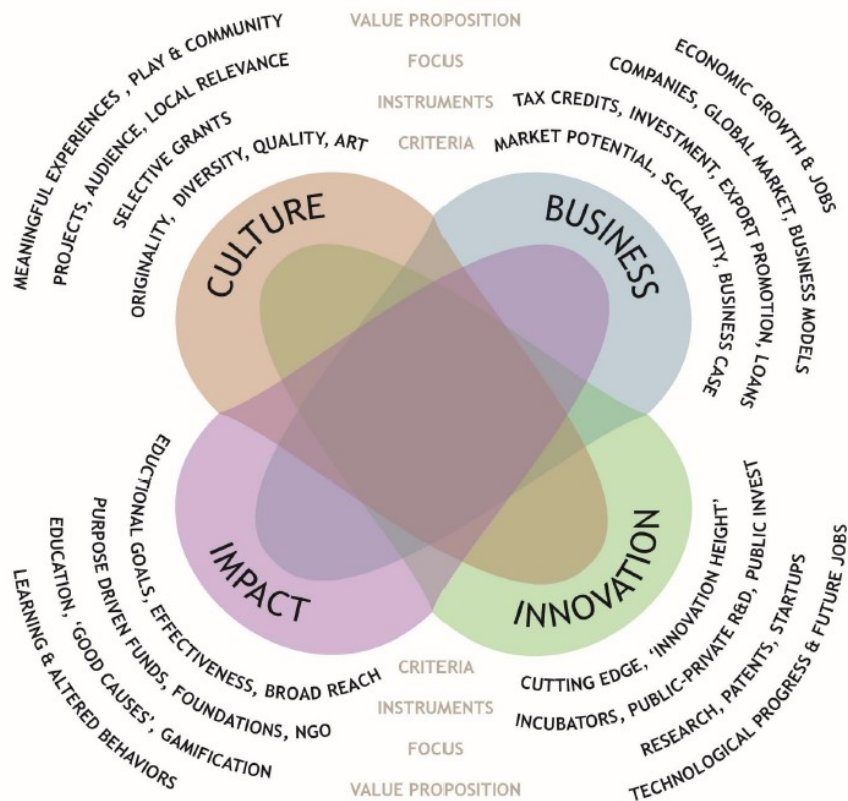
Illustration from page 45 i [Swedish Game Developer Index 2021](#), published by Swedish Games Industry 2022. Chapter written by SpielFabrique

## Presentation by Simon Løvind

Simon delivered a comprehensive speech discussing the evolution of game funding policies in Denmark and the complexities of integrating cultural, business, innovation, and impact perspectives into coherent governmental strategies.

### Key Points

- 1. Denmark's Evolving Game Support:** Simon highlighted Denmark's transition from having game support predominantly centred within the film institute to establishing a separate games institute under the cultural ministry. This restructuring aims to give games their distinct voice and support system, reflecting their unique cultural and economic contributions.
- 2. Separation of Game Producers:** Simon noted a recent organizational shift where game producers in Denmark have separated from film producers to form Games Denmark. This restructuring signals a focused approach towards addressing the specific needs and challenges of the game development sector independently.
- 3. Four-dimensional Perspective:** Instead of a traditional triangle (culture, business, innovation), Simon proposed a more nuanced approach incorporating culture, business, innovation, and impact. He emphasized that each perspective brings its own set of instruments, criteria, and focus areas, which may not always align perfectly.



4. Value Propositions: Simon outlined the distinct value propositions associated with each perspective:

- Culture: Focuses on creating meaningful experiences, community-building, and artistic experimentation.
- Business: Emphasizes economic growth, job creation, scalability, and market potential.
- Innovation: Highlights technological progress, knowledge advancement, and behavioural change through educational initiatives.
- Impact: Aims at learning outcomes, societal benefits, and addressing public health or environmental challenges.

5. Policy Challenges: Simon acknowledged the challenge of developing coherent policies that balance these diverse perspectives. He stressed the importance of defining clear priorities and areas of focus to effectively allocate resources and support initiatives across the game development spectrum.

6. Areas of Focus and Risk: Simon identified specific areas where each perspective excels or faces challenges:

- Culture: Supports local content, artistic experimentation, and children's games, despite their limited business case.
- Business: Deals with market dynamics, business models, and ethical considerations such as data privacy and addiction prevention.

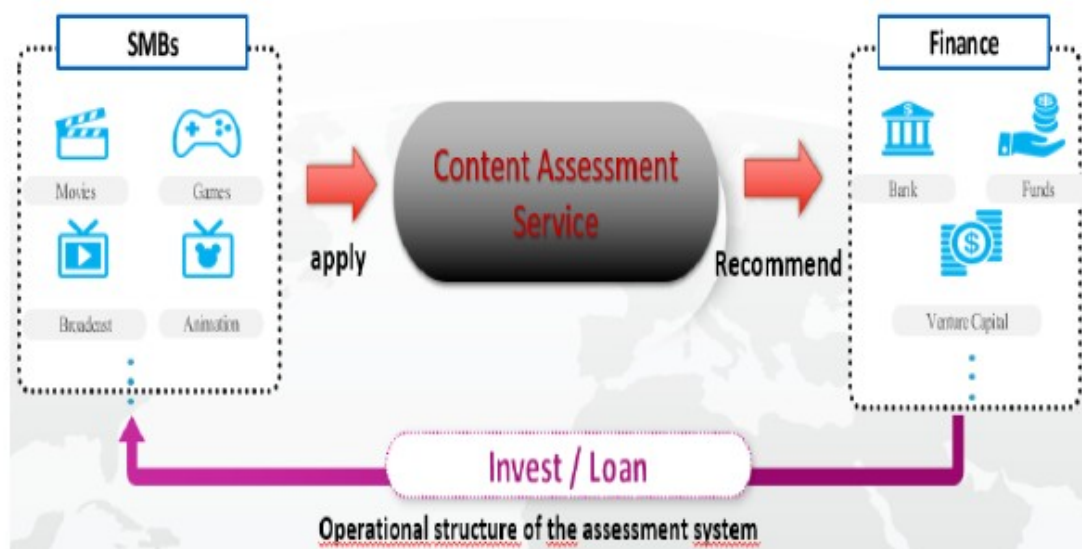
## Conclusions

In conclusion, Simon advocated for a nuanced and strategic approach to game development policymaking in Denmark. By recognizing the distinct contributions of culture, business, innovation, and impact, Denmark can tailor its support mechanisms to foster a vibrant and sustainable game

industry. The speech underscored the need for ongoing dialogue and adaptive strategies to address evolving challenges and opportunities within the gaming sector.

## Presentation by Tautvydas Pipiras

Tautvydas Pipiras delivered a speech focusing on the innovative funding model employed in South Korea's creative industries, particularly in games, contrasting it with the European approach. He highlighted KOCCA and its content value assessment as a pivotal tool in attracting investment and supporting cultural industries.



### Key Points

- 1. Korea Creative Content Agency (KOCCA):** Tautvydas began by introducing the KOCCA, established in South Korea 2009 to address the inadequacies of traditional funding models for cultural industries. Unlike Europe, where metrics like infrastructure and revenue dominate evaluation criteria, KOCCA emphasizes a content value assessment.
- 2. Content Value Assessment:** This assessment evaluates projects based on their creative content rather than traditional financial metrics. It provides a risk evaluation (similar to investment grades A to D) and assigns a monetary value to the content, certifying its potential attractiveness to investors.
- 3. Investment Attraction:** The certification by KOCCA facilitates investment from a wide range of entities, including private banks, venture capital investors, pension funds, and other financial institutions. This approach aims to bridge the gap between cultural creativity and financial investment, promoting sustainable growth in the creative sector.
- 4. BSG Go Projects' Dilemma:** Tautvydas discussed BSG Go Projects' contemplation of adopting a similar model in Europe. They are considering implementing a curators' model where trusted mentors assess content applications, aiming to engage generalist investors in game projects certified for their cultural and financial potential.
- 5. Public-Private Partnerships:** In South Korea, Tautvydas highlighted the success of blended finance initiatives where public funds support certified cultural projects, leveraging private investments. This model encourages collaboration between public institutions and venture companies, facilitating economic support and growth in the cultural sector.

6. Challenges in Europe: Tautvydas acknowledged the reluctance in many European countries to fully integrate games into cultural funding frameworks. He noted that despite the economic success and cultural impact of the gaming industry, it is often treated differently from traditional cultural artifacts like film, posing a barrier to comprehensive policy integration.

7. Global Perspectives: Drawing on his experience, Tautvydas emphasized that emerging markets often show more openness to including games within cultural frameworks compared to more established Western countries. This disparity reflects broader cultural perceptions and institutional resistance within established cultural paradigms.

## Conclusions

In conclusion, Tautvydas Pipiras advocated for reevaluating European funding models for cultural industries, drawing inspiration from South Korea's innovative approaches. He highlighted the importance of recognizing games as significant cultural artifacts and integrating them into broader cultural policy frameworks. The speech underscored the potential benefits of adopting more flexible and inclusive funding strategies to support creative industries effectively.

## Session 1 Plenary Discussion: Analysing Cultural Funding and Policy Engagement in the Video Games Industry

This section synthesizes in-depth insights derived from multiple discussion transcripts focused on cultural funding strategies, government support frameworks, and strategic policy engagements within the global video game industry. The analysis encompasses discussions on the KOCCA funding model, comparative international strategies, and specific case studies from various countries, providing a comprehensive overview of the challenges and opportunities in shaping policy for the video game sector.

### Discussion Highlights

#### 1. Ireland's Funding Update

The discussion commenced with an update on Ireland's funding strategies, highlighting recent adjustments aimed at enhancing support for the video game industry. Participants noted a shift in categorization, symbolized by the transition from light green to dark green on funding maps, indicating increased availability and accessibility of funding opportunities for game developers. This strategic move seeks to streamline the application process and improve transparency in funding distribution, aligning with broader efforts to bolster Ireland's creative industries.

#### 2. KOCCA Funding Structure

Participants engaged in a detailed exploration of KOCCA's funding structure and its implications for cultural sectors, particularly focusing on games, film, and the arts. KOCCA's substantial investments in film and gaming underscored its recognition of these industries as significant cultural and economic contributors. The discussion underscored the importance of equitable distribution and strategic allocation within cultural funding frameworks to maximize impact across diverse sectors.

#### 3. Cultural and Business Integration

Central to the discussions was the integration of cultural initiatives into sustainable business models within the video game industry. Participants deliberated on the challenges posed by perceptions that prioritize economic metrics over cultural impact in funding decisions. Strategies proposed included leveraging economic data, such as tax revenues generated by the gaming sector, to strengthen the industry's position in policy advocacy. The need for effective communication strategies to bridge the gap between cultural value and economic benefit emerged as a critical theme.

#### 4. Role of Government and Industry Collaboration

The pivotal role of collaborative efforts between governments and industry stakeholders in fostering cultural and economic growth was extensively discussed. Case studies from countries like Korea highlighted successful initiatives such as the K-wave, demonstrating the transformative impact of unified policy approaches across sectors. Participants emphasized the importance of cohesive strategies that transcend traditional sectoral boundaries and adapt to evolving industry dynamics, mirroring successful international models.

#### 5. European Context and Funding Challenges

Comparative analyses provided insights into diverse European funding models, highlighting challenges such as the prevalence of short-term project funding and advocating for sustained financial instruments akin to KOCCA. Examples from Germany showcased innovative funding approaches and their implications for industry sustainability and growth. The discussions underscored the need for adaptable strategies aligned with broader economic and cultural objectives to foster long-term industry resilience.

#### 6. Cultural Policies and International Impact

Participants explored the global implications of cultural policies on market penetration and international competitiveness within the video game industry. Case studies from Brazil illustrated industry-driven approaches to government collaboration, emphasizing the role of strategic governmental support in nurturing robust export sectors. The discussions underscored the importance of tailored policy interventions that leverage cultural diplomacy and strategic economic alignments to enhance global market presence.

### Conclusions and Recommendations

The discussions concluded with reflections on the imperative of integrated funding models that balance cultural preservation with economic sustainability within the video game industry. Insights highlighted the intricate interplay between cultural policy frameworks, industry dynamics, and global market strategies.

In conclusion, this session offered a nuanced analysis of contemporary challenges and opportunities in cultural funding and policy engagements within the video game industry. By navigating cultural perceptions, leveraging economic arguments, and advocating for tailored policies, stakeholders can strengthen alignment with national cultural agendas and secure essential governmental support. This may serve as a strategic roadmap for policymakers and industry leaders seeking to influence policy discourse and shape supportive environments for sustainable growth in the global video game sector.

The participants advocated for policy reforms aimed at aligning funding mechanisms with long-term industry sustainability and international competitiveness, emphasizing the need for continuous dialogue and adaptive policy responses.

**1. Policy Alignment:** Advocate for cohesive policies that integrate cultural and economic incentives to foster sustainable growth across the video game industry.

**2. Long-term Funding Strategies:** Promote the adoption of sustained funding instruments that support cultural projects beyond short-term initiatives, ensuring continuity and stability.

**3. Global Engagement:** Learn from successful international models to enhance market penetration and cultural diplomacy efforts, adapting strategies to local contexts and market dynamics.



## Session 2 – Games and the world: *What are drivers of change? Mega trends challenging public support, the games industry and the world.*

### Presentation by Johanna Nylander

Johanna Nylander, speaking on behalf of the Swedish Games Industry Association, delivered a poignant address at the recent industry event in Malmö. With over a decade of experience in the sector, Johanna reflected on the industry's resilience amidst historical downturns and current challenges. Her speech aimed to illuminate both the pressing issues facing the games industry today and the promising avenues for future growth and adaptation.

#### Urgent changes and risks

- Fewer investments
- Reports on layoffs
  - American headlines perceived as facts in Europe
- Stagnation and lack of support
  - People leaving the industry
  - Investments goes to traditional concepts & teams
- Increasing political interest
  - Be careful, you might get what you wish for
- Problem seeking -> outside stakeholders take advantage and define solutions FOR our industry without industry knowledge



#### Key Points

1. Johanna began by contextualizing her remarks with a retrospective glance at the industry's struggles during the 2008 downturn, particularly in Sweden where it had a profound impact on studio closures and economic instability.
2. She highlighted a contemporary decline in investments, especially affecting smaller firms, cautioning against undue alarm over reported layoffs without solid empirical backing. Johanna underscored the influence of media narratives on public perception, noting a worrisome decline in young students opting for careers in game development due to negative portrayals.
3. Amidst these challenges, Johanna acknowledged a growing political interest in the industry, which, while potentially beneficial, posed risks of regulatory overreach if not carefully managed. She advocated for industry autonomy in addressing internal challenges rather than relying on external stakeholders who might not fully understand the industry's dynamics.
4. On a more optimistic note, Johanna celebrated the industry's remarkable evolution over the past 15 years, citing the resilience of many Swedish companies that have navigated adversity to emerge stronger. She highlighted emerging sustainable business models and a maturing industry landscape characterized by stability and growth across diverse platforms and global markets.

## Conclusions

In conclusion, Johanna emphasized the pivotal role of players in driving ongoing industry innovation and growth. She urged industry stakeholders to navigate current challenges with resilience and strategic foresight, leveraging past lessons to shape a future that embraces both stability and dynamic evolution. Johanna Nylander's address provided a nuanced perspective on the games industry's trajectory, inspiring confidence in its capacity to thrive amidst uncertainty through innovation and strategic adaptation.

## Presentation by Margarete Schneider

Margarete Schneider delivered a compelling speech at the policy summit, focusing on the evolving landscape for indie game developers, particularly in Hamburg. Representing Game City Hamburg, she provided insightful perspectives on the current challenges and opportunities faced by small indie studios amidst global industry shifts.

### Key Points

1. Margarete began by acknowledging the recent wave of industry layoffs globally, noting that while Hamburg was comparatively less affected, significant impacts were still felt locally. She highlighted a growing trend where displaced developers, motivated by job insecurities, were leveraging setbacks to establish their own indie studios. This entrepreneurial trend was supported by local initiatives like Hamburg's bond track program, which assists newly formed studios emerging from layoffs.



2. In contrast to larger AAA studios, Margarete emphasized the resilience of indie developers in navigating financial constraints and market volatility. She underscored their adaptability and creativity as key strengths that enable them to weather industry trends more effectively than their larger counterparts.

3. Furthermore, she shared success stories within the indie game sector, citing examples like Bellatrol and Melrose, which demonstrated that indie titles could achieve notable acclaim and commercial success despite the inherent challenges. While celebrating these achievements, she also acknowledged the significant hurdles faced by many indie studios, including financial sustainability and the high risk of project failure.

4. In response to these challenges, Game City Hamburg has implemented several support programs tailored to indie developers. These include an incubator program designed to foster sustainable business practices, prototype funding initiatives to aid game development, and educational events aimed at enhancing skills and resilience within the indie community.

### Conclusions

In conclusion, Margarete Schneider's speech provided a comprehensive overview of the indie game development landscape, highlighting both the opportunities and obstacles faced by small studios. Her address underscored the importance of community support and strategic initiatives in nurturing growth and resilience within indie game ecosystems.

Margarete's call to action for increased collaboration and enhanced support mechanisms resonated with the audience, emphasizing the need for ongoing dialogue and innovation within the indie game development sector. Her insights into the transformative potential of local initiatives and success stories offered a hopeful outlook amidst challenges, reinforcing the role of proactive measures in sustaining indie game development into the future.

### Presentation by Thierry Baujard

Thierry, representing Spielfabrique in Germany, delivered an informative speech at the policy summit, focusing on the landscape of public funding available to indie game developers across Europe. His insights shed light on the current challenges and diverse opportunities arising from various funding initiatives.

### Key Points

Thierry commenced by highlighting the significance of public funding in supporting indie developers, especially amidst the difficulties they face in accessing financial support. He emphasized Spielfabrique's involvement in professionalization programs backed by Creative Europe, such as an exhibition program in collaboration with Arctic Game. This initiative received a substantial 400 submissions, selecting 25 studios from 14 countries, underscoring the demand for professional development among indies.

He proceeded to outline the different types of funding available, ranging from grants for prototypes and productions to reimbursable loans prevalent in regions like Berlin and Belgium. Additionally, Thierry discussed the growing prominence of tax incentives across Europe, noting successes in countries like France, the UK, Belgium (with its tax shelter), Italy, and Ireland. These incentives serve to attract game developers to establish themselves in these regions, contributing to economic growth and cultural development.

Thierry emphasized the diversity of funding models and their evolution over the years, adapting to the changing needs of the gaming industry. He illustrated this with a map categorizing countries based on the strength and variety of their public funding support. Countries were classified into dark green (strong support), rose-pink (established support but limited), and blue (emerging support, such as tax incentives).

## Public Funding in Europe: Different incentives ; different purposes

Grant	Reimbursable Loan	Tax incentives
<ul style="list-style-type: none"> <li>Financial support with no repayment required</li> <li>Max amount = 200,000€</li> </ul>	<ul style="list-style-type: none"> <li>Financial support with repayment based on profits</li> <li>Max amount = 500,000€</li> </ul>	<ul style="list-style-type: none"> <li>Fiscal benefits</li> <li>Tax Shelter, Tax Credit...</li> <li>Max amount = 25,000,000€</li> </ul>
<ul style="list-style-type: none"> <li>“Free money”</li> <li>Support on Pre-production</li> </ul>	<ul style="list-style-type: none"> <li>Limited financial stress</li> <li>Profits “reserved”</li> <li>Higher amounts</li> </ul>	<ul style="list-style-type: none"> <li>“Unlimited budget”</li> <li>Very high amounts</li> </ul>
<ul style="list-style-type: none"> <li>Limited amounts</li> <li>Limited to projects</li> <li>High amount of constraints</li> </ul>		<ul style="list-style-type: none"> <li>Not applicable for every studio</li> <li>Not direct financial support</li> </ul>
<ul style="list-style-type: none"> <li>Almost all countries with public support</li> </ul>	<ul style="list-style-type: none"> <li>Germany (regional)</li> <li>Belgium (Flanders)</li> </ul>	<ul style="list-style-type: none"> <li>France</li> <li>Belgium</li> <li>Ireland</li> <li>Italy</li> </ul>

*Public Debt & Equity also exists, but is very limited (France, Belgium, Finland, Ireland...)*

Moreover, he introduced Indie Plaza, a database supported by Creative Europe, aimed at cataloguing over 200 public and private funding sources available to indie developers. This resource facilitates transparency and accessibility for developers seeking funding options across different countries.

Lastly, Thierry discussed the establishment of a network of public funds across Europe, involving countries like Germany, Switzerland, and others. This network facilitates regular meetings to exchange best practices, discuss challenges, and enhance collaboration among stakeholders involved in public funding for game development.

### Conclusions

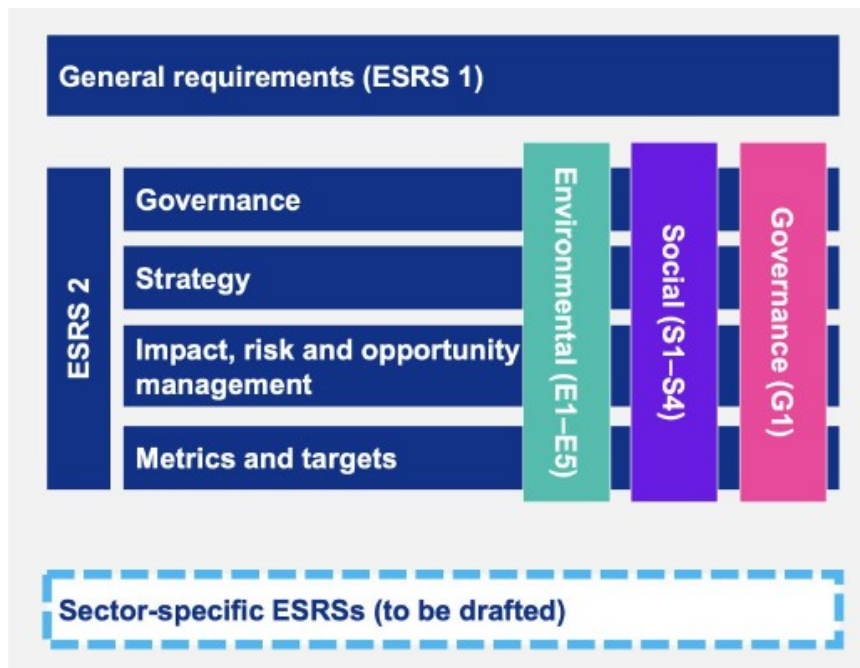
In conclusion, Thierry's speech provided a comprehensive overview of the current state of public funding for indie game developers in Europe. His insights into the diversity of funding mechanisms, the impact of tax incentives, and the collaborative efforts through networks like Indie Plaza underscored the opportunities available amidst challenges.

Thierry's call to leverage these resources and foster greater international cooperation aims to strengthen the support framework for indie developers across Europe. His presentation resonated with the audience, highlighting the pivotal role of public funding in nurturing innovation and sustainability within the indie game development sector.

### Presentation by Jiri Kupiainen

Jiri, Chairman and Co-founder of the Sustainable Games Alliance (SGA), delivered an insightful speech at the policy summit, shedding light on the significant regulatory landscape facing the games industry in Europe. His expertise spanning 23 years in the industry, including roles as an indie

developer and VP of technology at Disney, provided a seasoned perspective on the evolving challenges and opportunities regarding sustainability.



### Key Points

Jiri introduced the Sustainable Games Alliance, a newly formed organization that has been actively working behind the scenes for almost a year. He highlighted the pivotal role of Maria, the managing director, in initiating efforts since NordVPN last year. The SGA's primary focus revolves around navigating the intricate web of EU legislation aimed at promoting sustainability across various sectors.

He delved into the specifics of EU legislation impacting the games industry, identifying four key directives. The first, Empowering Consumers for the Green Transition (ECGT), under the EU Green Deal, mandates rigorous verification of environmental and social claims made by any product, including games. This directive necessitates substantiating such claims with scientific evidence and life cycle assessments, restricting companies from greenwashing their products.

Moreover, Jiri outlined the Green Claims Directive, a companion legislation targeting specific sectors beyond those with existing certification schemes like organic foods or financial products. It aims to standardize and approve labels certifying sustainability claims, thereby enhancing credibility across the industry.

The Corporate Sustainability Due Diligence Directive (CSDDD), albeit applicable only to the largest EU companies, imposes stringent environmental and human rights due diligence throughout their supply chains. Public reporting requirements ensure transparency and accountability, compelling large companies to scrutinize and mitigate adverse impacts across their operations, which inevitably affects their gaming partners.

However, the centerpiece of Jiri's discussion was the Corporate Sustainability Reporting Directive (CSRD). This directive mandates all companies to report sustainability matters akin to financial reporting standards. It encompasses Scope 3 emissions, a category encompassing indirect emissions associated with a company's value chain, including suppliers and product use. For gaming companies, which predominantly fall under Scope 3, compliance entails significant challenges in defining and reporting emissions accurately.

Jiri emphasized the urgency for game developers to familiarize themselves with CSRD reporting standards, as non-compliance will soon carry substantial financial penalties. He underscored the SGA's proactive role in developing a standardized framework tailored for the gaming industry, aimed at simplifying compliance while fostering actionable sustainability practices within studios.

### Conclusion

In conclusion, Jiri's comprehensive overview underscored the critical importance of sustainability compliance for the games industry amidst evolving EU regulations. His insights into the intricate details of ECGT, Green Claims Directive, CSDDD, and CSRD highlighted the impending challenges and opportunities for game developers to adopt sustainable practices.

The SGA's initiative to develop a user-friendly reporting standard reflects a proactive approach to support studios in navigating these regulatory landscapes effectively. Jiri's speech resonated with stakeholders, urging them to take regulatory compliance seriously and leverage sustainability as a driver for innovation and industry resilience.

This report encapsulates the key themes discussed by Jiri, offering policymakers and industry leaders valuable insights into the regulatory framework shaping the future of sustainable gaming in Europe.

### Presentation by Malte Behrmann

Malte Behrmann delivered a compelling speech at the policy summit, contrasting his role as a moderator with that of an opinionated speaker. His extensive experience in the gaming industry, spanning back 23 years, provided a historical context to the current challenges and opportunities facing the European games sector amidst evolving regulatory landscapes.



### Key Points

Malte Behrmann commenced by reflecting on the history of the Nordic Game conference, where he first attended 20 years ago. He highlighted the inception of the Nordic Game Program, initially focused on defining criteria such as technology, economy, and culture in supporting game projects. This balance was fundamental in the design and operation of the Nordic Game Program. This historical perspective underscored continuity in industry challenges over the years, juxtaposing issues that remain unchanged with emerging new challenges.

He reminisced about debates from the past where public funding for the games industry was a contentious issue. He recounted discussions with Thierry Baujard from the film industry, highlighting

scepticism towards public funding's benefits. Behrmann contrasted this with his belief that public funding is essential, akin to support received by other sectors like automotive and energy, albeit on a smaller scale.

Behrmann emphasized the dichotomy between European and overseas approaches to game industry support, noting the influence of well-funded lobbyists from non-European entities hindering European game industry growth. He advocated for a stronger European stance to nurture homegrown game development, challenging the dominance of non-European platforms and distribution channels.

Transitioning to contemporary issues, Behrmann addressed the current inclusion of games within Creative Europe, stressing the ongoing relevance of these discussions after two decades. He highlighted progress in establishing funding systems across EU member states based on cultural exceptions, yet noted persisting challenges in distribution control, particularly concerning app stores and platforms like Steam.

Behrmann proposed leveraging new EU regulations like the Digital Markets Act (DMA) and Digital Services Act (DSA) and the audiovisual directive to regain control over game distribution platforms. He advocated for European digital sovereignty, lamenting the lack of dedicated EU leadership in digital agenda post-elections, influenced by external pressures from global tech giants.

## Conclusion

Malte Behrmann's impassioned speech at the policy summit articulated a comprehensive vision for the European games industry's future amidst regulatory complexities and global competition. His historical insights underscored persistent challenges while advocating for proactive measures to assert European digital sovereignty and enhance support frameworks for game developers.

Behrmann's call for a renewed focus on appointing a European Commissioner for Digital Agenda resonated with stakeholders, signalling a critical step towards rebalancing the industry's competitive landscape. His speech concluded with a rallying cry for industry unity and decisive action to safeguard European interests in the evolving digital ecosystem.

## Session 2 Plenary Discussion: Prospects for the European Game Industry

The plenary session on the future trajectory of the European game industry provided a comprehensive overview of current challenges and opportunities facing the sector. Participants from diverse backgrounds and sectors converged to share insights and perspectives on funding, regulatory frameworks, market access, sustainability, and cultural identity within the industry.

### Key Points and Discussions

- Funding and Support for Small Companies:** Participants expressed optimism about the potential of small and midsize European game companies, emphasizing their creativity and innovation. One participant highlighted, "I would really love to see more support going into bolder initiatives and small companies because this is where Europe shines." Another echoed this sentiment, stating, "We need to invest in grassroots initiatives that foster innovation and diversity."
- Regulatory Challenges and Public Support:** The discussion on regulatory challenges emphasized the importance of public support and effective policy implementation. A participant noted, "There seems to be growing political interest in supporting the games industry, but implementation could take years." This sentiment was echoed with discussions on how different countries are approaching funding and regulation.

3. **Global Competition and Market Access:** Market access and global competition were recurring themes. Participants highlighted the dominance of global platforms like Steam and the challenges European developers face in gaining visibility. "Distribution remains a challenge, particularly in ensuring European games are prominently featured and accessible," noted a participant.

4. **Environmental Sustainability:** Sustainability emerged as a critical concern. Discussions centred on the industry's carbon footprint and efforts towards environmental responsibility. "We need to develop tools and calculators for sustainable development in games," emphasized one participant, reflecting ongoing efforts within the industry.

5. **Cultural Identity and Market Perception:** The perception of European games in global markets and the importance of cultural identity were debated. "Do players really care where the games are made?" questioned one participant, highlighting the challenge of promoting European cultural content effectively.

6. **Policy and Platform Regulation:** Discussions also touched on regulatory frameworks and the role of platforms. "Regulation should focus on how games are presented and promoted on platforms," noted a participant, emphasizing the need for strategic regulation to support European game developers.

## Conclusions and Recommendations

The plenary discussion underscored several key conclusions:

- There is a strong call for increased funding and support for smaller European game developers.
- Regulatory frameworks need to evolve to support market access and promote European cultural content effectively.
- Environmental sustainability is a pressing issue that requires industry-wide collaboration and innovative solutions.
- Strategic platform regulation is essential to ensure fair visibility and promotion of European games.

### **Recommendations:**

- Establish unified funding mechanisms and policies across Europe to support small and midsize game companies.
- Develop robust regulatory frameworks that balance market access with the promotion of European cultural identity.
- Implement tools and guidelines for environmental sustainability reporting and management within the game industry.
- Advocate for platform regulations that ensure fair visibility and promotion of European games alongside global content.

In conclusion, the plenary discussion highlighted both the opportunities and challenges facing the European game industry. By addressing these issues collectively and strategically, stakeholders can pave the way for a more vibrant, sustainable, and globally competitive European game ecosystem.



## Session 3 – Clusters and best practice: *How to kick-start growth?*

### Presentation by Björn Flintberg

Björn Flintberg, a representative from the Research Institute of Sweden, delivered a compelling speech at the conference, shedding light on the critical role of game hubs in fostering entrepreneurial ecosystems within the Swedish game industry. His presentation provided insights into the unique dynamics and supportive structures that have contributed to Sweden's success in the global gaming arena.

#### Key Points

- 1. Opening Remarks and Background:** Flintberg introduced himself as a researcher and coordinator focusing on the games industry at the Research Institute of Sweden. He underscored Sweden's notable success in the global gaming industry despite challenges such as limited national funding and formal strategies, which were previously highlighted by another speaker.
- 2. Role of Game Hubs in Sweden's Success:** He attributed Sweden's success partly to robust regional and local support systems, particularly through various game hubs and clusters across the country. Flintberg cited specific examples like Game Habitat in Malmö, Sweden Game Arena in Skövde, and Arcade Game People in northern Sweden. These hubs act as vital support actors, enabling the development and growth of numerous small game companies that constitute the majority in the industry.
- 3. Research Focus and Methodology:** Flintberg shared insights from his ongoing research on entrepreneurial ecosystems within the gaming sector. He emphasized the scarcity of research on innovation and entrepreneurship in the games industry, prompting his investigation into the roles and structures of game hubs. His research aims to compare and analyse game hubs in different Swedish regions—specifically Malmö, Umeå, and Luleå—to understand their unique contributions and operational strategies.



- 4. Factors Influencing Entrepreneurial Ecosystems:** Drawing on models like the company lifecycle and Ben Spiegel's ecosystem connectivity model, Flintberg highlighted various factors influencing entrepreneurial ecosystems. These factors include local policies, infrastructure, educational

institutions, access to talent, investment capital, mentorship networks, and cultural support. He noted that local policies, in particular, play a crucial role at the regional level, shaping the social dynamics and operational strategies of game hubs.

5. Impact and Importance of Game Hubs: Based on interviews with stakeholders from different regions and sectors—ranging from company representatives to policymakers and educators—Flintberg affirmed that game hubs are instrumental in shaping the Swedish game industry. He emphasized that without these hubs, the industry's growth would be severely limited or non-existent in some areas. Their impact ranges from talent retention and attraction to policy advocacy and infrastructure development.

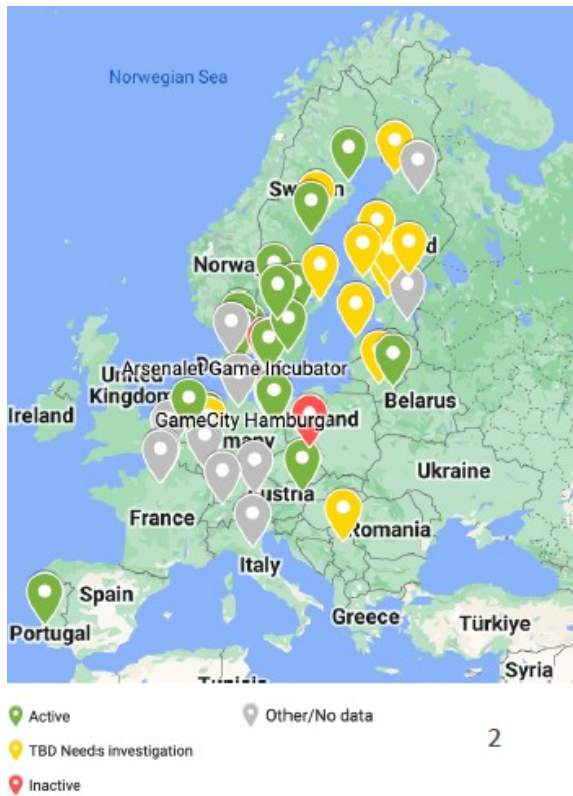
6: Reflection on Talent Development: In a brief anecdote, Flintberg recalled how talent nurtured in these local clusters can extend beyond the gaming industry, citing an example of a former developer who later became a prominent government minister. This anecdote underscored the broader societal impact of localized game development clusters beyond economic contributions.

### Conclusions

Flintberg concluded by emphasizing the significance of game hubs as foundational infrastructure for the game industry, particularly benefiting small and medium-sized enterprises. He highlighted ongoing research to identify commonalities and differences among game hubs, aiming to extract valuable lessons for fostering new hubs and enhancing existing ones. His presentation underscored the pivotal role of collaborative ecosystems in sustaining Sweden's competitive edge in the global gaming market. In conclusion, Björn Flintberg's speech provided a comprehensive overview of the role of game hubs in Sweden's gaming industry success, backed by empirical insights and ongoing research. His analysis highlighted the importance of local support structures and policy frameworks in nurturing entrepreneurial ecosystems critical for sustained industry growth.

### Presentation by Tim Lukas Leinert and Christina Sauter

Tim from Arctic Game and Christina Sauter from BSV Go delivered a joint presentation focused on the role of game hubs in Europe and their collaborative potential. Their speech highlighted initiatives to strengthen the game industry across Europe through shared knowledge and coordinated efforts among game hubs.



## Key Points

1. Opening Remarks: Tim began by introducing himself and his affiliation with Arctic Game, emphasizing their dedication to discussing game hubs. Christina Sauter, representing BSV Go, elaborated on their project's mission to foster a more resilient game industry, with a particular emphasis on the role of game hubs.
2. Mapping European Game Hubs: The presentation included an overview of existing game hubs across Europe, initially identified through a comprehensive mapping exercise. They highlighted approximately 75 initiatives providing local and regional support to game developers throughout Europe, noting the dynamic nature of these hubs as new initiatives continue to emerge.
3. Survey Insights and Common Challenges: Tim and Christina shared insights from a survey conducted among 30 of these game hub initiatives, revealing common challenges and areas requiring support. They underscored the survey's findings, emphasizing the shared struggles and the expressed interest from 27 respondents in collaborating on a European level.
4. Formation of Game Hubs League: Motivated by the survey results and the identified need for collaboration, Tim and Christina introduced the concept of forming a "Game Hubs League." They defined game hubs and clusters as interchangeable terms encompassing diverse support structures ranging from incubators to community-driven initiatives.
5. Purpose and Activities: The proposed Game Hubs League aims to amplify the collective impact of individual hubs by pooling resources and expertise. Tim highlighted that while individual hubs have regional influence, collective action could significantly enhance their reach and effectiveness. This collaboration extends beyond traditional activities like meetups and conferences to include joint incubation programs, mentorship networks, and community support initiatives.
6. Regional Impact and Funding Redistribution: They emphasized the strategic advantage of pooling resources to maximize regional impact. By redirecting existing funding towards collaborative projects, the Game Hubs League seeks to overcome limitations faced by individual hubs operating in isolation.

This approach is intended to elevate regional support for game developers across Europe, aligning with broader industry resilience goals.

## Conclusions

In conclusion, Tim and Christina invited established game hubs to join forces under the Game Hubs League initiative. They highlighted the potential for enhanced collaboration to drive meaningful change within the European game industry, leveraging shared experiences and resources for collective growth and sustainability.

Their presentation underscored the importance of community-driven initiatives in nurturing vibrant game development ecosystems across Europe. By fostering collaboration among game hubs, they aim to address common challenges and cultivate a supportive environment conducive to long-term industry success.

## Presentation by Jeferson Valadares

The speaker, whose extensive career spans across Brazil, Helsinki, London, San Francisco, and Lisbon, provided insights into the challenges and dynamics of game industry associations and policy advocacy in Europe. Drawing on personal experiences from various global contexts, the speaker highlighted the complexities of navigating political landscapes and cultural perceptions related to the gaming industry. The speaker introduced themselves as someone deeply involved in the game development industry, having founded companies in Brazil and currently working for a Japanese multinational. They emphasized their transition to Lisbon and the initiation of an association aimed at advancing the local game industry. The speaker underscored their experience in founding associations, noting the significant impact of hiring a skilled advocate to navigate governmental relations effectively. Challenges in European Context: In Portugal, the speaker noted challenges unique to the European Union (EU), where unfamiliarity with local laws and EU regulations posed obstacles. They referenced a recent collaboration to establish a gaming hub in Lisbon, illustrating efforts to integrate into the local ecosystem with support from the city and industry partners.

## Key Points

1. Translating European Policies into Local Realities: The speaker raised concerns about the gap between European-level policies and their implementation in member states, seeking best practices for effectively adapting and applying EU directives within the Portuguese context.
2. Cultural and Economic Recognition of Gaming: Addressing the perceived lack of recognition for the economic and cultural contributions of the gaming industry in Portugal, the speaker highlighted the disconnect between gaming initiatives and broader economic policies. They sought strategies to align gaming advocacy with existing startup incentives and cultural initiatives.

# What are the best practices to boost local decision making?

- What are the challenges of (1) adapting audiovisual laws to encompass videogames or (2) pushing forward new laws specifically designed for our industry?
  - How can the local associations use the work at the EU Commission to help push/guide local policies beyond EU council meetings (which tend to be less effective at the local level)
- How can local associations better orchestrate efforts with central governments since gaming doesn't often fall under the same umbrella (culture, gaming, economics)
  - Portugal Example:
    - There are no references to videogames/gaming in Portuguese Legislation
    - Public agencies do not acknowledge videogames as part of the audiovisual umbrella
    - It is hard for videogame producers to be eligible for the existing tech startup incentives



3. Combatting Negative Perceptions: The speaker expressed frustration with prevalent negative stereotypes associated with gaming, such as addiction concerns, in discussions with government officials. They advocated for collaborative efforts with publisher associations to reshape perceptions and highlight the industry's positive contributions.

## Conclusions

The speaker concluded by soliciting insights and best practices from the audience on three key challenges: bridging policy implementation gaps, integrating gaming into broader economic strategies, and addressing negative perceptions. They emphasized the need for strategic advocacy and collaboration to elevate the visibility and legitimacy of the gaming industry within Portugal's regulatory and cultural frameworks. In conclusion, the speech provided a candid assessment of the challenges faced by game industry associations in navigating European policies and fostering local recognition. The speaker's call for actionable solutions underscored their commitment to advancing the industry's interests amidst regulatory complexities and cultural biases.

## Presentation by Daniel Wilén

Daniel Wilén, representing a games industry cluster in northern Sweden, opened his speech by emphasizing the collaborative efforts among municipalities to foster a thriving ecosystem for game developers. His address focused on the disparities in available public funding across the European Union (EU) and the potential risks of intra-EU competition, advocating instead for harmonization to benefit the industry collectively.

Daniel introduced himself humorously and highlighted his involvement in managing a games industry cluster encompassing four municipalities in northern Sweden. He acknowledged the wealth of insights

shared during the session and noted the evolving nature of his prepared remarks in response to the discussions.

### Key Points

1. **Disparities in Public Funding:** Daniel underscored the significant differences in available public funding for game developers across EU member states. He referenced earlier presentations discussing various EU programs, tax incentives, soft money loans, and public investment funds, noting the complexity and challenges of navigating these diverse opportunities.
2. **Risk of Intra-EU Competition:** Daniel expressed concerns about the potential negative impacts of disparities in public funding and incentives. He argued that unequal support mechanisms could lead to unhealthy competition among EU nations, hindering collaborative efforts and potentially causing talent and knowledge drain from regions less supported.
3. **Advocating for Collaboration:** Drawing from the successful collaboration model among municipalities in Sweden, Daniel advocated for a unified approach within the EU. He suggested that by reducing differences in funding and incentives across European nations, the industry could retain talent, knowledge, and economic benefits within the region. He drew parallels to the European League initiative discussed earlier, proposing that greater alignment could yield similar benefits at a continental scale.

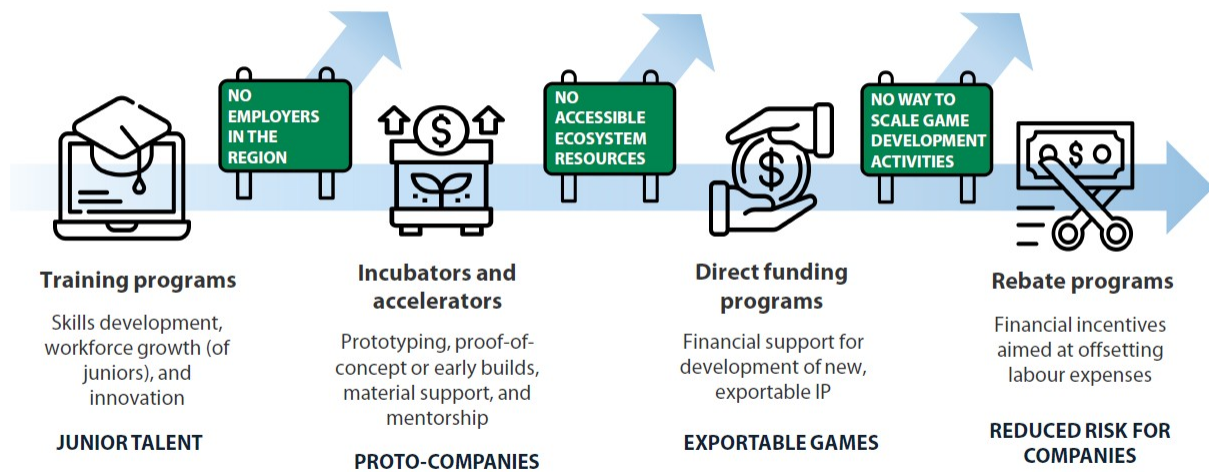
### Conclusions

Daniel concluded by thanking the audience and encouraging continued dialogue and collaboration on harmonizing EU policies and funding mechanisms for the games industry. He emphasized the potential benefits of a unified approach, ensuring that talent and innovation remain within Europe while fostering a competitive yet cooperative environment for game developers across the continent.

### Presentation by Kristian Roberts

Kristian from Nordicity presented insights into developing effective policies for the games industry, drawing from his extensive experience advising teams, industry organizations, and governments globally. His talk emphasized the holistic approach necessary for fostering successful game development ecosystems, transcending mere incentives and focusing on systemic integration and optimization. Kristian introduced himself as a consultant at Nordicity, specializing in advising on policies that support the games industry. With over a decade of experience in this field, he highlighted his role in helping jurisdictions develop comprehensive strategies beyond traditional tax credits or incubators.

# The Developer's Journey



## Key Points

- 1. The Developer's Journey Approach:** Kristian stressed the importance of viewing the development of a games industry ecosystem as a journey rather than a series of isolated initiatives. He outlined typical strategies governments seek, such as training programs, incubators, and funding incentives, acknowledging their importance but cautioning that these alone are insufficient without broader ecosystem support.
- 2. Integration of Ecosystem Components:** He argued that successful ecosystems integrate various components seamlessly. For instance, while training programs develop talent, without corresponding job opportunities (e.g., game studios), investments in skills may not yield desired outcomes. Similarly, incubators are crucial for nurturing early-stage companies, but without pathways to scale up through funding mechanisms like rebate programs, sustained growth is challenging.
- 3. Policy Development Process:** Kristian proposed a three-step process for policymakers: first, assess the existing landscape and resources; second, identify the industry's needs and aspirations; and finally, optimize policy interventions to align these two perspectives effectively. He highlighted the common pitfall of starting with preconceived solutions (like tax credits) without first understanding the industry's readiness or requirements.
- 4. Holistic Approach and Flexibility:** Emphasizing a heuristic approach, Kristian advocated for policies that allow for experimentation and adaptation. He cited examples where successful ecosystems have evolved by learning from failures and adjusting strategies to meet changing industry dynamics.

## Conclusions

Kristian concluded by urging policymakers to adopt a nuanced understanding of the games industry's needs and to tailor policies accordingly. He emphasized the importance of flexibility, iterative learning, and strategic alignment between policy objectives and industry realities. By doing so, he suggested, policymakers can create environments conducive to sustainable growth, innovation, and global competitiveness in the games sector.

## Presentation by Jonne Taivassalo

In the final speech of the day, the speaker Jonne Taivassalo, discussed a critical issue in the games industry: ecosystem debt. This term refers to the historical foundation of the industry on hobbyists and enthusiasts who lacked institutional support and the current challenges in providing adequate backing for today's aspiring developers. The speech highlighted the personal experiences and challenges faced within the Finnish game development ecosystem, emphasizing the need for sustainable support mechanisms.



### Key Points

- 1. Ecosystem Debt Defined:** The speaker articulated how the game industry's roots were grounded in passionate individuals who were driven purely by enthusiasm rather than structured support systems. However, today's juniors have more options, such as internships or junior positions, which are essential but scarce. Despite the capital area of Finland hosting numerous game companies, there is insufficient institutional support for nurturing new talent or sustaining existing ventures.
- 2. Personal Experience as a Case Study:** The speaker candidly shared personal challenges and experiences. Having been involved in various capacities within the game industry, including founding a non-profit organization to support local game developers, he highlighted the financial instability and personal sacrifices that often accompany such endeavours. Policy changes led to funding cuts, forcing him to juggle multiple roles and endure significant stress, impacting personal well-being and productivity.
- 3. Coordination Challenges:** Reflecting on the Finnish context, the speaker discussed the complexity of navigating numerous associations, student unions, and educational institutions involved in the game development sector. Managing communication and resources efficiently amidst limited funding and time constraints emerged as a significant hurdle, contributing to burnout among industry supporters.
- 4. Call for Sustainable Support:** The speech underscored the urgent need for sustainable support mechanisms that can alleviate ecosystem debt and prevent burnout among industry advocates. Initiatives like new incubator programs aimed at fostering entrepreneurship among students were proposed as potential solutions to encourage fresh talent and diversify the entrepreneurial landscape within established ecosystems.



## Conclusions

The speaker's address concluded with a poignant reflection on the industry's reliance on a limited pool of dedicated individuals who balance game development with ecosystem support. They questioned the sustainability of this model, expressing concerns about the industry's ability to retain passionate contributors amidst financial instability and personal sacrifices.

The speech highlighted the critical need for policymakers and industry stakeholders to prioritize sustainable funding models, streamline communication channels, and foster a supportive environment for both new entrants and seasoned professionals in the games industry. By addressing ecosystem debt and promoting balanced support frameworks, the industry can enhance resilience, foster innovation, and cultivate a thriving community of developers and advocates.

The personal anecdotes and challenges shared by the speaker resonated with the audience, offering a stark reminder of the human cost behind industry advocacy. The speech likely prompted discussions on policy reform, resource allocation, and mental health support within the games industry, encouraging stakeholders to rethink strategies for sustaining long-term growth and inclusivity.

## Session 3 Plenary Discussion: Policy and Game Development Clusters in Europe

The joint panel discussion merged insights from two distinct perspectives: one focusing on local vs. national policy dynamics in ecosystem development, and the other examining the challenges and strategies in building game development clusters across Europe. This synthesis aims to highlight synergies and contrasts in policymaking, funding dynamics, and cultural influences pertinent to fostering thriving economic ecosystems and game development hubs.

### Key Highlights

- 1. Policy Dynamics: Local vs. Pan-European Perspectives:** The discourse opened with contrasting views on the efficacy of local autonomy versus pan-European collaboration in policy formulation. Participants underscored that while local governance facilitates tailored solutions aligned with regional needs, collaborative European strategies are crucial for tackling common regulatory challenges. As expressed, "There's a big variation culturally where you are, and you have to... talk about the cultural values... and work opportunities." This sentiment was echoed in the game development context, where speakers debated the merits of territorial versus boundary-agnostic approaches: "Game production doesn't need to be territorialized. We can produce games with collaborators without being attached to the local system."
- 2. Role of Incubators and Funding:** Both discussions converged on the pivotal role of incubators in translating policy into tangible economic growth. The integration of local and national objectives through incubators emerged as a critical strategy, fostering synergies within ecosystems: "Think about... input and output... it's systems thinking." Similarly, the dialogue on regional funding highlighted contrasting approaches in governance structures, influencing policy implementation and economic development: "It's very important... the relationship between the region and the national level."
- 3. Challenges and Strategies: Building Sustainable Ecosystems:** Participants collectively addressed challenges such as defining natural boundaries for local ecosystems and fostering interregional collaborations. The complexity of delineating boundaries in a globally connected industry was articulated: "It's like bubbles within bubbles... the line drawing... gets really hard": In the game development sphere, cultural and policy disparities were identified as barriers to cohesive cluster

formation, necessitating nuanced approaches: "Policies want to make some local places shine better than others, but game production doesn't necessarily adhere to these territorial boundaries."

4. Support Structures: Financial and Psychological: The necessity of financial support mechanisms was universally acknowledged, alongside a burgeoning emphasis on psychological support for sustaining developer communities: "We've talked a lot about financial support, but what about psychological support for developers?" The critical role of supportive community environments in bolstering developer morale and productivity was underscored: "There was a game developer in Berlin who created a thriving community hub but eventually had to close due to financial constraints."

## Conclusions

In conclusion, the synthesis of these discussions highlights the complexity and interconnectedness of policymaking and ecosystem development in Europe. It emphasizes the need for adaptive strategies that balance local autonomy with collaborative pan-European efforts, integrating financial and psychological support mechanisms to nurture sustainable economic and game development ecosystems. As Europe navigates evolving economic landscapes, leveraging diverse perspectives and fostering resilient leadership will be pivotal in fostering innovation and growth across sectors.

## Summary, with overall conclusions and recommendations

### Current Strategies and Support Framework

#### Identified Challenges

The current public support framework is not suitable for the games industry, with many member states offering no support at all, placing them at a significant competitive disadvantage. Games are often not recognized as an independent artistic medium, leading to cultural funding being based on instruments designed for the film industry. Public funding instruments rarely address the cultural, business, innovation, and impact aspects of games comprehensively. Additionally, the amount of public support allocated to the games industry is typically very limited.

Cultural funding for games, while fostering artistic communities and valuing art for art's sake, often does not lead to financial success and can be elitist. Measuring cultural and artistic value is inherently challenging. Business funding, although it promotes economic growth, can encourage questionable business practices and models. General start-up/business incubators or accelerators often fail to support games effectively. Technological funding provides tools for creating better games but often reduces games to mere software and business entities, neglecting their cultural and artistic dimensions. There is also a lack of coordination between national and EU-level support instruments, resulting in fragmented eligibility criteria.

#### Identified Solutions

Public support for games should be viewed as an investment in growth. The industry requires better data on the impact of public support instruments, with a focus on fostering new start-up studios to generate fresh success stories, finding their own balance for culture, innovation, business and impact. Establishing a game-centric public support framework could leverage the opportunity presented by austerity politics to create something innovative and robust. Public support instruments should be reliable enough to gain the trust of private investors, like the Korean model of blended public-private support.

The EU's diversity in public support is an advantage, allowing for varied support mechanisms and fostering experimentation. The games industry must work harder to improve access to public funding and develop more coherent support frameworks at EU, national, regional, and local levels. Joint priorities within the industry should be established.

To achieve this, the EGDF should be encouraged to and supported in mapping public support instruments and visualizing the game industry ecosystem, including the role of public support infrastructure, funding, telecom networks, talent, and events for knowledge transfer.

To summarise, we need:

**Cohesive, aligned policies that integrate cultural and economic incentives to foster sustainable growth across the video game industry, supporting global competitiveness before intra-EU competition.**

**New, game centric support systems created from the ground up, based on the games industry's own vocabulary and definitions of value, balancing business, cultural and innovation aspects.**

**Long-term funding instruments that support cultural projects beyond short-term initiatives, ensuring continuity and stability.**

**Data on the impact of public support instruments.**

**Focus on new, first-round start-ups to create a breeding ground for new success stories.**

**Public support systems need coherence in eligibility and selection and able to earn the trust of private investors.**

## European Games in a Global Context, with Megatrends

### Identified Challenges

The industry faces an investment winter, layoffs, and a lack of job security, although the EU may be more resilient than the USA. Big studios are hesitant to hire, leading to industry stagnation exacerbated by recent crises such as the pandemic, wars, and economic downturns. Despite games being eligible for audiovisual funding under Creative Europe, there is still a significant lack of public support.

A greater understanding for the industry and its particular challenges is much needed on the political level, but also for the enormous strategic, technological, commercial and soft power potential of the European games industry.

Different funding mechanisms like grants, loans, tax incentives, and public equity investments each have their pros and cons. Grants provide "free money" and support pre-production, fostering creation but often with limited financial stress. Loans offer more substantial funding but come with financial obligations. Tax incentives support production with potentially unlimited budgets, while public equity investment is crucial given that European actors have lost control over game distribution channels to global giants, leading to a significant outflow of funds from Europe.

Increased political interest in games has led to more regulation and fragmentation of global markets. External influences often define the industry's problems, pushing overseas or other industries interests over European games industry ones. Climate change and sustainability reporting are additional concerns.

Carbon accounting needs to be encouraged and policies to be in place to promote it, either through grants covering its costs or enabling access to further funding.

### Identified Solutions

Getting public attention for industry success stories and exploiting crises as opportunities for growth is essential. Europe should capitalize on its value creation (essentially IP), emphasizing that it is not just a production base for American and Asian studios. Agile indie studios and new business models focused on sustainability offer growth potential. The EU's regulatory framework should encourage ecological sustainability through industry-specific standards and better analysis of business models and technologies.

Strengthening the position of game developers in the value chain and supporting the EU's digital sovereignty are crucial. Making European games more discoverable could help, while measures like platform levies to fund local developers should be studied. European actors need to take control of their future on platforms like VR, with more data on distribution channels to improve access.

Public support must be enhanced with new instruments and increased funding for disruptive initiatives by SMEs. Including sustainability criteria in funding, supporting marketing and distribution, and capitalizing on the current political momentum are vital. A dedicated European Commission member for digital affairs and a policy focus shift from publishing to production are necessary steps.

The placement and discoverability of European games in platforms and value chains outside of the control of European players on EU territory could be improved by making country of origin indicators mandatory for games distributed through digital distribution platforms. Possibly the application of rules if the Audiovisual services directive could deliver some interesting results.

To summarise, we need:

**Unified funding mechanisms and policies across Europe to support small and midsize game companies.**

**Robust regulatory frameworks that balance market access with the promotion of European cultural identity.**

**Tools and guidelines for environmental sustainability reporting and management for the games industry.**

**Platform regulations that ensure fair visibility and promotion of European games alongside global content.**

**Data and analysis on successful international models enhance market penetration and cultural diplomacy efforts, adapting strategies to local contexts and market dynamics.**

**Data and analysis on business models, technologies and opportunities.**

**Data on global industry distribution channels.**

**Greater political-level understanding for industry challenges and for its opportunities for strategic, technological, commercial and soft power advantages, complementing the established consumer rights policy focus with a global context producer focus.**

**Promotion of European industry success stories.**

## Clusters, with Policy and Best Practice

### Identified Challenges

Local company needs vary significantly, and regions have different demands, creating a wide variety of regional dynamics. Game industry clusters are built on a mix of cultural, social, and material support elements. These include a supportive culture, success stories, social support networks, access to talent, private investment, mentors, role models, knowledge (research), incubators, education, infrastructure, and services.

The developer journey from training programs to junior talent, incubators to proto companies, direct funding to exportable games, and repeatable programs to risk reduction is complex. Many regions struggle to retain talent and face risks of subsidy races between EU regions and the rest of the world. Territoriality challenges arise as games are a borderless business, but clusters are often territorial, potentially creating isolated bubbles. The relationship between regional and national actors is crucial for understanding ecosystem functionality. Success is often tied to the performance of the best company in a region.

### Identified Solutions

Clusters must have a clear mission, a defined role, a solid and sustainable organization, competent experts, an evangelist/spokesperson, data, impact measurement, and unique selling points. Benchmarking and sharing best practices among clusters are essential. Collaboration and knowledge

sharing should be encouraged, with support for avoiding reinvention of the wheel and lobbying for public support.

Evaluating current assets and future goals to develop growth-optimized instruments, collaborating on talent attraction, and understanding the investment implications at the regional level are critical. Investing in the games sector means investing in the people who make games and the ecosystem. Without investing in creators, success is unattainable.

More research on game industry ecosystems and how they form is needed. Better support mechanisms, clear information on funding application processes, and support for supporters to avoid burnout are crucial.

To summarise, we need:

**Adaptive strategies that balance local autonomy with collaborative pan-European efforts, integrating financial and psychological support mechanisms to nurture sustainable ecosystems.**

## Setting Policy Priorities

Fully cognisant of the challenges in making policy recommendations, and formulating and implementing policy, the authors chose to try to complement and structure the width and breadth of the focus areas and actions recommended by our summit of industry experts.

If the political insight and resulting will is present, along with an understanding of the field to be addressed, the major remaining obstacles, put simply, are time and money.

After documenting, summarising and analysing the output of our summit process, we chose to return to our experts, to get hints on possible priorities among all the recommendations. We asked them to rank defined action points generated by the Summit on how soon they should be implemented, and how much budget weight they should be assigned, respectively.

## Suggested Priorities for Scheduling

Below are the action points from the preceding sections, rated as to the immediacy of their address.

The responses were given in reply to the following statement: “Please rate the items below as to their **priority in time** -- when to start in other words. (You don't need to weigh in the calendar or working time you think an action requires to complete, or if other actions need to be completed before. We're just asking for your expert view, or personal gut feeling, of the need for **immediacy of these games industry-oriented actions on the European level.**)“

All items were mandatory to respond to on a four-step Likert scale, selecting one of the following choices: “This should start immediately”, “This should start soon”, “This should start thereafter” and “This should start later”, weighted 4 to 1, respectively. The indexed maximum possible value is 100 (if all respondents had selected “This should start immediately”), and the minimum 0 (if all respondents had selected “This should start immediately”).

[Rating: 79] Long-term funding instruments that support cultural projects beyond short-term initiatives, ensuring continuity and stability.

[Rating: 73] Focus on new, first-round start-ups to create a breeding ground for new success stories.

[Rating: 70] Greater political-level understanding for industry challenges and for its opportunities for strategic, technological, commercial and soft power advantages, complementing the established consumer rights policy focus with a global-context producer focus.

[Rating: 68] Cohesive, aligned policies that integrate cultural and economic incentives to foster sustainable growth across the video game industry, supporting global competitiveness before intra-EU competition.

[Rating: 68] Provide data on the impact of public support instruments.

[Rating: 68] Unified funding mechanisms and policies across Europe to support small and midsize game companies.

[Rating: 67] Promotion of European industry success stories.

[Rating: 65] New, game centric support systems created from the ground up, based on the games industry's own vocabulary and definitions of value, balancing business, cultural and innovation aspects.

[Rating: 58] Leverage diverse perspectives and foster resilient leadership to support innovation and growth.

[Rating: 58] Coherence in public support systems' eligibility and selection to earn the trust of private investors.

[Rating: 58] Provide data and analysis on successful international models enhance market penetration and cultural diplomacy efforts, adapting strategies to local contexts and market dynamics.

[Rating: 56] Provide data and analysis on business models, technologies and opportunities.

[Rating: 56] Adaptive strategies that balance local autonomy with collaborative pan-European efforts, integrating financial and psychological support mechanisms to nurture sustainable ecosystems.

[Rating: 55] Provide data on global industry distribution channels.

[Rating: 48] Tools and guidelines for environmental sustainability reporting and management for the games industry.

[Rating: 45] Platform regulations that ensure fair visibility and promotion of European games alongside global content.

[Rating: 32] Robust regulatory frameworks that balance market access with the promotion of European cultural identity

## Suggested Priorities for Funding

Below are the action points from the preceding sections, rated as to the allotment of funding.

The responses were given in reply to the following statement: "Please rate the items below as to their **priority when it comes to allotted resources** - their share of the funds available, in other words. (You don't need to estimate the cost for an item or prioritise it in relation to external needs, like health or defense. We're just asking for your expert view, or personal gut feeling, on appropriate relative shares

for these actions out of a hypothetical **total budget for games industry-oriented actions on the European level.**)”

All items were mandatory to respond to on a four-step Likert scale, selecting one of the following choices: “This should get the most resources”, “This should get a lot of resources”, “This should not get very much” and “This should get the least”, weighted 4 to 1, respectively. The indexed maximum possible value is 100 (if all respondents had selected “This should get the most resources”), and the minimum 0 (if all respondents had selected “This should get the least”).

[Rating: 80] Long-term funding instruments that support cultural projects beyond short-term initiatives, ensuring continuity and stability.

[Rating: 67] New, game centric support systems created from the ground up, based on the games industry’s own vocabulary and definitions of value, balancing business, cultural and innovation aspects.

[Rating: 67] Focus on new, first-round start-ups to create a breeding ground for new success stories.

[Rating: 64] Cohesive, aligned policies that integrate cultural and economic incentives to foster sustainable growth across the video game industry, supporting global competitiveness before intra-EU competition.

[Rating: 62] Unified funding mechanisms and policies across Europe to support small and midsize game companies.

[Rating: 62] Adaptive strategies that balance local autonomy with collaborative pan-European efforts, integrating financial and psychological support mechanisms to nurture sustainable ecosystems.

[Rating: 61] Greater political-level understanding for industry challenges and for its opportunities for strategic, technological, commercial and soft power advantages, complementing the established consumer rights policy focus with a global-context producer focus.

[Rating: 58] Data and analysis on successful international models enhance market penetration and cultural diplomacy efforts, adapting strategies to local contexts and market dynamics.

[Rating: 53] Provide data on the impact of public support instruments.

[Rating: 53] Coherence in public support systems' eligibility and selection to earn the trust of private investors.

[Rating: 53] Leverage diverse perspectives and foster resilient leadership to support innovation and growth.

[Rating: 48] Promotion of European industry success stories.

[Rating: 47] Platform regulations that ensure fair visibility and promotion of European games alongside global content.

[Rating: 47] Provide data and analysis on business models, technologies and opportunities.

[Rating: 45] Tools and guidelines for environmental sustainability reporting and management for the games industry.

[Rating: 41] Robust regulatory frameworks that balance market access with the promotion of European cultural identity

[Rating: 38] Provide data on global industry distribution channels.



## Suggestions for Actions in Practice

It seems that the actions proposed (a total of 17) cluster to a large extent into the themes of regulation and level playing field in global competition (2-3 proposals), coherent and appropriate funding, stressing especially the need for funding new entrants (5-6 proposals), as well as information gathering and dissemination, especially concerning global markets (5-6 proposals). As they came up in discussion, the authors would, in closing, like to remind the reader of a couple of possible sources of inspiration for coming efforts to address these proposals.

The European Audiovisual Observatory, that since 1992 has been providing essential market and legal information on the audiovisual industry, which here essentially covers all media except the press: cinema, television, radio, video and on demand services. This could possibly serve as a model for a similar institution for video games, addressing the information and communication needs brought forth by our experts. The actions addressed are by our experts regarded as relatively low-cost and not very urgent.

Striving for funding that is both coherent across Europe and appropriate for the games medium and industry, including supporting new talent, it is well worth to study the Nordic Game Program which was set up with precisely that ambition, but was not based on legacy film or general cultural or R&D support, as is the norm. Since the Nordic Game Program's lifetime, 2006-2015, other funding schemes with similar ambitions should also have come into existence globally. The related actions are by our experts regarded as relatively high or very high investments and quite urgent. Such previous support systems and programs need to be documented and their results analysed to serve as a key foundation for serious ambitions regarding improved and generalised games funding for Europe. These actions are by our experts regarded as requiring relatively high or very high investments and also as quite urgent.

# Appendix I: Invitation

Perspectives on a key industry for our future:

## Games for jobs, digital growth, innovation and European values



The games industry has been subject to policy measures to boost its growth on the basis of culture, innovation and trade for nearly **three decades now**.

What are the **important lessons learned** from many years of grants, tax subsidies, export promotion and proposed legislation? Which **mistakes** should countries and regions with emerging games industries avoid repeating?

The global games industry used to be **non-cyclical and recession-proof**, like much of the entertainment business. System shocks were instead driven by internal factors and it was relatively easy for game developers and publishers to **raise huge amounts of capital** for expansion and acquisitions.

With higher interest rates, demand returning to pre-pandemic levels and investors cashing in, the industry is now in an investment winter, with **studio closures and massive layoffs**, in the tens of thousands worldwide.

The current **severe contraction** in the games industry naturally also presents us with **great opportunities**.

Is this the perfect time to nurture **spill-over effects** into other sectors like **health, education, sustainability, climate and defense**? Or should we focus on boosting general **digital skills growth and innovation**?

Should we have **support instruments tailored** for the needs of the games industry? Should we support **public-private partnerships** for the games sector? Or are existing cultural, R&D and SME support schemes **all we really need** to maximise **quality, innovation and competitiveness**?

What **works** and what does **not** work?

**How should these issues influence games industry policy today?**

**Welcome to the discussion!**



### WHEN AND WHERE

From noon on Tuesday, 21 May, the summits and special events day of Nordic Game 2024's May edition. Europe's leading game developer conference celebrates its 20-year jubilee this year at Slagthuset in Malmö, Sweden, 30 minutes from Copenhagen airport.

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### GAMES POLICY SUMMIT CORE

A few short presentations lead and inspire roundtable, off-the-record discussions on subjects like ecosystem building and support instruments, leading games industry hubs, public equity investment programs and barriers to private investment, existing needs and potential demand from other sectors, as well as sub-sector and value-chain targeting to maximise competitiveness. Participation is limited in numbers and by application only. Registration for a Nordic Game conference pass is required.

### SUMMIT INTERACTIONS

Short presentations are addressed also to the concurrent GAMES EXEC SUMMIT and GAMES CAPITAL SUMMIT meetings and networking in the breaks is actively stimulated also with their respective participating industry leaders and startup entrepreneurs with VC investors. A closing joint mingle with food and refreshments encourages further inspiring and candid discussions across sectors.

### GAMES POLICY SUMMIT DISSEMINATION

The main Nordic Game conference program on Wednesday 22 May has a session reserved for reporting from EU- and other funded games and games industry research and development projects, as well as presentations from funding bodies open for proposals on research, technology and content development. Summary findings from GAMES CAPITAL SUMMIT are in closing reported in panel format to the full conference audience.

## Policies, action... or both?

Will game developers ever take the future of their medium and industry into their own hands, or should the future of the industry be left to investors, publishers, global industry giants, politicians, parents and angry mobs?

Is it really helping or actually a hindrance to bundle games with "screen media", "creative industries", "the experience economy", "ICT" and "startup clusters"?

Is the true potential of games applied for education, training and health best realised by the games industry? Or is it by academics that have never shipped a product together with developers that have never shipped a game?

A few cities and regions were nimble enough to support the self-organisation of the games industry 20 years ago. It was not a general triple-helix trend. Can really the EU, from a quadruple-helix perspective, be of support today?

## HOW TO JOIN THE DISCUSSION

If you already have or are planning to purchase a Nordic Game pass, apply to join the Games Policy Summit by clicking here to fill out our form. It takes about 5 minutes. No attachments or uploads needed.



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## Appendix II: List of participants

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Jérôme Benoit, Swiss Arts Council Pro Helvetia  
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Jinni Lü, Fingersoft  
Jiri Kupiainen, Sustainable Games Alliance  
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Jorge Sanz Gonzalez, European Investment Fund  
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Oscar Wemmert, Dataspelscentrum  
Pierre Escaich, Ubisoft  
Rami Ismail, Dutch Games Association  
Simon Løvind, Danish Film Institute / The Games Scheme  
Sten Selander, Bit Egg / Thailand Game Developers Association  
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