

Forever in the Middle? A Study of the Danish Game Industry

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In the Nordics, why is the Danish game industry markedly less successful than the Finnish and Swedish industries, yet more successful than the Norwegian industry?

Studies of the video game industry have focused primarily on large-scale and often console development, especially in the US and Japan. This has led to both computer game and mobile phone productions being overlooked. In addition, as home computers were the dominant game platform in Europe in the early 1980s, the European history is not reflected in overview histories of the industry (Conway and deWinter 2015; Huntemann and Aslinger 2012). Such problems are finally being countered with more studies of regional and local game industries (Ozimek 2019; Švelch 2018; Zeiler and Mukherjee 2021).

This presentation reports the results of a study of the Danish game industry. Based on interviews with 40 companies and on historical material, we make two major comparisons:

1. Where other smaller regional game industries are marked by a shift from large-scale production to smaller independent studios (Keogh 2019; Whitson, Simon, and Parker 2018), the Danish game industry's core identity has been as a small and alternative site of production, where growth often leads to successful companies leaving the country physically or being acquired financially. Furthermore, a large portion of the companies interviewed reported an ambivalence towards growth, and rather emphasized a wish to create good working conditions and a sustainable business.
2. Compared to other Nordic countries, the *demoscene* culture of making audiovisual programs, especially for the Commodore 64 and Amiga in the 1980s and early 1990s, has often been invoked to explain the success of the Finnish (Tyni C Sotamaa, 2014) and Swedish (Bøllehuus, 2022) game industries. Yet we show that it is surprisingly the most active early demoscene countries that have the *smallest* game industries.

The presentation therefore contextualizes the history of the Danish game industry with a history of Danish public and private funding and examines the business models and platforms of Danish game development. We show that the Danish industry while successful with companies like IO, SYBO, Unity, Playdead, Ghost Ship, and Triband, retains a conflicted relation to

the national cultural funding for games, and to growth, with a constant risk that any successful game or company will leave Denmark.

A standout sentiment among developers was a skepticism towards the freemium business model of mobile games, showing that small-scale development is now seen in opposition to both big-budget console games and to the mobile game industry, possibly limiting the growth potential of the Danish industry. We also show that in the Danish context, the “indie” label served as a framing device to value smaller companies, and to describe the already-existing small-scale development as an asset. Indie legitimized game development outside major gaming hubs, allowing small-scale, personal, and experimental work to be presented as a feature.

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