GAME-ER

Gaming Clusters Across Multiple European Regions: *Evidence & Policy Options – Deliverable 6.6*

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ABOUT GAME-ER

This policy brief is part of GAME-ER project - a 3-year initiative (2024-2027) funded by the Horizon Europe and UKRI programs. The project aims to research the emergence, development, and sustainability of local and regional video game clusters. While existing research tends to focus on non-European clusters or those in major European cities, GAME-ER seeks to address the knowledge gap regarding local and regional clusters, highlighting their critical role in driving innovation, economic growth, and social cohesion.

GAMER-ER's research will inform a series of policy and practical recommendations compiled into an Interactive Toolkit, specifically targeting local and national policymakers and decision-makers. The goal is to equip them with tools to establish new video game clusters or strengthen existing ones in their regions or cities. The project also recognizes the potential of video game clusters to foster innovation across other economic sectors, particularly within the Cultural and Creative Industries. By promoting the adoption of best practices, industry know-how, and new technologies, the toolkit aims to facilitate the integration of video game cluster knowledge into these other sectors.

GAME-ER Research: The project is conducting a comparative analysis of six such clusters in France, the Czech Republic, Italy, Scotland, and Portugal, chosen for their varying maturity levels and unique characteristics. In addition, GAME-ER is undertaking a comprehensive Europe-wide analysis and mapping of the spatial organization of the video game industry emphasizing local and regional clusters.

The GAME-ER methodology encompasses social sciences research methods including, among others, qualitative interviews, historical research, comparative research and spatial economic analysis based on data science.

WHAT IS THIS DOCUMENT ABOUT?

During the first year of the GAME-ER project a comprehensive **review of current and existing policies and recommendations** related to the project clusters, at local, national, and European level has been carried out. A total of 42 documents authored or commissioned by key stakeholders in the area of video game industry policy were identified (through web research, as well as by means of contacting industry organizations and leveraging their understanding of this area. Reference lists of the policy documents were also used to gather additional documents.) between May 2025 and January 2025) and analyzed. The data was analyzed qualitatively in two separate analyses.

The first one was using the analytical grid from Deliverable 3.1 and as such it was more deductive because it used the previously identified key aspects of industry clusters.

The second analysis was inductive and that one was concerned with identifying concrete policy recommendations. Based on these policy recommendations, we have identified several policy areas based on thematic closeness. This was basically qualitative thematic analysis.

The goal was to identify recurring challenges, policy gaps, and tensions, and inform the development of future policy tools and recommendations, including GAME-ER Interactive Toolkit.

In this document we present the main results of this analysis, as well as a summary of the recommendations flowing from the collected evidence and how GAME-ER will incorporate the findings in the Interactive Toolkit, contributing to overcome the identified challenges.

WHO IS THIS DOCUMENT FOR?

The target readers of this policy brief are primarily **policymakers and decision-makers at regional, national, and EU levels** who are involved in shaping creative industry strategies particularly with the focus on the video game industry. This includes (but is not necessarily limited to) government officials, regional authorities, funding agencies, industry associations, and relevant educational or research institutions. To sum up, this document is of benefit for any stakeholders interested in the the video game industry's potential for growth, job creation, and innovation, and in identifying evidence-based policies to strengthen regional gaming ecosystems.

WHAT'S IN THIS POLICY BRIEF FOR TARGET READERS?

The key insights provided in this policy brief are drawn from the analysis of the gaming cluster policy landscape. The analysis identifies key challenges faced by the cultural and creative sectors, especially the video game industry. This brief summarizes recent research, presents significant findings across various areas, and outlines potential policy options to enhance and support gaming ecosystems across Europe.

KEY FINDINGS AND POSSIBLE RECOMMENDATIONS

1. Cluster leadership:

Key Findings:

In the process of the analysis, it has been identified that the topic has been addressed by several researched policy-related documents. The main finding that has surfaced as the result of the analysis is the general recommendation to balance commercial, governmental, and other goals and needs. In this regard, GAME-ER brings together diverse video game industry clusters ranging from those with institutionalized leadership to those with informal or yet emerging leadership structures.

Possible Recommendations:

There is clear need for more research in the area. There is a potential to compare the existing forms of leadership that have been analyzed and based on the findings formulate policy recommendations for clusters at various stages of their existence. This recommendation is generally applicable to clusters across various stages of development.

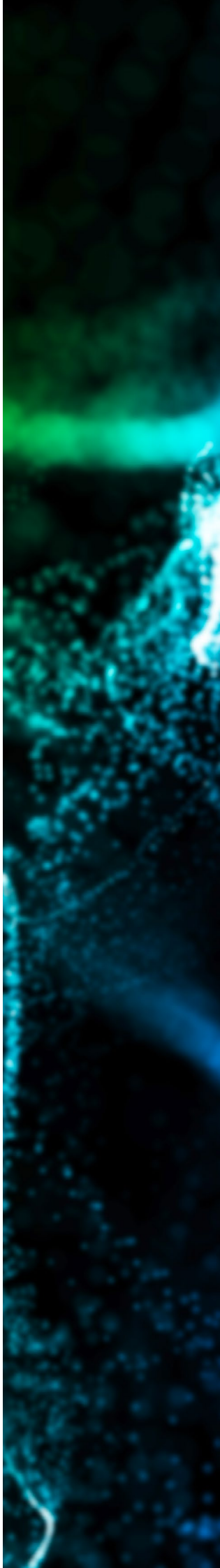
2. Data availability:

Key Findings:

Based on the policy review as well as other tasks of the GAME-ER project, specifically Work Package 2 (WP2), the issue of data availability about video game clusters as well as related issues, including policy mechanisms and funding opportunities, has clearly become an obstacle to both identifying and mapping existing video game clusters as well as for promoting further development in this area.

Possible Recommendations:

This area requires additional research to inform future decisions. GAME-ER project can in this regard address these gaps in available information about the video game industry from the cluster perspective and suggest policy improvements, including, for example, the lacking NACE classifications for video game production. A related issue is the relative vagueness of the previously discussed key performance indicators, which are considered central also for evaluating policy interventions. The project can further elaborate on how such KPIs should be defined. This recommendation is generally applicable to clusters across various stages of development.



3. Role of educational institutions:

Key Findings:

Based on the preliminary findings from WP4, educational institutions can play important roles in video game industry clusters. This is, for example, the case of the Brno and Dundee clusters, where educators and educational institutions act as important actors not just for skill acquisition, but also for networking and informal leadership.

Possible Recommendations:

There is evidence that underscores the gap in research in this area to guide informed policymaking. The GAME-ER project can further expand on this previously identified policy area beyond the previously recognized need for skilled talent, including the role of educational institutions and educators in the organization and governance, even on an informal level of video game industry clusters. This recommendation is generally applicable to clusters across various stages of development. Even the more developed clusters often argue that the educational infrastructure doesn't match the volume of need for new talent.

4. Industry-specific changes:

Key Findings:

The performed analysis highlights several key findings including the fact that the video game industry and related policy is undergoing constant and to some extent industry-specific changes, most recently dealing with issues related to deepening market consolidation, platformisation, the implementation of generative artificial intelligence as well as outsourcing.

Possible Recommendations:

Current knowledge remains insufficient, making additional research in this field essential for evidence-based policymaking The project could evaluate how these new developments affect the previously proposed policy recommendations and whether there is a need for revision given these new conditions. This recommendation is generally applicable to clusters across various stages of development.

5. Funding and regulation issues:

Key Findings:

As the result of the analysis that has been carried out, it was possible to synthesize and report the main shortcomings in the context of the complex and interlinked issues of funding and regulation.

Possible Recommendations:

Advancing research in this domain is necessary to generate the insights needed for future policy development and implementation. The project can assess the role of the mentioned policy areas leveraging comparative design. Here, the goal is perhaps not to propose entirely new policy mechanisms but provide guidance and more micro-level policy recommendations based on the available funding opportunities in various parts of the EU.

The issue in question is perhaps more pressing for clusters in their early stages of development where funding is lacking. Established clusters and companies usually have better access to funding.

Conclusion:

Local and regional game-development clusters are high-value assets. Our analysis shows strong potential, but progress is uneven. The main gaps are unclear or unbalanced leadership, weak data and KPIs, underused education–industry links, slow policy response to consolidation, platform shifts, AI and outsourcing related changes, fragmented funding and regulation.

How GAME-ER will approach it:

1. Comparative analysis across six European clusters will assess the role of funding and regulation policies, providing guidance and micro-level policy recommendations based on available funding opportunities in various EU regions. The project will leverage its comparative design to evaluate these complex, interlinked issues within national, regional, and global circumstances.

2. GAME-ER will address data gaps about video game clusters through comprehensive Europe-wide spatial analysis and develop clear KPIs for cluster evaluation. The project can further elaborate on how such KPIs should be defined, providing evidence base for improved industry classification and monitoring systems.

3. Cluster case studies will examine how different regions navigate platform relationships and evaluate how new developments (market consolidation, platformization, AI implementation, outsourcing) affect previously proposed policy recommendations, assessing whether revision is needed given these new conditions.

4. Research will examine educational institutions' roles in cluster organization and governance, expanding understanding beyond skill acquisition to include networking and informal leadership functions.

5. The Interactive Toolkit will encourage uptake of video game cluster know-how, best practices and technologies in other Cultural and Creative Industries clusters, promoting cross-sector innovation transfer.

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Know more about GAME-ER
Policy analysis

game-er.eu

Dataset: *zenodo.org/records/15323333*

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