



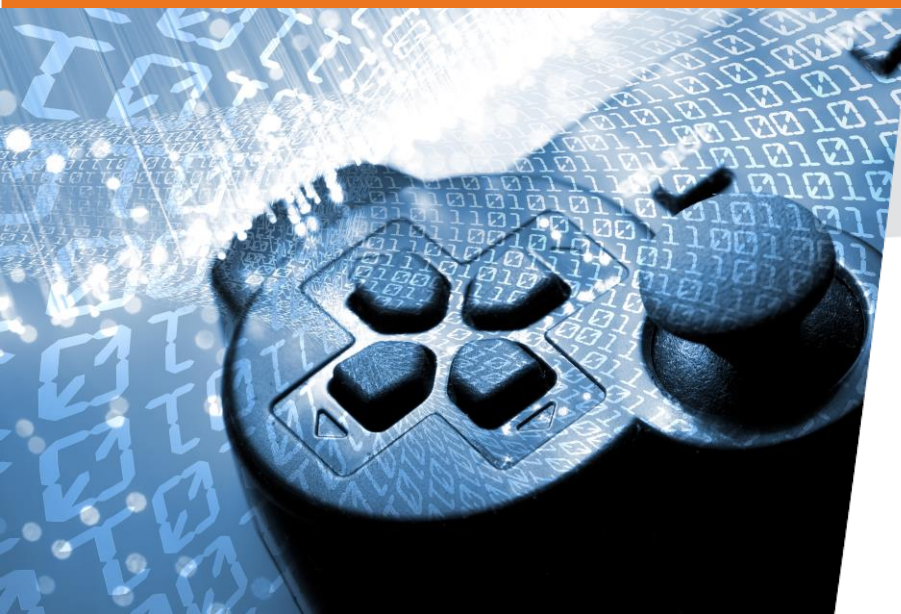
Homo Ludens  
Research and Consulting



## The Game Incubation Landscape in Europe

*Appraisal of the Game Incubation Landscape of  
the BSR in the European Context*

*Pedro Santoro Zambon, Ph.D*



EUROPEAN  
REGIONAL  
DEVELOPMENT  
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Pedro Santoro Zambon has been commissioned by BGZ Berliner Gesellschaft für internationale Zusammenarbeit mbH in the context of the BGI project to appraise different incubation approaches in Europe to provide a comparative view for the BGI incubation pilot results. He is also the manager of São Paulo's Digital Games cluster and Coordinator of GamesBR project, a hub of knowledge about the Brazilian digital games industry, market intelligence consultant for the games industry, providing services to policy makers and civil society institutions, such as ABrGames (Brazilian Association of Digital Game Developers). He is also a civil society representative at the National Council for Cultural Policies 2019/2022 and a mentor at the Finnish incubator Living Game Intelligence Network (LGIN) which had been piloted during the BGI project.

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# 1. Categorisation of Different Approaches to Game Incubation in Europe

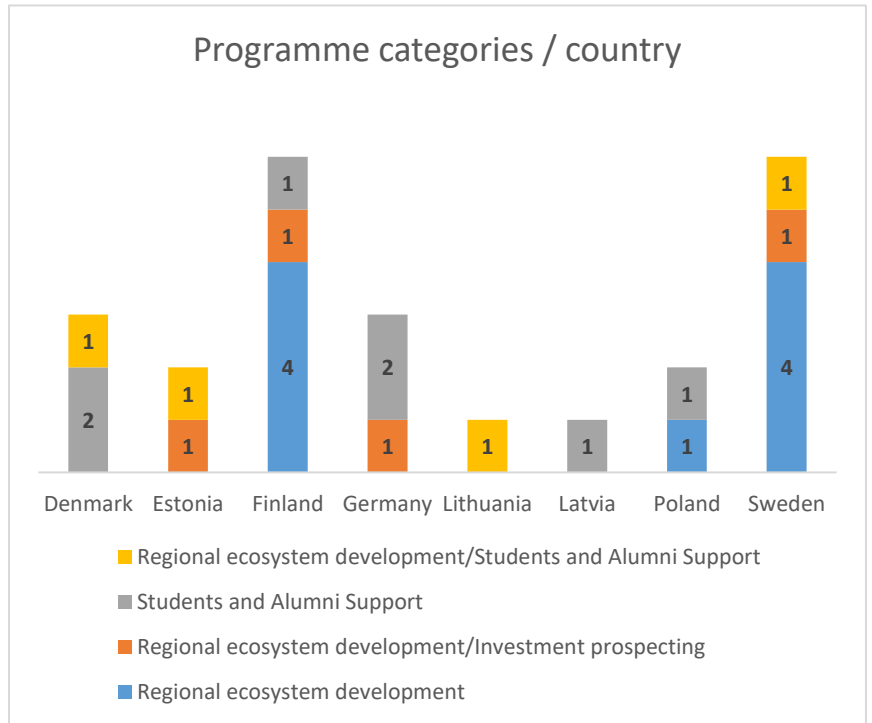
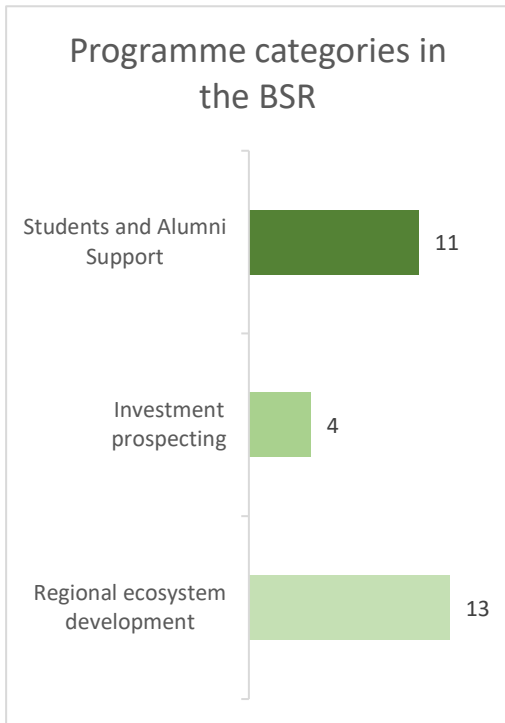
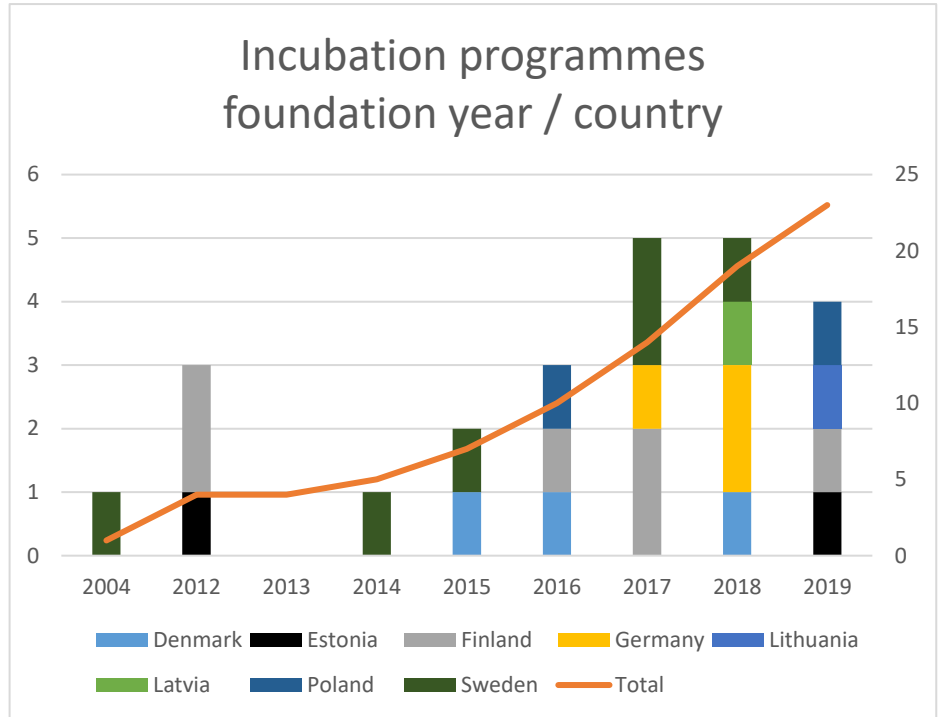
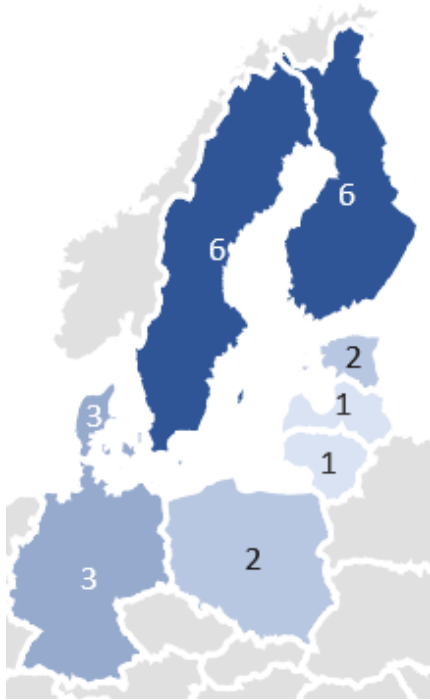
It is constantly stated in the academic literature that, both in the market and in academia, there is no consolidated concept that defines clear distinctions between incubation and acceleration (HAUSBERG; KORRECK, 2018; MIAN; LAMINE; FAYOLLE, 2016; PAUWELS et al., 2016). Both are described as programmes focused on the development of promising companies, increasing their chances of survival.

An incubation programme can be broadly characterised as “the way in which an incubation entity provides support to start-ups to improve the probability of survival of the portfolio companies and accelerate their development” (Pauwels et al., 2016, p. 2). The literature converges on four main models: (1) business innovation centers, with a focus on regional economic development; (2) university incubators to facilitate the commercialisation of technologies; (3) research incubators incorporated into research institutes to enhance research results; and (4) independent incubators, focused on the selection and support of high potential ventures (Pauwels et al., 2016).

However, these definitions cannot be directly applied to the game industry context. Based on these four models, we narrowed the scope to three main objectives: regional economic development; facilitate spin-off companies from universities; and select and support high potential ventures. With these perspectives, the following models were described:

- (1) Regional ecosystem development: a programme focused on developing the game industry in a specific territory;
- (2) Students and Alumni Support: a programme aimed at supporting students and alumni from a specific university or group of universities in a certain region;
- (3) Investment scouting: a programme focused on scouting and developing start-ups with high potential for investment

It is important to highlight the fact that some programmes can overlap two concurrent objectives. The GameFounders of Estonia, for example, was implemented with support from the local government in order to encourage the emergence of the industry in the region. At the same time, associated with a private investment fund, the programme looked for potential start-ups. In this example, GameFounders is a programme that seeks regional ecosystem development, while carrying out an investment scouting. Also, it is clear that each different local ecosystem has their own peculiarities, which reflects in the format and model of incubation programmes. Considering this point, any categorisation seeks to generalise some characteristics, but cannot encompass the entire range of possibilities around the local specificities.



There is a total number of 24 initiatives of game-focused incubators and accelerators in the Baltic Sea region. Half of these programmes are installed in two countries, Sweden (6) and Finland (6). The incubation programmes focused on games are a very recent trend, since almost 40 % of them (9) were created in the last three years. Also, as we see in the graphic above, most of the programmes are focused on supporting the development of regional ecosystems, and university students and alumni.

The basic components of an incubation model include: (I) access to physical resources, (II) office support services, (III) access to capital, (IV) process support, and (V) networking service. The acceleration programmes are a new generation of incubation models, according to Pauwels et al. (2016). The first generation, in the early 1990s, was focused on providing physical and financial resources for businesses with great potential. In the mid-1990s, the model gradually changed to a new generation that started to include intangible value-added services, such as access to knowledge, consultancy, and support for the development of products and services.

The new generation, in addition to including intangible services, such as mentoring and networking, has specific characteristics that set it apart from existing incubation models. First, accelerators are not primarily designed to provide physical resources or office support services over a long period of time. Second, they typically offer a pre-seed investment, usually in exchange for equity. Third, they are less focused on venture capital as the next step in financing but are more closely connected to angel investors and individual investors on a smaller scale. Fourth, the acceleration model places emphasis on business development and aims to develop startups in businesses that are ready for investment, offering intensive mentoring sessions and networking opportunities, together with an environment favorable to an entrepreneurial culture. The fifth and last characteristic highlighted by Pauwels et al. (2016) is that the acceleration model consists in providing support within a limited period of time (on average from three to six months), focused on intensive interaction, monitoring and training to enable rapid progress, although some provide continuous networking support in addition to the program. Summarising:

*Accelerators usually are fixed-term, cohort-based programs providing education, monitoring, and mentoring to start-up teams (usually not single entrepreneurs) and connecting them with experienced entrepreneurs, venture capitalists, angel investors and corporate executives and preparing them for public pitch events in which graduates pitch to potential investors (HAUSBERG, KORRECK, 2018, p.160).*

Accelerators are time-bound and focused. It's a certain period of time, usually fix, usually a few months, with a very clear outcome out from that. Incubation is something that is more long-term and not necessarily time-bound, but for a much longer period of time, usually measured in years. They work with some of the same tools: both of them can use some amount of funding, mentorship from numerous disciplines, networks that can help the studio, but the scope and time is usually the difference.

*Catalin Butnariu, Carbon coordinator*

What fundamentally distinguishes an acceleration programme, therefore, is its direct emphasis on attracting investment in a more concentrated and shorter time, while an incubation programme would involve monitoring the production process over a longer period of time.

Thus, in cases related to the game industry, we notice that incubation and acceleration are perceived as different initiatives based on the maturity stage of the target audience. In this case, the incubation would be destined for small enterprises in their early stages, which require a more extensive monitoring of the development process, often with mentoring that helps in production skills and more technical attributes of the created game, which is usually the first project developed by the incubated team. Meanwhile, the accelerators would be aimed at relatively more consolidated studios, focusing on providing business mentoring, attracting investors, publishers, etc.

It should be made clear that, since there is no consensus regarding these definitions in the industry, nor in academia, it is not possible to establish a definitive classification. However, for the purpose of this report, a categorisation is determined through the effects that each programme generates for the companies and start-ups.

Incubation is taken as a programme focused on developing the knowledge bases of the ventures, generating, as a direct effect, the expansion of cognitive proximity, preparing start-ups in a controlled environment before entering the market. The acceleration, in turn, focuses on connecting the startup with global production and investment networks, catalysing the potential of the enterprise through seed investment. Although incubators may offer networking related to attracting investment opportunities, they do not make direct investments in the ventures; their focus is on the quality of the entrepreneurial experience, and on the validation of the game and the business in its emerging stage.

The programmes can also be classified by a dichotomy between for-profit or non-profit incubators, or by strategic objectives, services offered and competitive focus. In general, non-profit incubators fostered by public policies have the broad objective of creating new jobs and income, as well as increasing tax collection, while for-profit incubators focus on return on investment and profitability. University-based incubators fall between these two models, seeking to support their students and alumni. (HAUSBERG, KORRECK, 2018).

Considering the difficulties of sustainability in the private for-profit model, but in view of the undeniable benefits of the programmes for the enterprises within a cluster, many programmes end up being financed with public funds at a loss. Shalaby (2007) highlights that incubators do not necessarily need to be self-sustainable, and their subsidy is justified once the benefits generated by the programs are constantly measured.

*Incubators can be considered as a part of the social infrastructure, like schools and hospitals, and thus justify initial support. Further, they are instruments for creating innovative ventures and self-employment, helping to overcome market failures and providing 'public goods'. Therefore, they continue to receive some forms of subsidy. But in future, a stronger case has to be made for government support to incubators by rigorous independent assessments of the total benefits to total costs, and credible demonstration of their effectiveness. (SHALABY, 2007, p.49).*

Governments play a crucial role in creating an environment in which the incubators' capacity building initiatives can flourish. Shalaby (2007) states that they have the primary responsibility for adopting appropriate laws and regulations that effectively promote the advancement of research and development, as well as entrepreneurship.



## 2. Game Incubation in Europe: Case Studies

In the context of the Baltic Games Industry (BGI) project, this report aims to create a brief overview on game incubation in Europe, based on case studies with a diverse range of categories and models. Since the BGI already has a complete group of reports, frameworks, and studies on Baltic Sea region initiatives (see [BGI Outputs](#) and especially [Output 3.7](#)), the main criteria of the selection of cases is to approach other European programmes that are outside the scope of the BGI studies. For the case studies, this report used data and information from Zambon (2020), with 7 additional interviews, in the following table:

Incubator	Interviews	Date
Dutch Game Gaden	Aryeh Loebe	2 November 2020
ACHIEVERS Hub	Elena Lobova	30 October 2020
Carbon Incubator	Catalin Butnariu	24 October 2020
Game Habitat	Peter Lübeck	06 November 2020
Game Founders	Kadri Ugand	02 November 2020
Cnam-Enjmin	Axel Buendia; Stephane Natkin	19 October 2020
Stugan	Jana Palm	30 October 2020

*Semi-Structured Interviews and Case Studies*



**Game  
Garden**  
Incubation

## a) Dutch Game Garden – Utrecht, Netherlands

**Model: Long-term, regional ecosystem development programme, publicly funded, without investment**

<https://www.dutchgamegarden.nl/>

Dutch Game Garden (DGG) is the second oldest incubator in the digital games industry, with operations started in 2008. The origin of the initiative goes back to the early 2000s with representatives from the Dutch universities University of the Arts Utrecht (HKU) and University of Utrecht (UU), which had recently started the first full-time programmes in game development. These representatives teamed up with a local innovation agency, Traskforce Innovation Utrecht Region (TFI), to find the need for a programme for graduates and students to open startups.

The incubation programme has undergone a series of modifications since its inception in 2008. While studying accelerators, incubators and how they work, programme coordinator JP Van Seventer noted that, in general, they focused on six to twelve weeks programmes in a row, followed by a demonstration day (“Demo Day”). This model had its limitations since it is difficult to align a minimum of five companies for concentrated availability during the same period. As a consequence, the DGG decided to carry out cyclical organic programmes. In this first incubation model, workspace, training, and monitoring were offered, without a broader linked and fixed programme.

As of 2013, the programme gained more structured molds, starting to have a process that involves three stages: talent search, acceleration and incubation. In the talent search phase, the Dutch Game Garden was designed to identify talented developers, paying attention to unique concepts, innovative business models and ambitious teams. By organising events such as Summer Game Dev, Global Game Jam and Startup Weekend Utrecht, DGG started to motivate students and beginners to pursue a career as an entrepreneurial professional in the game sector. At this point, JP Van Seventer highlights that in addition to creativity, an important success factor for the growth of a gaming company is sufficient attention to entrepreneurship and business development – delimiting the selection of teams that have at least one of the co-founders with clear commercial bias.

Having identified potential talents, Dutch Game Garden's acceleration programme focused on preparing young start-ups to become a viable company in a short time (i.e. approx. several months). During an intensive period of several months, the games were improved together with the participants based on feedback from players, experts, and mentors. In addition, there was a focus on transmitting business skills through workshops and lectures and building a network. As a result of the acceleration period, a business model and a prototype with proven growth potential were defined. With these deliveries, the company was qualified to migrate to the Incubator, which would also facilitate its additional growth.

The incubator's last stage helped promising game start-ups to become fully functional companies. In addition to its own office space in the Dutch Game Garden building, support for growth was offered, including, among other things, support from experts in the areas of law, accounting and HR,

individual training, and networking meetings. At this stage, companies could stay for years, until they felt prepared for the next step.

In all, twenty-five companies participated in this phase of the incubation between 2013 and 2017, among which stand out cases of success such as the studios Vlambeer, Wispfire and Ragesquid.

After a few years of following the same model, some limitations related to the reach and engagement of the program were identified. Until this moment, only companies that after a successful completion of the internal acceleration process were renting office space at the hub, could benefit from the programme. For this reason, the actions carried out had difficulties in reaching developers outside the Utrecht region, with a limited participation of the incubated studios, who were not obliged to participate in all activities.

From 2018 the programme started to be held in monthly actions focused on a day of lectures and thematic workshops, “Incubation Day”, held on the first Wednesday of the month, the same day as the “Network Lunch”, the main meeting of the Dutch gaming industry. Between 9 am and 5 pm, with a break between 12 pm and 2 pm for participation in the Network Lunch, a sequence of contents is held around the same theme, involving marketing, team management, strategy, production, financing, among others. During the rest of the month, they facilitate this network through the communication application Discord. This allows all companies in the programme to ask for advice from each other or from a preferred industry professional, at any given time. After twelve months, a company participating in the programme will have contact with the main training topics needed to achieve a next level of maturity. The program is free for participants, as long as they have a minimum dedication to the programme.

With the arrival of Aryeh Lobs in 2019, the incubation programme in monthly cycles is consolidated in an action called “Road to Agency”. That year Dutch Game Garden implemented a new Agency project, a matchmaking service where they connect game companies with publishers, investors, and other companies. DGG pitch their game and can negotiate a deal, also helping to connect these studios with work-for-hire projects as well. Occasionally, they help game companies with recruitment by introducing them to skilled candidates. For these activities, they work without pay basis, but a 5 % share for the deals closed with the agency mediation. In the incubation programme, the “Road to Agency” had the objective of prepare young new companies for the maturity demanded for the agency services.

In this programme they create a spreadsheet with five different stages for the incubees, starting from the challenges of setting up the company towards a pitchable prototype. The goal is making at least three companies go from incubation into agency maturity level, where their projects are technically and professionally good enough for being negotiated for publisher and investment agreements.

**Phase 1 – Intake:** In this phase they determine if a person or group is suitable to join the Dutch Game Garden Incubation programme.

**Phase 2 – Talent:** This is the phase where the development of their company starts. People in this phase can be anyone who have started a game company.

**Phase 3 – Starters:** Game companies who have less than three years of experience and have the potential to grow.

**Phase 4 – Growers:** Growers have shown their potential, game, and attitude to be worth the Agency time. They understand what it costs to make a game and what they might be able to make.

**Phase 5 – Achievers:** Company exists a little longer and knows the business side. They are scalable and want to scale up. Possible investment target.

The programme was efficient in promoting the evolution of the incubatees, but Aryeh identified some drawbacks. The first one is the volume of micromanagement and responsibilities for the incubation manager, who at times needed to administrate and evaluate 25 different start-ups, in a very labor-intensive process of manually following every step of each incubee. The second problem with this model is the linearity. Without a fix point of entrance in the incubation programme, some companies needed to wait months until the Incubation Day that offered the contents, they were interested in. Finally, with covid-19 pandemic and social distancing demands that transferred the Incubation Day and Network Lunch activities to online meetings, the incubation content has been reduced from a 9-hour face-to-face day to 3-hours of activities online. To fix these problems they are modeling a new programme, looking to digitise the incubation programme.

Since great part of incubation is the introspection process, characterised as looking and feedback each other's work, which is much more difficult in online environment, they have started to send homework mediated by discussions on the Discord channel.

Also, they are implementing a platform with all the 40+ videos of lectures and workshops, connecting all these contents to subjects, offering them in format of different courses. It allows them to scale the number of teams that benefits from the programme, overcoming the problems of linearity and making the knowledge sharing less dependent from the incubation manager. The idea includes to create a community, interacting on Discord, that collaborate and discuss the courses between each other, giving mutual feedbacks. Aryeh evaluates that this model can make the Incubation Days more efficient, since all the participants enter into the discussion with a stronger knowledge base, allowing the group to dive in a deeper level of information and feedbacks.

Dutch Game Garden is a valuable case for the European incubation landscape, not only for being one of the most enduring public-funded projects for game industry ecosystem development. All the

knowledge accumulated for its 12 years of history, in different implementation models, allow us to observe the evolution of this type of initiative and as the main frontiers and challenges encountered. In the process of finding ways to seek financial self-sustainability, at the same time that it seeks to increase the efficiency of the incubation program, always trying to innovate its methods, this case is one of the main examples to be observed by those who is seeking to implement an initiative of this type.



## b) GameBCN – Barcelona, Spain

**Model: Short-term, regional ecosystem development programme, publicly funded, with investment**

<http://gamebcn.co/>

GameBCN is a publicly funded incubator in Barcelona, Spain. The programme started in 2014 with the aim of continuing the development of projects with the greatest possible potential of the local specialised university programmes and supporting them to become new start-ups. More broadly, the aim of the programme was to seek to position Barcelona as a center for the gaming sector in southern Europe, attracting global talent. The initiative was formulated jointly between the business incubator Incubio, under the leadership of manager Simón Lee, the Department of Culture of Catalonia through the Institut Català de les Empreses Culturals, and Caixa Capital Risc, the venture capital arm of the bank La Caixa . It also had a partnership with Barcelona Activa, a public business development agency, which managed the space where the programs were carried out, and sponsorship from the legal and corporate advisory office Osborne Clarke.

In the first edition, in 2015, eight teams were selected for a four-month programme at the Barcelona Growth Center, in the heart of the 22@Barcelona innovation district. Each team received an allowance of €4,000 euros and the programme had more than 75 hours of training on the following topics: Game production, Game design, Monetization, Game analysis, PR and customer service, Legal, Human resources, and Distribution of games.

In addition, the teams were guided on several points of reference: company creation, fundraising, time to market, monetisation, and marketing procedures. The programme also featured GameBCN's participation in various industry events, including the Game Developers' Conference, Electronic Entertainment Expo, Mobile World Congress, and 4YFN. The programme culminated in a Demo Day, in which video game teams presented their projects to an audience of over 200 investors, publishers and industry professionals at Caixa Forum, held by the bank. After the Demo Day, qualified companies were selected to participate in an eight-month acceleration programme. In the second edition, in 2016, the format was maintained, but the incubation programme went from four to six months in duration.

In 2017, the programme underwent a major overhaul: the venture capital fund Caixa Capital Risc left the partnership and Incubio ended its activities. One of the co-founders, Simón Lee, started a new consultancy, incubation and business support company for start-ups, Peninsula, which started to manage Canòdrom, a public building that housed an old dog racing stadium converted into a Research Park by Creative Industry after a contest, hosting coworking space and incubators for creative activities.

Then, GameBCN moved to this new location, with support from the Peninsula. Its programme, with an annual cost of €100,000, started to be entirely subsidised by public resources, maintaining the contribution of the Catalanian government and receiving additional support from the city of Barcelona. The number of incubated projects decreased to five, maintaining the duration of six months. At the beginning of the project, each team receives an allowance of €3,000, and no counterpart in equity or revenue share is required. The only requirements for participation are that the team goes to work in the office and participates in the mentoring and training programmes, put the GameBCN logo on the company website and mention it on social networks. In addition, the adoption of agile production methodologies is required during project design.

The programme consists of 54 hours of training focused on production, marketing and business, as well as individual training geared to the specific needs of the teams. The trainings are carried out voluntarily by market professionals, in partnership with major studios and publishers with local headquarters such as Gameloft, King, Social Point and Ubisoft. Monthly meetings are also held with events related to the game industry, which are open and free for the entire Barcelona game dev community. In addition, a total of 36 hours of mentoring is carried out with industry experts, giving specific feedbacks on the projects and strategies outlined by the teams. The programme ends with a Demo Day for 100 potential investors and publishers, organised by GameBCN. Since 2017, the program has been coordinated by Oscar Sahun, a graduate of the first edition in 2015 with a focus and knowledge in the production area. In addition to monitoring the development and demands of the teams on a daily basis, he organises activities, events, and mentoring.

*“One of the pillars of training at GameBCN is production. So, we teach the teams how to use SCRUM, JYRA and we can monitor their production with them. Then, we can identify deviations. When these deviations are identified, we meet with the team. Why did you take twice as long at this stage than you had anticipated? Because I'm not able to animate a character. So, we contacted an animator and brought him to be with the team in the incubator to solve this problem” – Oscar Sahun, GameBCN.*

The GameBCN fixed team consists of three people: Oscar Sahun, managing the programme internally, Simón Lee doing administrative management and institutional relations, and a student at the University of Barcelona's ENTI (School of Noves Technologies Interactives), who receives a scholarship paid by the university itself to work as an assistant to Oscar. In addition to that agreement with the University of Barcelona, GameBCN has partnerships with other local educational institutions with video game courses, playing the role of intermediary for internship demands, seeking between students any professionals and skills that are lacking in the incubated teams.

In the 2019 incubation programme, three of the five teams had students in this model of unpaid internship contracts, since independent start-ups rarely have the resources to hire labor. In return, students fulfill the mandatory internship demand to complete the course, in addition to making contacts and gaining experience in the industry. In previous editions of GameBCN some of these students started to be permanently incorporated into the team after the internship experience during the incubation.

After the incubation programme, teams can stay at the Canodrome with subsidised rent. In 2019, there were six teams in the co-working room dedicated exclusively to game companies, of which three are graduates of the incubation programme. The companies present in co-working constantly attend monthly open events promoted by GameBCN's incubation programme.

In the current format, the programme's objective, in the short term, is to professionalise the teams, composed of good developers, but who lack production, marketing and business skills. In the medium term, the aim is to help teams obtain financing. In a broader sense, in the long run, GameBCN seeks to strengthen the industrial fabric in Barcelona and Catalonia. Oscar Sahun understands that the incubator is important in this context, as around 80 % of small studios end up dying for lack of knowledge, and this initiative arises precisely to overcome this difficulty.

GameBCN shows an interesting model of accelerator, developed with strong participation of municipality and province, partnership with universities and local publishers and companies. Is one of the most consolidated fix-term programme accelerators exclusive for games to follow.



### c) Cnam-Enjmin – Angoulême, France

**Model: Long-term, student and alumni support programme, publicly funded, without investment**

<https://enjmin-en.cnam.fr/cnam-enjmin-home>

The 'École Nationale du Jeu et des Médias Interactifs Numériques' (Enjmin) was opened in 2005 as part of the Cnam (*National Conservatory of Arts and Crafts*). The school was the result of a partnership initiated by the Cnam centre in the Poitou-Charentes region, which in 1999 brought together the Conservatoire national des arts et métiers (Cnam), the University of La Rochelle (Charente-Maritime), the University of Poitiers (Vienne) and the Centre National de la Bande Dessinée et de l'Image (the national comic strip and image centre).

The school's main source of funding is Pôle Image MAGELIS. The Pôle Image Magelis is a public organization created in 1997 to promote the Image industry in the Charente area comprising the *Conseil Départemental de la Charente* (Local Board of Charente), of the Nouvelle-Aquitaine region, of Angoulême's administration and of the Conurbation community of GrandAngoulême.

Cnam-Enjmin's vocation is to provide training leading to diplomas that will equip graduates with the right skills to enter the various sectors of the game and digital industries in training courses intended

to cover every sector and profession in the field of digital creation: game design and interactive storytelling; graphic and sound design; designing digital systems architecture and developing software; project management; marketing; and psychology and sociology applied to the design of human-machine interfaces.

The idea to create an incubator to support the Cnam-Enjmin students goes back ten years, when some of them wanted to create a studio and the institution started to think how to help them set up the studio. With the goal of helping students to start their own companies, the programme currently consists of providing students with an office space, material support (premises, machinery, basic services, sound studio, motion caption studio, etc), advisory support through the workshops of the Cnam incubator and the support programme of the Grand Angoulême technopole. They also promote the incubatees' projects using the institutional communication channels and organising events with professionals to network and project discussion. They are creating a publisher focus group to help the teams to find the right publisher for their projects. Inviting the publishers for being part of the school's jury of projects and, during the 2 days of the event, they try to connect them with the teams. So far there have been three teams in the incubator, the first one entering in 2014, the second in 2017 and the third in 2019. All teams continue to being incubated, with a policy that they can continue to use the office as long as the university does not need the space. They claim that helping these 3 companies enabled them to create 17 jobs. Since 2020 they have also started to accept teams from other sources than students and alumni from Cnam-Enjmin courses. To apply for the incubator, the team need to have a prototype of a game, and a project for the company.

As a publicly funded institution, with a not-for-profit purpose, the objective of the programme, in a broader scope, is to promote the EU talents and promote their creativity, attracting them to the Angoulême region.

Even though publicly funded, their objective as an incubator is trying to create a cost- neutral project for the institution. With reduced costs, the incubator uses the office space available in the school, and all the mentors are volunteers, professors, and professionals from the incubator's network. The incubator's managers anticipate a problem in the long-term with mentorship because they lack someone that follows the projects weekly, that helps the teams to identify the problems and issues that demands an experienced professional to prepare them for the struggles to come. Stéphane Natkin states that long-term mentors are hard to recruit and keep, and the only way to do that is paying for their job. To expand this and some other possibilities of the incubator, they are now looking for external sponsorships.

Besides the problem with long-term mentorship, Axel Buendia also highlights the lack of funding for early stage studios in France. In the country, there is a good range of subvention public match fund available, but no starting money (for project in early-stage development). In the private investment environment, early-stage game studios are seen as too risky.

To foster the business knowledge on the incubatees, Cnam-Enjmin tries to support the teams to produce in terms of project management and also marketing skills, the latter with help provided by SpielFabrique, a Franco-German accelerator programme for start-ups and young entrepreneurs in the games market. Following the creation of a new partner company in Angoulême, La Compagnie des Martingales, from the former director of Cnam-enjmin Stéphane Natkin, they also offer a full



range of possible productions (co-production with the authors, production only by the authors, or production without the authors). Finally, the project also develops a partnership with the Cologne Games Lab (CGL) at THK University, enabling exchanges between students from Cologne to Angoulême.

In conclusion, this case highlights a possibility to create an incubation programme in the university context using the same infrastructure and costs of the regular courses, using partnerships and institutional network to provide a wider infrastructure that helps the entrepreneurial development of spinoff game studios from schools.



#### d) Carbon – Bucharest, Romania

**Model: Long-term, regional ecosystem development / investment scouting programme, privately funded, with investment**

<https://carbon-incubator.com/>

Carbon is a game incubator / accelerator founded in January 2016 in Bucharest, Romania. Its emergence was due to a spin-off by one of the largest national gaming companies, an outsourcing agency and development services Amber, created by former employees of large companies of the games industry. The project started as a mix of incubator and publisher, with the objective of developing a local scene in Romania and capturing the best local talents, with a counterpart based on revenue, without taking equity from the companies. The project financing is 100 % private, funded by Amber and one of its founders, who joined the initiative as a venture capital investor. A shared value from Amber is the importance of a community, and the vision that they benefit from growth of a local ecosystem, possibly becoming future reference as a publisher emerging indie companies.

Carbon was coordinated by the Head of Development of Amber, Catalin Butnariu, who also has been president of the Romanian Association of Game Developers since its foundation in December 2015, a non-governmental organisation supporting the local industry. This relationship demonstrates that, even being a privately funded initiative, it is a mixture of a regional development programme and an investment scouting one, a rare case without public funding in the European context. The project seeks to address the imbalance in the global game industry that affects specially indie studios from outside of the major game development centers in emerging territories such as Eastern Europe, Latin America, Middle East and Southeast Asia that were bereft of publishing support, access to venture capital, and incubation or simply general business know-how.

The program finalised most of their first batch of invested games in late 2018 and only one team still is in the incubator. In March of 2019, the last team was invested by a publisher and exited the Carbon's investment, releasing their game in early access. Since then, Carbon is on hold, without new investments and partnerships.

So far, Carbon helped to release 4 games between 2016-2018, across different genres, platforms, and business models. The most successful case was the studio Metagame, an indie company focused on mobile that launched TapBusters, an idle RPG published by Tilting Point with more than 1 million

downloads. Until early 2019 they continued using the shared office with Amber, when they moved to a larger space. After this first success they also produced the *Zombieland* mobile game based on *TapBusters*, launching it in 2020. Right now, the studio is one of the most successful stories of the mobile game industry in Romania. Looking for the big picture, Catalin anticipates that together with *Metagame* great success, another studio will manage to succeed, another will survive and continue to produce games, and only one will fail. This studio, focused on VR, is struggling with this emerging and competitive genre. From these four invested studios, Carbon claims to break-even all investment, but they still have some operational costs to cover. Even with a good success rate, the coordinator states that the small sample made it difficult to evaluate precisely if (and why) this incubation / acceleration programme succeeded.

The programme model is composed of three tiers, based on revenue share. The first tier, the *Incubation*, is ideal for smaller teams which are starting out, and offers working space, equipment, consulting and mentorship on a revenue share of 10 %. Including the benefits of the first tier, the next tier, *Acceleration*, offers a complete publishing services – PR & marketing, development support services, QA, preparation and sponsorship for attending industry trade fairs, for a revenue share of 20 %. Finally, tier 3 *Funding*, includes all the services of the previous tiers and offers a development grant of \$50,000 per project, asking for a 30 % share of the game's net revenues. From the 4 studios in Carbon, two of them achieved the *Funding* tier, one stopped at the *Acceleration* tier and the last one at *Incubation* tier.

Even with success cases, Carbon highlights the difficulty of a private incubator business model. The revenue share of the successful games is not enough to sustain new rounds of investment, and also to pay the incubation / acceleration infrastructure. The main reason that made this Romanian initiative stop new investments in 2018 was a lack of funds for new rounds, and even with some interest from local investors, it was too little for the strategic objectives of Carbon.

In Catalin's view, to create something sustainable in the long term, they would need a very significant investment in order to be able to diversify and invest / incubate a lot of different titles. To be able to return the risky early-stage investments, a fund needed a lot of titles, for the really scalable and successful ones to pay for those who barely break-even the investment. At the moment, the investors are not interested in a larger contribution, and Amber decided to wait until they have this expandable cash to implement their vision. Catalin does not know of any fully private self-sustainable incubator, using the examples of *Execution Labs* and *GameFounders* as programmes that, even with a greater portfolio, were not able to maintain the investments for a longer period of time. He believes that the incubation programmes are meant to be supported by institutions like universities and governments, seeking a long-term return, not immediate profits. This immediate profit is difficult for an initiative like that.

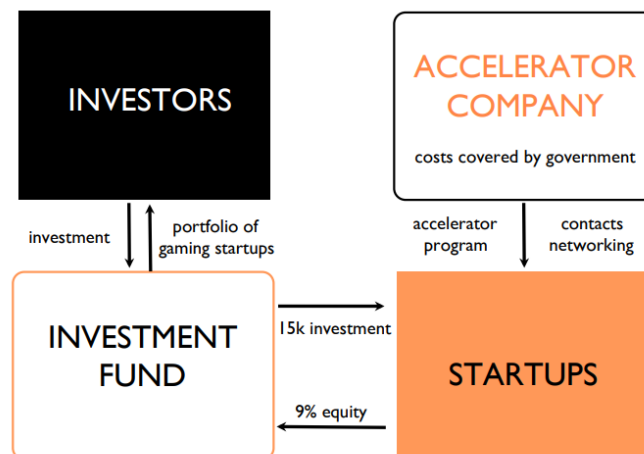


## e) GameFounders – Taliin, Estonia

**Model: Short-term, regional ecosystem development / investment scouting programme, privately and publicly funded, with investment**

<https://www.gamefounders.com/>

The origin of GameFounders traces back to the largest competition of business ideas in Estonia, the Ajujaht (Brain Hunt) which had been initiated in 2007. One of the persons running the project, Kadri Ugand, had a vision about creating an accelerator or an incubator to develop the teams after the competition. The idea came into its first implementation when in 2011 the Estonian government launched a public call for projects to implement a local accelerator, paying for the operational costs. At that time, the profusion of tech accelerators made Kadri and her team to think about innovating and create a novel concept of accelerator. Together with the founders they decided to create a vertical accelerator focused into a single sector, the game industry. Early 2011, the first fast-growing start-ups of the gaming industry, especially in the free-to-play mobile business models, started to appear.



GameFounders was awarded in the public call, that covered all the operational costs, like office, team, marketing, travels, and conferences expenses. Jointly with the operation, there was a fund composed by 16 private investors, that covered the investment for the teams. The selected teams take €15,000 each, with a 9 % equity from the companies.

The accelerator consisted of a 3-month programme, on site connected with a network of a 120+ mentors from 19 countries. During the programme, the teams passed through over 70 one-to-one meetings; seminars from game design to publishing deals; playtest days with different groups twice a month; board meetings every second week to keep track; and pitch days every Friday until the Demo Days, one regional and others in the USA. In the first round, the programme got more than 400 applications from 67 countries.

The main peculiarity of GameFounders is that even though it was a public-funded acceleration programme from Estonia, the applications were open to start-ups from any place in the world. Behind this option was the goal, for the Estonian government, to kick-start a game industry in the country. At that moment, the local industry had only one bigger company, Creative Mobile founded in 2010, and the scene was in its very early stages, without a game development movement and community, and no dedicated training courses. In that sense, even if the local government wanted to focus only on local companies, the critical mass was too small to scout enough talented start-ups to invest in. Besides the acceleration program and in order to empower a game industry, and have people become aware and interested in this sector, GameFounders organised events for different audiences, from school kids to university students, and established a monthly game developer meeting. Kadri was also one of the founders and president of the Estonian chapter of International Game Developers Association (IGDA) from 2014 and 2015.

*It worked really well, because before there basically were only one or two companies but when we finished, there were more or less fifty game companies in Estonia. In that sense, the kind of trick was that the international aspect allowed us to really kick-start the Estonian native industry to grow really fast. But also, with our international teams we attracted international mentors, interested in the international talent of the accelerator, and we got better partners, interested in this international aspect. Fortunately, we could persuade the government to believe in that and now they are very happy about it because gaming right now is considered one of the most successful sectors of the cultural affairs. – Kadri Ugand, Co-founder of GameFounders.*

The selected teams needed to have a prototype or a vertical slice of the project, proving their technical competence, and a vision on what they wanted to create around it, even if they did not have a company yet. The range of teams spanned from a company that had already launched their first game with a successful business model, to a group that met in a game jam three weeks before applying to the programme.

There were four rounds of GameFounders in Estonia, between 2012 and 2015, and an additional four rounds in Malaysia between 2015 for 2017, where the programme moved to after finishing the partnership with the Estonian government and started a new public-funded initiative. In total, there were 72 companies in the programme. Kadri estimates that the most important value of GameFounders was the international network of mentors, and an intense programme where you met more than fifty of them in person.

The joint venture between private and public funding, in an international programme that seeks to kick-start a whole local game industry makes GameFounders unique as an incubation / acceleration support. On top of having kick-started the national game industry in Estonia and Malaysia, the programme claims to have reached break-even with the investments in 2019. In terms of expectations of return on investment, the perspective was to make five times the initial invested amount. Even with this successful funding cycle, Kadri states that she doesn't believe that the end goal of an accelerator needs to be private, because of the benefits of it for the whole ecosystem (the private funding success of GameFounders would make us suppose that the end goal of an accelerator can

be only private, but Kadri highlighted that the benefits of a programme transcends the return of investment and goes beyond it, for the whole ecosystem). On the other hand, Kadri thinks that it is possible to create a self-sustainable programme through corporate sponsorships and providing services.

As seen with other programmes, GameFounders is not focused on the tech or the art in the game production, but on the business knowledge around making a successful game company. But while the programme was connected to a fund seeking return on investment, they provided support for scalable business models, looking for mobile free-to-play games with microtransactions, in opposition to a more artistic premium indie PC game for a niche. For Kadri, the latter kind of games would not need the accelerator because its network of mentors was focused on user acquisition and monetisation strategies, to boost the invested startups to break-even the equity.



## f) Game Habitat – Malmo, Sweden

**Model: Long-term, regional ecosystem development programme, publicly funded, without investment**

<http://www.gamehabitat.se/>

Game Habitat is a non-profit organisation based in Malmö and created in 2013 by a group of game companies in southern Sweden, with the goal of developing the local ecosystem. In 2020, there are 30 companies as members, selecting the board of directors. They have a good mix of AAA, business to business companies, indies, investors, universities and the city and region representatives. The main funding of the project comes from public sources, the city of Malmö and the region of Skåne.

As the focal point for the game industry in southern Sweden, Game Habitat is the gateway between the sector and everyone else, from developers, students, entrepreneurs, researchers, and enthusiasts. In 2019, a long-standing dream of Game Habitat came true, a physical hub with co-working spaces and an event location called DevHub where they gather all different players of the ecosystem in the same building, was realised.

The sustainability of Game Habitat is a combination of public funding with a private business model, with all the members paying a membership fee, a total of €56,000, from a third to a quarter of the public funding received. Peter Lübeck, CEO of Game Habitat, said that the contribution from the industry is growing over time, but still not enough to sustain the organisation. He expects that in ten years the industry will be able to support the core operations, but everything else, even events, will continue to depend on partnerships, public or private. Peter also believes that privately and publicly funded projects have different agendas.

*A very important distinction is that since, most of our funding has never come from our members, but comes from the public sector, it allows us to work in a more general long term for what is best for the region. If we could only get funded by our members, then we need to start to serve them*

*more directly and we don't today, we don't do things specifically for the member companies, we work more with the general building of the community, the awareness, doing things that we need in order to take the region further in the long term. That's the best way to do it. The combination of private and public money to allow you the freedom to work in a more strategic way rather than having a purely private funding short sided, for-profit kind of set-up. I think it would be really difficult to do anything similar on what we are doing, without public funding and I don't even know if we wanted to do that. – Peter Lübeck, CEO of Game Habitat.*

On the vertical of startup ecosystem development, Game Habitat created different products within, working with the Malmö's city incubators to create a pilot programme, and in 2020 they have started a brand-new project, the Game Accelerate South Sweden. It is a three-year project funded by the European Regional Development Fund with the goal of establishing sustainable methods and processes that can enable more game studios to start up and establish themselves in southern Sweden. The project is a partnership with all the incubators of southern Sweden, one university and Game Habitat (Minc, Ideon Innovation, Blekinge Business Incubator and Blekinge Institute of Technology). At the strategic phase, the commission is planning how the different players of the project can create a strong trajectory and build the best infrastructure for game startups.

So far, the plan is structured in three stages. In the first one, they are developing a programme for people that have not yet started the company but are dreaming of starting their own studio, i.e. for developers that are not yet entrepreneurs. They are planning to give them a crash course to inspire and encourage them to set up their own company, and also provide them with a reality check on what it means and what is needed to run a game company. The second stage is about helping these teams to actually build that company, with three months of coaching and preparing them for creating their pitches. During this stage, the programme will actually help the teams who do not have any founder with entrepreneurial skills to match them with someone who has that profile. The last and third step is more like an incubation programme, with a year's duration, of support from all the organisations mentioned above.

The expected impact in the long term is to increase exports of game development products and services, higher sustainable growth in the region's gaming companies, increased employment in game development companies and enhanced regional appeal for the game industry.

The project is intended to start in 2021, with a delay due to the COVID-19 pandemic, providing a strong offer not only for the developers in the region, but seeking to attract more companies and teams from Europe to Malmö. Their objective is to offer the best combination of access to talent and to the start-up ecosystem (provided by the programme), and of quality of life.



## g) ACHIEVERS Hub – Kiev, Ukraine

**Model: Long-term, regional ecosystem development / student alumni support programme, privately funded, without equity**

<https://achievershub.biz/>

Achievers Hub is a knowledge sharing platform founded in 2017 in Kiev, Ukraine, by a 10-year experienced game industry professional Elena Lobova. The motivation of the project was the perception that in Ukraine and in Eastern Europe there is a lot of talented game developers, but not that many success cases, and one of the main reasons is the lack of business vision and skills, especially on marketing side, despite all the competence on programming, design and art. Without local public funding, and not knowing how to attract private investment, there is not enough money to publish the games and, even when it is self-published, the lack of marketing knowledge makes them struggle to achieve a good return. After almost a year using her personal network and accumulated knowledge to organise events and activities for the local industry, and giving feedback for game projects, Elena decided to create a business around it: a company that helps game developers to achieve their successes. With a social impact business mindset, the objective was to create a sustainable company that helps the development of the game industry.

At first thought, Achievers Hub was intended to focus on Ukraine and Eastern Europe, but then the project turned out to become international, with start-ups from another regions. The main idea is to help teams in the business side of game production, while help them to concentrate on the creative side. There is no public funding, with the project starting with personal investment from Elena Lobova, and further with a funding partner. The project received some proposals from publishers and investors offering funding in exchange of some especial preferences, but they decided to remain independent and on the developer's side, looking only for options that is the best for them.

The Achievers Hub does not ask for equity, but a subscription fee for developers. Its a fully remote program with three layers. The first is the "Light" category (€39 / month) that provides: a primary feedback from mentors, analysing the project, the team, their strengths and weaknesses, and giving recommendations on gameplay, art, sound, game design, monetisation, etc; access to the webinars and the knowledge base, including templates and useful materials for indie developers including pitching, roadmap, and market overviews; being included on a portfolio offering the game for over 200 investors and publishers; and special benefits from partners, like discounted tickets to events. The "Optimal" subscription (€99 / month) includes the Light content, and a monthly feedback from mentors; partners consultancy (HR, PR, legal, finance); pitch deck preparation and training. The last option is the "Individual" (€399 / month) that comes with all previous benefits and a dedicated search for investors and publishers, where Achievers Hub creates a list of investors and publishers that matches developer's game; negotiation with publishers; helps to organise participation in the events, prepare a booth, and can represent the developers at the show (agreed separately); and providing support and consultancy regarding self-publishing. This category also provides help to developers raise funds for their games, with a success fee: if the contract with publisher or investor is signed as

a result of Achievers Hub introduction within the first 6 month after the introduction, they gets 5 % of the revenue share (deducted from developer's share during the first 6 month after release). The hub also monetises organising events with partners, like Global Game Pitch with GDBay, and a hypercasual game jam, Going Hyper, with Center42.

Elena evaluates that it is possible to create a fully private business model around incubation and acceleration if you are able to get some additional income beyond equity and revenue share, like subscription, events, and sponsorships. On the other hand, it is important to be smart with expenses. Achievers Hub is based in Ukraine, with a fully remote team, without an office or too many fixed operational costs. All the mentors are voluntary, from services providers that want a good hotspot to prospect clients in exchange of free consultancies, to publishers and investors giving feedbacks with counterpart of scouting good early stage teams, to experienced game developers willing to give back some knowledge for their community.

At this point there are a total of 35 teams subscribing the service, some of them working with a success fee agreement, without paying subscription. There are several different profiles of teams. Some of them are developers that work somewhere in the industry and make their own game in their spare time. There are some small indie teams in their first or second game project, realising the demand of attract publishers and investors. And also, there are some outsourcing teams that realised a lot of work already but want to start to create their own game.

*In the game industry is hard to have success formulas that works for everyone. Everything is super especial and unique for every genre, every platform, every team. It's very fluid and changes all the time. Of course, that make sense to have some general knowledge for example for developers who doesn't know much about the games industry, we recommend them to take some courses or read some books. Individual mentorship doesn't guarantee success but at least you can talk with someone who has a background close to what you're doing. For example, if a person in from PC world, they might be super professional but if he doesn't know anything about mobile, it doesn't mean that he will give a good advice for mobile game developers. That's why we also try to connect developers and mentors based on the mentors' background.*  
– Elena Lobova, Founder Achievers Hub

Elena Lobova stated the fact that developers should know that they need to pay attention on business side of game development but highlights that its common to all creative industries professionals to think more along the lines of the product than the business. In an accelerator the mentors can teach the importance the business side and provide the developers with basic knowledge in simple words.

The unique experience of Achievers Hub shows an emerging attempt to create a fully private and online community of knowledge exchange, that works as a service paid for those game developers that wish to receive the benefits from network and experienced feedback.





## h) Stugan – Vessmanstorp, Sweden

**Model: Short-term, regional ecosystem development programme, mainly privately funded, without investment**

<http://www.stugan.com/>

Stugan is a non-profit accelerator programme for talented game developers, helping new teams and individuals to realise their game ideas during a two-months stay in a cabin in the middle of the woods in Sweden's interior. Stugan means "the cabin" in Swedish and was also the name of the first commercial game ever created in the country, released in 1986.

To incentivise young talents to get into this industry and reach a world audience with their creations, Oskar Burman and Tomas Palm initiated a annual summer camp located between Falun and Borlänge, in the municipality of Dalarna. Having been in the game industry for many years as successful game entrepreneurs, Oskar's and Tomas' motivation was to give back and help other game developers who have not made it yet as far as them.

The cabin holds room for a large workspace, as well as bedrooms for 23 people. The selected participants are from all over the world, and they do not need to pay anything to stay in Stugan, only their travel expenses to and from Stockholm. Since Oskar and Tomas do not have time to work full-time on the project, Jana Palm has taken on the role of Project Manager in the programme.

The first round was in 2015 and was much more successful than the managers had expected, with 23 developers in 16 teams from different places around the world. The whole group became close and formed strong ties of friendship. The selection of teams is subject to a set of criteria looking for people from different places and different areas of expertise. The programme encourages the teams to collaborate, and after 4 editions of the programme (2015 – 2018), Jana affirms the creation of a successful environment of mutual exchange, crediting the open spirit of the indie game dev community for it.

The project is mainly financed by individual sponsors, people from the game industry who have been successful and now want to support new talents, without taking any return on their investment, functioning as a donation to the ecosystem. This is complemented by some governmental and municipality funding, but the main part of the budget comes from individual private sponsors. In contrast to the majority of incubation and acceleration programmes that focus on business, marketing, and production, Stugan ignores all this in favour of the creative process and the joy of game development, hence focusing on the "fun" part. That was especially the motivation of the project, the sponsors are not worried about profitability or the return on / of investment, but with the creation of a good game in an inspiring environment.

*At the end of the programme we ask people to write a short paragraph about their experience, and some people say that they had not expected to learn so much about themselves as human beings. They learn a lot about game development, but also about themselves. In Stugan, they need to live with strangers 24 hours, 7 days a week, they live together, they work together, they eat together. It is a really intense social experience where you have to interact within a very different environment. – Jana Pal, Project Manager at Stugan*

Apart from the teams, there are also mentors coming to Stugan, approximately 3 mentors every week, from various backgrounds and areas of expertise, helping the teams with different topics. Even with the programme's indifference to the business side of game development, there are some business mentors and some publishers scouting new projects and actually signing agreements after the programme.

Stugan is a unique project that shows a flourishing community-sponsored programme, and the power of collaboration and creative immersion as a tool to foster talented teams, attracting developers from all different places of the world to a cabin in the middle of Sweden. Even without investment or a promise of publishing networks for commercial agreements, hundreds of people were attracted to this program format. The fact that prosperous developers in Sweden had the willingness to invest and something back to their community, even without any direct benefits from their sponsorships, shows that it is possible to realise regional development programmes from the success cycle of investment in the games industry.

### 3. Discussing Incubation as an Appropriate Approach to Foster Entrepreneurial Spirit in Game Developers

One of the common points made clear by the managers interviewed for this report is the perception that specific incubation and acceleration programmes for the digital games sector are more efficient than generic programmes for technology-based start-ups. The origins and overlaps of the digital games chain with the software industry make it tempting for companies in the industry to approach incubation and acceleration programmes for technology start-ups, especially due to the wide availability of resources and investments compared to specific actions for the game industry. This leads many game studios to be attracted to generic programmes, often resulting in unsuccessful experiences.

The digital games industry is multifaceted in value chains with very different flows, especially between the premium PC / console linear models and the exponential and scalable models of the online and free-to-play games. In this context, it is questionable if providing the same incubation and acceleration programme for start-ups of such different business models can hamper their development. Some programmes end up mitigating these risks by presenting a format that offers mentors directed to the specific demands of that particular start-up. Other programmes, in turn, end up naturally selecting a specific start-up profile, focusing only on one or another type of game company. It is crucial that these distinctions of business models are considered when modeling an incubation and acceleration programme.

One of the problems with the start-up business incubators is that start-up investors are only interested in scalable businesses, something that does not comprise many game companies. These companies end up being rejected by traditional business incubators despite having great potential for stability, even if they do not scale as a success in the Venture Capital market. Another point is that non-scalable businesses, being stable, can generate local benefits, such as jobs and income, something that reverberates with the central objective of a regional development programme. In that sense, it is also noted that game incubation programmes within the investment prospecting category are more willing to approach game studios with scalable business models (freemium, microtransactions, etc.) than premium PC / console games, the case of Game Founders, for example. Early-stage company investors always seek to multiply their investment, which cannot occur in premium niche games with linear growth.

In this sense, we can also follow Lukosiute, Jensen and Tanev (2019) in the conclusions that it is not always good for a start-up to enter into an incubator or accelerator: “there are several aspects of business incubation practices that can negatively affect companies in initial stage, and the founders

of new ventures must be very careful when selecting a specific incubation programme” (p.13). The potential negative impact on participating in inappropriate incubation programmes are:

- Start-ups can face low commitment from incubation programme stakeholders such as business mentors, advisors, and external partners. External service providers are usually not interested in startups’ results.
- General workshops, lectures, and courses provided by incubation programmes are time-consuming and not necessarily useful. Start-ups spend a lot of time working on secondary tasks instead of focusing on primary ones.
- Incubation programme networks may not align with a start-up’s product. The majority of the incubation programmes provided only general network resources. (LUKOSIUTE, JENSEN TANEV, 2019, p.12).

The commitment issue is heightened when mentors, consultants and external partners are not aware of and not involved with the games sector, in a way that specific game programmes are able to mitigate some negative impacts. Likewise, alignment with a start-up’s product is considered essential for networks that are actually effective for businesses.

Connected with communities of practice in the digital games industry, game-focused incubators and accelerators programmes can reduce many of the risks, in one hand by bringing the community closer – favoring a more efficient exchange of knowledge – and, in the other hand, because of the collaboration taking place for other reasons than strictly economic ones. The involvement of managers, mentors, speakers, and participants is not only utilitarian, but also linked to a symbolic and affective connection with the community sheltered by the hub. This is reflected in the observation that, in all cases analysed, mentors and speakers are mostly volunteers.

The ways in which incubations and accelerations are established are diverse and adapt to several factors, from the reality of local enterprises to the availability of funds and infrastructure. In general, the two most distinguishing factors between the models are the duration period and the degree of maturity of the startups that participate in them.

Some incubation programmes are aimed at informal teams, students, and producers with little or no experience in the sector. Often, these are carried out in partnership with universities and can be offered in the form of lectures, workshops, meetups, online and in-person courses. The concept of these programmes is to foster the basics of entrepreneurial knowledge for those entering the market, introducing aspects about the game production business. They are not always associated with a physical hub and can be offered as a private or collective remote consultancy, like Living Game Intelligence Network (LGIN). In other occasions, they are one of the segments offered by hubs with broader actions, such as the phase aimed at start-ups of students from Game Hub Denmark.

One of the most important distinctions of a game incubation programme is a clear understanding that a game studio is not about technology – despite its critical importance on the development process – but about creative content. In that manner, emergent game developers are mostly artists looking for a way to express themselves through games, and many of them become entrepreneurs not for an extrinsic motivation for profit, but to make the production of their authorial games feasible. Even the most experienced developers, with years of practice in large companies, who end up opening their own businesses, did not care about anything other than developing their own content. It is also worth mentioning that there are cases in which game developers become entrepreneurs out of necessity: recently graduated and with no market experience, some developers do not find vacant job positions for beginners within large companies. The way to continue in the game industry is to open your own business, even without any technical or business experience. Finally, the emerging studios of the game sector, as a project-based industry, are created around specific projects, and the teams involved in such projects do not see themselves as a company that transcends the development of a particular game.

It is in this context that incubators and accelerators focus on the complex challenge of fostering the entrepreneurial spirit in game developers. The programmes include lectures, mentoring and workshops that address the need and importance of administrative rationalisation and business knowledge, enabling these ventures by providing management and production methods. On the other hand, these incubators need to maintain the intrinsic motivation around game production: looking at money as a recognition of work and the appreciation of the product developed; and, more than that, incorporating the understanding that an economically sustainable production cycle is essential to enable the development of new game projects. Therefore, incubators need to establish a cycle of learning and growth, which equips entrepreneurs to assess internal productivity based on measurable parameters. Helping them to understand how to balance the tensions between creativity and rationalisation is the main challenge of game business administrators.

The game industry is not a technology-oriented industry, it's a content-oriented industry, so the classic model of an incubator is not directed to that kind of product. The students, generally, when they come, they have a project, they have a game they want to put in the market. They don't have the idea of a company. The model of an incubator that we have on start-ups for digital technology is, for my point of view, not at all adapted for the games industry.

– *Stephane Natkin, Director Cnam-Enjmin.*

The program managers interviews included in this report, as seen in Zambon (2020), showed various successful cases of start-ups that were able to transcend the pure game development mindset into a company concerned about the business, able to attract private investments and sustainable in the medium and long term. But also, there is a common struggle on some startups that do not have any partners with business, production, and administration skills. Usually, these partners are programmers and artists, with none or mostly superficial business and administration content on their graduation courses. In that manner, some programmes like GameBCN, Dutch Game Garden or Game Habitat, are trying to connect these start-ups to business college students and other administration-focused talents, to embody these skills into the company.

Programmes seem to be able to foster the entrepreneurial spirit into game developers, especially in the context of graduates that lack disciplines that address administrative, business and production knowledge. At the same time, it is important to understand that, above all of the intention of transforming game development teams in companies, games are cultural products, and differently than start-ups, game production is a creative process that faces the Creative Industries tensions on rationalising a cultural and artistic expression into a commercial product.

It is expected that this report can help future incubators and accelerators managers with a pool of examples and categories. But, as we see in the case studies, there are a numerous range of possibilities and backgrounds where these programmes can emerge. There is no general rule that can be used as the master key to success for the development of a local ecosystem. With different evolutionary stages and contexts, incubation and acceleration need to be perceived as one piece from a holistic vision of regional development strategy. These initiatives are just tools for a greater objective, and without the understanding of the desired outputs, the efficiency of the programme can be limited.

## 4. ANNEX I - Game Incubation / Acceleration in the Baltic Sea region

Country	Name	City	Start	Description	Category	Public Funding
Denmark	Game Hub Denmark	Grenaa	2015	Established in the small city of Grenaa as lab for local, aspiring game entrepreneurs from mainly the game education programmes at Dania Games in 2013, it turned into a real game incubation programme under the Game Hub Denmark brand in 2016. The brand consists of game education institutions at upper secondary and higher vocational level, the game incubator, and game innovation through participation in relevant EU projects – most notably Baltic Game Industry (Interreg) and Game Hub Scandinavia. Game Hub Denmark's incubation programme is 100 % publicly funded by the participating education institutions, Norddjurs Municipality, the Central Denmark Region and the EU, and is at the time of writing this document expanding to other locations in Denmark such as the cities of Viborg, Aalborg and Aarhus in order to reach a larger critical mass of talented game start-ups. Website: <a href="http://gamehubdenmark.com/">http://gamehubdenmark.com/</a>	Students and Alumni Support/ Regional ecosystem development	Yes
	Arsenalet Game Incubator	Viborg	2016	Connected with Games Hub Denmark, Arsenalet Game Incubation is an opportunity for kickstart a company in the games industry as part of the creative working environment, which surrounds The Animation Workshop in Viborg. Sponsored by the European fund Interreg Öresund-Kattegat-Skagerrak and the Central Denmark Region, arranged by The Animation Workshop and hosted by the co-working office Arsenalet, the Game Incubation is a fast lane into a career in the game industry. Website: <a href="https://roof.nu/">https://roof.nu/</a>	Students and Alumni Support	Yes
	Aalborg Universitet Game Hub	Aalborg	2018	Connected with Game Hub Denmark, AAU Game Hub offers guidance and support in any game development related matter at AAU. They offer help with exploring game development as a career, whether it is through: starting your own game development (alone or with a team), joining a game studio or start-up, enhancing competences through workshops, and socialise with other game developers. Website: <a href="https://www.sea.aau.dk/students/gamehub/">https://www.sea.aau.dk/students/gamehub/</a>	Students and Alumni Support	Yes

Country	Name	City	Start	Description	Category	Public Funding
Estonia	GameFounders Europe	Tallin	2012	<p>GameFounders is a global startup accelerator programme that focuses solely on game studios and start-ups. They run a 3 months long program and provides mentoring for the teams to improve their business and game quality skills by over 60 top industry mentors, weekly pitch practice, playtesting, field trips to successful game studios and at the end of the program, demo days where you will get the chance to pitch to our global network of investors and publishers. The goal is to develop the studio's skills and solve more problems through the 3-month program than the studios can do by themselves in a year or more. Each studio gets a \$25k funding and gives 9% stake as equity.</p> <p>Website: <a href="http://gamefounders.com">http://gamefounders.com</a></p>	Investment prospecting / Regional ecosystem development	Yes
	Tartu Science Park BGI Gaming Incubation	Tartu	2019	<p>Tartu Science Park and Baltic Game Industry project run together gaming incubation programme, meant especially for game developers. Together with APT Game Generator and BGI international partners they bring technical competence to Estonian game developers</p> <p>Website: <a href="https://teaduspark.ee/en/incubation/baltic-game-industry-incubation-program/">https://teaduspark.ee/en/incubation/baltic-game-industry-incubation-program/</a></p>	Regional ecosystem development / Students and Alumni Support	Yes
Finland	Playa Game Industry Hub	Kotka	2012	<p>Playa game industry hub represents a community of game developers and other stakeholders in South-Eastern Finland. Supported by rapid growth of local game industry cluster and top-notch industry know-how and know-who, Playa's ambition is to grow and expand into one of the main game industry cluster in the world.</p> <p>Playa Game industry hub is based in Kotka, Finland, nestled between the metropolitan areas of Helsinki and St Petersburg. Playa aims to support the development of the local game industry through a common brand, shared marketing activities, a common development and demo studio "LevelUp" with shared tools and resources. Playa organises and supports business development activities and attendance in trade fairs and other global game industry events.</p> <p>Playa deals with private and public financing and business services to game industry start-ups. Playa is currently developing a service portfolio with an objective to provide world leading business incubation within the game industry. Playa is funded through a number of public financiers and industry development programmes and actively supported by local game developers.</p> <p>Website: <a href="https://www.visitkotkahamina.fi/en/playahub">https://www.visitkotkahamina.fi/en/playahub</a></p>	Regional ecosystem development	Yes



Country	Name	City	Start	Description	Category	Public Funding
	Oulu Game LAB	Oulu	2012	<p>Oulu Game LAB is an interdisciplinary education programme, tailored to meet the needs and requirements of the modern, fast-moving game industry. Besides assisting in the development of specialised skills required for the game building field, Oulu Game LAB also supports the recycling of talents from companies like Nokia and Microsoft, in effort to decrease the unemployment rates in the area through the creation of new jobs and opportunities. The global gaming industry has expanded rapidly to become one of the world's leading industries in the creative field of media, arts, and culture. The game industry has also experienced a significant upward trend in Finland and Oulu Game LAB works to support this growth by producing new game industry jobs, companies and professionals in the Oulu region.</p> <p>Website: <a href="http://www.oulugamelab.net/">http://www.oulugamelab.net/</a></p>	Students and Alumni Support	Yes
	Turku Game Hub	Turku	2016	<p>Turku Game Hub (the Hive) is a shared space for start-ups and established gaming companies in South-West Finland with headquarters in Turku. We are located in Kupittaa area, part of Turku where major IT and business development take place. Through our network and partnerships with Finnish and international experts from game industry, we offer solutions and necessary tools for game development teams to grow their business according to their specific strategies. For professional growth we are offering workshops and coaching sessions (classes, workshops, seminars with focus on: game development business and marketing; programming: Unity and Unreal Engine; use of VR and AR technologies; teaching 2D and 3D graphics and animations) that can benefit both hobbyists and professional developers. These workshops and coaching are done by visiting scholars, business experts and veterans of the gaming industry.</p> <p>Website: <a href="http://turkugamehub.com/">http://turkugamehub.com/</a></p>	Regional ecosystem development	Yes
	Farm League/ Live Game Intelligence Network (LGIN)	Helsinki	2017	<p>Farm League in Helsinki, Finland is a game specific incubator concentrating on early stage companies. It is a community centered incubator with a heavy emphasis on mentoring and peer support, with an offering of regular workshops, team coaching and networking events. It was originally run as a collaboration between Metropolia University of Applied Sciences and Games Factory business hub as a part of the BGI project. In 2019 they rebranded as the Living Game Intelligence Network, LGIN - a more open-ended mentoring and support network for game start-ups. In the new programme they provide a long-term mentorship partnership with early stage studios from Finland. Their goal is to help young game companies take flight faster and less painfully.</p> <p>Website: <a href="https://lgin.fi/">https://lgin.fi/</a></p>	Regional ecosystem development	Yes
	Nordic XR Startups	Helsinki	2017	<p>Nordic XR Startups is a pre-seed/seed investor and VR/AR accelerator based in Helsinki, Finland. Their mission is to contribute to and improve the competitiveness of the Nordic VR / AR ecosystem and accelerate the growth of our investment portfolio companies. It is a 6-month programme with an investment of up to €100,000 per company.</p> <p>Website: <a href="http://nordicxrstartups.com/">http://nordicxrstartups.com/</a></p>	Regional ecosystem development /Investment prospecting	Yes

Country	Name	City	Start	Description	Category	Public Funding
	Tampere Games Hub	Tampere	2019	<p>Tampere Game Hub is all about promoting and cultivating the game development scene in Tampere. Any game development team and company working actively in the Pirkanmaa region can join. The goal of the organization is to unify the Tampere game development scene. The board members of Tampere Game Hub consist of game industry professionals as well as representatives from the educational and business sectors of Tampere. They run a yearly Finnish Game Incubator programme together with the city of Tampere and Business Tampere in a ten-week business coaching plan.</p> <p>Website: <a href="https://www.tampere.games/">https://www.tampere.games/</a></p>	Regional ecosystem development	Yes
Germany	DE:HIVE	Berlin	2017	<p>The DE:HIVE at HTW Berlin combines research, teaching and entrepreneurship in a 2000 square meters game HUB at the university. Researchers, founders, teachers, and a total of over 180 students dedicate themselves to the topic of games and their social and artistic perspectives in the Connected Spaces. DE:HIVE is a center for games, art and technology and integrates the study programs Game Design and System Design for Games. The focus of DE:HIVE is on the expanded and in-depth mediation, research and application of interdisciplinary, artistic and design-oriented method sets for the drafting, for the creation and for the technical realization of games, play systems, rules, toys and related interactive systems, as well The transfer of game principles to other areas such as the control of processes, education, entertainment, health, etc. In addition to system thinking, these method collections also include game thinking, which is a transdisciplinary approach for analysis and optimizing processing of decision-making and problem-solving processes. DE:HIVE has implemented a pilot incubator programme in 2020.</p> <p>Website: <a href="http://gamedesign.htw-berlin.de/dehive/">http://gamedesign.htw-berlin.de/dehive/</a></p>	Students and Alumni Support	Yes
	Cologne Game Incubator	Cologne	2018	<p>The Cologne Game Incubator (short: CGI) primarily supports the development of game ideas into marketable products, providing its students and alumni with the opportunity to leverage their training and knowledge generated at CGL into professional and commercial success. Run by the Institute for Game Development and Research into the Technology Arts Sciences TH Köln. The CGI was established by the Cologne Game Lab and the Förderverein "Friends of the Cologne Game Lab" e.V. and is heavily supported by the KölnBusiness Wirtschaftsförderung (Cologne Business Development Fund) GmbH.</p> <p>Website: <a href="https://colognegamelab.de/about/cgl-game-farm-business-incubator/">https://colognegamelab.de/about/cgl-game-farm-business-incubator/</a></p>	Students and Alumni Support	Yes

Country	Name	City	Start	Description	Category	Public Funding
	SpielFabrique	Düsseldorf	2016	<p>SpielFabrique is an accelerator program for start-ups and young entrepreneurs in the games market – the first institution of that kind in Germany. This programme puts the focus on a comprehensive mentoring offer and network of companies, gaming experts, financiers, and programme partners, such as Microsoft and ARTE France. Subject to a sponsorship are game concepts and prototypes with a strong cultural and commercial potential. Their support starts with the game development and includes financing and marketing. The selected teams benefit from one-on-one online coachings and hands-on business workshops. The program approach is based on Franco-German cooperation. The Institut Français, the French Embassy, and the French and German Creative Europe Desks are SpielFabrique supporters from the start. The program is under the patronage of Delphine Gény-Stephann, State Secretary to the French Minister of Economy and Finance. Other partners joined since then, including the region of Nouvelle Aquitaine, Pictanovo, the German video game industry association and SNJV. The coaching platform is supported by the Film- und Medienstiftung NRW.</p> <p>Website: <a href="http://spielfabrique.eu/">http://spielfabrique.eu/</a></p>	Regional ecosystem development /Investment Prospecting	Yes
Lithuania	GamesPOT Kaunas	Kaunas	2019	<p>Provide access to the know-how data that helps to run a business, connect participants with experts of the game industry, and provides the game companies with new insights. The workshops had been designed for the game developers. The workshops focus on a specific theme, including Marketing, Team Management, Strategy, Design tendencies, Financing and Pitching. Held in partnership with Kaunas University of Technology and Vytautas Magnus University.</p> <p>Website: <a href="http://kaunomtp.lt/gamespotkaunas">http://kaunomtp.lt/gamespotkaunas</a></p>	Regional ecosystem development /Students and Alumni Support	Yes
Latvia	VHTP GameDev Incubator	Ventspils	2018	<p>VHTP GameDev Incubator has been operating as part of the Ventspils High Technology Park Business Support Centre since 2018. Designed to promote and develop high-potential ICT and game development start-ups, the GameDev Incubator provides various free-of-charge support tools, like co-working spaces, on-demand coaching, workshops, meetups, events, as well as opportunities to receive money grants to support the realisation of business ideas. Through the cooperation with Ventspils University of Applied Sciences the incubator received its first inflow of student game development teams in 2020, while its ties with the Latvian Game Developers Association (LGDA) allow the incubator to operate both in Ventspils and Riga, thus increasing its coverage and improving recognition of the game development industry in Latvia.</p> <p>Website: <a href="http://vatp.lv/bgi-gamedev-incubation-pilot-recap">http://vatp.lv/bgi-gamedev-incubation-pilot-recap</a></p>	Students and Alumni Support	Yes

Country	Name	City	Start	Description	Category	Public Funding
Poland	ARP Games	Ciezyń	2016	ARP Games is a video games accelerator operating under Polish Industrial Development Agency. The main objective of ARP Games is to support the development of the video game industry in Poland. The support includes financial and organisational help, as well as developing professional skills for future and current game designers. The main element of the support offered is the possibility of receiving the help of the accelerator in the production of an original idea of the game by individuals without access to the necessary financial, organizational and personnel resources. The intended effect of the acceleration programme is the creation of new companies equipped with all the essential tools, financing and, most importantly, mentoring. Depending on the needs of the teams, support may also include help in promoting and acquiring more funding for the project. ARP Games also supports events that promote the Polish video game industry. Website: <a href="https://arpgames.pl/en/home/">https://arpgames.pl/en/home/</a>	Regional ecosystem development	Yes
	Digital Dragons Incubator	Krakow	2019	Digital Dragons Incubator has been created as one of the existing tools in the game industry support ecosystem in Krakow Technology Park, where we already had different tools for events. One of them is a conference – Digital Dragons – where we also invited the participants of test incubation. The other ones are e.g. KrakJam – a regional edition of Global Game Jam, the biggest one in the country. KTP is also the organizer of Digital Dragons Academy – a series of lectures once a month where specialists talk about different aspects of creating games. They carried two batches of incubation. The first one started in October 2018 and finished in February 2019 focused on mobile game industry and the second one started off in November 2019 designed for PC and console game industry. Website: <a href="https://www.kpt.krakow.pl/en/startups/inkubator-digital-dragons/">https://www.kpt.krakow.pl/en/startups/inkubator-digital-dragons/</a>	Students and Alumni Support	Yes
Sweden	The Game Incubator / Swede Game Arena	Skövde Gotembör g	2004	Founded in 2004, The Game Incubator (TGI) is one of the first game incubators ever established, and in its 15th year still going strong as a 100 % publicly funded non-profit organisation with the sole task of helping create game start-ups and expand the game industry in Sweden. Through a proven and custom-made programme, TGI incubates game entrepreneurs and their teams, equipping them with the skills needed to run a game studio and launch their first products on the global market. TGI is mainly funded by Skövde Municipality and the Västra Götaland region and participates in the Game Hub Scandinavia Interreg project. The incubator is part of the Skövde Science Park, and collaborates closely with the University of Skövde, from where a substantial number of start-ups have been recruited. Their collaboration expresses itself in the cluster called “Swedish Game Arena”. In its lifetime, TGI has helped more than 100 game start-ups – including Coffee Stain Studios, Stunlock Studios, Landfall Games, Pieces Interactive and the latest global success Flamebait Games - and created more than 500 new jobs in the process.	Students and Alumni Support / Regional ecosystem development	Yes

Country	Name	City	Start	Description	Category	Public Funding
	Arctic Game Lab	Skellefteå	2014	<p>Arctic game lab is an organisation with the objective to create and nurture a strategic platform for the gaming industry in northern Sweden. The focus of the Arctic Game Lab is to support, and be a part of the creation, of a stable game industry platform in the north of Sweden. Since 2016, a regional investment in the game industry – funded by the municipalities of Umeå, Skellefteå, Piteå, Luleå and Boden – has been underway in northern Sweden. Skellefteå Science City is tasked with driving this initiative, with financial support from the municipalities, local regions and the EU project, Innovation Game 2.0. Innovation Game 2.0 started in the summer of 2019. The project goal is to strengthen the gaming industry in the region by contributing to a more diverse and inclusive labor market.</p> <p>Website: <a href="http://arcticgamelab.com/">http://arcticgamelab.com/</a></p>	Regional ecosystem development	Yes
	Stugan	Vessmans torp	2015	<p>Stugan is a non-profit accelerator for games, created by seasoned game developers with the intention to build a platform where new talent can bloom. The word Stugan means “the cabin” in Swedish and is also a throwback to the name of the first Swedish commercial computer game made in 1978. Stugan leverages the expertise of the established Swedish game industry and aims to provide opportunities for shepherding up-and-coming game designers and developers through development, publishing, marketing and more for ensuring a successful games launch. They initiated this project to give back to the grass roots of the industry and enable more people to discover the joy of game development.</p> <p>Website: <a href="http://www.stugan.com/">http://www.stugan.com/</a></p>	Regional ecosystem development	No
	Sting	Stockholm	2017	<p>Sting Game is the games division of the Stockholm Innovation and Growth incubator. Sting started in 2002 and has supported over 300 start-ups. The games chapter started in 2017. In the fall of 2016, Sting completed a pre-incubator program Sting Test Drive Game, where 10 projects and start-ups participated. Based on the positive experience and feedback, Sting will now start a full-scale incubator. Sting game works with personal coaches who have backgrounds as entrepreneurs in games. The chapter has a focus on both entertainment games and professional applications of games, as well as technologies and tools for game development. Sting is owned by a public-private foundation, the Electrum Foundation. The Electrum Foundation Board consists of representatives from the business sector (Ericsson, IBM, and real estate owners), academia (KTH, Stockholm University and Swedish ICT) and the public sector (the City of Stockholm, Stockholm County Council and County Administrative Board). Sting’s activities are financed with public funds, from Electrum and our main partners Vinnova, KTH, Stockholm County Council and Stockholm Region; and with private funding from partners, as well as through self-funding. Being a non-profit organisation, all proceeds go straight back to the programmes to help new start-ups become successful. It is a way for each participating company to “pay it forward”</p> <p>Website: <a href="https://sting.co/">https://sting.co/</a></p>	Investment prospecting/ Regional ecosystem development	Yes

Country	Name	City	Start	Description	Category	Public Funding
	East Sweden Game	Linköping	2017	<p>East Sweden Game is a community, workplace, and business incubator for developers of computer games and digital experiences. East Sweden Game is financed and operated by the city owned real estate company Sankt Kors, as an investment into the future. The goal is to establish and grow the game industry in the region to create exciting new jobs and economic growth. ESG Accelerator offer a six-month programme where experts from the gaming industry share knowledge and experience together with East Sweden Games staff. The first round occurred in 2018 and the second started in February of 2019.</p> <p>Website: <a href="https://eastswedengame.se/">https://eastswedengame.se/</a></p>	Regional ecosystem development	Yes
	Game Habitat	Malmö	2018	<p>Game Habitat is a community-focused non-profit organisation based in Malmö. They help create, nurture, and grow a thriving, supportive, and inclusive ecosystem for game development in southern Sweden. Their vision is for southern Sweden to be and be known as the best possible environment for everything and everyone related to game development. They enable companies, organisations, individuals, and the academic and public sectors to achieve their game development dreams and ambitions by eliminating obstacles, attracting opportunities, and supporting a world-class game development community. They run a Game Accelerate South Sweden, or GASS for short, a three-year project funded through the European Regional Development Fund. The goal is to establish sustainable methods and processes that can enable more game studios to start up and establish themselves in southern Sweden. The project is a collaboration between Game Habitat, BBI, Minc, Ideon and BTH.</p>	Regional ecosystem development	Yes

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## THE PROJECT

The project 'Baltic Game Industry' (BGI) aims to foster the game industry in the Baltic Sea region - turning an ambitious game developer scene into a competitive and attractive business sector with sound innovation potential and thus making the region a game hotspot with worldwide competitiveness.

The partnership works together on framework condition improvements, on making business support services fit for the special needs of game start-ups and finally on new business opportunities for game developers in other industry sectors, such as health care. The core element is the installation of durable game incubators, programmemes and schemes for game start-ups across the region.

BGI effectively combines policy and business development. Tailor-made game business support fosters a durable economic growth of this innovative industry in the whole region. The introduction of VR technologies in non-game industries contributes to boosting innovation beyond games. The common branding of the Baltic Sea region as game innovation hotspot will attract international clients, investors, creative entrepreneurs and qualified workforce.

Read more at [www.baltic-games.eu](http://www.baltic-games.eu)

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- Germany: Hamburg Institute of International Economics, HTW Berlin University of Applied Sciences, State of Berlin, University Medical Center Hamburg-Eppendorf
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