

SCALING INNOVATION, EXPORTING EXPERIENCE

How Gaming Became One of Finland's Top Exports

Case Study by



WINZO









About IEIC

IEIC is a **premier global not-for-profit organisation and India's largest community-led initiative, representing all esports and interactive entertainment ecosystem stakeholders.** Our members include **80+ leading esports and interactive entertainment companies, investors, studios, developers, and legal experts,** driving the future of India's interactive entertainment industry. IEIC serves as a unifying force, connecting innovators, policymakers, and investors to accelerate growth, foster collaboration, and build a globally competitive ecosystem where ideas, talent, and opportunities converge. Industry leaders like Griffin Gaming Partners, Makers Fund, Courtside Ventures, and WinZO Games, along with pioneering developers, esports companies such as Wala Interactive, Nukebox Studios, Dunali Games, and Orangutan Gaming, as

well as law firms including TMT Law Practice and Nilaya Legal, contribute to our thriving ecosystem.

IEIC's work focuses on collaborating with stakeholders to elevate the ecosystem and position India as a global leader. We champion initiatives such as **Bharat Tech Triumph Program - India's first countrywide competition to recognize and mentor India's top game developers.** We work with our members to build and scale domestic talent, provide them with marquee national and international platforms to showcase their talent, and build future-ready and export-ready products.



About WinZO

WinZO is India's pioneering and largest interactive entertainment platform. Launched in 2018, WinZO operates across India, the US, and Brazil and is the **preferred destination for interactive entertainment for its 250 million users**. WinZO offers over **100 social and esports games along with short-form microdramas and audio stories through ZO Play, available in 15 languages** across its key markets. WinZO is driving India's creator economy by democratizing content creation and championing our creators by building an intimate community of 75,000 micro and nano content creators, primarily from India's Tier II-V towns. We empower Indian content creators by building their global reach and monetizing their community through livestreaming esports. WinZO is **shaping the global cultural landscape** through tech-first, byte-sized, mobile-first, and immersive content

as it builds the infrastructure to **export 'Made in India' digital content** for global users. WinZO is also a pioneer in the **'Gaming for Good'** initiatives, such as Play to Prevent Cancer, through which it raised funds, partnered with the Tata Memorial Hospital to set up the Gene Counseling Center, and trained its team on early cancer detection and increased awareness among its 250 million users.

WinZO, a series-C funded venture, has **raised USD 100 million** from marquee gaming, esports, and entertainment investors, including **Griffin Gaming Partners, Courtside Ventures, and Makers Fund**. These investors forayed into the Indian market through their investment in WinZO.

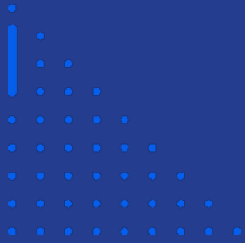


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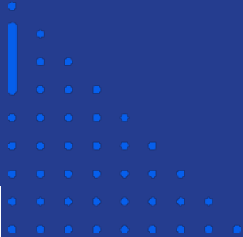
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Executive Summary

Finland is globally recognized for its exceptional technological and engineering expertise for gaming that supported the country's meteoric rise to an international gaming hub, producing blockbuster unicorn gaming start-ups like Supercell and Rovio¹. The Finnish gaming industry generates approximately €3.6 billion in annual revenue (approximately USD 3.9 billion). Out of this, an impressive 98% comes from exports, making it Finland's largest export sector². While other EU countries, such as Germany, France, and Sweden, also maintain large gaming industries, Finland stands out for its export readiness and mobile-first strategy for online gaming exports. **For instance, an estimated (and staggering) one billion people have played a game developed in Finland³, a figure all the more impressive given the country's small population of 5.5 million⁴.** This case study aims to examine Finland's gaming and digital economy landscape, examining its regulatory, educational, and industry landscape, to explore opportunities for cooperation and learning for emerging markets like India.





FOREWORD



Foreword by the Ambassador

It gives me great pleasure to present this report on the Finnish gaming sector, prepared by WinZO and IEIC. Finland is globally recognized as a pioneer in digital gaming, consistently punching far above its weight. With over 200 game development studios and a workforce of approximately 4,000 professionals, the industry has generated annual revenues exceeding €3 billion in recent years. Iconic titles such as Angry Birds, Clash of Clans, and Max Payne have placed Finland firmly on the global map, making it one of the most successful gaming ecosystems per capita in the world. This remarkable journey is built on creativity, technological expertise, and a spirit of collaboration that continues to inspire the global gaming community.

I commend WinZO Games for their timely and comprehensive effort in presenting this report, which provides valuable insights into Finland's gaming ecosystem for the Indian audience. Their work not only documents the historic achievements of Finnish companies but also highlights the lessons that can be drawn for emerging markets like India. Reports such as this one play a vital role in bridging knowledge gaps and fostering deeper understanding between two thriving digital economies.

The report also highlights the lessons that India can draw from Finland's model. India's scale, cultural diversity, and rapidly expanding digital economy create fertile ground for indigenous studios to rise as global contenders, while Finland's experience in mobile-first strategies, IP protection, and flat-team studio models offers practical insights for sustainable growth. Opportunities for collaboration between the two countries are vast, spanning joint ventures, talent exchanges, game-for-good initiatives, and cross-market IP creation. With Finland's expertise in innovation and India's unmatched market size and creativity, deeper partnerships could shape the future of the global gaming industry and establish new benchmarks for both cultural exports and digital entertainment.

India today represents one of the world's fastest-growing gaming markets, with over 500 million gamers and a sector projected to reach more than USD 8 billion by 2027. The scale of India, combined with Finland's proven expertise in game design and innovation, creates enormous potential for collaboration—be it through joint ventures, investment, or co-creation of new experiences. I am confident that greater dialogue and partnerships between our countries in this exciting sector will open new avenues for creativity, growth, and shared success.



Kimmo Lähdevirta

His Excellency Ambassador of
Finland to India



Prologue by Chairman, IEIC

I am glad to share IEIC and WinZO's joint effort to share Finland's success story in the global gaming industry. IEIC was created with the vision to promote the creation and exports of gaming IP from India and to establish India as a leading player in the global industry. To achieve this vision, we must reflect upon the journey of key gaming markets and emulate the best practices. Our mission is to accelerate India's growth in the interactive entertainment sector by fostering collaboration, shaping policy, and enabling Indian startups to scale globally. Finland espouses these success ingredients and it stands out among all the global success stories.

Finland is an inspiring example of how innovation, policy, and entrepreneurship can come together to create a globally competitive ecosystem. Finland's journey started with small groups of programmers experimenting together in the early days, a phenomenon which came to be termed the 'demoscene.' It is truly inspiring how these humble foundations eventually led to remarkable global successes like Supercell and Rovio, studios that have revolutionized, mobile-first gaming with hits like Clash of Clans and Angry Birds. These marquee studios epitomize Finland's success, where over a billion people worldwide have now played a game developed in the country. Finland's example shows how focused policy interventions and bold ideas can turn a small community into a world leader in gaming.

India is home to nearly 600 million gamers and is one of the fastest-growing digital economies in the world. Our scale and diversity position us to be a leading force in interactive entertainment. For India, the lessons from Finland's successful experiments with gaming, whether around export readiness, talent development, or supportive policy ecosystems, are particularly relevant as we chart our own path. Our rich culture is our biggest untapped asset, which we have to gamify and capture the imagination of three billion gamers worldwide. On top of it, our India Stack, our rich talent pool, and our focus on exports together make India the most promising player in the global gaming market. We must continue to equip our youth with the right skills, help our companies scale and export, and provide conducive policies and funding. Fast forward five years, and other countries will be documenting India's success.

On learning from global success, much can be gleaned from how Finland built its USD 3.9 billion-strong gaming industry. Two things stand out for me. One, how gaming became an unintended beneficiary as the Finnish giant Nokia declined and led to creation of independent studios, experimentation in gaming content, and

freed up talent for the gaming sector. Second, how Finnish gaming excellence is exemplified in the twin success of big gaming companies and independent studios - showing how symbiotic relationships create robust foundations for the long-term.

This report arrives at a timely moment, offering not only a detailed look at Finland's remarkable ecosystem but also a roadmap for India's ambitions for its interactive entertainment industry. I commend WinZO Games and IEIC in the preparation of this report, and I am confident that it will inspire meaningful dialogue, stronger international partnerships, and a renewed commitment towards building a globally competitive interactive entertainment and gaming industry for India.



Rohit Kumar Singh

Former Secretary to the
Government of India; Chairman, IEIC



भारत सरकार
GOVERNMENT
OF INDIA

MESSAGE

Message from IGDA Finland

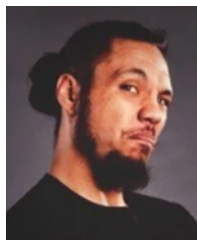
Finland's game industry is built on a foundation of creativity, collaboration, and trust. From our early demoscene roots to today's globally recognized studios, Finnish developers have shown that when talent, community, and innovation come together, it is possible to build experiences that reach billions of players worldwide.

At IGDA Finland, we believe that games are a cultural export, a meeting point of art and technology, and a bridge between communities. Our mission is to connect developers, share knowledge openly, and ensure that Finland remains a welcoming and thriving hub for game creators from around the world.

This report is an important milestone. It is the first time an Indian company has undertaken a comprehensive study of the Finnish gaming ecosystem, and it highlights the opportunities for cooperation between two of the world's fastest-growing gaming markets.

India's scale, diversity, and energy, combined with Finland's experience in global exports and innovation, create a natural foundation for collaboration.

I warmly welcome this effort by WinZO and the Interactive Entertainment and Innovation Council, and I hope it will inspire new partnerships, creative exchanges, and shared growth between communities. Games transcend borders, and by working together, we can ensure they continue to enrich lives everywhere.



Kim Kupiainen
Chair, IGDA Finland



Message from Business Finland

It gives me great pleasure to present this insightful report on the Finnish gaming sector, prepared by WinZO and IEIC. Finland has, over the past few decades, nurtured one of the most dynamic and innovative gaming ecosystems in the world, combining technological excellence with a culture of creativity and entrepreneurship. This report captures not only the milestones of our journey—from pioneering studios to globally recognized unicorns—but also the unique elements that make Finland a leader in interactive entertainment. I commend WinZO and IEIC for the rigor, clarity, and depth with which they have presented these developments, ensuring that the spirit of Finnish innovation is conveyed to a wider global audience.

Finland has emerged as a global leader in gaming, transforming a hobbyist-driven culture of the 1970s and 80s into a world-class industry worth €3.6 billion annually, with 98% of revenues coming from exports. With blockbuster hits such as Angry Birds, Clash of Clans, and Max Payne, Finnish studios have influenced every stage of the gaming evolution—from early PC development and Nokia's Snake to the mobile-first revolution that redefined the global industry. The success of studios like Rovio, Supercell, and Remedy is rooted in Finland's unique strengths: a strong talent pipeline shaped by demoscene culture and education policy, public investment programs like Business Finland's grants, bold risk-taking in new technologies, and an ecosystem of hubs in Helsinki, Tampere, and Oulu that attract around 35% of their workforce from abroad. Finland's case exemplifies how creative freedom, light regulation, and state-backed innovation frameworks can turn a small nation of around 5.5 million into one of the world's most export-competitive gaming economies, with over one billion people worldwide having played Finnish-developed games.

As Finland and India continue to explore opportunities for collaboration, such efforts play a vital role in bridging markets and fostering cross-border partnerships. WinZO and IEIC have demonstrated a strong understanding of the Finnish gaming landscape, and I am confident that their expertise will contribute meaningfully to advancing cooperation between our industries. I look forward to further engagement with WinZO and IEIC, and to building on this foundation of shared learning, innovation, and growth in the gaming sector.



Siddharth Naithani

Senior Advisor, ICT,
South Asia at Business Finland

**BUSINESS
FINLAND**

MESSAGE

Message from the Industry

WinZO, since its launch in 2018, has always aimed to establish and fortify India's position in the global gaming landscape. We innovated and scaled WinZO with the ultimate goal of making India a gaming giant. In this pursuit, we have been to the biggest gaming conventions, met game developers from across the world, and deep dived into global success stories. In this journey, we found Finland to be a unique success story, with lessons galore for India. We wanted to share Finland's success with the larger sector and with think tanks and policy makers to collaborate and replicate a similar success in India. This case study by IEIC and WinZO is a step in the pursuit to build and scale India's gaming industry by learning from the global peers.

WinZO is in a unique position to leverage the learnings from the Finnish success story for India. Since its launch, WinZO has grown into India's homegrown interactive entertainment and consumer tech platform with over 250 million users across India, Brazil, and the US. WinZO offers over 100 social and esports games in 15 Indian & foreign languages. WinZO is backed by leading global investors, including Griffin Gaming Partners, Makers Fund, Courtside Ventures, and Kaalari Capital. WinZO, as a leading gaming platform, sits at the confluence of investors, game developers, users, content creators, academic institutions, and leading gaming tech solutions companies. This gives us unique vantage point to replicate global lessons and leverage the ecosystem to bolster India's gaming ecosystem.

Finland's story resonates deeply with WinZO's own aspirations of democratising entrepreneurship. Finland's gaming ecosystem was built by small communities of tech and gaming enthusiasts who came together to experiment, share ideas, and create early digital experiences. These cooperative beginnings laid the foundations for what would become a multi-billion-dollar industry. Over time, this spirit of creativity and collaboration gave rise to globally celebrated studios like Supercell and Rovio, as well as ushered in a new generation of innovators such as Metacore and Giant Leap Games, who are carrying Finland's legacy forward in the evolving global gaming landscape. Finland exemplifies how bold risk-taking, creative freedom, and supportive policies can nurture world-leading gaming companies.

The lessons highlighted in this report—around mobile-first strategies, export readiness, collaborative innovation, and nurturing talent pipelines—are particularly relevant for a market like India, where gaming is poised to be among the most dynamic

drivers of the digital economy. I am confident that by learning from Finland's experience, India will not only strengthen its domestic gaming ecosystem but also emerge as a formidable global player.

We hope this case study serves as an aspirational guide to other fellow entrepreneurs in the digital entertainment ecosystem who wish to create in India, for the world. We thank IEIC and Business Finland in India for their kind support.



Paavan Nanda
Cofounder, WinZO



€3.6Bn
**ANNUAL REVENUE OF FINLAND'S
GAMING INDUSTRY**



01 Understanding Finland's Gaming Ecosystem

1.1. A brief overview of how Finland became a global gaming powerhouse

The origins of Finland's gaming industry trace back to the late 1970s, laying the groundwork for future breakthroughs through 'hobbyist programming'⁵, early demoscene⁶ culture, and the first commercial game released around the 1990s. This section outlines how Finland's gaming industry evolved through these phases, eventually laying the groundwork for its globally recognised gaming industry. The Finnish gaming industry has already set the international standards for what constitutes 'gaming excellence'.

1.1.a. Late 1970s to the early 1990s: The early days of Finnish game development

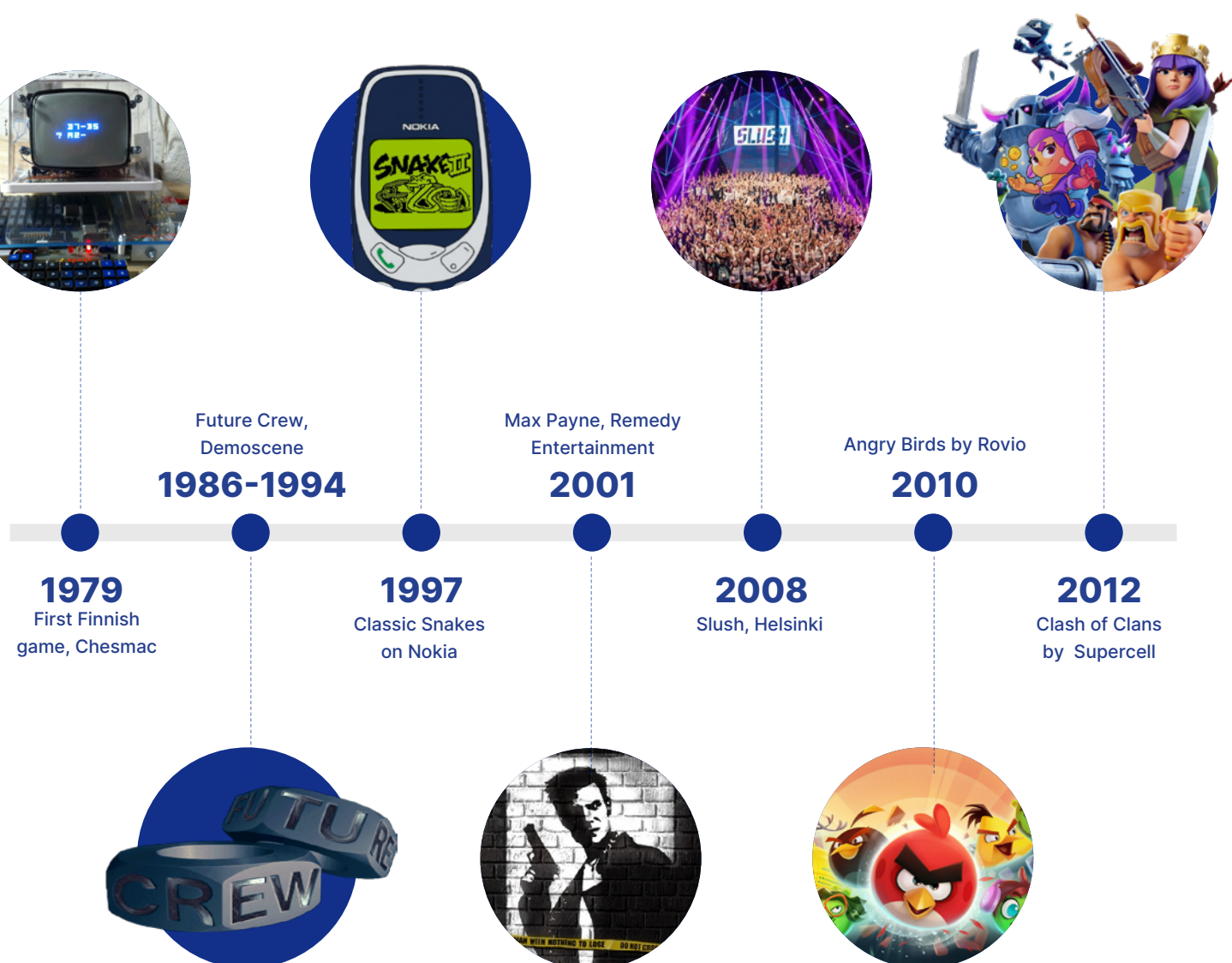
Finland's gaming industry evolved from hobbyist beginnings, with early pioneers laying the foundations for the eventual rise of the country's internationally recognized studios. The first Finnish game, Chesmac (a PC title), debuted in 1979, and later through the 1980s, game development was driven by enthusiasts programming on Commodore and other early computers⁷. The unexpected variable of Finland's punishing winters also played a role in the sector's growth. Finland's harsh winters drove coders indoors, giving rise to the **Demoscene**—a subculture where artists and programmers pushed the limits of available hardware to create audiovisual feats⁸. This laid the groundwork for a uniquely skilled talent pool that later fueled the Finnish game industry.

'Future Crew' was one such pioneering demogroup formed in 1986 that provided a creative haven for computer enthusiasts during a time when gaming was still a fringe hobby⁹. This collective not only fostered a sense of shared identity but also launched many of its members into professional game development, most notably as founders of Remedy Entertainment, creators of Max Payne. Many future developers of

top Finnish studios like Housemarque Entertainment, Remedy, and Supercell trace their roots to this collective¹⁰. **The Assembly event**, launched in 1992, became a pivotal gathering for this community, nurturing creativity and innovation.

As more Finns turned to building games for domestic audiences, games rooted in Finnish ethos emerged actively during this period. For example, Pro Pilkki, a PC ice fishing game released in 1999, vividly reflected Finland's cultural connection to its Arctic environments and seasonal traditions¹¹. At the turn of the 21st century, Remedy's Max Payne (a PC game) became Finland's breakout global hit in 2001, selling over 7.5 million copies by 2011¹². Meanwhile, Nokia's Snake¹³ released in 1997, laid the groundwork for mobile gaming. Habbo Hotel (PC game), created by the Finnish company Sulake in 2000, pioneered social virtual worlds¹⁴. Importantly, Slush, launched in Helsinki in 2008, evolved into one of Europe's premier startup and tech events, with a strong gaming presence that showcases Finnish innovation and connects local studios with global investors, publishers, and talent¹⁵.

TIMELINE: Evolution of Finland's Gaming Industry



1.1.b. The 2010s

The twin developments of the 2009 release of Apple's iPhone 3GS and the App Store's fast-growing distribution model marked a pivotal shift in the global gaming landscape—one that Finland seized with strategic precision¹⁶. The iPhone's intuitive interface and seamless monetization infrastructure positioned it as a near-perfect gaming platform, placing mobile gaming as a replacement for PC and console experiences. Moreover, Apple's app store curated editorial picks, seamless monetisation stack, and dev tools like Xcode and ARK that played a vital role in scaling these games globally¹⁷. That same year,

Finnish studio Rovio launched Angry Birds, which became an instant global sensation that not only redefined mobile gaming but also catalyzed a wave of mobile game startups both in Finland and worldwide. Riding this momentum, Finnish developer Supercell—founded by demoscene veterans—leveraged the freemium, in-app purchase model to create the blockbuster title Clash of Clans. Its global success validated the viability of free-to-play mechanics and fueled Helsinki's rise as a premier mobile gaming hub, embedding Finland's reputation as an innovation-led leader in the digital entertainment economy¹⁸.



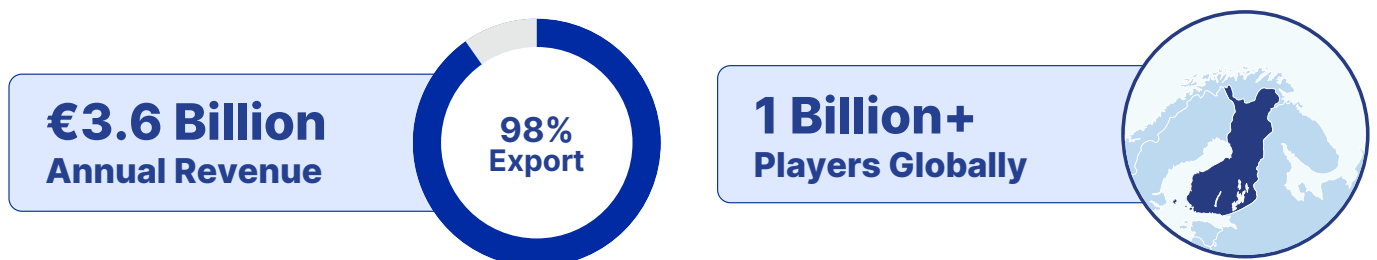
A citizen stops at the famous city sculpture "Three Smiths" which has been put on facial masks, in Helsinki, Finland, March 31, 2020

1.1.c. Post-COVID recalibration

Post the COVID-19 pandemic, the Finnish gaming industry definitively transitioned beyond its mobile-first legacy. Studios like Metacore (which developed the game Merge Mansion) and Giant Leap Games are refining the flat-team, high-trust model pioneered by mobile game developers like Supercell for today's more competitive, live-ops-driven gaming landscape¹⁹. Their focus is on building exceptional transmedia²⁰ gaming IPs, utilizing gripping interactive storytelling, and blending artistic excellence at tremendous scale. Netflix's acquisition of Next Games to build its global gaming hub from Helsinki signals continued global confidence in Finland as a launchpad for internationally competitive gaming innovation²¹.

Therefore, Finland's rise as a global gaming leader is underpinned by its long-standing deep-rooted strengths in technology, engineering, and innovation. As it stands today, its gaming industry has generated over €3.6 billion in annual revenue (USD 3.90 billion)²², with 98% of that revenue derived from gaming exports—making gaming the country's top cultural export. Over one billion people have played Finnish-developed games, and the nation's 'mobile-first strategy' and 'high export efficiency' sets it apart from competitor markets within the EU, with the market's projected annual growth rates staying at a steady 7.8% through 2026.

Finland's Gaming Industry at a Glance



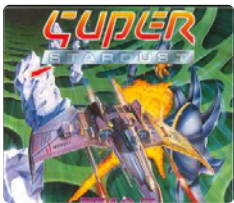


How Supercell Became A Nordic Powerhouse in Gaming

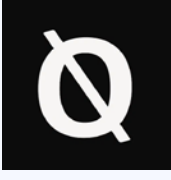
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Founded in Finland in 2010, Supercell has redefined mobile gaming with a lean, cell-based²³ team structure and hit titles like Clash of Clans and Brawl Stars²⁴. Despite having only 340 employees, its valuation soared to \$11 bn—over \$32 mn per employee—thanks to massive global hits and shrewd marketing campaigns geared towards tech-savvy consumers. Notably, Supercell was Finland's largest single corporate taxpayer in 2021²⁵. One of the world's largest video gaming companies, Tencent, acquired an 84% stake in the company in 2016, no doubt impressed²⁶ by Supercell's success, which stems from its focus on small, empowered teams, long-term product vision, disciplined game testing, and a relentless pursuit of quality over quantity.

Table 1: Key Finnish Gaming Studios and their Games

Studio/Developer	Game (Year)		
Programmed by Raimo Suonio and published by Topdata	 Chesmac (1979)		
 HOUSEMARQUE Housemarque Studio	 Super Stardust (1996)	 Resogun (2013)	 Alienation (2016)
	 Matterfall (2017)	 Returnal (2021)	 Nex Machina (2017)
	 Max Payne (2001)	 Max Payne 2 (2003)	 Alan Wake (2010)
	 Control (2019)	 Alan Wake II (2023)	 Quantum Break (2016)
	 Pro Pilkki (1999)	 Sequel Pro Pilkki 2 (2007)	
 Procyon Procyon Products			

Studio/Developer	Game (Year)
 NOKIA	 Snake (1997)
 sulake Sulake	 Habbo Hotel (2000)
 BUGBEAR Bugbear Entertainment	 FlatOut (2004)  Glimmerati (2005)
 ROVIO Rovio Entertainment	 Angry Birds (2009)
 GRAY AREA Grey Area	 Shadow Cities (2010)
 SUPERCCELL Supercell	 Clash of Clans  Hay Day (2012)  Clash Royale (2016)

Studio/Developer	Game (Year)
 Tracktwenty (EA Helsinki)	 SimCity BuildIt (2014)
 Next Games	 The Walking Dead: No Man's Land (2015)
 Small Giant Games	 Empires & Puzzles (2017)
 Nolla Games	 Noita (2019)
 Metacore	 Merge Mansion (2020)
 Tree Men Games	 PAKO Highway (2022)

1.2. What Fuelled the extraordinary competitiveness of the Finnish Gaming Industry

Finland's rise as a dominant player in the international gaming market is no accident. Astute founders, policymakers, academia, and investors deployed strategic decision-making and business-friendly policies that helped establish an industry that is now world-renowned. This section looks at factors that led to Finland's rise as a leading gaming-export economy.

1. Early Mobile Advantage and App Store Enablement:



Finland's game studios were among the first to seize the opportunity presented by the Apple App Store's launch in 2008. Companies like Rovio and Supercell capitalized on the mobile-first wave with freemium models and scalable live services. Apple's editorial promotion, coupled with in-app monetisation infrastructure, allowed Finnish games to achieve global visibility and commercial success²⁷.

2. How Nokia's Decline led to the rise of Developer-Led Ecosystem:



The decline of Finnish telecommunications giant, Nokia, from 2008 onwards²⁸ freed up a highly-skilled technical workforce of engineers, designers, and business professionals, many of whom easily transitioned into gaming and allied sectors. This catalyzed the formation of independent studios, empowered experimentation in game play and design, and democratized access to talent in game development across Finland, especially in mobile and casual gaming²⁹. This innovation is builds on in Finland's longstanding history of experimenting fearlessly with technology—while Nokia fell, its vision to experiment in fusing telecommunications with gaming stood the test of time. N-Gage, launched by Nokia in 2003, was an ambitious hybrid between a mobile phone and a handheld gaming console, aiming to redefine portable entertainment³⁰. Though the N-Gage did not achieve desired success, its bold fusion of phone and gaming device laid the conceptual groundwork for Finland's mobile gaming boom. The rise of mobile gaming, a global phenomenon pioneered by the Finnish, is perhaps no surprise.

3. Public Investment and Long-Term Institutional Backing:



Finland's government, through Tekes (now Business Finland), actively supported game development via R&D grants, export promotion, and targeted programs like the Skene Game Refinery (2012–2015). These initiatives professionalized the industry and strengthened global competitiveness. Business Finland, a pioneer in creating domestic and international appetite for Finland's gaming economy, continues to fund creative tech and education-focused programs to this day.

4. Strong Education and Early Exposure to Tech:



Finnish national education policies emphasize coding, digital literacy, and creative problem-solving from an early stage. Game design began to be integrated into curricula, while programs such as Learning Solutions (2011–2015) promoted digital innovation and internationalization of educational products, including games³¹. This longstanding foundational training in creative education has translated to the rise of strong higher educational programs specialising in game development. Some of these are projects or separate courses, complementary to the student's main degree programme curriculum. However, several degree programmes fully commit to game development and other forms of game studies, facilitating the development of future skilled game developers that can sustain the Finnish game industry's long-term success³².

Table 2: Key Gaming-focused courses offered in Finland

University Name	Course offered (all are 2-year-long courses)
 Aalto-yliopisto Aalto-universitetet Aalto University Aalto University- Helsinki, Finland	New Media - Game Design and Production; Computer, Communication, and Information Sciences - Game Design and Production.
 Tampere University Tampere University- Tampere, Finland	Game Studies
 KAMK Kajaani University of Applied Sciences- Kajaani, Finland	Game Business Management
 TURKU AMK University of Turku/Turku University of Applied Sciences	Turku Game Lab; Engineering, Information and Communications Technology (Game and Interactive Technologies)

5. International Talent and Cluster Formation:

Finland's top hubs or clusters for online gaming - Helsinki (its capital), Tampere, and Oulu³³- offer vibrant ecosystems with robust infrastructure and supportive professional networks [like International Game Developers Association (IGDA) Finland]. Global gaming and game development giants like Unity and Netflix have established offices in Helsinki, recognising the salience of these rich gaming clusters. Finland's gaming ecosystem has also served as a magnet attracting top global talent in game development. According to the Finnish Game Industry Report 2025, 35% of the gaming industry workforce consists of foreign talent (professionals who do not hold Finnish citizenship)³⁴. The majority of them are in Finland with specialist residence permits. The country's high quality of life, government-backed relocation support, and strong professional networks are considered to be enabling factors³⁵.

1.3. Conducive National and Regional Policies Enabling the Growth of Gaming in Finland

Finland's gaming boom has been fueled by supportive government policies, including R&D incentives, startup grants, and public-private initiatives such as Business Finland. These frameworks fostered innovation, talent development, and global market readiness, making Finland a global gaming hub. **This section covers both Finnish Policies and European Union Policies.**

1.3.a. Finland's Government Policy

Table 3: Key Gaming-focused courses offered in Finland

Policy	Brief
1990s-2000s	Finland follows a “hands-off” model for regulation³⁶ and this may have rubbed off on the gaming industry too. This meant that instead of enforcing heavy content regulation or licensing, the government allowed the sector to experiment and evolve organically. This approach enabled creative risk-taking and gave rise to grassroots movements such as the Demoscene, a digital art subculture that proved instrumental in developing early game development talent.
Digidemo Program	Launched in 2002, the Digidemo Program, managed by AVEK (The Promotion Centre for Audiovisual Culture) and funded by the Ministry of Education and Culture, remains a crucial public grant for fostering early-stage innovation in Finland's creative sectors, especially the games industry ³⁷ . With ongoing adaptations, the program supports R&D projects that experiment with new forms of audiovisual and cultural narratives, multi-platform services, and content innovations. In 2024, a total of €390,000 was awarded to 22 demos under the DigiDemo grant.³⁸
Business Finland (Tekes)	Started in 2018, it is a government-owned innovation and trade promotion agency, and has been instrumental in the growth of the Finnish game industry by providing over €150 million (\$162 million) in funding to companies such as Supercell, Rovio, Remedy, Small Giant Games, and Colossal Order³⁹. With a network of 760 specialists across 40 global and 16 domestic offices, Business Finland supports startups and studios with strong ideas, capable teams, and global ambitions, helping them scale rapidly through financial support and international expertise⁴⁰. Examples of funded companies also include Koukoi Games ⁴¹ , which later launched successful games such as Om Nom Run ⁴² , downloaded 30 million times.
Immersive Digital Life Mission	Launched as part of the broader Finnish Metaverse Initiative in April 2023, it envisages Finland as the global leader, architect, and enabler of Immersive Digital Life by 2035 ⁴³ , with the gaming industry at the heart of this transformation. The mission, led by Business Finland, seeks to build a globally recognized Finnish metaverse ecosystem, foster next-generation immersive gaming interfaces, and enhance competitiveness by adopting advanced digital technologies in game design, storytelling, and interactive entertainment.
National IP Strategy of Finland (2022–2030)	The National IP Strategy of Finland (2022–2030) ⁴⁴ is a comprehensive framework aimed at strengthening the country's innovation ecosystem by enhancing the creation, protection, and commercialisation of intellectual property (IP). For the gaming industry, this strategy is particularly impactful: it fosters a supportive environment where studios can confidently develop and export original content—such as game mechanics, characters, and visual assets—knowing their creations are protected.

1.3.b. Relevant Gaming-related Stakeholders

Table 4: Finland's Government & Regulatory Bodies

 EDUSKUNTA RIKSDAGEN Finnish Parliament (Eduskunta) Legislative body that enacts gaming laws.	 FINNISH GOVERNMENT Legislative Review Council Reviews legal and social impacts of reforms.
 MINISTRY OF EDUCATION AND CULTURE FINLAND Ministry of Education and Culture Works closely with funding bodies like Business Finland and Arts Promotion Centre Finland to support innovation, research, and cultural exports—making it highly relevant to Finland's thriving game development sector.	 Ministry of Economic Affairs and Employment of Finland Ministry of Economic Affairs and Employment Business Finland operates under this ministry and plays a key role in supporting gaming and tech-related startups.

Table 5: Judicial & EU-Level Entities; Gaming Industry Associations

 European Games Developer Federation (EGDF)	Represents game developer associations at the EU level and works on shaping policy, copyright, tax incentives, access to funding, and education frameworks.
 EU Intellectual Property Office (EUIPO)	Provides access to IP scan services, advice on protecting game assets (trademarks, software, character design, etc.).
 European Commission and Directorate-General for Communications Networks, Content and Technology (DG Connect)	Through DG CONNECT, the Commission monitors the cultural and creative sectors, including video games.
 Finnish Game Developers' Association	The association coordinates cooperation between game developer companies and advocates for their industry.
 IGDA Finland	IGDA Finland is the Finnish chapter of the International Game Developers Association, with the goal of connecting game developers, promoting professional development, and advocating for the interests of the community.
 Neogames Finland	Neogames is a membership based, non-profit association for the game industry. Their mission is to coordinate and support the growth and development of the Finnish Game Industry and its ecosystem.
 Game Makers Of Finland	Game Makers of Finland is the world's first labour union for people who work or study in the game industry.



02 Gaming as Export: Lessons from Finland and what gave it the 'X Factor'

Finland has positioned gaming as a key creative export sector, with over €3.6 billion in annual revenue (\$3.90 billion), and global hits like Clash of Clans and Angry Birds reaching more than a billion players. Its success stems from strong IP protection, public R&D support, and a vibrant startup ecosystem—offering valuable lessons for India to similarly scale its high-potential indigenous gaming exports. Finland's key gaming hubs—Helsinki, Tampere, and Oulu—drive innovation across mobile, PC, and console platforms, supported by strong academic and startup ecosystems⁴⁵. This section unpacks Finland's "X-Factors" that made it the hub for global gaming innovation that it is today.



Table 6: Finland's 'X' Factor

Why Finland Attracts Global Gaming Talent
Quality of life and safety – Finland is known for its excellent healthcare, safety, and overall quality of life, making it an attractive destination for professionals willing to migrate⁴⁶. Strong professional network – A mature ecosystem with deep connections among gaming professionals facilitates easier collaboration and access⁴⁷. Gender equality and education – Women developers have better access to opportunities due to Finland's emphasis on education and gender equality in the workforce⁴⁸. As of 2018, women made up 20% of Finland's game industry workforce, with 3,200 total employees⁴⁹. Further, bodies like 'Women in Games' Finland, established in 2019, aims to increase representation and support inclusiveness across the industry⁵⁰.
Gaming Support Bodies and Unions
Finland is home to the world's first union for game developers, Game Makers Union⁵¹, reflecting a mature, worker-conscious industry. The union helps maintain uniform salaries and fair working conditions, contributing to a supportive industry culture.

Strong Ip, Copyright And Patent Laws

In Finland, the protection of gaming and animation intellectual property is governed primarily by the Finnish Copyright Act (404/1961)⁵², which aligns with EU directives. **This law offers robust rights to game developers and animators by safeguarding software code, characters, design, and multimedia elements under copyright.** Additionally, innovations like game mechanics may be protected through Finland's Patent Act, and trademarks help secure branding. Together, these frameworks ensure comprehensive IP protection across both domestic and international markets⁵³. Finland's Patents Act⁵⁴ also allows protection of technical innovations in gaming and animation, such as unique algorithms or game engines. Developers can secure national or EU-wide rights via the Finnish Patent Office or European Patent Office, respectively⁵⁵.

Diversity In Job Roles

Game production today involves a broad mix of skills beyond traditional programming and design, including deep data literacy and cross-functional collaboration⁵⁶. As creative and analytical roles increasingly converge, Finnish game studios offer a wide array of employment opportunities across disciplines and beyond developers, such as HR, designers, programmers, and testers- broadening employment opportunities.

Lessons From Business Innovations In The Finnish Ecosystem

As noted earlier, Finland's gaming industry has been significantly shaped by pioneering giants like Rovio and Supercell, whose global success laid the groundwork for a thriving ecosystem, mirroring how India's Nazara Technologies is steadily expanding its international influence. As consumer behavior evolves, particularly with Gen Z and Gen Alpha, the industry is swiftly adapting by emphasizing speed, interactive participation, and broader accessibility. **A key driver of innovation remains diversity among creators, which fosters a richer, more inclusive range of game narratives and experiences.** Furthermore, the industry is witnessing a strong trend of cultural convergence, where games increasingly incorporate elements from pop culture, artificial intelligence, and cinematic IPs—fueling transmedia growth, generating new job opportunities, and elevating the medium's cultural relevance.

Games For Good: Social & Educational Innovation⁵⁷

Finland is home to several socially driven gaming initiatives—Aalto University is developing therapeutic games for depression, while SyraWise's Rescuebusters educates children on safety using gamification. Team Action Zone's ActionTrack empowers global users to create educational, event-based mobile games, and 4Good Games channels game revenues toward environmental causes aligned with the UN SDGs. Studios like Platonic Partnership use narrative games to address issues like alcohol abuse with empathy.



03 Future of Industry

Finland's gaming industry, anchored in creative freedom and flat studio structures, continues to evolve beyond its 2010s mobile boom. Companies like Metacore⁵⁸ and Giant Leap Games⁵⁹ are refining the Supercell-inspired model by blending artistic integrity with scalable operations. Backed by strong public support and a skilled talent pool, Finnish studios are expanding into new genres and platforms. Moreover, promising firms like Nitro Games, have received approx. 430,000 EUR (\$472,000 USD) from Business Finland⁶⁰. This shows the ecosystem's resolve towards prioritizing mentorship and global talent attraction, positioning Finland for sustained, value-driven leadership in global gaming⁶¹. This approach has also given rise to some of the world's most iconic games while promoting employee well-being and sustainable practices. As global competition intensifies, Finland is redefining its competitive edge—not through imitation, but by building a resilient, globally relevant gaming ecosystem rooted in its values and creative strengths⁶².

Effective June 11, 2025, updates to Finland's Aliens Act require non-EU/EEA professionals to secure new employment within 3 to 6 months of contract termination, with employers obligated to inform the Finnish Immigration Service (Migri) within 14 days⁶³. While the intention is to ensure administrative clarity, the game industry, led by bodies like Neogames⁶⁴, emphasizes the need for policies that reflect the long-term contributions of international professionals. The Finnish gaming industry is home to immense foreign talent, which makes up 35% of the workforce. Many of these individuals hold specialist permits, have resided in Finland for years, and are deeply integrated into local communities. Continued dialogue is encouraged to maintain Finland's position as an open, globally competitive hub for innovation and creative talent.

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Case Study

