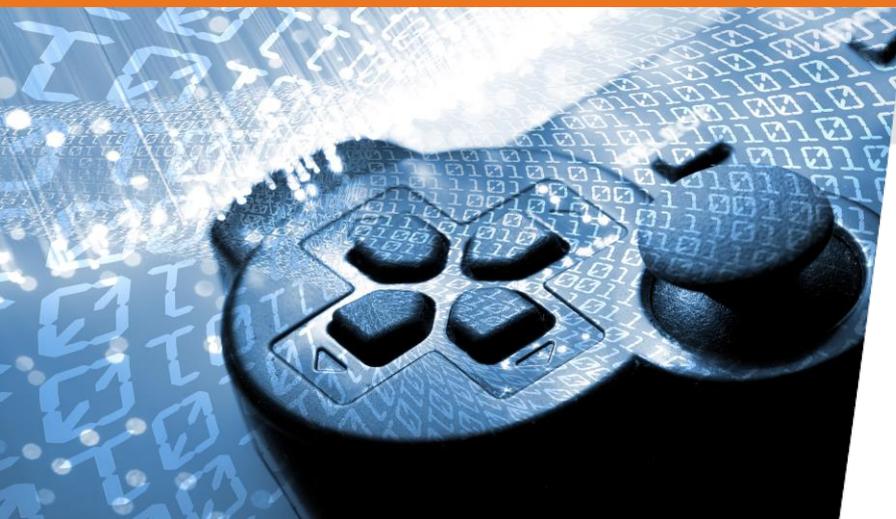




Manual on International Cooperation for BSR-Wide Game Business Development

Output 3.5 of the BGI project



EUROPEAN REGIONAL DEVELOPMENT FUND

The manual summarises all the findings, lessons learnt and conclusions from the work on internationalisation, ideas for cooperation and recommendations to the different actors in game business.

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Executive Summary

The project “Baltic Game Industry” (BGI)¹ aims towards boosting the game industry in the Baltic Sea region (BSR), increasing the capacity for innovation and transforming the regional game industry into a global player with worldwide competitiveness. Joining public and industry perspectives together, the project focussed on improving the external framework conditions for the industry and fostering talent growth from within through game incubation strategies.

By definition² a business incubator is a facility established to nurture young (startup) companies during their early months or years. It often includes providing affordable space, shared offices and services, hand-on management training, marketing support and access to some form of financing. Frequently, this entails or requires a network for the ecosystem, i.e. for the education sector, for industry facilitators, services, experts, consultants, media, established companies, etc.

A core element of the project was a pilot investigation into the value and utilisation of international co-operation for game business development within the BSR. This manual summarises the findings, lessons learnt, conclusions and recommendations that the project partners gathered as part of the project pilot. International aspects in game incubation are the focus of the first part of the manual, while the second part focuses on international co-operation of game incubators.

Fundamentally, it is crucial to understand what the term “international aspects in game incubation” means and constitutes for the practical realisation of game incubation. On the one hand, as a structural issue, an incubator might want to cater to international teams. Most incubators in the BSR for example, tend to cater to game developers from the region the incubator is based in. Catering to teams beyond national borders is an issue that entails aspects of language, funding, as well as for example visa permits. On the other hand, as a content issue, it could be desired to make the incubation programme itself an international one. For that, challenges of competitiveness in international markets need to be considered, as well as international environments for startups in the incubator.

¹ Baltic Game Industry (BGI): <http://baltic-games.eu>.

² BusinessDictionary “business incubator”: <http://www.businessdictionary.com/definition/business-incubator.html>.

International co-operation of game incubators can be approached from a variety of different angles. For the purpose of the pilot investigation, the following approaches were considered to be central and are therefore part of this manual. These approaches are a “common network”, a “common identity”, a “common knowledge base” and “collaborative ecosystem activities”. All these approaches have been extensively investigated during pilot three of the BGI project and the resulting case studies are a reflection on the above-mentioned approaches. Based on the investigation into these different approaches, into their advantages and disadvantages, a common network has been identified as a most potent driving force for other practices of international collaboration in game incubation.

As it can offer a foundation for the other above-mentioned practices, the case for a game incubation network is the starting point for the pilot’s insights. The “Baltic Sea Game Incubation Network”, initiated during BGI, provides valuable learnings for the future.

Creating a common identity, as a key approach to international co-operation in game incubation is the topic of the next chapter. After explaining the basics, this manual can prove to be especially useful by referencing the “Baltic Sea Games” branding initiated during BGI, as well as the “Baltic Sea Games Award” that was realised during the BGI project. Furthermore, joint event booths are examined as means for brand promotion and collaboration.

The creation of a common knowledge base has been identified as another key approach. Insights of the BGI project show that knowledge exchange is often one of the central demands, especially in the context of a network.

Collaborative ecosystem activities are most important for strengthening the incubation ecosystem. This is a key finding of BGI and can be shown for a range of activities, small and large in scale, that can be carried out by different entities.

Finally, this manual aims to provide practical and viable recommendations for supporting the internationalisation of regional game business in the BSR. Overall approaches as well as concrete actions within the context of international co-operation can be used to tackle the challenge of developing the BSR into a game business hotspot.

1. International Aspects in Game Incubation

The game market ranks amongst the fastest growing global mainstream markets with sales revenues increasing substantially every year. On the world ranking list for consumer spending on games, China is taking the lead, not too far behind are the United States, third is Japan. The others of the top ten are currently South Korea, Germany, United Kingdom, France, Canada, Spain and Italy.

While countries with extremely large populations such as China may focus on their home market, European countries - with few exceptions - have negligible home markets, and therefore need to orient themselves towards the global market. However, this offers an opportunity, as this encourages young talents to “think globally” right from the start, when creating their games. On the other hand, it means that game incubation needs to meet the challenge of preparing young game developers or companies for the global market and therefore game incubation tuition needs to target internationalisation of the game developers’ creative and entrepreneurial skills.

Although incubators we have interviewed as part of BGI tend to assert that their training is intrinsically international, it is worthwhile to reflect on the implications of “international game incubation” as a “standardised” approach.

Basically, this could encompass a series of possible approaches, such as

- catering to teams, coaches and mentors from abroad, or mixed teams from the incubator’s region,
- offering programmes on topics such as international law, market conditions, culturalisation³, IP and localisation,
- introducing the teams to international audiences at e.g. conferences, jams, award contests and pitching events.

³ Pioneered by Kate Edwards (see Geogrify: <http://www.geogrify.com/about/>).

a) Catering to International Teams

Incubators more commonly harbour regional or national teams. The two main reasons for this are:

- that incubators with programmes spanning over one or more years and offering workspace on their premises, entail living in the vicinity of the incubator
- that incubators are often part of a larger framework (university, tech & science park, cluster or co-working facilities) and depend on their regulations, which often include European or national/regional funding schemes dedicated and limited to European or national startup teams

Though most incubators assert that they would gladly include international teams, catering to international teams, in particular from outside Europe, might involve challenges that would require more resources than most incubators have available at this point in time. The most obvious challenges are:

- English as common language: in the incubator's presentation (e.g. website), application (forms/communication), programme (tuition and mentoring), and for communication between the teams themselves
- support with visa permits
- eligibility of public funding for the incubator

The easiest way for an incubator to cater to international teams is to have mixed teams, i.e. regional teams with international team members who already have settled in the region (and thus are, if needed, already equipped with a visa permit). Where public support is involved, this would also solve the matter of eligibility of those funds, as they would be registered in the country as resident.

For an incubator intent on attracting more international teams in order to create a truly international work environment for regional teams, they will need to invest extra resources to widely communicate their brand and programme across borders, and support non-European teams entering their country.

However, some incubators are ready to invest these extra resources, as they are interested in widening their scope of "clients" and related sources of income. In this case, a physical presence by the teams would not necessarily be a requirement for joining the incubation programme. Thus, the challenge here will be to find suitable ways of remote tuition.

To cater either to international teams or to make use of international experts remotely, a set of proven online tools needs to be part of the incubation "fabric". This will also require careful

conceptualisation of online tuition to ensure active participation, which is more difficult online than face to face. The incubation staff will need to do some in-depth investigation into existing practices of such online tuition and assess them for their value for the game development business.

Whether it is remote or physical training, English will have to be the basic language for tuition and mentoring. This might pose a major challenge as there is already a significant shortage of competent game experts inclined to take on the role of coach or mentor, let alone being fluent in English on top of that.

Of the incubators in the BGI project, only three incubators asserted the use of English as their common work language, but almost all others claimed that they could easily switch to English if required.

b) International Incubation Programme

For the programme itself to be international, incubators are looking at

- topics that deal with specific challenges for a regional team to master in order to be competitive on the international market
- international environments to send their startups to

Topics of International Relevance

The gaming industry is growing fast with a high potential of reaching 300B USD by 2025⁴. Ongoing globalisation and digitalisation provide endless opportunities and bring markets closer together and at the same time intensify competition in all fields of business. The effect can be explicitly seen in the games industry with all the main marketplaces internationally and easily approachable for early stage startups, allowing creators to access consumers directly on international platforms: e.g. Steam store for PC games, Android Google Play Store and Apple App Store for mobile games, Sony PlayStation and Microsoft Xbox stores for console games, etc.

Game Incubators have to cover a broad range of topics during their courses and workshops. While most of the technical issues are the same around the globe, other topics require a deliberate international orientation for the success of the startups and hence the incubator. Some of these concern the design of the game as such and others marketing and publishing.

⁴ Lanier, Liz “Video Games Could be a \$300 Billion Industry by 2025 (Report)” *Variety* 2019: <https://variety.com/2019/gaming/news/video-games-300-billion-industry-2025-report-1203202672/>

Deciding the road to market is one of the key challenges for game developers. There is a wide range of critical issues on the way: e.g. how to maximise marketing efforts, decide pricing for games, negotiate publisher cuts, how to get the game featured on the front pages of typical publishing platforms, etc. With the high potential and easy approachability of the platforms, the main challenge game developers are facing are related to generating visibility and brand recognition towards consumers.

In order to provide valuable support, incubators working with game developers need to constantly update their knowledge about current trends, tools and opportunities. International co-operation is key, as this provides access to an external pool of experts. Staying up to date is a resource-heavy task as it involves travelling to partners and events. Sustainable business models (e.g. accelerator programmes reinvesting profits into future programmes), successful game developers (e.g. alumni) and/or public funding support from regional or international sources is required to be able to stay up to date.

Furthermore, often specific types of games or technology involve distinct topics for coaching that require special knowledge for which an incubator might need to invite experts as consultants or tutors, for e.g. localisation. Localisation of games during or after the development is a common strategy to adapt games to specific national markets. Localisation services offering this specialised skill are part of the game ecosystem. However, in particular startups or small studios might not be able to finance professional localisation services for their project. Hence, in order to create a game which succeeds in many countries and regions, it might be useful to develop a game that caters to several cultures/markets in the first place. Internationally oriented incubation will sensitise their startups to be aware of issues pertaining to select or succeed in potential markets, such as:

- maturity of specific mobile game sectors,
- mobile game penetration by category,
- types of devices,
- demographics,
- gamer behaviours (UX),
- credit card penetration,
- in-app purchases,
- publishing regulations,
- legal launching permissions,
- user interface or graphics regulations (what images can be shown),

- Target market partner search,
- co-production opportunities.

All these characteristics can be helpful in identifying potential target audiences and in configuring a monetisation strategy. It would be helpful for startups to avoid mistakes made by other companies. Experienced staff might provide an analysis of failures and successes of similar game projects or the incubator might seek opportunities to get in touch with other companies of a specific market to obtain vital information from them regarding a target market. Or an incubator might help with a soft launch⁵ in that market through contacts in the respective ecosystems of this market, e.g. game usability experts and user acquisition agencies. All of which ties in with the importance laid on a sound and wide-ranging network as delineated later in this document.

Due to ongoing globalisation, media and culture align more and more these days. Trends from Asia or the US often also influence European gaming. Importantly, there also might be some differing legal requirements which are already relevant to consider during the game design phase, e.g. policies regarding the depiction of violence (especially blood), profanity, racist or sexual contents. Incubators need to keep abreast not only with new technologies, but also new insights such as “culturalisation”, strongly promoted by experts such as Kate Edwards, as culturalisation is transcending the parameters of localisation.

“[...] the process of culturalization in which the game’s assumptions and choices are assessed against the complex cultural landscape of local markets, including primary factors such as history, religion, ethnicity and geopolitics. By considering these deeper level aspects, game content can be better adapted to avoid the potential for negative backlash and to augment games with more locally-relevant content.”⁶

The question of different markets is not only a cultural one. Regarding publishing and marketing, topics of international relevance might vary depending on the chosen publishing strategy. Publishing on international platforms like Steam usually does not require specific strategies for different markets besides fulfilling potential legal requirements of the chosen regions. Countries with strict regulations like China do not approve of Steam and are currently attempting to curtail the free access

⁵ Typically 5,000 to 10,000 users - and a maximum time frame expected for a launch, which is usually 3 - 4 weeks.

⁶ Edwards, Kate “Beyond Localization: An Overview of Game Culturalization” in “Fun for All. Translation and Accessibility Practices in Video Games”, edited by Mangiron, Carmen; Orero, Pilar; O’Hagan, Minako; Lang, Peter. Bern 2014 and <https://www.youtube.com/watch?v=CDzKyIYhzZA>.

to it through a “China Steam” version.⁷ These new developments are the kind of up-to-date knowledge incubation staff needs to acquire or invite experts for, as such a change would alter the landscape of marketing in China through Steam and possibly become a new topic in the incubation marketing courses.

With regards to marketing games, social media content in English will have a wide reach to many different countries. Only under certain conditions (e.g. games for young children) or for markets with very different cultures and requirements, it might make sense to produce region-specific advertisements and localise the game manual, game packaging, user interface, written dialogues or subtitles, annotations and in-game notes, spoken dialogues, graphics and words, sensitive images, animations, gifs or videos.

International Environments

Game jams, hackathons and bootcamps are currently often used to gather the community of game developers, boost co-operation, generate and test new ideas, find team members and develop new skills. In addition to countless small-scale local jams, there are large-scale events targeting developers across the world, e.g. international game jam communities:

- Ludum Dare⁸ - international game jam community hosting international events
- Global Game Jam⁹ - world's largest game creation event taking place around the world at physical locations

But there are also public international pitching competitions:

- Big Indie competition¹⁰
- Nordic Game Discovery Contest¹¹

⁷ Messner, Steven “Many Chinese developers are worried about Steam’s upcoming Chinese-only version” PCGamer 2020: <https://www.pcgamer.com/many-chinese-developers-are-worried-about-steams-upcoming-chinese-only-version/>.

⁸ Ludum Dare: <http://ldjam.com/>.

⁹ Global Game Jam: <https://globalgamejam.org/>.

¹⁰ Big Indie Pitch 2019: <https://www.bigindiepitch.com/event/the-big-indie-pitch-at-gdc-2019/>.

¹¹ Nordic Game Discovery Contest: <https://discovery-contest.nordicgame.com/>.

To encourage the formation of new cross-border startups with game developers from different countries, the project Game Camps¹² was initiated with partners from Finland, Sweden, Estonia and Latvia. It received funding from the Interreg Central Baltic Program for 2017-2020 to run a series of hackathons/bootcamps, where entrepreneurial game developers from different countries could come together, form new teams and learn from each other as well as from experienced mentors about the business. As a direct result, more than 250 game enthusiasts were involved, and four new startups were founded directly influenced by the project's efforts with several more teams still working on their games and aiming at starting a new business. Additionally, more than 15 existing startups were supported during the project with mentoring at several events and acceleration programmes, but also with travel support, attendance and visibility activities at game industry trade shows.

The game developer community is regularly gathering at large B2B and B2C events (see Annex I). This provides participants an excellent opportunity to showcase their new games, check the newest technologies, trends and hotspots, meet with service providers, pitch to mentors, investors and publishers. Most of the events also regularly open calls for awarding the newest games. There are hundreds of events, but the largest community events to mention are:

- Electronic Entertainment Expo (E3) in Los Angeles¹³
- Penny Arcade Expo (PAX) held in different locations across USA and Australia¹⁴
- Tokyo Game Show in Japan¹⁵
- Gamescom in Cologne, Germany¹⁶
- Game Developers Conference (GDC) in San Francisco, USA¹⁷
- Casual Connect in Los Angeles and London (now GameDaily Connect)¹⁸

Participating such events provides the opportunity to access:

- new knowledge and skills, as there is a wide range of peers, experts and mentors available for exchange of information

¹² Game Camps: <https://gamecamps.info>.

¹³ E3: <https://www.e3expo.com/>.

¹⁴ PAX: <https://www.paxsite.com/>.

¹⁵ Tokyo Game Show: <https://expo.nikkeibp.co.jp/tgs/2020/>.

¹⁶ Gamescom: <https://www.gamescom.global/>.

¹⁷ Game Developers Conference (GDC): <https://www.gdconf.com/>.

¹⁸ Casual Connect (now GameDaily Connect): <https://connect.gamedaily.biz/>.

- new people - finding team members and development/marketing/publishing partners
- new tools - usually all the latest software and hardware is presented at these events
- feedback on prototypes from other developers as well as end-users
- investors and publishers - usually there are specific tracks to pitch the game ideas to early stage investors and publishers at these events
- media coverage/PR
- other collaboration opportunities (e.g. developing and sub-contracting partnerships)

For all these reasons, incubators are generally encouraging their teams to participate in large events as described above. As with keeping up to date of trends for the incubator staff, attending such events requires financial resources. In most cases, the incubator cannot provide this, but will help the teams source the money, through e.g. public funding schemes.

An outstanding example for incubation environments is Stugan¹⁹ created in 2015 by a group of seasoned developers from Sweden and offering a 2-month accelerator programme focusing on attracting small startup teams to work in a camp outside cities with 20 other developers, sharing cabins and living space. This offers participants an especially focused way of developing their game ideas while learning from and sharing with other developers that have different levels and types of experience. Although established to support the Swedish game community, there is an increasing interest from game developers all over Europe, reflecting the increased demand for this type of learning and working environment.

¹⁹ Stugan: <http://www.stugan.com/>.

2. International Co-Operation in Game Incubation

Incubators often act as intermediaries between various industry stakeholders, and therefore are regularly partnering up with international or internationally savvy partners. These international collaborations are a major asset of an incubator to secure the international impact of their programme. Involving game experts as mentors and investors provides an additional internationalisation perspective to the “regular” tuition of startups on international topics.

A recent study from Roland Berger²⁰ emphasises that internationalisation is one of the key aspects which help incubators and accelerators to become successful and survive. The internationalisation of game incubators encompasses almost all fields of activity of an incubator. A survey conducted amongst the BGI partners’ incubators²¹ explores which concepts they currently pursue in order to “be international”.

In the following, we will discuss several approaches to international co-operation, starting with forming a network which can (but is not mandatory to) support the other approaches:

- common network
- common identity
- common knowledge base
- collaborative ecosystem activities

Each of these approaches have been investigated during the Pilot 3 of the BGI project and the resulting case studies are a reflection on the above-mentioned approaches.

Naturally, each of these aspects have value on their own and are not necessarily interdependent. However, an active and strong network would be a potent driver and offer a compelling foundation for the other practices of international collaboration.

²⁰ Roland Berger “How accelerators and incubators can reinvent themselves” 2019:
<https://www.rolandberger.com/fr/Publications/How-accelerators-and-incubators-can-reinvent-themselves.html>.

²¹ Baltic Game Industry Incubation Program Tartu Science Park, Digital Dragons Incubator (Krakow Technology Park), Farm League - Games Factory (Helsinki), Game Hub Denmark, GamesPot Kaunas (Kaunas Science and Technology Park), STING game incubator, Ventspils High Technology Park GameDev Incubator.

a) Making a Case for a Game Incubation Network

Networking is an essential part of running a successful business these days. Next to networking with potential clients, investors, employees or experts, it can be helpful to connect with other incubators. A regular exchange with people who run a similar business is beneficial in many ways. However, this can be difficult as incubators, in particular those focussing on the game industry, are still rather rare. That is why it might make sense to organise a dedicated game incubation network rather than relying on opportunistic co-operation based on chance meetings e.g. at gaming events, or fixed-term collaborations in funded projects.

Dedicated incubation networks in general seem still rather uncommon²² and not surprisingly, there is no effective game incubation network in place in the BSR or Europe. In 2014 GameFounders²³, a game developer acceleration programme originally located in Estonia (meanwhile they've moved to Malaysia), had launched the "Game Initiative"²⁴ with the intent to form some kind of game incubation network: "an unofficial grouping of organisations that support the development of young game studios". They also carried out a survey, producing an interesting "White paper"²⁵. Unfortunately, the initiative was aborted after the second annual meeting in 2015.

The conception of an incubation network can vary considerably depending on its concrete purpose. These types of networks might range from rather loose connections to more formal networks which are managed professionally. Depending on the approach chosen, benefits and obligations for its members differ as well. More institutionalised networks might involve e.g. significant member fees. The purpose and the geographical scope might range from regional or national to global networks. As the game industry relies on international markets and dedicated game incubators are rather scarce, a wider geographical scope would be more beneficial for a game incubation network.

A second aspect with regards to scope of such a network is the question of which kinds of institutions should be included: only specialised game incubators or also more general incubators, or game

²² Europe has an overall business network which works as an umbrella network also for incubator in general: <https://ebn.eu/>. EBN is a network of around 140 quality-certified EU|BICs (business and innovation centres, incubators, accelerators and other support organisations).

²³ GameFounders: <http://www.gamefounders.com/>.

²⁴ Game Initiative: <http://gameinitiative.gamefounders.com/>.

²⁵ Game Initiative "White Paper" GameFounders 2014: http://gameinitiative.gamefounders.com/wp-content/uploads/2014/09/Game-Initiative_summary.pdf.

"accelerators", dedicated co-working spaces such as Game Habitat (SE)²⁶ or programmes without fixed work places, e.g. SpielFabrique (DE/FR)²⁷? Publicly financed or privately financed ones or both? Should other members of the ecosystem, such as game education institutions like e.g. universities or schools²⁸, or game experts or investors be invited to become members or not? Again, the ideal composition of the network is determined by its primary goals. Too large and heterogeneous, a network might be harder to manage and coordinate, but if members are too similar, the benefits of knowledge transfer and capacity building might be limited.

Next to the structures of networks, also their tools differ according to the intent. Usually, one key aim of each network is that its members should benefit from the accumulated knowledge and experiences. Therefore, incubation networks might use common instruments like regular (online) conferences, events, workshops, newsletters, web presences and social media in order to foster regular exchange between its members and inform about each other's activities. Hence, the content should mainly be delivered by the network's members, e.g. a series of presentations of each incubator in general or sharing experiences on specific topics (e.g. startup selection). Next to the exchange of knowledge and best practices, networks might have several other benefits as well. They might enhance co-operation between incubators e.g. sharing or exchanging experts and mentors. Also, members might share contacts, e.g. for recruiting employees or gaining potential clients and investors.

Besides generating expertise regarding the management staff of incubators, incubation networks might also include activities that directly address the incubators' startups, e.g. a startup exchange programme between game incubators across borders. Currently, attempts in this direction have been initiated through the Erasmus Young Entrepreneurs programme²⁹, though this targets startups from all industries. Benefits of such a programme include the improvement of language skills, insights into the workings and learnings of another incubator, as well as insights into country-specific market characteristics. Startups can also get inspiration from working with companies from another cultural heritage background³⁰ or a more mature game industry.

²⁶ Game Habitat: <https://www.gamehabitat.se/>.

²⁷ SpielFabrique: <http://spielfabrique.eu/en/home-2/>.

²⁸ PlaygroundSquad: <https://www.playgroundsquad.com/>.

²⁹ Erasmus for Young Entrepreneurs: <https://www.erasmus-entrepreneurs.eu/>.

³⁰ E.g. France has an important comic book and animation tradition, fantasy and Sci-Fi novels from Eastern European countries, such as the successful "The Witcher", are very successful on the global market.

Another recent idea that came up is that of co-production which would best be promoted by a transnational game incubation network. So far, the practice of co-production is not very common in the game production industry, if compared to the film industry. Fortunately, there are tendencies to open the mindset of game studios towards co-production³¹.

BGI Case Study: “Baltic Sea Game Incubation Network”

The Baltic Sea Region has the largest amount of dedicated game incubators in Europe (see Annex II). At the same time, there is a recent tendency to widen the concept of “incubation” to include curated game co-working environments such as Arcade 5 in Helsinki or Game Habitat in Malmö with “peer-to-peer learning”, or accelerator programmes such as the ones offered by Sting (Stockholm) or Games Hub Denmark (Greena), or educational programmes such as PlaygroundSquad in Falun, a vocational training organisation, DE:HIVE in Berlin, or stand-alone programmes within tech and science parks such as Krakow, Ventspils, Kaunas and Tartu. For the initiative “Baltic Sea Game Incubation Network”, we chose to invite organisations that fit into this wider concept, as we believe that the boundaries between those different approaches and categories are already becoming permeable³².

All game incubation staff agree that a network would make sense and be beneficial in principle, but all have already too little resources to operate their incubators as intensively as they would wish to. Investing resources into a network is an additional challenge that will be quickly pushed to the bottom of the priority list. With the understanding that establishing a formal network with membership constraints, shared responsibilities and allocated management tasks that are easily arranged, but always at risk of becoming a “sleeping commitment”, we deferred from insisting that the interested incubators join a network in a formal way right from its inception. Instead, we opted for an approach that would convince the participating organisations of the added value of committing to a game incubation network, through knowledge and experience exchange in physical and online discussions, thus gradually and in an uncoerced fashion stimulating the wish for a more formal network. Consequently, we invited different organisations to join us at the first “Baltic Dev

³¹ SpielFabrique Co-Production: <http://spielfabrique.eu/en/co-production-2/>.

³² We propose to follow the model of the EBN network with their EU|BICs, defined as “[...] quality-certified business support organisations, which dedicate their efforts and resources to help entrepreneurs with innovative ideas, turn those ideas into viable, successful and sustainable businesses”:
<https://ebn.eu/index.php?Ink=KzF0aDVES1I3bG9TYXFGeEhLL2dQMvJwTGRaNXFyY0FLOHp2cUIkN3huTTO=.>

Days” in Kiel in September 2019. Our different incubation approaches in terms of selection procedures, duration and focus came to light when presenting our respective programmes. Quickly a range of questions appeared reflecting common topics of interest and challenges. Of these, we selected one for our next meeting in an online conference four weeks later: “Creating a knowledge base for game incubation - Part 1: Are there reproducible recipes for success?” Soon afterwards, we attempted another physical meeting at the event “GameOn” in Vilnius in November 2019. This, however, attested to one of the real challenges of establishing a functioning network: The full agendas of the individual participants and the constraints of the travel budgets, makes travelling and short-term schedules impossible for a larger group. Such meetings would best be scheduled in correlation with events where most incubation staff are likely to visit anyway, such as the big conferences “Gamescom” in Cologne, Germany, or “Nordic Game” in Malmö, Sweden. Many also go to the renowned “GDC” in San Francisco, US. In Vilnius, we discussed with the few organisations that were present, the topic of “Women in Game Incubation”: How to approach women as an incubator, as only few women join incubation programmes or take on the role of mentor/coach. We took up the same topic in an online meeting, as it has been identified to be of strong interest to all participants in the earlier Kiel workshop. Another online meeting has been planned where BGI will present their findings with respect to profile requirements of game developers for non-entertainment industries. The topic will introduce the question of whether incubation for not-for-entertainment game development and marketing requires specific knowledge and a different approach than entertainment games.

The aim of the case study is to find a feasible and durable model for a functioning and collaborating network. The initial step was knowledge exchange and sharing ideas to stimulate member interest. The next step should be collaborative actions and the formalisation of the network with management/governance regulations to steer its networking activities.

b) Creating a Common Identity: Joint Visibility & Public Engagement

Industry and Regional Branding

Branding refers to the process of raising awareness and purposely influencing an image of something (e.g. a company or an industry) in order to attract people (e.g. winning over and keeping clients, employees, investors).³³ Establishing a brand generally serves various purposes and actors. Compared to product marketing, brand marketing takes a more comprehensive and long-term perspective as it encompasses all aspects of the entity it stands for, e.g. working conditions or sustainability instead of focusing on the features of single products or services.

The aim of branding is to create a long-term relationship between an entity and its client, so that consumers become loyal and in the case of product or service provider branding less price sensitive. Therefore, branding also goes hand in hand with experience and trust building. In particular for products or services for which the quality is difficult to evaluate before purchasing, using a known brand might be a decision criterion for consumers.

Branding for an industry and/or region is a very special case with distinct characteristics. The main motivation usually is to create economic growth and employment for the whole region and/or industry. Branding for a specific industry is often motivated by a disadvantageous reputation of the industry or developments which might threaten the respective industry (e.g. digitalisation, environmental concerns, etc.).³⁴

Industry Branding

The game industry for a long time had the image³⁵ to be dominated by a mostly young and male audience³⁶. In recent years however, this image seems to be changing and gaming has gradually been more widely accepted as a common hobby performed by all kinds of people. Yet, the industry in the BSR is still struggling to be taken seriously as a professional business by large parts of society (e.g. general public, investors, policy makers, etc.). Hence, there are grounds for improvement through the creation of an industry-wide branding which aims for a more professional image of the industry.

³³ Keller, Kevin "Strategic Brand Management" Global Edition *Pearson* 2012.

³⁴ Bajde, Domen "Branding an industry?" *Journal of Brand Management* 2019.

³⁵ Yanev, Victor "Video Game Demographics – Who Plays Games in 2020" *Techjury* 2019:
<https://techjury.net/stats-about/video-game-demographics/#gref>.

³⁶ Hanson Smith, Elizabeth "Negative Stereotypes of Online Gamers and the Communication Consequences" University Honors Program 2010.

Regional Branding

The motivation for regional branding is often a willingness to expand to new markets due to globalisation.³⁷ In most cases, the focus here lies on specific industries as well. The video game industry can be considered as a rather competitive and volatile industry which shows oligopolistic structures.³⁸ Small and/or new studios might face considerable disadvantages compared to established companies regarding visibility and quality signalling. Additionally, as most larger players come from a few larger countries (in the case of games this would be the US, Canada and China), creating a joint brand for several smaller countries from one region might help to overcome this imbalance. As a side effect, a positive branding of the BSR game industry might help (further) improve the reputation of the game industry in general which also helps in competing against other industries (e.g. the film industry) globally.

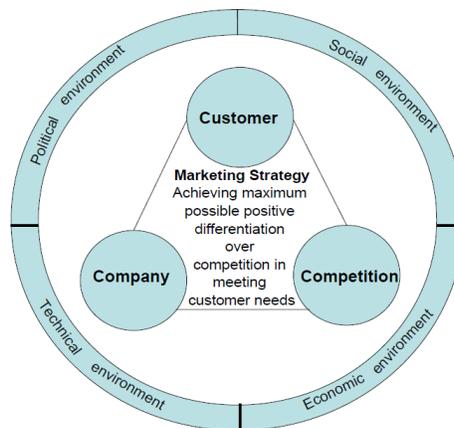


Figure 1. Strategic marketing (Jain 1997)⁴

The aim of industry branding is an improved performance of an entire industry which is usually driven by competition from other industries or markets. Compared to corporate branding which usually focuses on potential consumers, target groups such as political institutions and the general public become more important in the case of industry branding. Hence, branding activities should be adapted to these purposes. Instead of a differentiation between single companies of one market

³⁷ Dinnie, Keith “Nation Branding – Concepts, Issues, Practice” Routledge 2015.

³⁸ Marchand, A.; Henning-Thurau, T. “Value creation in the video game industry: Industry economics, consumer benefits, and research opportunities” Journal of Interactive Marketing 2013.

(e.g. by covering different price segments), focusing on commonalities must be paramount. Based on this, common branding tools like logos and slogans are crucial for industry-level identification.

BGI Case Study: “Baltic Sea Games” Branding

A BSR-wide branding aims to connect, represent and strengthen local hotspots in the BSR under an umbrella identity. This will strengthen the visibility of the game industries of the eight European countries of the BSR vis-à-vis international game markets.

As a consensus within the BGI project consortium, the brand *Baltic Sea Games* as the BSR common identity was created. *Baltic Sea Games* will act as the umbrella brand for actions to advocate the BSR as an international game hotspot. The brand *Baltic Sea Games* was introduced in October 2019 within the BGI project, as part of the pilot on internationalisation of the BSR game business. The rationale is to test the viability of a common BSR identity. Undoubtedly, further piloting based on the findings, lessons learnt, conclusions and recommendations of this initial pilot is necessary to understand the full scope and potential of the development of a BSR common identity and to share acquired knowledge accordingly.

Establishing a common brand for both the game industry and the Baltic Sea Region, entails a set of questions with regard to the drivers of such an endeavour:

- Who creates and promotes the brand?
- Are they the best placed to do so?
- Who do they compete with?
- What are their motivations?
- Which target groups are their priorities?

A brand is a long-term venture, and for it to succeed the rationale behind it must be sound, therefore all parameters need to be scrutinised for their pertinency. A plethora of aspects need carefully to be taken into consideration, in particular the wide array of target groups whose “emotion” is meant to be won over:

“In addition to being strategically constituted by a multitude of brand constituents, industry branding also addresses highly diverse audiences. Industry branding seeks to transform the image of an industry in the eyes (and pockets) of investors, prospective employees (employer branding), the general public, political representatives, public institutions and regulators, and, of course, the consumers.”³⁹.

In the case of the *Baltic Sea Games* as a regional and industry brand, there are several challenges to be met. The most salient one is that of distinguishing the brand from other brands, and thus the entity to be created (in this case the common identity of eight regions) with a common excellent reputation (here of an industry with diverse histories and framework conditions).

- In comparison to “The Nordics” or even “The Baltics”, there is no perception of the regions bordering the Baltic Sea as “one entity” outside the actual geographically based (i.e. Baltic Sea related) common activities such as maritime issues (fishing, shipping, water, submarine ecosystems). For the creative industries, a perception of the BSR as one would need to be created artificially in a first step, to test if there is enough common ground to empower a common identity.
- In the global game industry, “Nordic Game”⁴⁰ is enjoying a high reputation. The Nordic’s mature industries have been thriving on a lot of successful companies, several with AAA status. From their point of view, there is no immediate benefit of widening the regional scope to include the non-Nordic regions of the BSR. To the contrary, it would seem at first glance to be a disadvantage in terms of giving up their stand-out position within Europe.
- “The Nordics” as a benchmark for the new brand *Baltic Sea Games* has the advantage of a similar level of success and maturity within their industries, all with a traditionally strong openness towards the global market, with close cultural heritage ties and histories, while the

³⁹ Bajde, Domen “Branding an industry?” *Journal of Brand Management* 2019.

⁴⁰ Nordic Game is an organisation (owned by the stock company Nordic Game Resources AB) representing the Nordic Game Community, and organising the Nordic Game conference and Discovery Contest: <https://nordicgame.com/about/>

new brand acts as an umbrella for a pronounced diversity both in levels of industrial maturity and economic success of that industry, and in cultural and historical backgrounds.

With these kinds of challenges to struggle with, creating the *Baltic Sea Game* brand begs the question of motivation and purpose.

So, who are the drivers of this new umbrella brand? The initiators are basically the incubation partners of the *Baltic Game Industry* project, motivated by their investigation and collection of expert knowledge on game incubation. Game incubators play an interesting and important role in the emerging game industry:

- they have a key role in fostering a thriving game ecosystem as their activities provide new talents but often also events that help create a sense of community, and often act as first stop for investors and publishers.
- game incubation being a recent practice, knowledge exchange amongst incubators is crucial, but also leads to reflections on the nature of the game industry and optimisation of framework conditions for young entrepreneurs.
- as intermediaries between industry associations, educational organisations, investors and publishers, experts (mentors), young startups and established companies (e.g. alumni), they are at the nexus of the ecosystem and best placed to create an efficient, productive network

It, therefore, seems logical to embark on the journey of creating a common identity and an umbrella brand with a network of game incubators. Through the network, the brand can gain traction to gradually include other groups of the game ecosystem. Though a network does not mandatorily require a brand, for the success of a game incubation network, a brand will provide an added value and increase its impact, thus motivating further the network members to collaborate and present their startups jointly to international markets.

In terms of motivation, game incubators are in a position to best understand the power of a common visibility. Their incubatees have not reached a scale where they out of their own initiative can easily attract international investors. It would greatly improve the success rate of game incubators, could they gain the trust of investors by demonstrating that they select and represent promising, creative and innovative teams. Obviously, addressing investors and markets with a common regional brand that heralds exciting new game productions, increases substantially the potency of success than any individual incubator could ever reach with its own brand. The challenge for a regional brand is to find a balance between the “commonality” and the diversity, and to draw strength from both in equal measures.

“Finally, the social and economic motivations for purposeful branding of industries are reinforced by intensifying competition between regional or national industry sectors, as well as between industries that are increasingly forced to compete for the same pool of resources (e.g., private and public-sector industries). Globalization has given rise to global industry (brands), while at the same time accentuating the relevance of local industry (Askegaard and Kjeldgaard, 2007).

Strategic efforts to brand an industry often derive from the need to strengthen the standing of regional or national industry brands in an increasingly global marketplace (Dinnie, 2015).

“Regional and national industry bodies have become increasingly active in branding local industries both domestically and internationally” (Bajde, 2019).

The brand development strategy for the *Baltic Sea Games* brand has been based on the following branding activities (as pilots within the project Baltic Game Industry):

- Baltic Sea Games logo
- Baltic Sea Games website
- First “Baltic Sea Games Award”
- Stakeholder engagement activities (e.g. Panel “Game Investment 101”)
- Joint event booth

The pilot provided the basic features needed to establish the brand *Baltic Sea Games*. A visual toolkit (e.g. logo, video, etc.) was created that combines BSR identity facets with gaming aspects. This visual component is one key part of the common BSR-wide branding. So far, the visuals have been used for different publicity formats, e.g. for social media and a brand website, but also for offline events within the pilot of the Baltic Game Industry project. In order to make such a brand sustainable and attractive, many more features and formats will need to be piloted and potentially implemented at a later stage. The visuals are designed to be easily adaptable to any future application, thereby emphasising the goal of long-term sustainability inherent to the nature of a brand.



Picture 1: Baltic Sea Games logo; Picture 2: Baltic Sea Games logo with additional lettering

The *Baltic Sea Games* logo combines a playful atmosphere and levity with a visually memorable color scheme and catchy shapes. A seal and the “*Baltic Sea Games*” lettering are at the centre of the logo. The shape, size and layout of the logo allow for easy application in many different settings. Please find more examples of the logo application on Facebook⁴¹, Twitter⁴², WordPress⁴³ and YouTube⁴⁴.

Publicity features of the *Baltic Sea Games* branding include a social media presence on Facebook and Twitter, and a WordPress website (see above and footnotes for links). While the social media presence on Facebook and Twitter can act as a suitable gateway to connect customers, investors and publishers to the BSR game industry, the important BSR common identity staging ground, the (WordPress) website, can only be seen as an initial and fragmentary landing page.

⁴¹ Baltic Sea Games Facebook: <https://www.facebook.com/balticseagames>.

⁴² Baltic Sea Games Twitter: https://twitter.com/baltic_games.

⁴³ Baltic Sea Games WordPress: <https://balticseagames.home.blog/>.

⁴⁴ Baltic Sea Games YouTube (BGZ Berlin YouTube Channel):
https://www.youtube.com/channel/UCiVliaqqK7JCAvnegDV-4ng?view_as=subscriber.

Common Award Competition

A proven form of joint visibility has often been managed through a common award either for a national industry, but more increasingly also for cluster regions, such as the already mentioned “Nordic Game” who have managed to create an award of high renown.⁴⁵ The same is true for the Central & Eastern European Game Award⁴⁶ or regional editions of global (mainly US-driven) Awards, such as the International Mobile Gaming Awards for South-East Asia IMGA SEA or, IMGA MENA (Middle East and North Africa)⁴⁷.

Of interest is the merging of the brand “Nordic Game” with a conference. This conference has become exceptionally popular, so has therefore both its award, but also the concept of the Nordic Game Discovery Contest (NGDC), which ties other events to the Nordic Game conference through local pitching contests culminating at the finalists’ pitch at the Nordic Game conference, with the collateral effect of these local events paying deference to the Nordic Game conference.

An award is a time-intensive marketing tool, but for an industry or product such as games it is a very efficient way to create visibility, elevate prestige, engage with new partners, raise funds, inspire trust, and if there is a brand in play then also to increase your brand awareness.

BGI Case Study: “Baltic Sea Games Award”

As part of the BGI pilot on internationalisation strategies for the BSR game industry, we tested a common award, the “Baltic Sea Games Award”, as a means to both strengthen the notion of a common BSR identity and visibility, and increase startup skills in acting on an international stage.

The pilot event “Baltic Sea Games Award” took place on 16 November 2019 at the video game conference “GameOn” in Vilnius, Lithuania.

The rationale behind this test run was to understand:

- what optimal conditions such an award would require in terms of preparation and implementation
- how the brand awareness could benefit from it

⁴⁵ The “Nordic Game Award” will be presented for the 14th time in 2020, during the equally renowned Nordic Game conference, which has been organised annually since 2003. The NGDC has been introduced in 2016.

⁴⁶ Central & Eastern European Game Awards (CEEGA), introduced in 2018: <https://ceega.eu/>.

⁴⁷ International Mobile Gaming Awards: <https://www.imgawards.com/>.

- whether this could be a sustainable practice taken on by the incubation network

With the incubators as the drivers of such an award, and the incubatees as the developers to be motivated, the award took on two perspectives: both creative quality and business orientation were to receive their due accolade. In a first step, an online jury of game experts cast their vote for the winners in the four categories “Best Game Design”, “Best Game Art”, “Best Game Audio” and “Best Game Narrative” – evaluating the creative quality angle.

As the focus of this pilot was on startups, we opted for a “curated” call. Every partner incubator proposed a curator and a juror. The curator pre-selected a maximum of five suitable startups (with a not yet published game, at least in prototype stage) of the partner region. This allowed us to get around lengthy criteria descriptions, e.g. with regards to content (violence, sexual or racist behaviour), trusting the curators to select appropriate game projects. The jurors were able to cast their votes on the curated selections for the other regions, avoiding biased positions towards their own region. The curated startups joined the contest online with their games and descriptions. In total, 29 startup teams from the eight European countries of the BSR submitted their project.

The lesson learnt was that the system with curated pre-selection and the jurors voting for the other regions worked well and is recommendable, at least as long as the award is still in its early growth.

However, it turned out that finding startups that would submit their game was not as self-evident as initially believed. In countries such as Finland, Denmark and Sweden, the teams have so many opportunities to present their game at national or regional awards, that investing time and effort into an award without renown (for investors) was not attractive enough. Also, the lack of a monetary prize was a deterrent, in particular for startups that commonly invest their efforts into getting public funding.

The second round of the contest happened not online, but as a live pitch in front of three jurors (experienced investors/publishers) that would evaluate the business plans for the games. The four winners of the online round became the finalists for this second phase in the offline “Baltic Sea Games Award” ceremony. As a strategy to foster the BSR identity and the common brand, the public also got a vote: An online community vote prior to the event and a live audience vote both had a stake in the final scoring.

Ultimately, “Weakless” by Punk Notion won⁴⁸ the title “Best Startup Game 2019” in front of a large audience in Vilnius. The award was video-recorded⁴⁹ and published as an aftermovie featuring the common BSR-wide branding *Baltic Sea Games*. To connect the award visually to the brand, we produced a trailer⁵⁰ that can be reused for other productions for visual recognition purposes.

With the use of the award, the branding *Baltic Sea Games* was already able to reach more than 600,000 people in a short period of time after its introduction. Game industry startups that took part in the online round of the award, as well as the game industry startups at the “Baltic Sea Games Award” ceremony in Vilnius, were able to increase their chances of connecting to investors and game industry business representatives due to the increased visibility and prominence created by the award.

These effects can definitely be multiplied with adapted and specifically tailored formats that could be tested in the future, e.g. an award within an investor workshop event. It is anticipated, that the BSR common identity *Baltic Sea Games* will continue to attract attention, mostly through its social media channels.

⁴⁸ Weakless Facebook: <https://www.facebook.com/weakless.game/> by Punk Notion <http://punknotion.com/>.

⁴⁹ Baltic Sea Games Award 2019 – Aftermovie: <https://www.youtube.com/watch?v=Dt-AWhmiLPk>.

⁵⁰ Baltic Sea Games Award 2019 – Trailer: <https://www.youtube.com/watch?v=zznvdvWpSYc>.

Joint Appearance at Game Event

Another form of common visibility can be created through a common booth at a game exhibition, convention or conference. A joint appearance at a fair does not necessarily call for a brand, but it would for practical reasons alone need an umbrella denominator, e.g. a regional umbrella such as CEE (Central Eastern European) Showcase at the Digital Dragons game event. On the other hand, if there is a brand, then sharing a booth at a games event is an excellent way of promoting the brand and showcasing what it stands for. However, as the booths are mostly about presenting games, a prominent placement of visual brand elements will often be limited, depending on the fair's booth regulations and restrictions. But mentions in the floor plans and programmes will have the desired impact.

Case Study: Game Camps at Game Developers Conference (GDC) Expo

The Central Baltic Interreg-project Game Camps organised a shared booth "gamecamps" for a transnational delegation of about 25 teams and startups. The shared booth set-up was managed by a timetable with slots for the startups and teams, though the size of the delegation, as well as the limited physical space at the GDC made the implementation slightly difficult. Nevertheless, the results and feedback were overwhelmingly positive. All participating startups and teams reported great satisfaction with the trip itself. Additionally, and most important in terms of tangible results, participants reported extended negotiations with publishers and service providers. In the wake of the event, one publishing deal was realised and several companies reported improved recruiting.

Case Study: Central Eastern Europe (CEE) area at Digital Dragons (Krakow, PL)

Digital Dragons, a renowned and popular annual B2B game fair and conference, introduced a dedicated exhibition area for Central Eastern European game companies in 2018 with booths for on average six participating regions. In collaboration with game industry associations or if there is none, then with other influential members of the regional communities, they invite game companies to present their most recent game at the fair. It allows the organisers of Digital Dragons, the Krakow Technology Park, to attract more international business stakeholders interested in Polish and Central Eastern European game projects and ensure more diversity at the fair. For the CEE companies, this transnational environment and the proximity to regions that share many of their challenges, in particular with regards to accessing the global market, is highly beneficial and was well received by the participating studios. There is an appreciation of commonness amongst CEE countries, however, the denomination of the exhibition area is not intended to purport the idea of a brand or the concept of a common identity.

Apart the common visibility, the benefit of a joint booth or booth area is the opportunity for small studios and startups to be present at a fair at low or no cost. A regional umbrella activity often can receive public funds for their initiative which allows them to compete with Indie booths/showcases, another low-cost opportunity for startups.

c) Knowledge Management & Transfer

Knowledge exchange is a widespread practice using a plethora of formats. Such exchanges commonly require some organisational effort, if they are not serendipitous and bilateral. For regular and intensive exchanges, a network is often the driving force, establishing a structured environment for knowledge exchange. It is usually the initial motivation, often because also the least resource-intensive action, for joining a network. As an incentive, this is particularly true for emerging practices and non-profit organisations which, as a rule are under-resourced and consequently cannot easily partake in other more expensive types of competence building activities.

Meetings and Workshops

Knowledge exchange can have many facets and levels of required input. The most common is a meeting or workshop, physically or online, though the latter has proven to be less effective in the beginning when people do not yet know each other well. Meetings and discussions are a productive means of unlocking knowledge that is still “ephemeral” because the experience is with a person only, and not retrievable in the person’s absence. On the other hand, this advantage is also its disadvantage, as the participants of the discussion will have gained new knowledge, but the knowledge has not yet been organised and documented for use outside the meeting or workshop. Another downside of physical meetings is the fact that they are time and cost intensive, as cross-border network meetings naturally entail travelling. Such meetings make sense at its inception, but in parallel more sustainable formats should be initiated such as

- documenting the existing knowledge
- providing means to store and retrieve documented knowledge
- implement more permanent formats such as databases or repositories for a compiled body of knowledge
- ensure alternative communication strategies to the physical meetings, such as newsletters, listservs, chatroom or blogs

Shared Body of Knowledge

Knowledge is an invaluable asset. Sharing this asset is as important as exchanging it. However, sharing can be a challenge in the inception phase of a network, as the assets are not always equally distributed amongst all its members. In the case of a BSR game incubation network, this is particularly true in terms of the imbalance between the Nordic regions with their mature industries and the very

early-stage industries of the Baltic regions, for example. Sharing requires a certain amount of trust. This can be built up in physical knowledge exchange activities as mentioned above.

The pilots of the regular project BGI focused on “How to create a dedicated game incubator”. The discussions with veteran game professionals showed that game incubation is an emerging practice with a lot of not yet organised knowledge. The mission of a network could be to organise their knowledge in a common “body of knowledge”. At least in order to provide a sustainable way for their own staff to access and retrieve information and data. If the online tool is open to all, then naturally also other staff and organisations outside the network would benefit from that body of knowledge. This in itself would create a positive image and an expert reputation for the network and the region it represents for being the source of sound knowledge on game incubation.

Documenting knowledge, compiling existing knowledge scattered throughout the Internet, translating valuable documents into English, transcribing recordings, all these elements could be the building blocks of a body of knowledge that an incubation network as proposed for the BSR and initiated during the BGI project, could be in charge of. The added value of a sustainable, organised and documented body of knowledge will equally benefit all network members regardless the above-mentioned imbalance of assets.

Shared Database

While a shared body of knowledge will most likely not entail crucial issues with regards to public access to the information, as the network members are free to select open source material for their compilation, this is possibly very different when it comes to sharing databases. The type of databases that would most benefit a game incubation or game industry network would be one that shares data on e.g. mentors, specialists, investors. All these contacts are valuable assets and the most difficult to convince owners to share with others. If the owners are willing to share, then in many instances this will be in conflict with GDPR and require special licensing and agreements. Therefore, in order to stimulate the creation of such common databases, it might be necessary to consider a restricted access rule (e.g. members only). On the other hand, this might have the effect of getting attractive organisations to join the network which in turn would expand the group of entities acting together under an umbrella brand.

Shared Newsletter or Blog

A shared newsletter or blog has the advantage of keeping the members in touch on a regular basis without the costs of travelling. But experience has shown that implementing a regular newsletter is often doomed to fail. The way to succeed lies in the attractiveness of the newsletter content and the lean handling of it. For this, a network will need to invest time to create a feasible concept and an adequate operational framework. The success of a newsletter lies in its usefulness and reader-friendliness.

d) Collaborative Ecosystem Activities

While knowledge transfer, exchange and sharing are the most common motivations to form a network, for a network such as a BSR game incubation network, collaboration would substantially enhance and benefit the regional incubation programme. Emerging practices often operate in isolation. This is reflected in the lack of organised and documented knowledge as much as in the limited scope of action of the individual incubator. During the BGI pilot on internationalisation, the partners detected shortcomings in what individual incubators can offer or achieve. In the following, BGI has identified activity areas which only as a transnational activity can have a significant impact and quality boost. The three main areas are:

- strengthening the incubation ecosystem
- sharing expertise on specialised topics
- creating international environments for startups

The Incubation Ecosystem

An incubator does not operate in a vacuum, on the contrary the incubator is an intermediary between the components of its ecosystem: incubators, startups, educational organisations, mentors, established game companies and investors. In order to have a solid and durable ecosystem, these groups need to be well balanced. As the incubators rely on partnerships with veteran game developers, other experts in the field and investors, they have a vested interest in a well-balanced incubation ecosystem. This entails having a minimum number of competent mentors and investors at hand to partner up with. As there is a shortage of experienced mentors and tried investors, an incubation network would not only benefit from sharing the contacts they have, to expand the pool of available experts and investors for all, but this is where together they could be most effective and

increase the number of contacts, ensuring shared access to the required level of competence to deal with game startups.

BGI recommendation: Mentor & Investor Competence Building

When investigating “mentorship” in the BGI-pilot two, it turned out that with the shortage of mentors and financial resources, incubators have to opt for volunteer game experts with varying mentor skills. BGI-pilot one investigated “incubation programme” development. One stage in the training may require volunteer investors for pitch training. To be able to form fruitful relationships with investors and mentors, the incubators need to reach out to investors who understand the nature of the game industry and market. This is, however, particularly difficult when it comes to investors as investing in a game company is very different from investing in e.g. other IT-driven businesses. Investing in games is mainly a partnership venture which demands a trustful relationship between investor and game company. In the incubator, the startups receive tuition to master the business side of their company and lay the foundation for financial success. In most cases they will need at some point in their training, the support of a mentor or an investor. As financial experts, the investor can offer not only capital, but also valuable support in matters of financial planning skills. Game incubators struggle to find competent mentors and investors knowledgeable about the nature of the game industry.

Therefore, a collaborative effort to “train” interested investors and mentors to assure a satisfactory competence level, is highly recommended as network activity.

Special Incubation Topics

Incubation staff comprise management, office and tuition staff. Game experts train and guide startups or postgraduate developers in developing their game in terms of creative potential, technology application, audience orientation and game thinking: e.g. key performance indicators for game platform marketing or on the legal nature of IP in different markets. On top of this, the incubator steers the teams towards becoming entrepreneurs. Some of these skills are similar to those of other industries, and would require an expert on, which the regular incubation staff might not be especially competent in, e.g. contracts, entering a foreign market, localisation, IP legal status, marketing and branding. Therefore, many incubators have a network of experts on specific topics which they regularly invite to hold seminars or for individual teams to consult. The game industry is a field where parameters are constantly changing, and it is important to keep abreast of the latest

development and trends, e.g. games as a service, streaming games, VR technology. This too may demand inviting an external expert. Not only is there also a shortage of these types of experts, but they usually do not work on a volunteer basis. The budget constraints of individual game incubators call for synergetic action of a network of incubators. Not only sharing the contact itself but organising joint events to maximise the benefit of that contact.

Due to the diversity of game products, platforms, audiences and purposes, incubators will also sometimes need a specific expert for only one team. It would again prove more efficient, if these needs were assembled through an incubation network. Hence one workshop or seminar and one expert could cater to several “special topics” and teams at once.

Just as well topics of general interest to a wide range of teams, regardless of their orientation, e.g. topics that are not specific to games but IT or legal or tax-related in general, could be offered in a MOOC (Massive Open Online Course) or large Webinar type of activity, with the costs shared amongst the participating incubators.

There are basically two main types of ways to offer expert knowledge in such a concerted, transnational manner: offline and online.

BGI Recommendation: Online Webinar

This type of approach is a very efficient means to share external expertise and to engage with experts across the globe and reach out to pioneer knowledge.

Though seemingly the simpler option in comparison to the offline modus, an online webinar requires coordination of the partnering incubators in terms of setting up the online infrastructure, remunerating the expert and perhaps a moderator, investing in dissemination, and if applicable in the selection of participants, in preparing perhaps material beforehand, in transcribing or summarising recordings and in carrying out an evaluation.

This format could also be used for competence building/continued education of regional incubation staff as they often only have limited time to keep up to date with what is happening around the globe in terms of new technology, new methodologies, new analytical assessments, etc. For this, however, a large network of incubators needs to be in place with a mission and resources to organise such webinars.

BGI Recommendation: Themed Transnational Workshops

Naturally, a transnational workshop involves travel organisation, time and costs. This format, therefore, only makes sense with topics that are salient for only a few teams per incubator and require a broader and more intensive approach, i.e. over several days. Example: teams working on a game for the medical industry, which entails a different collaborative and customer approach, or test cycles, KPIs, etc. Or it could also be conceived as a means to attract certain groups that are reluctant to join an incubator, e.g. women.

An offline multi-day workshop implies the availability of a respective space with the necessary infrastructure. The most feasible option is to do this either at one of the participating incubators or an affiliated university. This will at the same time take on the nature of an international exchange programme.

While the focus of the above two mentioned formats is on extending the individual incubator's offer on specialised topics through acting in collaboration with other game incubators, the collateral benefit of these is also the fact that the teams will be discussing (online) and working (offline) in a transnational environment which will enhance their international orientation.

International Incubation Environment

Incubation programmes need to include ways for startups to achieve a higher maturity level for acting in international environments, e.g. when pitching at an international event, competing for an international award or presenting their products or services at international fairs. Local incubators tend to prepare their startups for international business through pitch-training and visits to fairs. However, these two measures are a big step from the reality of doing business with investors from overseas or pitching publicly in front of an international large audience. Taking into account that most startups are young people with limited knowledge and skills needed for professional business dealings, it would greatly benefit the incubation if startups could gain more confidence through monitored or curated international incubation formats.

The gap between the incubation programmes taking place in the relative comfort zone of the incubator premises and their own cultural environment, and the actual competitive situation at international events has been identified as a critical challenge.

The two formats mentioned above (webinar and themed workshop) would already contribute to this approach. A stronger impact could be generated through collaborative formats that focus on providing international work environments.

BGI Recommendation: Summer Academy or Bootcamp

Learning from good practices or pilots such as the Game Camps project or the Stugan experience, local incubators could help boost their incubatees' skills and confidence to act in international business contexts, by jointly organising a bootcamp or summer academy.⁵¹ This should be longer than the themed workshop stated above but need not necessarily be as long as Stugan (which has a 2-months duration). 10-14 days would provide intensive and productive training to hone the startups' international skills effectively while being professionally mentored.

The challenge here will be to fund such an endeavour. The two examples mentioned here are both financed externally, one through public funding (EFRE through the Interreg programme) and the other through private sponsoring by a small group of successful alumni from Swedish incubators.

Each region/incubator would contribute by selecting the startups and finding funding for their participation. The collaborative part would be the organisation of the programme, mentors and other staff. This could either follow the model of the Game Camps with a jam-like approach of inciting teams to work together or of Stugan where the time is used to mentor teams working on their own product, yet allowing for communication and exchange of views and ideas through the physical proximity of the teams and seclusion of the work situation from the outside world. A rotating principle could be applied for organising the location and logistics, which would require an organised network with an agreed governance structure.

⁵¹ Summer academies and bootcamps offering courses on game design and programming are very common in the US for example.

3. Recommendations for Supporting the Internationalisation of Regional Game Business in the BSR

For an emerging industry as the game industry, talent growth is amongst the key challenges to ensure a prospering business sector. Game incubators, accelerators and other forms of startup and young business support are amongst the key drivers of talent growth. Which is the reason why the Baltic Game Industry project and the pilot on internationalisation, the insights of which presented in this document, focussed on game incubation.

Also, game incubators play a central role in the games ecosystem, as they not only interact and collaborate regularly with other ecosystem stakeholder groups, but because they together with groups such as industry associations, are actively engaging in lobbying for public support and reflecting on improvements and good practices for regional game businesses.

The recommendations with respect to international co-operation for a BSR-wide game business development are therefore targeted at fostering the international co-operation of game incubators.

For game incubators, the BGI recommendations are based on the pilot results and reflections described above:

- form a network
- create a common knowledge base
- collaborate to increase competent external expert support
- engage in common incubation activities
- cooperate on building a common identity to increase global awareness and shape a positive image of the BSR game industry

Creating a sense of common identity with the help of an umbrella brand to foster the collaboration is undoubtedly a long-term endeavour. In our view, a brand will have more durable benefits than a logo or corporate identity components (logo, etc.) because its impact will work both ways, outwards in terms of visibility and appeal, and inwards in terms of confidence through the association with a strong group, enhanced support of startups and incubation staff, and higher productivity of the incubation programme.

The Dictionary of Brand defines brand as “a person’s perception of a product, service, experience, or organization.”⁵² This recognition and meaningfulness of a brand grows through accumulations of feelings and perceptions. The above-mentioned recommendations are good stimuli to flesh out and shape the brand.

As in the case of a BSR brand, the strength of the underlying network is decisive for its successful implementation, then the motivation for joining a network and investing time and resources to operate it needs further investigation.

Many networks and collaborative initiatives are an outcome of a funded project. Most fail after a while due to lack of resources beyond the project funding. Therefore, it is advisable to carefully examine the incentives for becoming a member in a network and for remaining actively involved. Lean management and low-cost engagement will obviously be more effective in the first phase of a network. As described earlier, a network can take on many forms. Even though we would recommend a loose informal initiation phase to establish a convincing case for a more formalised network, it will be essential for its survival that a dedicated governance structure or body is in place.

In addition, our recommendations for public authorities and for established businesses (e.g. alumni of an incubator) is to plan for an intensified support of both such a transnational network itself and its common activities. The European idea of transnational co-operation is very strong on all levels, from local to regional, to national, cross-border, cluster-regional (e.g. BSR, North Sea, Alpine, etc.) and European-wide, and many schemes and programmes are supportive of cross-border co-operation. Additionally, there is also a strong focus on IT startups. It would be recommendable for public authorities to review these schemes to include game incubation too and for the game community representatives (i.e. game incubation managers) to help understand the idiosyncrasies of game incubation and benefits of supporting businesses with the combined skill set of creativity and IT-expertise.

The game community is widely acclaimed for its openness, transparency, sociability and mutual support. In particular the more mature industries such as the Swedish and Finnish game industries have shown great support to young businesses and game incubation with veterans volunteering as mentors and tutors, and often as (quick) investors. Still, not only do the younger industries lack such

⁵² Neumeier, Marty in “Defining What a Brand Is: Why Is It So Hard?” Emotive Brand: <https://www.emotivebrand.com/defining-brand/>

veteran support, many successful companies move to Asia or the US or Canada, leaving a gap of experienced game business knowledge and support. As game incubators are in need of such collaborators, it would be most beneficial if game incubators worked hand in hand on a strategy to expand the pool of competent partners from the game industry and the investment sector. For an investor, it would probably also be of interest to have a one-stop contact, i.e. an incubation network, offering a competent first screening of young companies and their projects for them.

An important aspect of strengthening the regional game industry is not only for incubators to collaborate transnationally to overcome challenges that cannot be tackled by individual organisation, but to create a sense of belonging and loyalty, and of responsibility and to encourage mutual support and to motivate successful companies to remain in the regions that supported them in their first year and help create a sustainable successful industry. The basis of this trust will lie in the startup support from the public and the community itself.

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5. Annexes

Legend	not available / bad	average / okay	great	unknown
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Event	Location	Date	Costs (Business Pass)	Costs as Exhibitor	Indie Area	Game Focus	Award	Meet to Match	B2B Value	Internationality	EU Accessibility	Value for Money
Arctic15 2020 Stockholm "Nordic Growth" arctic15.com/stockholm2020	Stockholm, Sweden	05.-06.02.2020	369 € (STARTUP ticket)	1199 € (includes 2 STARTUP tickets)								
TechChill 2020 techchill.co	Riga, Latvia	20.-21.02.2020	99 € (STARTUP pass)	249 € (includes 2 STARTUP passes)			Fifty Founders Battle					
PAX East east.paxsite.com	Boston, USA	27.02.-01.03.2020	225 \$ (PAX 4 - Day Badge)		PAX East Indie Showcase, PAX Rising							
Game Developers Conference gdconf.com	San Francisco, USA	16.-20.03.2020	1.999,00 €	375,00 €	GDC Play, alt.ctrl.GDC, IGF Pavilion, etc.		Independent Games Festival (IGF) & Choice Awards	GDC Connect Meetings				
Game Connection game-connection.com	San Francisco, USA	16.-20.03.2020	1.790,00 €				Indie Development Awards					
Nordic Game Jam nordicgamejam.com	Copenhafen, Denmark	16.-19.04.2020	54 € (EARLY BIRD All-inclusive ticket)									
gamesweekberlin - QUO VADIS qvconf.com (gamesweekberlin.com)	Berlin, Germany	20.-21.04.2020	375 € (PRO X)	500 € (QUO VADIS Micro Booth)								
BLON Animation and Games Festival blon.lt/?lang=en	Klaipėda, Lithuania	23.-26.04.2020	29 € (Regular)									
Nordic Game 2020 conf.nordicgame.com	Malmö, Sweden	27.-29.05.2020	590 € (Conference Pass)	300,00 €								
re:publica 20 re-publica.com/en	Berlin, Germany	06.-08.05.2020	529 € (Early Bird Business Ticket)									
Internet Week Denmark iwdk.dk	Aarhus, Denmark	12.-17.05.2020										
Arctic Game Week arcticgameweek.com	Skellefteå, Sweden	20.-23.05.2020					White Reindeer Award					
Pixel Heaven Games Festival & More 2020 www.pixelheavenfest.com/en	Warsaw, Poland	17.-19.05.2020	12 € (Blind Bird)									
Digital Dragons 2020 digitaldragons.pl	Krakow, Poland	18.-19.05.2020	235,00 €	0,00 €	Indie Showcase		DD Awards					
Arctic15 2020 Helsinki arctic15.com/helsinki2020	Helsinki, Finland	26.-27.05.2020	369 € (STARTUP ticket)	1199 € (includes 2 STARTUP tickets)								

LOGIN login.lt	Vilnius, Lithuania	28.-29.05.2020	129 € (Standard Pass)									
gamescom 2020 gamescom.global	Cologne, Germany	25.-29.08.2020	16,50 € (Day Ticket)		gamescom indie village		gamescom award	Matchmaking365				
Baltic Dev Days 2020 balticdevdays.com	Kiel, Germany	16.-17.09.2020	99 € (Early Bird REGULAR PASS)		Indie Area							
Posznan Game Arena gamearena.pl/en	Posznan, Poland	09.-10.11.2020	10,00 €	260 € (Early Bird - Indie Standard)								
EGX Berlin egx.net/berlin	Berlin, Germany	TBD (2019: 1.-3.11.)										
Game Industry Conference gic.gd/en	Poznan, Poland	08.-11.10.2020			Indie Zone							
GameOn gameon.lt/en	Vilnius, Lithuania	TBD (2019: 16.-17.11.)	149,00 €									
Slush slush.org/events/helsinki	Helsinki, Finland	19.-20.11.2020										

BSR Game Incubators										
Name of Incubator	URL	Country	Nature (programme only or physical space)	Economic Type (public, private, PPP)	Funding (public, equity, sponsorship)	Duration of Scheme / Programme	Number of Workshop Sessions	Number of Start-ups / Companies	Topics Covered / Structure of Mentoring Programme	Additional Information
DE-HIVE	https://gamesjgo.btw-berlin.de/forschung/	DE	Physical incubation space by HTW Berlin	public	public	12 months (option for 24 months total)	n/a	4 at a time	n/a	No costs
Game Hub Denmark	https://www.gamehubdenmark.com/	DK	Programmes and shared physical work space	public	public regional and national funds	2-5 years	n/a	15 (5-8 at a time)	*companies gain access to wide range of different resources, such as office space, lawyers, international business partners, business projects, etc. *incubator offers the companies a AP Degree programme in Innovation, Product, and Production, focusing on teaching Innovation, Marketing, Leadership, and Business Development as a part of the incubator program	Start-ups are graduates from either Viden Djurs Game College, Viden Djurs 3D College, or Dania University of Applied Science – or graduates from both institutions
Arsenalet	http://www.arsenalet.dk/	DK	Physical Space	public	Arsenalet is a commercial foundation established in 2011 by Viborg Municipality, the local Business Council and The Animation Workshop. (a/d? Sponsored by the European fund Interreg Øresund-Kattegat-Skagerrak and the Central Denmark Region)	9 months	n/a	n/a	Arsenalet offer services including networking, mentorship, matchmaking, incubation, business development, and counseling. Arsenaleet arranges talks, seminars, workshops and conferences based on wishes from the tenants, topics of relevance, or on behalf of external clients that would like to network or collaborate with resident companies. The common goal is to make the companies that reside in Arsenaleet stronger and help them realize or boost their full potential. We also collaborate on projects with different departments of The Animation Workshop to expand and explore the use of animation, games, visualization and VR/AR/XR in areas of learning and education, health, science communication, and the fine arts, giving you the opportunity to tap into, contribute, or learn from these exciting projects and partnerships.	Incubator for creative industries with an included game incubator
Digix	http://digix.eu/	EE	Incubator for creative industries. Services with physical co-working space	private	through rents and regional EU-funding	12 months	1/week seminar 1/month 1:1 training 4/year field trips	20	*Team coaching by business mentors *weekly seminars by start-uppers and content experts *pitch trainings *meetups with business community and experience sharing with fellow entrepreneurs *match-making with crowd-funding platforms and angel investors	n/a
Tartu Science Park BGI Gaming Incubator	https://theaduspark.ee/en/incubator/baltic-game-industry-inc	EE	Programme and physical space	public	public	6 months	n/a	4 at a time	n/a	No costs
Nordisk VR	http://nordicvrstartups.com/	FI	Incubator/accelerator offering mentoring and shared work space for gaming companies with focus of VR/AR	private	n/a	6 months	Weekly jam sessions, monthly community meetups, mentor days and everything culminating in our Demo Day at Slush 2018.	n/a	*Office Space for free, business and back office support, demo Day at Slush for investors and partners. *Mentoring: experts both local and global, ranging from seasoned entrepreneurs to investors to VR / AR tech specialists to platform holders to legal mentors	Invest up to 100k € per company.
Turku Game Hub	https://turkugamehub.com/	FI	A hub for game professionals offering coaching, seminars etc.	n/a	n/a	n/a	Workshops and coaching sessions (classes, workshops, seminars) no amounts stated	15	*front and back end systems *mobile and web applications *gamification *serious games (education, healthcare, wellbeing) *augmented reality *virtual reality development and mocap studio services	n/a
Playa Game Industry Hub (Kotka)	https://www.visitkotkahamina.fi/en/playahub	FI	Programmes and shared resource space	public	Playa is funded through a number of public financiers and industry development programmes and actively supported by local game developers.	n/a	n/a	100	n/a	Support: • for international collaboration • for the rapid growth of the startup ecosystem Acceleration: Coaching, development, finance, consulting Local community gatherings, Global events, Investor relations & events • for education and research, via college and university co-operation
Helsinki Games Factory / Farmleague	http://www.gamesfactory.fi/	FI	Incubator with programmes and physical facilities; collective	private	support and cooperation from IGDA and gaming hubs rents and membership payments, 3 membership types: private office, desk and hotspot	6 months	7	15-20 game studios, 200 gaming professionals	*selected in-house service providers who have in-depth knowledge regarding topics such as game audio, legal services, accounting, game research and user acquisition *high speed internet connection	No costs *lighthouse - a physical location that foreign investors can visit, a showcase to attract international talents. A living and working embassy that can help new companies set up and invite multinational studios to come to Finland *Open in June 2018, with event space and a showroom

Digitalents	http://digitalents.munstadi.fi/en/#busy	FI	Programme - Digitalents Helsinki is a unique, inspiring, and innovative community for youth aged 16 to 29. We focus on digital media, coding, and software development.	public	public funds (for 1 year)	1 year	n/a	n/a	n/a	n/a
Oulu Game Lab	http://www.oulugamelab.net/	FI	Interdisciplinary team to work on game development	public	public	Depending of type of chosen programme	n/a	n/a	n/a	n/a
GamesPOT Kaunas	http://kaunomtp.lt/seminaras-kaip-paversti-zaidimu-kurima-y	LT	Programme	public	public	6 months	n/a	3 at a time	n/a	No costs
Ventspils High Technology Park Gamedev Incubator	https://www.vatp.lv/business-support	LV	Programme	public	public	3-6 months	n/a	4 at a time	n/a	No costs
ARP Games	https://arpgames.pl/en/home/	PL	Accelerator programme and physical space	99% owned by the ARP S.A. which is state-owned joint-stock company	public	at least 3 months (2 stages, in case of qualifying into the 2nd stage of the programme and taking up shares in the newly established companies - it can take a lot longer)	3 workshops/each edition + mentoring sessions	3 (physical space) and ca 10 start-ups/teams qualified for each edition of the programme	*During competition: financial support of the team members, the office space, hardware and software, as well as legal and accounting care *In the next stage: set up meetings with industry and equity investors, and ensures teams' participation in programmes promoting Polish video game productions on the most important trade fairs	The company is solely dedicated towards development of the video games industry in Poland
Digital Dragons Incubator	http://www.kpi.krakow.pl/en/startups/inkubator-digital-drag	PL	Programme and physical space	public	public	5 months	n/a	6-10 at a time	n/a	No costs
Stugan	http://www.stugan.com/	SE	Accelerator programme with accommodation and work place (summer camp)	non-profit company	sponsored stay by companies	2 months	continuous accompaniment of the development, not so much business aspect related.	around 15 teams (max 3 persons per team)	*Visitors from the game industry will frequently visit to inspire and get inspired *room- and workmates in the camp that inspire each other	This is a big cabin in the woods with a lake.
STING	https://sting.co/en/	SE	Programme and physical space	public	Sting is a non-profit company and its activities are financed with public funds, from Stiftelsen Electrum and our main partners Vinnova, KTH and Stockholm County Council; and with private funding from partners, as well as through self-funding	12 months	n/a	5 at a time	n/a	No costs but stock option rights
The Game Incubator	https://www.thegameincubator.se/	SE	Incubator with training and shared work space and infrastructure	public	public funding (financed by the European Regional Development Fund and Region Västtra Götaland)	n/a	n/a	n/a	*Assignment of a business coach	Have to be located in Sweden to apply and join
Gameport	https://www.gameport.se/	SE	n/a	n/a	n/a	15 months (The startup phase is 3 months. The Business phase and the final Venture phase are both 6 months each.)	n/a	7 (Status June 2018)	n/a	part of the Blekinge Business Incubator
Arctic Game Lab	http://arcticgamelab.com/en/about/	SE	Support, and be a part of the creation, of a stable gaming industry platform in the north of Sweden.	public	public	n/a	n/a	n/a	n/a	n/a
East Sweden Game	http://eastswedengame.se	SE	Accelerator programme and shared physical work space	n/a	n/a	n/a	n/a	n/a	*business coaching & advisory from associated partners *invitations to meetups and lectures	n/a
Games Habitat	http://www.gamehabitat.se/	SE	A hub for game professionals offering coaching, seminars etc.	n/a	n/a	n/a	n/a	n/a	n/a	n/a

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, programmes 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

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