MSC Business Management & Human Resource

Master's Thesis: Polish and German Game Industries: Production and Distribution Structures

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Abstract

This thesis has explored how Polish and German video game industries were formed based on production structures, distribution structures, funding conditions, and competitiveness. The study adopted a semi-structured interview data, secondary literature, industry reports and policy documents using the qualitative comparative design. The data were found to indicate a significant technological change on production structures through reduced barriers to entry, greater flexibility in the development model and the possibility of smaller studios thriving. Distribution was discovered to have moved away between conventional retail and intermediary practices, towards digital and platform-based systems, which was more likely to access the market as well as establish new dependency on platforms visibility and control. Another limitation of the research was the detection of financing limitations and low public support as predisposing factors to the development of the firm, innovation, and stability. Moreover, competitiveness was indicated not just to be determined by the development of the game, but also user acquisition, monetization, retention and performance after the launch in a market that is driven by a hit. Altogether, the paper has found that the technological, structural, financial, and strategic factors of firm performance in the video game industry interact with each other to have significant effects on sustainable growth and support of policies in similar areas in both countries.

Keywords: Video Game Industry, Poland, Germany, Production Structures, Digital Distribution, Financing Constraints, Competitiveness, Sustainable Growth.

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CHAPTER 1: INTRODUCTION

1.1 Research Background

The video game industry is widely recognized as a core segment of the creative and digital economy, characterized by project-based production, modular pipelines, global collaboration and platform-mediated distribution (Tomkinson and Harper, 2022). Within Europe, national ecosystems differ substantially in their market size, institutional support and labor conditions. Germany illustrates a mature, high-consumption context: the German games market generated around €9.4 billion in 2024 across games, hardware and online gaming services, remaining the largest market in Europe, with approximately 37.5 million people playing games (game, 2025).

Germany on the production side had 910 games companies in 2025 and 12,134 people working at developers and publishers, which is slightly less than the year before, so there is international consolidation and uncertainty in the funding (game, 2025). This situation of consumption dominance and production weakness is not really new: the domestic game developers traditionally had a limited share in the domestic market, and only in 2019 this improved indisputably to a new level: as noted by Koley (2022), the federal government initiated its first national level games funding programme specifically with the goal of making the domestic growth in the development sector possible (Behrmann, 2020). This slowness in providing structural public support, as well as persistent doubt about the structure and reach of the programme, helps understand why the scale of production in Germany has not increased in the same way as its status as the largest consumer market in Europe.

Poland, by contrast, represents an export-oriented production hub. In October 2025 there were around 824 active game producers and publishers employing 14,568 people, with industry revenue reported at €1.293 billion in 2024 and over 450 game releases per year (PARP, 2025). Polish studios are structurally oriented to international distribution: the report estimates that about 97% of Polish game production is sold abroad, with premium games as the dominant business model (69%) and Steam remaining the primary release platform (PARP, 2025). Despite geographical proximity and shared EU market access, these two ecosystems differ in their combinations of domestic demand, export dependence, funding regimes and publisher/platform relationships, making them a suitable comparative setting for firm-level analysis of production and distribution structures.

1.2 Problem Statement

Although the European game sector has expanded rapidly, empirical comparative evidence on how firms organize production and distribution across different national ecosystems remains limited. Existing studies often prioritize market outcomes, audiences or cultural texts and devote less attention to the organizational designs and institutional conditions that shape firm behavior (Tomkinson and Harper, 2022). This gap is especially visible for Germany and Poland.

Germany has the largest consumer market in Europe, coupled with a development scene of small studios and medium sized studios, which in most cases rely on international publishers and policy support. Introduced in 2019, the federal games funding programme has some design issues such as lack of limitations to international sub-contracting of funds which aimed at to create public savings on the base of local capability, as opposed to direct relation (Behrmann, 2020; Koley, 2022). Although the principles of the programme have been optimized throughout the years and experts in the domain of industry were integrated into the central administration, its overall strategic influence on the national competitiveness is debatable (Koley, 2022). Such structural under exploitation and programme design flaws, as well as partiality in the budget in the recent past, have been listed among certain primary opportunities limiting the capacity of Germany to build internationally competitive studios (game, 2025).

Poland combines a sizeable development workforce with a strongly export-driven sales structure, where platform visibility and international publisher conditions are critical constraints and opportunities (PARP, 2025). Without a structured comparison of how firms in these two contexts build production capabilities, finance projects, manage labor and access distribution channels, it is difficult for researchers and policymakers to identify which organizational and institutional factors drive competitiveness and sustainable growth.

1.3 Rationale of the Study

This study addresses the gap between macro-level industry narratives and micro-level firm experiences by focusing on production and distribution structures as determinants of competitiveness in a knowledge-intensive creative industry. Germany and Poland are particularly relevant for comparison because, despite operating within the same European regulatory space, they show contrasting configurations of market demand and production orientation. Poland's industry profile (824 active producers/publishers and 14,568 employed in 2025) is comparable in scale to Germany's development ecosystem (12,408 employed in 2024, 12,134 in 2025; 948 companies in 2024 and 910 in 2025), yet the two countries differ markedly in export dependence, platform strategies and policy funding stability (PARP, 2025; game, 2025). Understanding these differences provides actionable insights for cross-border partnerships, studio scaling strategies and the design of public funding instruments that support sustainable growth in the European games industry.

1.4 Research Aims

The main aim of this study is to compare the production and distributional structure of the game firms in Poland and Germany and to examine the impact of these structures on the competitiveness and sustainable growth. The research aims to substantiate the systematic knowledge about organizational models on the level of firms and the institutional reasons within two game industry ecosystems in Europe, which would be incorporated into the larger discourse of the development of the creative industries.

1.5 Research Objectives

- To map firm-level production/distribution models in both countries.

- To examine differences in funding, labor markets, and cultural policy.
- To identify drivers and constraints on firm performance.

1.6 Research Questions

- How do Polish and German firms structure production and distribution?
- How do funding sources, labor conditions, and cultural policy influence these structures?
- Which factors explain cross-country differences in competitiveness and sustainability?

1.7 Significance of the Study

The research assists in the academic and practical research on the game industry as an industry of knowledge and creativity. In an academic context, it builds upon the current literature by providing an analysis of organizational structures on a firm-level, comparative context, going beyond the prevailing approaches that are based on the cultural texts or the reception of the players (Kudlla, 2023). It will also be part of wider debates about competitiveness and sustainability in digital industries that do projects. Practically, the results apply to managers of game studios, publishers, and policymakers since they have illuminated structural limitations, support systems, and strategic discrepancies between national settings. The insights can be used in designing policy to fund, regulate the labor market, and strategic choices to be made by the firms who are already in the European game markets or the ones that are coming into these markets.

1.8 Research Gaps

This research is encouraged by several research gaps. To begin with, a comparative empirical study comparing the production and distribution patterns of the European game industries does not exist. Second, company-specific views of the availability of funds, labor market relationships, and the work of institutions are still underrepresented in the literature that focuses significantly on cultural or consumer-focused aspects (Kudła, 2023). Third, existing research often focuses on successful companies or flagship labels, without considering challenges to the structure of small and medium studios. This study fills all these gaps by integrating the analysis of survey data using SPSS with the qualitative thematic analysis to give a more detailed picture of how organizational and institutional variables influence competitiveness and sustainability in the game industry.

1.9 Structure of the Dissertation

Chapter 1 presents the background of the research, statement of the problem, research aims and objectives, research questions and the general importance of the study.

Chapter 2 is a thematic literature review encompassing models of game production, models of distribution ecosystems, models of funding mechanisms, models of labor markets, and cultural policy models, based on comparative relationships in the European context.

Chapter 3 describes the research methodology which is the mixed-method design, Likert-scale survey, SPSS analysis, thematic analysis, and ethical concerns.

Chapter 4 introduces and discusses the empirical result, combining both quantitative and qualitative findings.

Chapter 5 explains the findings relative to literature, presents practice and policy implications, limitations, and visitation of future research.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction to the Literature Review

The following section provides an overview of the purpose and the scope of the literature review, which is a synthesis of scholarly and industry literature in the video game industry in its turn as a fundamental part of the creative and digital economy. This review pays attention to the nature of production structures, distribution models, the way it is financed, the state of the labor market, the cultural policy, and competitiveness, which is a multidimensional aspect of game development as an economic and cultural phenomenon (Parekh, 2024). The chapter provides a foundation for analyzing organizational dynamics at the firm level by combining the insights of the studies on innovation and research in the innovative industry.

The review of literature has a thematic approach and not chronological or author-by-author approach. It is specifically used in interdisciplinary fields of research like game studies, creative industries, and business management that have relevant scholarship in economics, media studies, labor research and public policy. According to earlier literature, thematic synthesis enables one to identify recurring themes and structural connections between various research traditions better (Ortiz-Ospino, González-Sarmiento and Roa-Perez, 2025).

Lastly, this section explains how literature review guides the design of empirical research. The themes identified influence the research objectives, the generating of the Likert-scale survey instrument, and the thematic analysis structure which will be used in the dissertation later. By doing so, the literature review acts as a contextual base as well as a conceptual framework to the mixed-methods research approach.

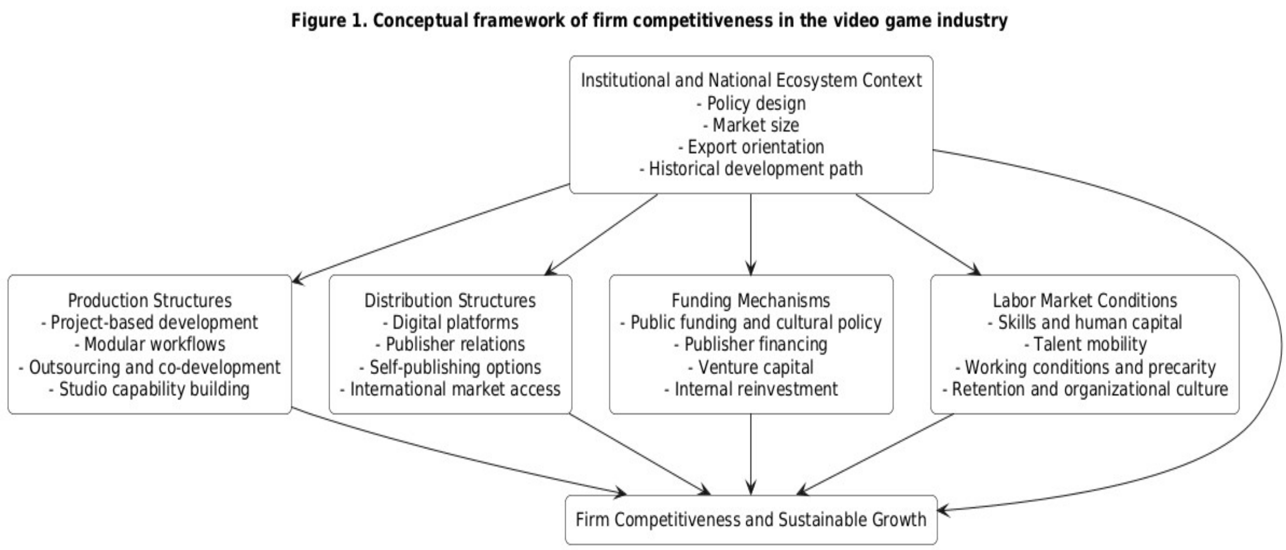

Figure 1: Conceptual framework of firm competitiveness

Source: Made by Author

2.2 The Video Game Industry as a Creative and Digital Industry

2.2.1 The Game Industry within the Creative Economy

The video game industry is extensively situated in larger creative and cultural industries because it draws upon symbolic material, intellectual property and creative labor. Game production is a hybrid undertaking that integrates artistic creativity, technical skill and business focus as opposed to the conventional manufacturing or service based sectors (Wolniak and Jonek-Kowalska, 2022). Consequently, game companies exist at the interplay of culture and money-making.

It is highlighted in scholarly literature that video games serve as both cultural and economic products. They exemplify stories, design, and interactivity on the one hand; they are created in competitive markets that are influenced by innovation, intellectual property regimes, and demand on the international market, on the other hand (Ulitina and Yakusha, 2024). The twin nature brings some organization pressures to firms because it involves coordinating creative teams with technical specialists.

Moreover, the game industry is becoming more knowledge based and innovative oriented. The high rate of technological change, digital distribution and data-driven design processes has succinctly shortened the process of production and created more uncertainty. These features underscore the fact that previous analytical models typically applied to manufacturing, or even more in regular service sectors cannot be applied to game firms and reasons why the industry approaches of creating industries perspectives are necessary.

2.2.2 Growth, Globalization, and Platformisation

The video game industry has been growing steadily worldwide due to the advancement of digitalization, the integration of international markets and development of online channels. To provide more examples of how platform-based distribution has altered the ways of value creation and capture of revenue, literature brings out the aspect where platform-based distribution reshapes value creation and revenue capture by using digital storefronts, subscription services, and live-services models (Gekker and Joseph, 2021). These technologies have drastically changed the relationship scheme between developers, publishers and consumers.

Power relations have also been transformed by platformisation in the industry. Large digital platforms become gatekeepers, affecting the visibility, monetization mechanisms, and access to the global audiences. This change has both increased the competition between the developers and at the same time decreased the entry barrier of smaller studios who are interested in reaching the international market (Kostić and Tomić, 2022). Consequently, distribution strategies have turned into a significant element of company competitiveness.

These processes are also enhanced by the globalization of game markets whereby companies are developing products that cater to the international audience at an initial stage. This background offers a vital background to subsequent analysis of the dependence and distribution forms of publishers in

Poland and Germany whereby firms are on common global platforms but with varied institutional bases.

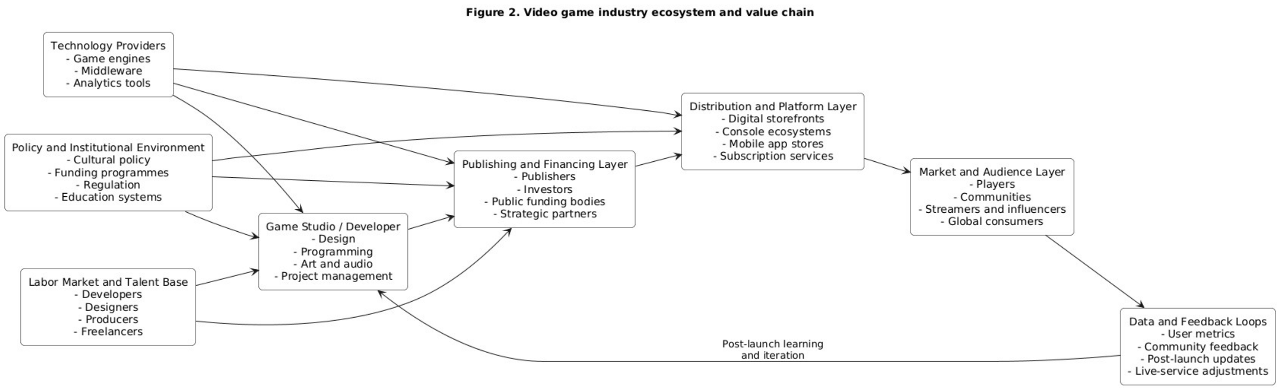

Figure 2: Video game industry ecosystem and value chain

Source: Made By Author

2.3 Production Structures in the Video Game Industry

2.3.1 Project-Based and Modular Production Models

The video game industry is generally structured in terms of project-based and modular production. Investigations into game production reveal that development is commonly being produced by temporary and multidisciplinary teams convened to work on a particular project, and not with long-term and consistent production lines (Sotamaa et al., 2021). This organizational structure indicates inventive and experimental game development.

The process of game production is marked by the cyclic development of the processes, such as prototyping, testing, and constant revising. With modular workflows, feedback and technological constraints allow the teams to make changes to design factors, technical components and content features. This kind of flexibility is necessary in a highly volatile, fast-innovating, and consumer tastes environment.

These attributes make game development different as compared to linear production models that exist in conventional industries. The focus on adaptability and collaboration determines the allocation of the resources, risk management, internal team structure and production structure becomes the focus of the central role in comprehending the performance and sustainability of a firm.

2.3.2 Outsourcing, Co-development, and Global Collaboration

The concept of co-developing and outsourcing has gained more popularity in the context of game production. Companies often engage the services of another studio or freelance experts to gain access to certain technical expertise, save money, or cope with the fluctuations in workload within the developmental stages (Czernek-Marszałek, Klimas and Wójcik, 2023). The trends signal more general changes in the creative industries towards networked production.

Although outsourcing is flexible, and access to talent in the global scene, it comes with coordination issues. There exist literature risks such as communication failures, quality assurance and external integration of externally put together parts to the main production lines. Such collaborative relationships require effective organization to stay efficient with production.

The increasing interdependence through global cooperation emphasizes the necessity of organizational capabilities and social networks. These findings are the direct input to the survey questions of this research to measure the intensity of outsourcing and models of collaboration between Polish and German game companies.

2.3.3 Firm Size, Studio Structure, and Capability Building

Depending on the size of firms and the form of their organization within a studio production structure can differ greatly. Larger studios tend to build more formalized structures and internal capabilities, whereas smaller studios tend to be serviced by smaller lean teams, malleable roles, and external partnerships. According to the literature, such differences can determine the scale, risk tolerance, and long-term strategy positioning (Papaevangelou and Roinioti, 2021).

Capability building is a progressive process that is influenced by previous project experience, financial availability, and workforce permanence. The issue of path dependency is extremely crucial; initial organizational decision making may inhibit or allow further growth patterns. Companies that are successful in building up production capacities are in a better position to handle complicated projects and cope with changes in the market.

The role of firm size and structure of the studios in the production organization is thus of primary focus in the analysis of competitiveness and sustainability in video game industry, especially when comparing the national level.

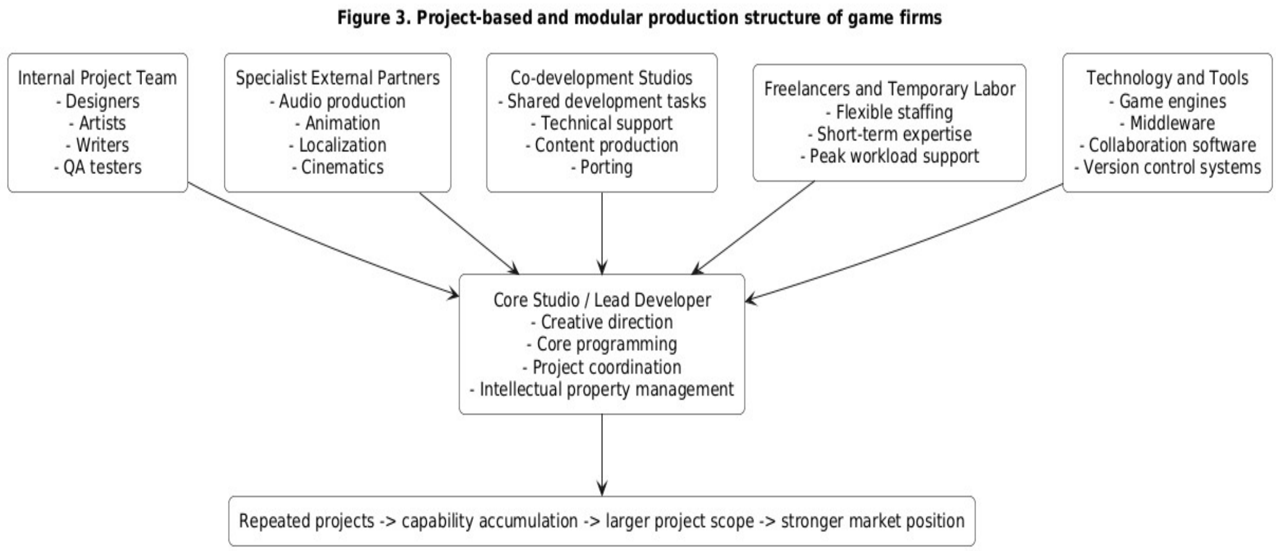

Figure 3: Project-based and modular production structure

Source: Made By Author

2.4 Distribution Structures and Market Access

2.4.1 Digital Distribution Platforms

The video game industry is now relying on digital distribution platforms as the core of market access, which is significantly transforming the distribution, discovery, and monetary face of games. In academic literature, the existence of online storefronts and platform-based ecosystems has minimized the traditional physical distribution barriers at the same time as creating new spheres of control over the visibility and allocation of revenue (Gekker and Joseph, 2021). This means that platforms are currently decisive when it comes to the games that are introduced to global audiences.

Among the important points covered in the literature is platform gatekeeping, during which platform owners impact access by determining access with curation policies, approval, and content moderation. In parallel to this, revenue-sharing schemes which are frequently formulated on set percentages reductions define the financial performance of developers, especially smaller studios with reduced bargaining power (Kostić and Tomić, 2022). Such setups have the potential to limit profitability regardless of expanded market coverage.

The other notable dimension of the platform is the aspect of algorithmic visibility because sites are progressively basing surfacing content on recommendation systems. The performance and longevity of sales of titles are influenced by algorithm-driven discovery, which encourages developers to make changes to design and marketing approaches. These processes directly affect the strategic decisions of the firm on the level of prices set and time of release as well as investment of the game into post-launch support, so the distribution structure is a key element of the competitive positioning in the modern game industry.

2.4.2 Publishers, Self-Publishing, and Power Asymmetries

Publishers have remained a strong participant in the video game distribution through their provision of financing, marketing experience and penetration of established distribution channels. According to literature, the support provided by publishers would eliminate financial risk among developers and help them to release their products in a foreign market, especially small studios with no capital or no marketing capabilities (Czernek-Marszałek, Klimas and Wójcik, 2023). Nonetheless, these arrangements are usually associated with control-related and revenue sharing trade-offs.

The asymmetry of power between publishers and developers in general, and intellectual property rights and creative control in particular, are extensively debated. Developers can forego partial rights to design making or future rights to franchise in favor of initial funding and advertising. Such dynamics may form the strategic stance and constrain subsequent change (Gekker and Joseph, 2021). Because of this, self-publishing has become an alternative method of distribution made available by digital medium. Although the autonomy and potential higher margins are achieved due to self-publishing, it also transfers all the financial and operational risk to the developers. This tension gives necessary background to the analysis of the publisher dependency with the help of the Likert-scale survey as the survey in this research.

2.4.3 Internationalization and Export Orientation

One of the main features of the modern video game business is internationalization when companies aim at global markets even at the initial stages of creation. Especially with nations featuring smaller domestic markets, export orientation is very crucial as in such cases the studio must make international sales to attain financial sustainability (Katowice and Hofman-Kohlmeyer, 2021). Consequently, global market access is closely associated with distribution strategies.

In helping to achieve successful internationalization, literature emphasizes the emphasis on localization, adaptation based on culture and platform optimization. Language, licensing and customer diversities create strategic demands and necessities. The factors are particularly applicable in the case of comparing the Polish and German game markets because the companies of the two settings are placed on the common international platform yet have national institutional and market circumstances.

Figure 4. Evolution from traditional to digital distribution in the game industry

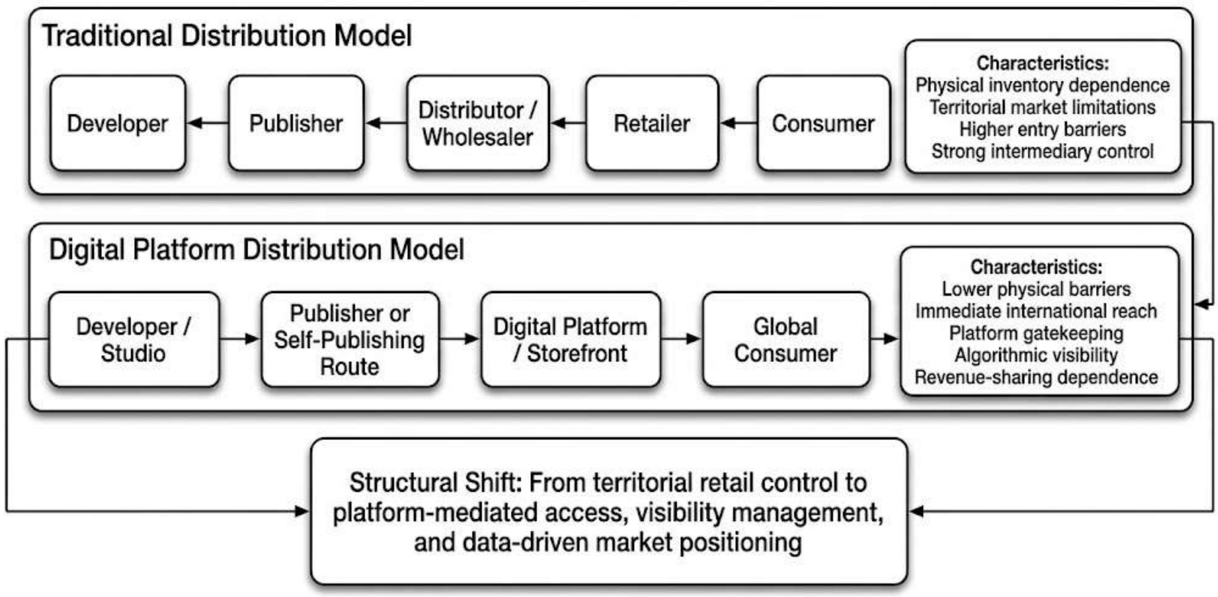

Figure 4: Evolution from traditional to digital distribution in the game industry

Source: Made By Author

2.5 Funding Mechanisms in the Game Industry

2.5.1 Public Funding and Cultural Policy Support

The contribution of public funding and cultural policy support in the video game industry development is becoming more prominent in Europe. The need to support game development can be often justified by governments and other organizations due to cultural and economic reasons, perceiving games as a source of both creativity and innovation and, in fact, job creation (Meggiorin, 2023).

Subsequently, there is a tendency to come up with funding schemes which are a combination of cultural goals and industrial policy.

Public funding requirement criteria usually lay emphasis on innovation, cultural value and the possible economic impact. Nevertheless, it was literature that access to these kinds of funding might differ considerably in terms of national and regional conditions due to the administrative aptitude, policy priorities, and institutional frameworks (Fazlagić, Szulczewska-Remi and Loopesko, 2021). Such disparities determine the opportunities of game firms and can be the perpetuators of the existing differences between national eco-systems.

The German example is rather informative in that matter. Germany is a relatively late follower of some of the leading European games markets: fellow nations such as France and the United Kingdom had already instituted special structures to support small businesses in the sector by 2019 (Behrmann, 2020). An assessment of the German federal fund discovered that although the programme had enhanced access to cultural and artistic game development and facilitated the process of a maturation of the industry, some structural faults lingered, including the fact that there was no limit to the global outsourcing of funded projects, which were likely to shift the citizens investing their funds to local studios (Koley, 2022). In Poland, the funding dynamics have been different; a study on Germany, France, the UK, and Poland by Behrmann (2020) revealed that the financing options open to Polish-based developers, which involved combining both private-source funding in publishers and partial support by the government, meant that studios had to operate in a complex multijurisdictional between commercial and institutional conditions and without much certainty of success. The two examples thus demonstrate that even public funding, where it is present, does not necessarily imply firm level capacity or competitiveness unless the design of the programme is closely connected with the nature of the domestic industry as it exists.

The question of policy effectiveness is under debate as studies and research have challenged the idea of how public funding can bring about sustainability of a firm in the long term or is reserved for short term projects. These discussions are what inform the survey questions to be used in this study to measure firm level perceptions of the availability and effectiveness of public funds.

2.5.2 Private Investment and Financial Sustainability

The other significant source of funds to game companies is private investment, such as finances provided by publishers, venture capital, and reinvestment of funds. It has been seen in literature that private funds can help fast-track growth and fund larger projects, though they are typically accompanied by higher performance pressures and demands and are likely to have higher returns quicker (Parekh, 2024). Such conditions may impact on strategic decision-making and risk tolerance.

Publisher-based financing is by far one of the best known models of private financing and it is nearly connected to distribution arrangements and this financial sustainability. Venture capital investment is not as common, but it is related to scalability and global expansion and can focus on growth as opposed to the creative or cultural goal. Internal reinvestment, in its turn, enables companies to be more autonomous and is normally constrained by cash flow (Rydzewski, 2021).

The equilibrium of these sources of finance influences long-term sustainability through influence on the ownerships, creative control and financial strength. These trade-offs are hence fundamental in the analysis of the impact of funding mechanism on the competitiveness in Polish and German game industries.

Moreover, the literature has indicated that; not only survival of firms is determined by the structure and accessibility of funding sources, but also the kind of undertakings that are being pursued in the industry. Companies that have stable access to funds are more likely to invest in long-term, risky, and innovative projects, as compared to financially constrained firms which have a shorter-term outlook and more investment in safe approaches that guarantee quick earnings. This brings a deviation in the production of creativity and restricts the total variety of the market. In addition, uncertainty about the availability of funds may demoralize experimentation and limit the capacity of firms to scale their operations. Consequently, funding is not just a financial tool but a strategic factor, which defines the ability to innovate, position, and sustainability in the video game sector.

Figure 5. Funding mechanisms and strategic outcomes in game development

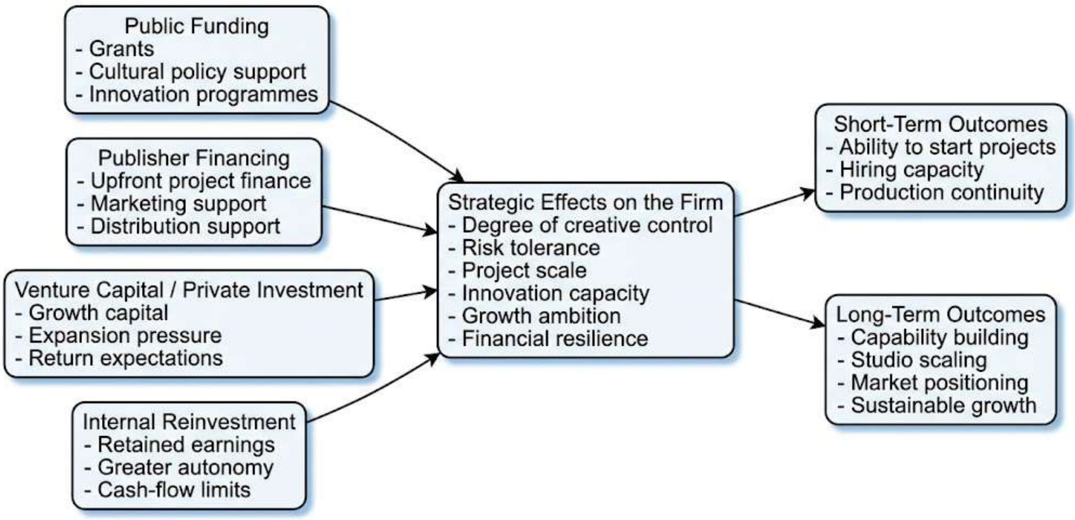

Figure 5: Funding mechanisms and strategic outcomes

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2.6 Labor Market Conditions and Creative Labor

2.6.1 Skills, Human Capital, and Talent Mobility

The video game industry is a sensitive industry regarding labor availability and skill composition that determines the production capacity. In literary sources, it is stressed that the development of the game requires extremely specific skills of integrating technical knowledge, creative design, and teamwork to solve problems. Human capital therefore remains a strategic focus at game companies in highly creative sectors based on knowledge (Ortiz-Ospino, González-Sarmiento and Roa-Perez, 2025). Skill deficiencies, especially at higher-level programming and game engine creation as well as technical art, can limit project scope and project schedules.

Globalization of the game industry has increased competition in the skilled labor supply and rising cross-border movement of talents. Companies often outsource overseas to resolve workforce shortages at home and as a source of skilled developers who have previous work in offshore companies. Talent mobility is determined by national labor market policies, education, and living expenses, however, which determine the capability of firms to recruit and retain skilled employees (Wolniak and Jonek-Kowalska, 2022). Those dynamics form the significance of the condition of labor markets in generation of production structures and competitiveness, especially in comparative terms like Poland and Germany.

2.6.2 Working Conditions, Precarity, and Project Work

The video game industry is characterized by employment practices usually based on project-based work arrangements, a condition that may cause labor instability, and the incidence of increased labor. It is discussed that short-term contracts, a freelance worker, and the attraction of members based on a cycle are commonplace as the game production is project-oriented (Sotamaa et al., 2021). These kinds of arrangements enable companies to be flexible yet can raise the insecurity levels of the workers.

The long hours of work and deadlines, especially at acute stage of development, are very often the topic of literature on creative labor. Such circumstances might have adverse impacts on the well-being of the employees and lead to burnout and turnover. The sustainability of the mode of production is hence directly interconnected with the effect on how firms regulate labor intensity and staff stability on employment (Czernek-Marszałek, Klimas and Wójcik, 2023). These dynamics are vital in understanding the long-term competitiveness because continuous precarity can diminish the skill retention and organizational learning of game studios.

2.6.3 Organizational Culture and Workforce Retention

Organizational culture has a significant contribution to workforce retention and long term capability development in game firms. Research indicates that positive workplace conditions, means of skill progression and the embracement of diversity and inclusion tactics within an organization can counter some of the adverse outcomes of project-based work (Papaevangelou and Roinioti, 2021). Companies that take care of their employees and share knowledge within their companies are in a better position to retain extensive experience and continue with production. A growing perception of these practices is considered as strategic assets to help create industries to grow sustainably.

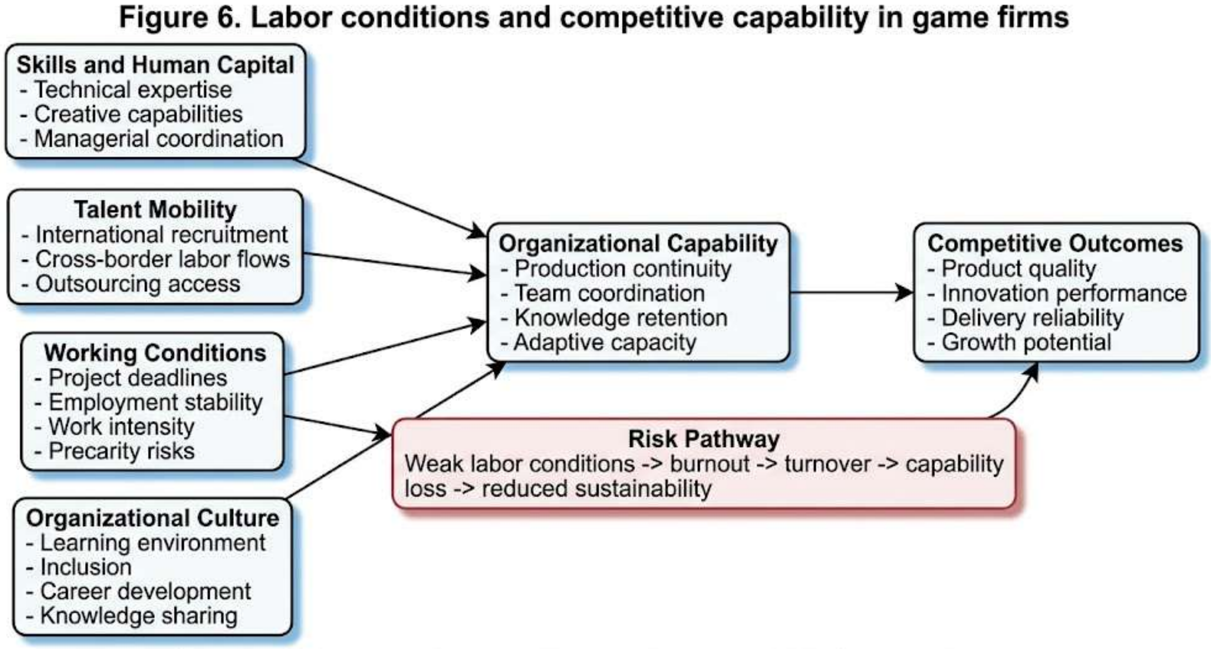

Figure 6: Labor conditions and competitive capability

Source: Made By Author

2.7 Competitiveness and Sustainable Growth in Creative Industries

Innovation capacity, market positioning and availability of enabling institutional environments determine competitiveness in creative industries. Literature underlines that companies that work in knowledge-intensive industries need to be constantly innovative to not lose their competitiveness, especially in industries where the technological pace of change and the shift in preferences of consumers can occur rapidly (Parekh, 2024). Innovation in game industry is not only technology but also creative design, business model and method of distribution.

The production and distribution structures are closely related to the market positioning. Companies, which build a good internal capacity as well as partners manage to differentiate their products and gain access to international markets. Simultaneously, the distribution platforms and publishers affect competitive results and generate revenue, thereby affecting visibility. These interrelationships discern the relationship of dependability between market performance and organizations structures.

Institutional assistance also helps in the development of competitiveness through the availability of financing, labor, and infrastructures. The frameworks of policy promoting innovation, entrepreneurship, and cultural production can help to boost the resilience of firms and their growth prospects (Meggiorin, 2023). Mismatch between policy goals and industry requirements, on the other hand, can limit growth. The key to sustainable development lies then in the coordination of production, distribution, funding, and labor organization in favorable institutional environments. This combined view offers a basis of analyzing competitiveness in Polish and Germany game industries.

2.8 Comparative Perspectives: National Game Industry Ecosystems

Comparative study of national creative industry eco-systems underlines the importance of institutional structures, historical evolution channels, and regimes of policy in the determination of industry successes. The national settings shape firm arrangements to produce, acquire resources, and commit to markets, which result in unique ecosystem properties even in combined regional markets like the European Union (Fazlagić, Szulczewska-Remi and Loopesko, 2021). The differences are especially applicable in industries that depend on state aid and specialized labor.

Recent industry reporting also underlines why a focused Poland–Germany comparison is analytically useful. Poland's game development and publishing sector counted around 824 active producers/publishers and 14,568 employees in 2025, with €1.293 billion industry revenue recorded for 2024 (PARP, 2025). Germany's development ecosystem reported 910 games companies in 2025 and 12,134 employees at developers and publishers (game, 2025). At the same time, Germany's domestic games market is significantly larger in consumption terms (around €9.4 billion in 2024), which can shape distribution strategies, publisher relations and investment logic in ways that differ from Poland's export-first model (game, 2025; PARP, 2025).

An important concept in the process of comprehending national ecosystem development is path dependency. Such long-term decision-making grounded in the initial policy choice, the achievements of flagship firms, and investment in education can influence the direction of development of the given industry and establish the validity of organizational types and competitive strategies. After being formed, these tendencies could be hard to change, having an impact on the strategic choices of firms and their ability to adjust (Wolniak and Jonek-Kowalska, 2022).

The analysis of the Polish and German game industries is useful as it could give an idea of how various institutional and policy conditions influence related industries. Although the two countries deal with similar European market and the global distribution platforms, their variations in the funding regimes, labor market structures, and priorities on policies make the competition antagonistically different.

Offering a national context as a valuable dimension of analysis, this study can help increase our understanding of the interaction between ecosystem level conditions and firm-level structures to achieve competitiveness and sustainability. This is even reinforced by the opinion of the 2025 Games Policy Summit that in its concluding ideas on the European games industry urged explicitly to give force to technology, artistic, and operating sovereignty between European creators, gains access to talent, funds, and intellectual property, and improve discoverability and market penetration of European labels (Behrmann, 2025). These suggestions are a direct consequence of the tension inherent in the structure of Poland and Germany that this dissertation is attempting to address, i.e., the mismatch of the scale of European markets to the structural competence of European studios to address these issues on their own.

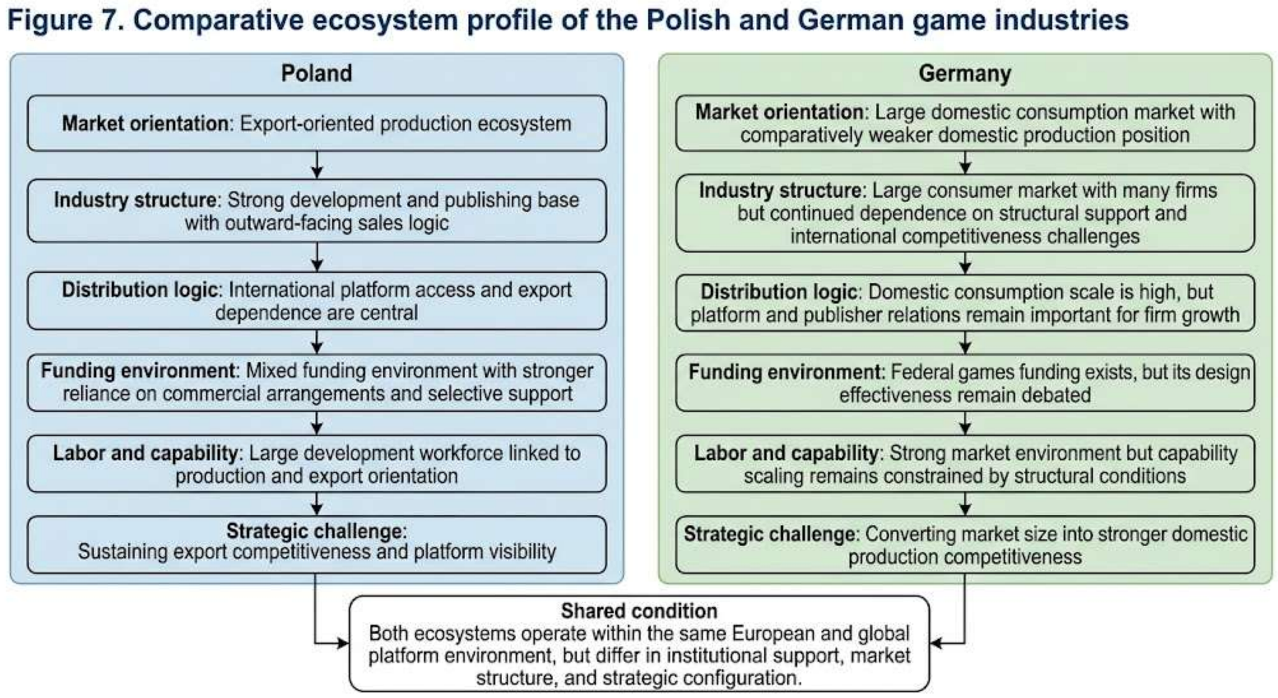

Figure 7: Comparative ecosystem profile of Poland and Germany

Source: Made By Author

2.9 Chapter Summary

Literature reviewed in this chapter shows that the video game industry has been structured in an interdependent system of production systems, distribution systems, funding systems, and labor forces that together determine competitiveness of firms at firm level. These dimensions do not operate alone, but instead interact in such a way that they affect entry mode to markets, expand operations and maintain long run growth of firms. One of the most important lessons that can be learned about the game industry production structures is the fact that they are becoming increasingly modular, project-driven, and technologically empowered.

On the one hand, this will make the process more flexible and reduce barriers to entry, but, at the same time, will raise the cost of external cooperation, professional workforce, and organizational organization. Through this, firm capabilities will not be pushed out as a result of technological changes. Distribution wise, access to markets has been redefined by the movement on to digital platforms. Whereas platforms are decreasing the traditional barriers and increasing the reach to the entire world, they also create new dependencies in terms of algorithmic visibility, revenue-sharing schemes, and platform governance. This develops a paradox in which the firms get access but meet greater competition and less control. Another structural limitation, as pointed out in the literature, is funding. Existing mechanisms of public funding are not always in line with the industry requirements, but the need to make faster returns arises with the introduction of private investment.

Therefore, financial forms have a direct impact on strategic decision-making, risk-taking and innovation capacity among companies. Moreover, the labor market, such as talent presence, mobility and precarity, also have a great impact on sustainability of production. Companies which manage to retain talented employees and create organizational knowledge are more competitive to stay afloat in an unstable market.

Lastly, the video game industry competitiveness is revealed to be contingent upon the quality of production, as well as the post-release success, such as the number of users and the monetization and the long-term participation of users. This further supports the notion that production, distribution and strategic market positioning are integrated to make success. On the whole, the literature provides a clear conceptual basis of the given research, showing that the performance of firms within the video game industry depends on the combination of the structural, institutional, and market-driven factors. These clues directly guide the research design and it serves as a guide as to how to interpret the empirical evidence in the subsequent chapters.

CHAPTER 3: METHODOLOGY

3.1 Introduction

This chapter presents the methodology framework used to answer the research aim and questions with specific focus on rigor, transparency and ethical compliance. The methodology is also a key factor that makes sure that the research findings are plausible and directed towards the nature of the research problem, particularly in the case of studies of a complex nature of creative industries (Parekh, 2024). In that respect, this chapter describes how methodological decisions facilitate the systematic analysis of organizational forms and firm-level perceptions in the video game industry.

The research will need a method that is able to record more than just the organized patterns and contextual knowledge. This is why a mixed-methods design is taken, a Likert-scale is utilized survey that was analyzed in SPSS and a qualitative thematic analysis. Such a combination gives an opportunity to identify comparative trends and at the same time remain sensitive to the contexts in the industry and institutional circumstances (Ortiz-Ospino, González-Sarmiento and Roa-Perez, 2025). The final part of the chapter is the description of its structure that includes research philosophy, design, data sources, and data collection.

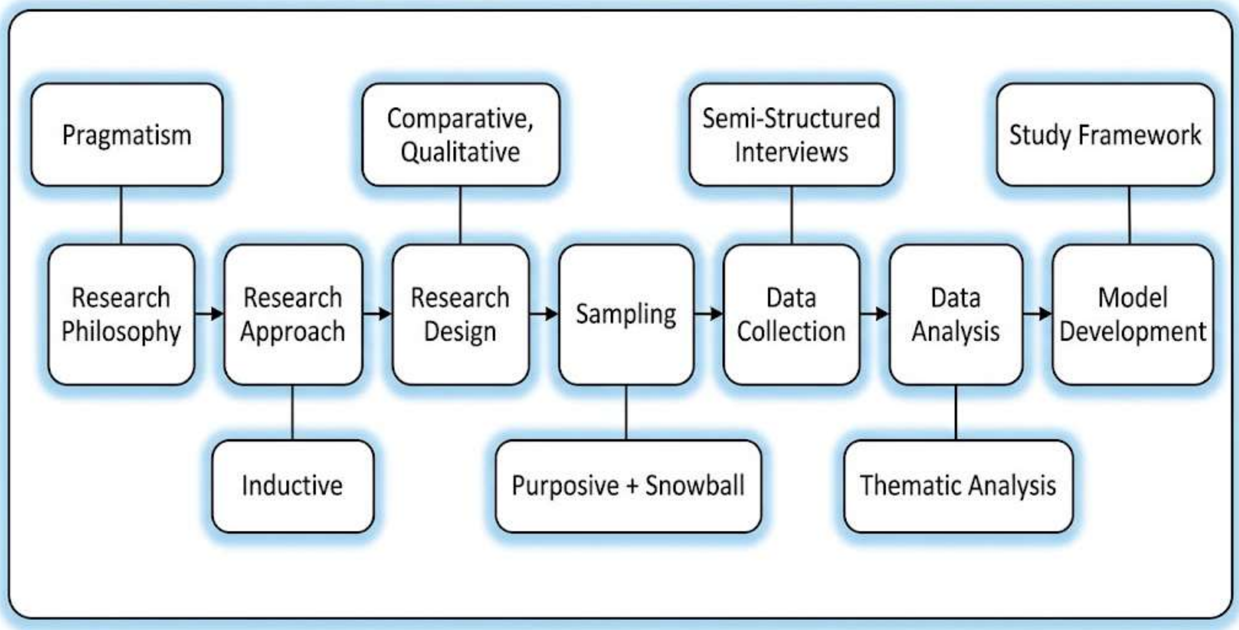

Figure 8: Research Design Overview

Source: Made By Author

3.2 Research Philosophy and Approach

The research is based on pragmatic research philosophy which puts priority on research questions and tackling practical issues rather than adherence to one epistemological stand. The approach of pragmatism can be particularly applicable to the investigation of creative industries, as the economic, cultural, and organizational aspects meet and need the elastic approach to them (Meggiorin, 2023).

This philosophical position justifies the application of various approaches to produce an insight that is analytically and practically sound.

The integration of quantitative and qualitative methods is possible with the help of pragmatism as understanding is that various types of data may provide different sides of the same phenomenon. The structured survey is also capable of showing general trends of firms in the video game industry, whereas qualitative insights clarify the formation of these trends, based on the institutional and social background (Czernek-Marszałek, Klimas and Wójcik, 2023). Such alignment is also critical to the interpretation of organizational complexity within creative, as well as fields.

The research design is largely inductive and exploratory due to a small number of comparative empirical literature on the topic of production and distribution structure in the Polish and German game industry. Quantitative elements of descriptive elements are included to aid in comparison though no hypothesis testing and causal inference at all is obtained. This is in line with previous research that has stressed contextual definition and pattern recognition more than prediction in creative industry research (Sotamaa et al., 2021).

3.3 Research Design

This research design was a comparative study based on qualitative research on firms within the video game industry. The comparative design was appropriate to the aim of the research, which was to explore similarities and differences between Poland and Germany industries that were engaged in the same European and global markets but were in various national environments (Fazlagić, Szulczewska-Remi and Loopesko, 2021). It was cross-sectional study since it was not a longitudinal study that followed the change over time but internalized the perspectives of people about the industry as well as the industry situation at that specific time.

It was non experimental and descriptive design since the purpose of the study was to investigate perceptions, organizational arrangements and institutional influences and not to manipulate some variables or measures the behavioral outcomes. This was in line with studies on creative and cultural industries, where the descriptive and interpretive approaches work better to analyze the organizational practices and contextual conditions (Wolniak and Jonek-Kowalska, 2022).

Because of the necessity to enhance the depth of analysis and validity, the design employed a combination of semi-structured individual interviews with thematic analysis of both primary and secondary information. The interviews offered firm-specific information, whereas the comparison of the literature, the industry reports, and the policy documents helped put these accounts into a broader contextual picture (Katowice and Hofman-Kohlmeyer, 2021). This kind of triangulation enhanced the arguments of the results but at the same time was suitable to an exploratory comparative study that did not aim at statistical generalization.

3.4 Data Sources and Data Collection Methods

3.4.1 Primary Data: Semi-Structured Interviews

The method of primary data collection was semi-structured interviews with the selected participants in the video game industry, in Poland and Germany. This approach was to address the firm level views on production systems, distribution systems, financing systems, labor terms, policy conditions, and perceived competitiveness. The use of semi-structured interviews in this research was suitable due to the fact that they combined predetermined topics with the flexibility to expand a participant on their experience and realities in an organization in a more detailed manner (Parekh, 2024).

The interviews were to be carried out online to facilitate access to the industry players distributed in varying geographical regions. The interviews were to take a duration of about 30 to 45 minutes and it was all voluntary. Informed consent was also taken electronically before every interview and this made the process ethical and pristine. The interviewees were made aware of the fact that they might refuse to answer any questions and could leave the interview at any point without any adverse implications (Ulitina and Yakusha, 2024).

The sample group was recruited by using industry-based online communities and professional networks frequented by game developers, publishers and other industry stakeholders. This method of recruiting matched the established methods in research in the digital creative industry field, where professional circles are core in knowledge sharing, networking, and obtaining experienced members (Papaevangelou and Roinioti, 2021).

3.4.2 Secondary Data: Literature and Industry Sources

Qualitative thematic analysis and contextual interpretation of survey results are provided using secondary data. The sources will consist of peer-reviewed scholarly sources, industry reports and policy documents concerning the European video game industry. These sources offer information about institutional structures, market relations, and policy situations that influence the behavior of the firms (Meggiorin, 2023). The secondary data is important in the triangulation of the survey outcome as it will place firm-based perceptions in the context of the industry trend. Combining these sources, the study adds depth to the interpretation and makes sure that the quantitative trends are examined by referring to the existing research and policy discourses (Gekker and Joseph, 2021).

3.5 Sampling Strategy and Participants

The research employed purposive sampling method in order to choose the research participants with a first-hand experience related to game production, publishing, or distribution, in Poland or Germany. Semi-structured interview necessitated that the participants needed to be information-rich and capable of giving a thorough insight into the organizational practices, institutional issues and competitive environment in the video game industry. In the study of domain-specific creative industry, purposive sampling worked as the knowledge of interest was not distributed throughout the population, but lying in professional circles (Czernek-Marszaalek, Klimas and Wozczak, 2023).

Since video game business is highly network-related, snowball sampling was to be used in addition of purposive sampling. The first participants were requested to suggest other professionals who would qualify as per the inclusion criteria and thus, assist the researcher to access industry actors who would otherwise have been challenging to access. This solution aligned with the research on digital and creative industries, in which, professional networks are made of mutual exchange of knowledge and access to experienced members (Papaevangelou and Roinioti, 2021).

Inclusion criteria included that participants needed to be actively engaged in game development, game publishing or game distribution either in Poland or in Germany. It was assumed that in the sample, there would be a small yet informational group of industry stakeholders on the form of studio founders, developers, producers, publishing professionals, and business managers. They also gave attention to fluctuation in the position of the participants, the size of the firms, and production to get the participants with diverse views of their organizations. The sampling limitations that were also considered as concerns, such as self-selection bias and the potential over-representation of digitally active professionals, were addressed and breached by careful interpretation of the results instead of statistical mitigation (Wolniak and Jonek-Kowalska, 2022).

3.6 Interview Guide Design

A semi-structured interview guide was the main data collection tool which aimed at probing firm-level views regarding production structures, distribution approaches, financing scheme, labor terms, policy endorsement, and perceived competitiveness. The interview guide was designed to be based on the research objectives, so the main themes pertinent to the research were covered but still, the participants were free to discuss the issues that they raised during the conversation (Parekh, 2024).

The guide was initiated with some introductory questions related to the role of the participant in his/her career and the overall portrait of the firm. Then it proceeded to very wider ranging thematic questions on the organization of production, practices of collaboration and outsourcing, access to the distribution channel, source of funds, the labor market conditions, and perception of competitiveness and sustainable growth. The structure also facilitated some consistency in interviews as well as enabling the researcher to pose further questions to seek clarification, examples, and country-specific experiences where need be.

In the exchange of the interview questions, they were maintained in the form of a straightforward, disinterested and open ended language to minimize confusion and promote thought provoking answers. Semi-structured interviewing was particularly appropriate in this study since it allowed comparability among participants as well as the depth to explore the complexity of the organizational experience in the creative industries. This way, the interview guide was designed in a manner that would allow aligning the research objectives, data collection processes, and the following thematic analysis (Katowice and Hofman-Kohlmeyer, 2021).

3.7 Data Analysis

Qualitative thematic analysis was employed in the analysis of the interview data. The responses in the interviews were also read thoroughly after collection of the data to get to know with the content of the interview and the patterns that were replicated. The initial codes were then made on the basis of the data with centers on problems concerning production models, distribution arrangements, funding challenges, labor conditions, policy support, and perceived sources of competitiveness. All these codes would be divided into larger categories and narrowed down to themes that encompassed the key trends that occurred among participants (Czernek-Marszaalek, Klimas and Wojcik, 2023).

The discussion was more explanatory and descriptive as opposed to a causal one. This was intended not to statistically quantify relationships, but rather to have a semblance of the context of relationships within which the participants described their organizational realities and how such realities varied in the Polish and German reality within the game industry. The use of thematic analysis was appropriate since it enabled the researcher to directly observe shared experiences as well as significant differences among firms as well as being sensitive to the context (Meggiorin, 2023).

This was especially done in regard to similarities and differences of the participants in the two countries. This comparison of the analysis of the interview content enabled the researcher to evaluate the influence of the national ecosystem conditions to the firm behavior, strategic decision making and the perceptions of the long term sustainability. The comparative intention of the dissertation was thus upheld in this manner through the interview analysis.

Thematic analysis of qualitative data is also used on secondary sources to supplement quantitative results. It is analyzed in a systematic manner by first familiarizing, coding and developing themes. The codes are categorized into larger themes depicting the production practices, dynamics in distribution, funding, and labor conditions (Czernek-Marszałek, Klimas and Wójcik, 2023).

The thematic analysis allows understanding how respondents understand challenges and opportunities in their organizations in their respective national contexts. Instead of considering qualitative results as independent results of their own, the themes serve to have the quantitative patterns found in SPSS results patients. This methodology promotes the closer insight into the experiences of firms and it is in line with the current practice in the research of the creative industry (Meggiorin, 2023).

3.8 Integration of Primary and Secondary Findings

The results of the semi-structured interviews, as well as the secondary sources, were combined at the interpretation phase where qualitative triangulation was applied. The data presented in the interviews gives the insight into the understanding of production, distribution, finance, labor and competitiveness in the firms on the firm level and the secondary data provides the background of these insights using industry-wide and policy-wide perspectives. This combination led to the opportunity to relate the personal experiences with broader structural and institutional patterns (Ortiz-Ospino, Gonzalez-Sarmiento and Roa-Perez, 2025).

Integration was done through comparison between the themes created using the interview data and those generated in the literature and industry reports. In any case where the similar patterns were found in both sources, the results were considered as reinforcing each other. Where divergences were observed these have been looked into closely so as to determine whether they represented a national divergence or firm level diversity or a strain between policy story and industry facts. Such comparative and interpretive were having an enhanced credibility on the findings without asserting some generalization of statistics.

The importance of the study in addressing the research questions is because a single source of data would not have provided such an inclusive response as the combination of both the interview evidence and the contextual secondary material did. This methodology was particularly appropriate as an exploratory comparative study of creative industries where the complexity of the organization and the national context are the key elements of explaining competitiveness and sustainable growth (Meggiorin, 2023).

3.9 Ethical Considerations

The research design revolves around the ethical considerations, which are tackled in line with the approved ethics application. The study is voluntary and informed consent is sought electronically before attaining the interviews. Respondents are made aware of the aim of the study, information usage, and their free will to pull out of the study any time without any penalty (Ulitina and Yakusha, 2024). The problems of anonymity and confidentiality are maintained through gathering no personally identifiable data and presenting the results anonymously. Small professional groups are especially vulnerable to these risks, which is why these measures should be taken. The information is safely stored on the password-protected devices and encrypted cloud storage, where only the researcher and supervisor can access it (Meggiorin, 2023). All data processing complies with the requirements of GDPR such as secure storage and limited access, as well as specification of retention time. Research integrity and ethical transparency are crucial to ensure the trust of the participants and the integrity of the study, particularly in research with online data collection in the creative industries (Gekker and Joseph, 2021).

CHAPTER 4: RESULTS AND DISCUSSION

4.1 Introduction

The chapter provides and critically evaluates the results based on the semi-structured interview responses as compared to the literature reviewed in Chapter 2. The chapter is not a description of the results but an attempt to place the findings in the larger academic and industry prospect, thus, connecting the experiences of firms with the structural and institutional forces of the video game industry. The analysis is conducted in the manner of the thematic approach, in which the major patterns observed in the data will be grouped in four focal themes in accordance with the research objectives: production structures, distribution systems, funding conditions, and competitiveness. This framework provides a high degree of analytical clarity and at the same time keeps the research questions to the point. Notably, the chapter takes an interpretative approach, i.e. findings are not regarded as singular observations but are considered within the context of already existing theoretical frameworks and research studies. This will enable one to understand more about the interaction between organization practices and industry conditions to determine the firm performance.

This strategy aligned with broader research in the field of game production and highlighted the need to make the correlation between firm-level experience and processes at wider scales (Sotamaa et al., 2021).

Table 1: Initialized Themes

Themes	**Reason for selecting the theme**
1. Uneven national ecosystem maturity and limited comparability	This theme was selected because it directly shaped the interpretive limits of the dataset. It was analytically important not only for what the interview revealed about Germany, but also for what it revealed about the difficulty of making firm conclusions on Poland from this particular interview alone.
2. Platformization and the expansion of the games market	This theme was selected because market growth and platform change were among the most recurrent ideas in the interview. They provided the macro-level context within which production, distribution, and monetization changes could be understood.
3. Digital distribution and the decline of traditional intermediaries	This theme was selected because it sat at the center of the dissertation's concern with distribution structures. It was one of the clearest and most repeatedly explained structural transformations in the transcripts.

4. Technological change lowered entry barriers for smaller studios	This theme was selected because the interview consistently linked technological change with lower production costs, faster development, and broader participation by smaller teams. It therefore connected production structure to capability formation.
5. Financing constraints and weak public funding support	This theme was selected because access to finance was not mentioned in passing; it was framed as a core constraint affecting project initiation, risk tolerance, and strategic options. It maps directly onto the study's interest in financing arrangements.
6. Business model innovation reshaped industry logic	This theme was selected because the interview repeatedly emphasized that industry transformation was driven not only by distribution channels, but also by new revenue logics. It therefore deserved to stand as a distinct theme rather than being subsumed under distribution alone.
7. The game industry as a hit-driven and highly uncertain market	This theme was selected because it provided the interpretive bridge between production, funding, and competitiveness. It explained why strategic planning in this sector remained volatile even when resources were substantial.
8. Competitiveness depended on user acquisition and post-launch scaling	This theme was selected because it translated abstract competitiveness into concrete operational economics. It demonstrated that sustainable growth in the game industry was closely tied to marketing efficiency and long-term monetization strategy.

Table 2: Finalized Themes

Themes	**Reason for selecting the theme**
1. Transformation of production structures through technological change	This theme was selected because it directly addressed the thesis objective of mapping firm-level production structures. It also helped explain how organizational capability, scale, and entry barriers were shaped by technological change. Since production structure is one of the central pillars of the dissertation, this theme was essential to retain.
2. Digital distribution and the decline of traditional intermediaries	This theme was selected because it was one of the clearest findings in the transcripts and directly addressed the thesis focus on distribution structures. It also captured an important structural shift in how firms reached markets and positioned themselves

	competitively. As the dissertation compares production and distribution systems, this theme was analytically central.
3. Financing constraints and weak public funding support	This theme was selected because it most directly addressed the second thesis objective concerning funding differences and policy support. It also linked firm-level experience with broader institutional conditions, which is important in a comparative study of national game industry ecosystems. The theme therefore connected micro-level firm realities with macro-level support structures.
4. Competitiveness in a hit-driven market: user acquisition, monetization, and uncertainty	This theme was selected because it spoke most directly to the thesis objective of explaining drivers and constraints on firm performance, competitiveness, and sustainable growth. It moved beyond structural description and captured the economic logic through which firms survived or failed in practice. It was therefore one of the strongest integrative themes in the dataset.

Instead of eight themes, the themes were reduced to four to ensure that the only themes that would respond to the four main purposes of the thesis are retained. The chosen themes got the best and most frequent trends of the interview data and also fitted closely into the theme described in the study of the production structures, distribution systems, financing conditions and also competitiveness. Less consistently developed and better-supported themes in the transcript were not given priority, and the themes that were more contextual were not given priority. This narrowing made the analysis considerably more specific, as well as made the presence of the eventual thematic structure more focused, coherent and up-to-the-point when it comes to explaining the key antecedent structural and strategic variables that define firm performance in video game industry.

4.2 Overview of the Analytical Framework and Theme Selection

Thematic analysis was used to analyze the interview transcript in order to establish recurring patterns of interest as far as the objectives of the study were concerned. It consisted of repeated reading of transcript, initial coding of important ideas and inducting the similar codes into bigger thematic categories. Though a number of patterns were identified in the process, four themes were used to structure the final discussion due to the fact that, they provided the most precise connection to the purpose of the research and reflected the most actively developed issues of the interview material. Such thematic reduction was suitable as it allowed the chapter to be analytically focused and at the same time be able to capture the complexity of the evidence produced through qualitative inquiry (Katowice and Hofman-Kohlmeyer, 2021).

The process of narrowing of themes was also connected to the necessity to differentiate the core analytical findings and some general contextual findings. Although the interview did give valuable clues to general change in the industry, it was stronger on Germany than on Poland, and only cross-country conclusions could be made with caution. It was especially critical considering the broader comparative body of literature, which revealed that Poland and Germany are different in terms of institutional conditions, entrepreneurial support arrangements, and development paths in sectors (Fazlagić, Szulczewska-Remi and Loopesko, 2021). It is based on this that the chapter concentrated on four themes namely transformation of production structures through technological change, distribution of content digitally and the downfall of conventional middlemen, lack of financing and insufficient public funds support and competitiveness in a market where a hit is popular.

4.3 Theme 1: Transformation of Production Structures through Technological Change

4.3.1 Presentation of Findings

The results of the interview pointed out that the process of creation of video games was impacted significantly by technological change. The previous models of production were linked with the higher technical barrier, the intensive use of expert knowledge and higher intensity of the development processes. In comparison, subsequent advancements in game engines, browser formats and digital production tools seemed to open development to smaller companies and make it more flexible. According to the respondent, these changes resulted in the fact that the industrial logic of production transformed and it became more evident that less resourceful firms could enter the market and produce viable products. This was indicative of the wider trend in the artistic business and technology has tended to intensify more people as well as altering the conventional production cycles (Ortiz-Ospino, Gonzalez-Sarmiento and Roa-Perez, 2025).

Another effect of the interview was that availability of technologies not only changed the conditions of entry but also changed the organization of the production process. The process of development was no longer presented as depending on big and capitalized formulas only; smaller teams may work in a more agile manner when provided with right tools and technical expertise. This proposed a shift in structure with not so flexible and resource-intensive production systems, into more adaptable and scalable modes of development. Simultaneously, the results did not presuppose that technology eliminated all the restrictions, but instead, it restructured capital, labor force, and technical capacity roles in game manufacturing. A similar reading was consistent with the larger arguments about alteration of the production set-ups within the video game sector (Sotamaa et al., 2021).

4.3.2 Discussion in Relation to the Literature

The results affirmed the argument that modern game production is becoming more and more a process of modular, project based and technologically facilitated workflows. The Chapter 2 literature review revealed that game development can seldom be organized using one specific organizational model, this is because there are firms which tend to integrate specialized tasks, flexible teams, and changing production pipelines based on the circumstances that impact the market and technology. This opinion was supported by the interview since it implied that open engines and online networks had decreased some of the past restrictions of production and created some more accessibility to smaller studios. This implied that technological change was a focal point about the rearrangement of production capacity and company composition in the industry (Sotamaa et al., 2021).

Nonetheless, the interview also showed that the access to technologies was not to be understood as an absence of organizational ability. In the areas where tools would be made easier to operate, companies still needed talent, vision, strategic alignment, and the capability to gain the right type of relationship mobilization to generate competitive products. Technological change, in this case, played an enabling role and not a solution to the problems in production. This meaning was in line with the findings of the literature, which demonstrated that the performance of the creative industry does not solely rely on the formal elements and infrastructures, but also on the collaboration capacity, the exchange of knowledge, and the quality of interpersonal and professional relations in the field (Czernek-Marszaalek, Klimas and Wojcik, 2023). As discussed, it was proposed that technology altered the conditions of production and did not eliminate the need of having capabilities that were firm level in nature.

4.3.3 Link to Research Objectives

This theme directly related to the initial purpose of the research study that was to discuss the firm level production structures in the video game industry. According to the results, change of technology became a significant influence on production model and its impact was especially close to the development in terms of such a feature as increased availability of engines, computer technologies, and flexible development environments. Consequently, production arrangements could no longer be easily explained by their size or financial magnitudes, as technological capability now played an important role in shaping the way firms were organized.

4.4 Theme 2: Digital Distribution and the Decline of Traditional Intermediaries

4.4.1 Presentation of Findings

The findings of the interview revealed that the context of distribution in the video game industry had significantly changed as compared to the former physical store and intermediate-based systems to the digital and platform-based ones. The previous forms of the market was said to be more reliant on distributors, retailers and the physical circulation channels such that the firms had less access to consumers and were more limited by the decisions taken by the intermediaries. In comparison, the respondent clarified that digital distribution diminished the utilitarian value of most of the traditional gatekeepers and allowed games to be made available to the players in a more instant and global way. This implied that distribution had developed less territorially attached and more embedded in the international networks of digital format, which is similarly conveyed by broad industry shifts (game, 2025).

Another implication on the findings was that this transformation did not only alter the manner in which games were distributed to the consumers, but also how the firms positioned themselves in the value chain. The direct access to digital storefronts and online venues seemed to provide a greater degree of freedom regarding the way the developers and publishers can reach audiences, as well as made the presence of a platform and visibility an even more crucial aspect of the strategic value. In this regard, digital distribution shifted the relationship between firms and the market since some of the older intermediaries were not as important and new channels to cross-border consumers were established. Meanwhile, the description of the respondent suggested that the value chain had not simplified but had been designed in other ways in platform-led circumstances (Gekker and Joseph, 2021).

4.4.2 Discussion in Relation to the Literature

The results aligned with findings proposed in the literature reviewed in Chapter 2 which argued that video game distribution had become more digital and more international and platform-specific. The previous models were focused on the physical retail based on geographical circulation and territory, but modern market access depended much more on the presence of online shops, e-networks, and the image of strategic visibility management. This interview evidence was hence in line with research that had indicated the distribution in the games industry had moved further and closer towards a platform economy where access to users was becoming more mediated by large scale digital infrastructures as opposed to traditional retail chains (Gekker and Joseph, 2021).

Nevertheless, this decline of the older middlemen did not always mean structural inequalities and domination were being eliminated. Rather, the results were an indication that power had changed as opposed to dissolved. Firms have possibly attained closer access to market but also ended up being increasingly reliant on platform terms, visibility algorithms, self-publishing mandates and the larger commercial rationale of digital ecosystems. This implied that the digital distribution could be interpreted in both ways as an opportunity and as a new dependency, particularly on the smaller studios aiming discoverability in the saturated markets. This interpretation was consistent with the research that found creative production within the digital sectors tended to continue to be mediated by circumstances of control, negotiation and disproportionate market power when the more established barriers appeared to fall (Tomkinson and Harper, 2022). Interview thus supported the opinion that digital distribution reorganized the relations of power and not destroyed them.

4.4.3 Link to Research Objectives

This theme also directly spoke to the initial aim of this research by demonstrating how companies organized distribution within an industry becoming more and more dominated by digital channels. The results showed that the distribution was no longer primarily coordinated by the help of physical intermediaries, but by platform-based systems, which determined market access, visibility and internationalization. This further facilitated the broader purpose of comprehending firm performance, since the power to ensure effective distribution had been strongly intertwined with the business survival and the business growth over time. Not only did firms have to create games but they also had to position them effectively at digital ecosystems where being discoverable and reaching the audience was of utmost importance. This is why the distribution arrangements had to be considered with financing and policy terms being another critical factor affecting the performance of an industry (Kostić and Tomić, 2022).

4.5 Theme 3: Financing Constraints and Weak Public Funding Support

4.5.1 Presentation of Findings

According to the interview findings, financing was the issue that was perceived to be one of the significant challenges to the development and growth of game firms. The respondent postulated that less access to the public funds and the availability of the private capital decimated the probability of companies investing new projects and scaling their operations and absorbing the risks that game development incurs. This meant that financial constraints did not consist solely of short term operation problems but would be structural problems that defined what firms could produce as well as what lengths they could reach. Financial accessibility was found to be constrained in an industry where technological change was rapid and competition was strong, which tapped strategic flexibility and the ability of firms to react with confidence to the opportunities in the market (Rydzewski, 2021).

The results also indicated that the level of weak or inconsistent public support led to uncertainty in the firms. Instead of serving as the constant source of innovation and development, public funding seemed to be viewed as rather narrow in definition or not integrated deeply with the overall development of the industry. This was significant in that the respondent did not give an isolated issue of finance but rather one that is closely related to production capacity, growth opportunities and competitive standing. In areas where there was ineffective support systems, companies seemed to have increased pressure to either feed off of unpredictable levels of commercial success or restricted external financing. In this regard, financing not only determined livelihood, but also the magnitude and orientation of strategic decision-making in the industry (Meggiorin, 2023).

4.5.2 Discussion in Relation to the Literature

These results supported the evidence in the literature indicating that companies in the video game industry tended to experience severe funding limitations even though they were in a rapidly expanding digital and innovative industry. Although innovation and internationalization are often linked with the industry, the interview demonstrated that the capacity of companies to enjoy the opportunities was heavily contingent on finance availability. This is aligned with studies that underscored that creative and digital industries were typically characterized by high growth rates and volatile investments, especially when companies were dependent on project-based services and ambiguous business payoffs (Parekh, 2024).

It was also pointed out in the discussion that financing has to be viewed as an institutional problem and not a problem at the firm-level. The policy support variation, entrepreneurship promotion, and access to capital does matter significantly to the competitiveness of national ecosystems. In Germany, the federal games funding programme, which was established in 2019, though impressive in its intention to do so, was discovered to have structural constraints that diminished its effectiveness as a capacity-building instrument: specifically, funded projects were no longer restricted in going abroad, so an allocation of the public money did not necessarily bring local nuisance development capacity (Behrmann, 2020; Koley, 2022). The studios that have a model of export-first market did not have the same pool of financing sources, with the sources being dependent on the private publisher deals and the revenues of platforms instead of on the government grant, which concentrated the risk of financial loss on the firm and restricted its strategic independence. The 2025 Games Policy Summit also declared access to funding and the rights to intellectual property to be also a key barrier to sovereignty to European game developers such as in both Germany and Poland and instructed a simpler alternative, more attuned instruments of public funding that would fit the realities larger develop studios operate which are, in particular, SMEs who do not incur the costs of creative rights by high alienation (Behrmann, 2025). This particularly applied in a comparative case of Poland and Germany when general policy and support settings have been demonstrated to vary in significant aspects. In turn, the financial statuses were connected not only to internal company capabilities, but to frameworks that enabled and/or impeded entrepreneurship and industry development (Fazlagic, Szulczewska-Remi and Loopesko, 2021). The argument that sustainable development in the game industry, which is sensitive to the consistency and effectiveness of the surrounding institutional support systems is therefore confirmed by the interview.

4.5.3 Link to Research Objectives

This theme has best tackled the second aim of the research, which was to investigate funding and policy conditions disparities that impacted on video game industry firms. The results revealed that limited financial resources were highly connected with the capacity of companies to invest, grow and compete successfully, whereas the support of citizens determined the level of stability that could be ensured in the larger business context. In that regard, finance was not merely a management issue to be solved internally, but a structural fact to be considered in terms of sustainable growth and long-term competitiveness. The theme was thus related to the support systems of institutions and firm performance showing that competitiveness in the game industry had to be realized in terms of market and policy. That also pre-equipped the conversation with the last theme that is uncertainty, monetization, and survival in the competition (Wolniak and Jonek-Kowalska, 2022).

grew and was introduced into the market. It was also the theme related to the overall aim of articulating competitiveness, as technological change did not only affect how firms were producing games, but how effectively, and strategically, they may position themselves in a transforming creative economy (Parekh, 2024).

4.6 Theme 4: Competitiveness in a Hit-Driven Market: User Acquisition, Monetization, and Uncertainty

4.6.1 Presentation of Findings

The results of the interview revealed that the video game market was perceived as a very unpredictable and hits market where the commercial success could not be calculated just by the size of the production and the amount of money spent on the production. The respondent indicated that budgets with big sizes and the existence of identified intellectual property did not necessarily ensure success whereas the smaller organizations that receive less could still perform well in the market given the right circumstances. This signified that a more intricate arrange of variables as opposed to size alone determined competitiveness in the sector and that the market was still naturally unstable despite being resource endowed by large firms. The results thus were made to be the uncertainty as part and parcel of the industry rather than an irregularity in otherwise steady commercial circumstances (Tomkinson and Harper, 2022).

Other implications of the interview were that long-term competitiveness relied more on user acquisition, monetization strategy, and post-launch commercial performance. Bringing a game into existence was not shown as being enough but rather the ability to lure players effectively, keep them and create value in the long-run by proper revenue designs. This way, customer lifetime value, user acquisition cost, and long-term monetization were regarded as the primary strategic factors. These results meant that competitiveness could no longer be decided only on the moment of release but on the continuum of relationships between the game, its customers, and its performance in the marketplace since the release (Kostić and Tomić, 2022).

4.6.2 Discussion in Relation to the Literature

These results were aligned with other studies cited in Chapter 2 that claimed that the opportunities to be competitive in creative industries relied on the integration of innovation, timing, strategic capability and positioning in the market. The interview in the case of video games affirmed that it is not just the quality of the product itself that led to success, but also the ability to replicate the quality of monetization models, the organization of the interaction with the users, and the possibility to operate in the most dynamic market environment. This demonstrated that the performance of the firms in the industry relied on the contact between innovative production and business approach instead of on either the art or the technical production (Parekh, 2024).

The discussion revealed as well that uncertainty should be perceived as a structural aspect of the industry. The opportunities of access had been increased by platformization, market saturation, and digital rivalry, but had rendered visibility and holding onto them more challenging. Consequently, companies were in a place where success was not assured, but could always come through since consumer attention, discoverability, and post-launch profitability was all very competitive. This observation conformed to research of digital game distribution and platform economies that suggested that the outcome of commercial activities was influenced by larger market infrastructures as much as by the attributes of individual merchandise (Gekker and Joseph, 2021). The interview hence solidified the theme that long term survival in the video game sector was pegged on the capacity to integrate imaginative creation and flexible monetization and advertising framework in an architecturally unsound scenario.

4.6.3 Link to Research Objectives

This theme was a direct response to the third aim of the study that the key drivers and limitations of firm performance in the video game industry. The results indicated that other factors affected competitiveness since, in addition to product development, there are user acquisition, monetization, retention, and strategic adaptability in influencing long-term success. In this aspect, the theme unified the knowledge of the foregoing sections since it demonstrated that all production systems, distribution structures, and financing conditions were contributors to the competitive performance. It also revealed that sustainable growth was through the ability of firms to deal with the opportunity and uncertainty in a fast-changing market. It then organically progressed to a wider synthesis of how these themes responded to the research questions (Meggiorin, 2023).

Moreover, the results have shown that companies should constantly modify their strategies even after the first game release to stay competitive. The significance of after sales services, such as updates, community interaction, and live-services features, demonstrates that the development of the game is not a single production cycle anymore but a continuous value production cycle. Such a change makes the strategic process more complex to the companies as they have to strike the balance between creative development and the data-driven process of decision-making and market responsiveness. It also supports the notion that competitiveness is not a statistic but a dynamic process that demands companies to react immediately to the reactions of players, trends in the market, and the conditions of the platform. In turn, success in the long term is tied to the capacity of the firm to maintain the engagement and to develop the product in the long term.

4.7 Integrated Discussion in Relation to the Research Questions

Combined, the four themes offered a consistent response to the research questions by demonstrating that the performance of firms in the video game industry was determined by the interplay between the structure of production, distribution channels, funding environment, and market competitiveness. This discussion revealed that both the production and distribution received changes brought about by both technological and platform-related changes, which not only diminished some of the old forms of barriers but also brought other sorts of dependency and strategy pressures. In this respect, companies did not act in the confines of functional scopes; on the contrary, their capabilities to develop, market, and standardize games required the level of their responsiveness to broader structural shifts in the market (Sotamaa et al., 2021).

Also demonstrated in the chapter was that funding and policy conditions affected development by the firms in these developing structures, and competitiveness based on how well firms transferred the capability of production and distribution to market performance. This proved that institutional support, market access and strategic capability were not independent variables that determine the success. Simultaneously, the evidence recorded during the interview was strong on interpreting the overall industry dynamics rather than making firm conclusions about Poland and Germany to the same extent due to the fact that the evidence was detail-filled about the former compared to the latter. That is why, the relative worth of the results was mostly determining the structural patterns that might warn of the signs of cautious translation of both national settings (Fazlagić, Szulczewska-Remi and Loopesko, 2021).

Altogether, the results indicate that the work of the firms in the video game sector cannot be determined by one single factor, but by the combination of many structural and strategic levels. The flexibility of production, access to distribution channels, access to funds, and competitiveness to compete in a highly uncertain market environment all define sustainability. This strengthens the point that the competitive position in creative industries is endemic and not independent as firms must all deal with technological, financial and market-based challenges at the same time.

CHAPTER 5: CONCLUSION

5.1 Introduction

This chapter is the culmination of the dissertation as it summits the key findings of the study and correlates them to the research aim, objectives and questions. This research was meant to investigate the nature of the influence that firm-level production structure, distribution channels, funding conditions, and competitiveness had on the growth of video game industry in Poland and Germany. The study adopted a comparative and qualitative design in examining how these factors were inter-playing in the fast changing and shifting creative industry environment.

The chapter starts with an overview of the major findings made in Chapter 4 and thereafter, explains how the findings were used to answer the objectives and questions of the research. It followed that by describing the contribution of the study, the implication to policy and industry practice, a discussion of the key limitations of the research and recommendation of further research directions. That way, the chapter allows making an ultimate reflection of the structural and strategic environments that determine the performance and sustainable development of firms within the video game industry.

5.2 Summary of Key Findings

The results of the current research indicate that the video game market in Poland and Germany is conditioned by the complicated combination of the production systems, distribution, financing terms, and competition. The production structures have been firstly made more flexible and technologically based to enable smaller studios to have a say in the market. Nevertheless, such flexibility does not exclude the necessity of effective organizational abilities, the skilled workforce, and efficient coordination. Secondly, it has changed the distribution channels and moved to Be digital platforms that altered market accessibility greatly. On the one hand, this has facilitated global accessibility, on the other hand, it has made companies more dependent on visibility of the platform, algorithms, and competitive positioning within crowded markets.

Thirdly, there is an acute issue of funding. Access to public financing and dependence on private investment limit the possibility of firms increasing in scale and innovation, as well as compounding financial risk and strategic pressure. Lastly, the industry competitiveness is extremely unpredictable and relies on the post-launch performance indicators including the user-acquisition, monetization, and long-term engagement. Production then is not the key to success but the capacity to maintain performance in the market in the long run. All these findings point out to the fact that a successful firm in the video game business is defined by the development of the capacity to synchronize the production, distribution, financial resources, and market strategy in a highly dynamic digital context.

5.3 Conclusion in Relation to the Research Objectives and Questions

The aim of this research was to investigate the relationship between the structure of production and distribution and competitiveness and sustainable growth in Polish and German video games industries. The results affirms that the two contexts have companies that operate in similar international market structures but are influenced by institutional and funding conditions. The production systems are becoming more flexible and technologically oriented; distribution is concentrated on the digital platforms and competitiveness is largely focused on the strategic positioning in the systems.

The study also reveals that the policy environment and funding is very crucial in developing the capabilities and growth potential of firms. The disparity in the social backing and financial access helps to explain differences in the scale, innovativeness and competitiveness of firms across the borders. In general, the research questions are answered in the research as it demonstrates that the competitiveness of the video game industry cannot be defined by one specific factor, but rather as the play between production, distribution, funding, and market dynamics. The ability of firms to traverse these networks determines sustainable growth.

5.4 Contribution of the Study

This dissertation contributed to the academic and practical contribution. Academically, it has helped comprehend the video game industry as a component of the greater creative economy, through its integration of production, distribution, funding, and competitiveness into a single set of analytical opportunity. The study did not look at these issues individually, but rather, made the interaction evident in the manner in which they influenced firm behavior and long term performance. It further contributed value by applying the thematic analysis to interpret the evidence on interviews to be able to relate firm level experience with wider industrial and institutional circumstances.

In practicum, the research was helpful to those developers, policymakers, and other stakeholders in the industry. It pointed out the structural issues that companies experienced especially in terms of funding uncertainty, dependence on digital market, and the pressure on long-term competitiveness. The dissertation thus added a context-relevant insight to the situation that sustainable growth in the game industry and more particularly to the European context of Poland and Germany needs.

5.5 Implications for Policy and Industry Practice

The research had a number of policy and practice implications in the industry. Policy-wise, the results confirm that certain funding instruments are necessary that can be structurally correlated with the real operating conditions in both countries. In the case of Germany, it can be inferred that the federal games fund is worthwhile but needs to be redesigned, so that state-backed projects lead to the emergence of domestic capacity and not externally outsourced ownership (Behrmann, 2020; Koley, 2022). In the case of Poland, where studios work mostly on export-based, platform-reliant decoding, specific targeted public effort in pre-release market testing, early audience maturation, and protection of IP and intellectual property rights would respond to the particular weaknesses that make Polish studios very competent, but structurally at risk of platform dependency and publisher leverage. The recommendations of the 2025 Games Policy Summit, such as the development of pan-European systems of collaboration, easing the path to public procurement for SMEs, and funding possibilities in designing a game in iterative way and testing market fit directly provide the policy direction that addresses the structural issues within both of the national ecosystems analyzed in this thesis (Behrmann, 2025). Political policy should then go beyond general cultural industrial paradigms and create specific tools to handle the nexus of the capability to produce, distribution available and ability to sustain financial needs at the firm level.

Industry wise the results indicated that competitiveness was not based solely on the quality of the game productions. Other areas that firms had to put into consideration are distribution strategy, acquiring users, monetization, and long term positioning in the market. This entailed sustainable development and needed wider strategic dimension where creative development was paralleled to commercial planning and operative flexibility. Smaller studios, in particular, seemed to need not only technical capacity, but also increased assistance in overcoming complicated digital markets.

5.6 Limitations of the Study

There were multiple limitations of the study that ought to be recognized. The most serious limitation was the small sample of the interview that also implied that the scope of the qualitative evidence was restricted. Specifically, the material available in terms of interviews was more insightful to a specific country, Germany, as compared to Poland, limiting the dense comparison of the two countries.

Another limitation was that the qualitative design was intended to offer deeper results interpretations as opposed to statistically generalizable findings. The results must then be construed as being analytical and exploratory instead of the full population of the industry. Moreover, there were no other themes in the material of the interview, like labor market dynamics, and mobility of the workforce, that were developed as comprehensively as others. These constraints do not cause any harm to the quality of the study, though they determine the tendency within which the results are supposed to be construed.

5.7 Recommendations for Future Research

This study can be expanded in future research through a wider comparative sample of firms and stakeholders in Poland, as well as in Germany. It would reinforce the cross-country aspect of the analysis and enable making more evenly based conclusions regarding the differences and similarities of nations. The problems of labor market and talent mobility, publishing relations, and ways to scale up firms could also be studied further in the course of the research.

The other helpful lead would be to incorporate the qualitative interviews with the industry statistics to build a more informed picture of the performance of the firms. This would allow preserving interpretive complexity, in addition to enhancing the empirical coverage of the analysis.

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