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Rethinking the Rules



Executive Notes | From a European conversation to a sharper set of choices

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Editorial premise. These notes trace the evolution of a continuing GESE conversation from Asturias 2025 through London and the pre-Seville dialogue to the October 2026 discussions. They combine previously circulated GESE notes with the recorded Seville conversations. They preserve recognisable arguments without identifying speakers or mistaking a contested proposition for consensus. The editorial interpretation remains open to correction by participants.



Executive summary



The industry's central challenge has shifted from production capacity to durable relevance.
Better tools and more accessible development capabilities have not made it proportionately easier to earn attention, build trust or sustain profitable companies. The conversations from Asturias through London to Seville suggest six connected leadership questions, rather than a single prescription.

Quality must be connected to demand.
A good game remains essential, but a credible business also needs an identifiable audience, evidence that its proposition matters and a realistic path to discovery. Early signals can sharpen decisions without becoming a veto on originality.

Discovery and community are questions of power and accountability.
Platforms, creators and players do not always experience the same problem. Building a community relationship means deciding how player intelligence influences decisions, not merely collecting engagement metrics.

Efficiency can redistribute risk rather than eliminate it.
Smaller teams, modular publishing and specialist partners create flexibility, but may weaken training, continuity and bargaining power unless responsibilities and long-term value are deliberately shared.

AI demands judgment beyond adoption.
Faster workflows are not automatically better products or healthier businesses. Leaders must evaluate costs, returns, creative differentiation, employee consequences and the player outcomes their systems optimise.

Europe's challenge is to retain the value of its creativity.
Talent and cultural diversity are strengths; fragmented finance, uneven commercial access and the difficulty of sustaining companies between projects remain structural constraints. The question is how to turn creative capability into lasting ownership, influence and international scale.

No universal model emerged.
These are recurring tensions and editorial implications, not positions unanimously endorsed by participants. GESE's value lies in bringing leaders from different parts of the value chain into a conversation where assumptions can be challenged, trade-offs made visible and decisions improved.

The pre-Seville dialogue



GESE's discussions have developed across a continuing European network, including earlier gatherings in Tenerife and Nerja. Those encounters matter to the history of relationships and trust, but the documentary record used for this edition permits a more detailed reconstruction from Asturias in 2025 onward. The following is therefore not a claim that a single, linear consensus has existed across every edition. It is a reading of how successive documented conversations have made particular questions more difficult, more concrete and more consequential.

Asturias 2025: defining the kind of industry Europe wanted to build.

The Asturias notes were unusually explicit about aspiration. They imagined a more coordinated European creative voice, grounded in cultural distinctiveness rather than imitation of larger markets. Human intention, ethical responsibility and transparency were placed at the centre of the emerging AI conversation. Layoffs and burnout were understood as failures of organisational sustainability, not merely as fluctuations in labour supply. Flexible, networked studios were imagined as alternatives to large hierarchies, provided that trust, shared purpose and autonomy remained intact. The possibility of stronger links between games, education, culture and civic life enlarged the question beyond commercial growth.

That perspective was not simply optimistic. It identified genuine structural weaknesses: Europe's fragmented representation, the vulnerability of creative labour and the risk that technological progress could outpace ethical governance. Nevertheless, the organising question was still largely aspirational: what sort of industry would we choose to create? The 2030 horizon gave participants room to discuss desirable institutions, leadership behaviours and cultural priorities rather than only the immediate constraints of the next project.



London, April 2026: testing the aspiration against the economics.

The conversation at BAFTA made several of those ambitions harder to sustain without changing the system around them. Europe could support the production of games while doing far less to finance the continuity of the companies that produce them. A studio might secure money to develop a title and still lack the working capital, marketing capacity or commercial runway to build a lasting business. The gap between projects emerged as a particularly dangerous moment: the company has accumulated people and knowledge but cannot finance the time needed to turn that capability into the next opportunity.

London also shifted attention from the creation of intellectual property to the retention and compounding of value. Publishing deals, investment terms and acquisition pathways can make production possible while transferring control and long-term upside elsewhere. Europe's capital problem was described not merely as insufficient money but as fragmented institutions, incompatible incentives and national boundaries that complicate scale. The group examined the possibility of modular publishing services, alternative financing structures and lessons from film and television. None was treated as an already proven successor to existing arrangements.

The same meeting exposed the ambivalence of the smaller-studio ideal. Modular teams and specialist partners can lower fixed costs and increase flexibility, but they may also make European companies more dependent on external owners of finance, IP, distribution and audiences. Layoffs could move skilled people into adjacent industries without ensuring that games could retain or regenerate its own talent base. Established games and live ecosystems were capturing a substantial share of attention and spending, while new IP had to compete for entry into those habits. London's conclusion was therefore neither that games had failed nor that growth had ended. It was that the structures supporting the previous phase of growth were no longer adequate to every business model.



Before Seville: turning apparent solutions into uncomfortable questions.

The written dialogue circulated to the community before the October gathering began from these two bodies of work. Its central move was to ask what happens after a seemingly sensible response is adopted. If a company becomes leaner, where does the displaced risk go? If more of production is delivered by partners, who holds the knowledge that makes good creative decisions possible? If execution becomes easier to buy, what becomes scarce and defensible? If IP ownership is important, is ownership alone sufficient, or must the creator also retain control, commercial participation and the capacity to compound enterprise value?

The pre-Seville material also developed a more demanding view of European competitiveness. Regulatory protections may have legitimate purposes while creating asymmetric compliance costs between large incumbents and small firms. The problem may be the industry's capacity to influence rules and adapt quickly, rather than a simple choice between regulation and deregulation. On AI, the emphasis moved from predictions of disruption to observed adoption, cost, return, creative boundaries and the possibility that AI would reshape player relationships as well as production.

The advance conversations therefore served as a bridge between the broad principles of Asturias and the commercial constraints of London. They did not settle those tensions. They made it possible to arrive in Seville with a sharper question: **which assumptions should leaders stop treating as self-evident, and which responsibilities cannot be delegated to technology, capital providers or platforms?**

The questions becoming sharper



The written notes were informed by individual exchanges with executives and contributions from the wider GESE network, including people who would not be physically present. That matters: the October discussion did not begin with a blank page, and the community's contribution should not be reduced to those in the room. At the same time, the circulated synthesis is an editorial account of that dialogue, not a transcript of every exchange. Its themes can be described faithfully; the number of people endorsing each proposition cannot be inferred from the document.

Several connected tensions had already become visible.

From studio size to the distribution of risk.

A smaller core can reduce fixed commitments, but the economic exposure does not vanish. It may move to specialist suppliers, freelancers, service studios or a chain of partners dependent on uncertain projects. A project-based industry needs mechanisms to preserve careers, knowledge and continuity outside a single employer. The comparison with film is useful only if it includes the financing, labour and professional infrastructure that developed around that industry's production model.

From outsourcing to shared intelligence.

External partners are often treated as execution capacity, separated from the reasoning behind the work. Yet as more production occurs across organisational boundaries, product knowledge, market evidence and creative context become harder to contain within one core team. The proposition was not that every supplier should become a co-owner. It was that a modular industry may require more intelligent partnerships, clearer decision rights and arrangements that allow both parties to learn and accumulate value.

From making IP to capturing durable value.

IP ownership remains important, but it is not the whole question. Creative control, upside participation, equity, repeatable capabilities and the ability to develop a business beyond one contract may matter as much as



the formal title to an asset. Conversely, holding an IP that cannot be financed, discovered or monetised may not confer meaningful strategic independence.

From abundant execution to scarce judgment.

Better tools can make previously expensive capabilities more accessible. That changes what differentiates companies. Taste, trust, creative identity, community, accumulated expertise and the ability to coordinate people around a coherent purpose become harder to replicate than production capacity alone. This is a hypothesis about changing scarcity, not a declaration that craft or technical execution have ceased to matter.

From European ambition to institutional speed.

Europe's cultural richness and creative skills are not automatically converted into international leverage. Fragmented finance, administrative friction and uneven access to policymakers can compound disadvantages for younger businesses. Collective representation may matter, but so does avoiding interventions that preserve existing structures without improving their effectiveness.

From AI speculation to operational responsibility.

The questions had become concrete: what is being adopted, what is actually improving, what does it cost, what evidence would justify wider use, who decides the boundaries and how will the consequences be shared with employees and players? The distinction between optimising for engagement, revenue, satisfaction and wellbeing was already emerging as a leadership choice, not merely a technical one.

Taken together, these questions form the intellectual route into Seville. They also explain why the later discussion gravitated toward demand, community, company structure, discovery and AI. Those are not five unrelated trends. They are five points at which the industry's previous division of responsibilities is becoming unstable.

How the conversation narrowed in Seville



The recorded October exchanges repeatedly returned to a basic asymmetry: it is easier to increase production capability than to create demand, trust or lasting economic security. The propositions that ultimately attracted sustained discussion were recognisable in their own language: *“A good game is not good enough”; “Community has no seat at the table”; “If companies get smaller, where does everybody else go?”; “Why can't I find games that interest me?”*; and the question of leader-driven AI adoption, its boundaries and accountability.

These formulations were not a replacement for the broader European conversation. They were ways of making it actionable. Quality without an audience exposes the limits of a production-first business model. Community without influence exposes a gap between declared value and governance. Lean teams without career pathways expose a conflict between company efficiency and ecosystem resilience. Discovery exposes the power of platforms and the difference between the producer's interests and the player's experience. AI exposes the difference between what management can optimise and what it should optimise.

The following sections explore those questions as arguments rather than reporting how they were selected or discussed. Where perspectives diverged, the disagreement is preserved. Where the material indicates shared concern but not agreement on remedies, that distinction is made explicit.



The central shift: making games is easier than making them matter



The games industry has not lost its ability to create remarkable entertainment. What has become less dependable is the relationship between creating something remarkable and building a viable business around it. More production capacity, more accessible technology and more routes to release do not necessarily produce more commercially sustainable companies. An industry can become more efficient at making games while becoming less effective at connecting them with people.

This is not a uniform crisis. Businesses with established intellectual property, powerful distribution relationships or deeply engaged audiences may be performing well. A first-time premium studio, a mobile operator, a specialist supplier and an established franchise owner face materially different conditions. Treating them as participants in one undifferentiated downturn obscures the mechanisms that matter.

The more useful question is whether the industry's inherited assumptions still describe where value originates, how it reaches players, and who retains control over it. The answers are increasingly intertwined. Production decisions shape financial exposure. Platform incentives shape discovery. Community relationships shape demand. AI changes the distribution of capabilities. Organisational restructuring changes who can enter the profession and who can remain in it.

The strategic problem is not simply how to make games at lower cost. It is how to build businesses whose creative proposition, audience relationship and economics reinforce one another.



“A good game is not good enough”: quality, evidence and commercial conviction

1

Quality is indispensable but does not guarantee relevance, visibility or revenue. The distinction is uncomfortable because the industry's self-image is built, with good reason, around craft. Yet the ability to deliver a compelling experience and the ability to build demand for that experience are different capabilities. Neither can reliably compensate for the complete absence of the other.

The question begins well before launch. Who is this game for? Why should those players care about it rather than the alternatives competing for their attention? How will the team know that its assumptions are right? What evidence should change its mind? And what is the credible path from concept to cash?

This calls for more than adding marketing earlier to a production schedule. It requires treating audience development as part of business design. A team may need to validate a proposition, identify its most distinctive qualities and understand the context in which players make choices before committing to a scope that assumes demand will eventually arrive.

There is no easy formula. Creative conviction can make a product exceptional; it can also protect weak assumptions from scrutiny. Data can improve decisions; it can also reward imitation and penalise ideas whose appeal is difficult to measure early. Wishlists, follower counts and early engagement may be useful indicators, but none is a universal measure of purchasing intent. Their meaning changes with genre, platform, audience and the quality of the underlying relationship.

The same scrutiny applies to publishing. Financing, market access, positioning, production support and specialist commercial expertise remain valuable. But the label publisher does not establish which of those capabilities a partner actually contributes. Conversely, self-publishing does not abolish dependency: it may replace one partner with several platforms, contractors, technology providers and acquisition channels.

A harder discipline is needed: to distinguish a product that can be built, a product that deserves to exist, and a product that has a plausible route to a sustainable business. Those judgments overlap, but they are not interchangeable.

A more capable production pipeline is not a substitute for a convincing theory of demand.



1

A practical example from the conversation made the change in expectations tangible. A studio approaching a commercial partner may now be asked about its Steam presence, Discord audience, playtests, followers or wishlists before the merits of the game are fully considered. These signals can reduce uncertainty. But they also provoke a legitimate objection: if every investment decision is filtered through pre-existing traction, what becomes of the publisher's capacity to identify something that audiences do not yet know they want? The argument was not simply for more data. It was about the balance between evidence and professional judgment.

The phrase **“full cycle from concept to cash”** captured a broader commercial discipline. It asks creative teams to confront market assumptions before production costs and organisational commitments become difficult to reverse. But this is not the same as allowing an algorithm to dictate the design brief. Early validation can reveal a real audience; it can also privilege legible, familiar concepts over unusual creative bets. The challenge is to learn early without surrendering originality.

The discussion also distinguished commercial success from the existence of a good product. A well-executed game can still fail to cover its costs. A franchise with accumulated awareness may thrive under conditions that defeat an original IP. An attractive launch can be followed by weak conversion, or by a business model dependent on discounting that alters expectations of full-price purchases. These are different mechanisms and should not be collapsed into a single story of declining quality or declining demand.





Whose discoverability problem are we solving?

2

The abundance of games is often described as saturation. That term captures a real difficulty for creators, but it risks treating the supply of games as the problem in itself. For players, abundance can be a benefit. The more precise concern is whether the systems through which players encounter games help them find experiences they would genuinely value.

A developer's failure to be seen and a player's failure to find something interesting are related, but they are not identical. More advertising may help one developer while doing little to improve the player's experience of choice. More algorithmic personalisation may improve relevance, or it may intensify the tendency to recommend what is already familiar and commercially successful.

Discovery is therefore partly a question of market design. Platforms determine ranking, search, curation, recommendations, merchandising and the information available to users. These mechanisms operate within commercial incentives. The interests of a player seeking an unexpected experience, a new studio seeking visibility and a platform seeking engagement or transactions need not align.

The conversation also exposes an important disagreement: is discovery principally an industry problem, or do players experience it as a problem themselves? Many players continue to rely on friends, creators, familiar brands, communities and platform storefronts. Others may be underserved by categories and recommendation systems that struggle to represent the particular qualities they seek. Both observations can be true across different audiences.

AI may enable richer matching between players and games, including preferences that are difficult to express through genre labels alone. But better prediction is not the same as better incentives. Systems already collect considerable behavioural data. A new intermediary would still need to establish trust, neutrality, privacy protections and a reason for players to adopt it.

The deeper strategic implication is that discoverability cannot be assigned exclusively to marketing teams. It affects product definition, positioning, community, distribution partnerships and the extent of a company's independence.

A studio can own its creative work while remaining dependent on others to make that work discoverable.



2

The disagreement became particularly revealing when one perspective challenged the wording of the question itself. Developers can experience discovery as a crisis while players continue to find games through their habitual routes: friends, creators, familiar franchises, storefronts, community recommendations and social signals. A shortage of attention for producers is not necessarily a shortage of choice for consumers. That distinction matters because it changes who should act and what success would mean.

A proposed neutral, AI-assisted discovery layer would describe games and player tastes more precisely than conventional genre categories. Its promise is intuitive: a player might discover a game that matches a very specific emotional, mechanical or social preference. Yet the proposal immediately raised questions about data access, trust, privacy, neutrality and incentives. Recommendation systems already possess considerable behavioural information. More information does not guarantee that a system will prioritise surprise, diversity or a player's long-term satisfaction over engagement.

The conversation also resisted treating discovery as one market. Performance marketing in mobile, wishlists and creators in PC, and platform-led visibility on console are different systems. Attribution, user acquisition, merchandising and curation have different costs and degrees of transparency. Some established franchises continue to find enormous audiences. The more precise question is which companies, genres and business models are excluded or disadvantaged by the present pathways to attention.





“Community has no seat at the table”: influence, trust and accountability

3

The industry routinely describes community as an asset. The harder question is what that assertion changes inside a company.

Community is not simply an audience count, a social channel or a launch campaign. It is a relationship involving trust, identity, expectation, feedback and, sometimes, shared ownership of a game's cultural meaning. Those relationships can strengthen discovery and retention. They can also reveal what a studio has misunderstood about its own proposition.

Yet community knowledge often sits far from the decisions that shape products and investment. It may be collected by teams without authority to influence priorities. This creates a contradiction: the company values its players rhetorically while treating the understanding of those players as an operational afterthought.

The answer is not to hand product strategy to the loudest members of a Discord server. Closer engagement carries genuine risks: toxicity, harassment, parasocial expectations, disproportionate influence by vocal minorities and commitments that cannot be honoured. Leaders can reasonably worry about losing control. But refusing to define the relationship does not remove those risks. It leaves them unmanaged.

A more mature approach would clarify which decisions benefit from community insight, who owns the relationship, what the company will disclose, what it can promise and how feedback changes decisions. There is a material difference between asking for opinions and building an organisation that can act on what it learns.

This requires resources and patience. Trust cannot be purchased on demand, and a large community does not automatically convert into commercial success. A small, committed audience may be more strategically valuable than a large but superficial one. The relevant measure is not only reach, but the durability and quality of the relationship.

> If community is strategically important, its influence must be visible in governance, not merely in communications.



3

One of the most pointed observations concerned the mismatch between declared importance and organisational authority. If community is a primary source of value, why does the person who understands that community so often lack influence over strategy? The conversation went beyond the familiar recommendation to “listen to players”. It questioned whether companies are structured to learn from them.

Fear was offered as one explanation. Community is not predictable; it can challenge management, resist changes or react strongly to disappointment. A company may respond by placing junior community staff between executives and the consequences of executive decisions. That arrangement can make community management a reputational shield rather than a source of intelligence. A proposal for more senior community responsibility, including the possibility of a chief community role or advisory council, addressed this governance problem rather than merely the quality of social-media communication.

There was also a useful warning against romanticising community. A vocal minority is not a representative sample. A successful title can change the scale and composition of its audience. What feels authentic before launch can become difficult to maintain after growth. The executive task is therefore to create meaningful feedback loops, make decision rights explicit and maintain a relationship without promising that every demand will be satisfied.



“Community has no seat at the table”: influence, trust and accountability



4

Smaller core teams, lower fixed costs, specialist partners and faster decisions can offer compelling advantages. They may enable experimentation with less capital and give creative leadership greater coherence. New technology can extend the capabilities of a compact organisation.

But 'smaller' is not itself a strategy. A studio still needs to decide what it must own, what it can source externally, where accountability sits and how it integrates work. The ability to outsource an activity does not remove the need to understand it. Nor does a reduced payroll automatically produce a resilient business if uncertainty has simply moved to suppliers and freelancers.

The implications become more serious when considered across the sector. Large and medium-sized organisations have often served as places where junior professionals learn through proximity to experienced colleagues, receive mentorship and develop into specialists or leaders. If firms systematically eliminate those roles while expecting the market to supply fully trained people, they risk weakening a resource on which they all depend.

This is a collective-action problem. A decision that makes financial sense for one company may be damaging when widely repeated. Training becomes someone else's responsibility until there is no obvious institution left to provide it. The cost may surface later as a shortage of experienced talent, reduced diversity of career pathways and diminished capacity for innovation.

There is no demonstrated universal replacement for the traditional studio. Different projects will require different degrees of scale, specialisation and integration. A lean organisation may be highly effective in one context and fragile in another. The question is less about the ideal number of employees than about the capabilities, relationships and development pathways a viable industry must preserve.

Possible responses include paid apprenticeships, deliberate junior hiring, cross-company learning and more durable partnerships between studios and specialists. These should be assessed as investments in industrial capacity, not simply as goodwill initiatives.

> Efficiency should be judged not only by what a company saves today, but by what the industry may lose tomorrow.



4

The attraction of lean structures was not abstract. Participants discussed keeping vision, core design and essential accountability inside the company while drawing on external specialists for production, technology, testing and other functions. This can reduce fixed commitments and permit projects to be assembled around a more focused creative nucleus. It can also introduce coordination costs, fragmented knowledge and uncertainty about who carries the risk when work crosses organisational boundaries.

One challenge cut through the efficiency narrative: **where do junior developers learn if the industry systematically stops hiring them?** The effect is not limited to individual careers. A sector that relies on experienced talent while reducing entry points can undermine its own future capacity. Proposed responses included traineeships and pathways to paid employment, but the underlying economics were not resolved. Companies under financial pressure may be poorly positioned to fund benefits that competitors will also enjoy.

Another important qualification was that the new model had not yet been demonstrated as universally successful. Small teams can be effective, but smallness is not proof of resilience. The decisive questions are whether the studio knows what it must do exceptionally well, whether partners share incentives, and whether the resulting structure can survive a failed launch or a delayed project.out promising that every demand will be satisfied.



AI: between faster production and a different creative proposition

5



AI is altering the economics of experimentation and production. Rapid prototyping, assistance with routine work and new creative possibilities are meaningful. But a higher rate of output is not necessarily a higher rate of valuable output. The availability of a tool does not establish a competitive advantage, and widespread adoption does not demonstrate positive returns.

The most consequential distinction is between using AI to perform familiar tasks more cheaply and using it to create experiences that would otherwise be impossible, unaffordable or substantially less compelling. Both may have legitimate applications. Only the latter necessarily expands what players can experience. If competitors gain access to similar productivity tools, the resulting cost advantage may quickly become a new baseline rather than a durable differentiator.

The economics are also more complicated than subscription prices or time saved on a task. Integration, quality assurance, security, intellectual-property uncertainty, liability, staff development and dependence on technology providers all matter. A credible assessment must consider the fully loaded cost and the quality of the result, not merely the speed of generation.

AI is also an organisational choice. A mandate from leadership may accelerate adoption while weakening trust if employees are excluded from decisions about its purpose and limits. Bottom-up experimentation can reveal useful applications but may create inconsistency, security risks or unexamined dependencies. Effective governance requires both strategic direction and informed participation.

A question raised by the discussion remains particularly difficult: how does an industry centred on human imagination and experience remain human-centred while embracing automation? The question does not imply that human creativity and AI are incompatible. It asks leaders to identify what they are protecting, what they are trying to improve and which trade-offs they are prepared to accept.

Metrics should therefore include more than hours saved. Product quality, player experience, economic returns, organisational trust and the development of people all belong in the evaluation. Some are difficult to measure, but difficulty is not a reason to ignore them.

The real test of AI leadership is not adoption. It is whether technology strengthens the creative proposition and the organisation that delivers it.



5

The conversation drew a distinction between **augmentation** and **“fusion with AI”**. In the first, AI accelerates an established workflow. In the second, teams reconsider how work is organised, which capabilities remain scarce and what kinds of experiences become possible. The distinction matters because the strategic value of AI cannot be inferred from how frequently employees open a tool.

A participant presented survey findings suggesting broad experimentation but relatively shallow integration and limited measurement of return. Those figures were offered in discussion and have not been independently verified for this publication. The more defensible shared observation is that adoption is easier to demonstrate than comparative business impact. There is not yet a sufficiently transparent public benchmark for deciding which companies are using AI most effectively, or whether gains in one function improve the final product.

The provocative question **“If AI is so good, why isn't everything better yet?”** points to this gap between technical potential and realised value. The group also discussed the cost of inference and tokens, dependence on cloud providers, code generation, rapidly changing tools, intellectual-property exposure and whether the same capabilities available to everyone can ever be a lasting moat. These are not merely implementation details: they affect cost structure, differentiation and the distribution of bargaining power.

Leadership was contested as well. Some argued for clear direction from the top; others emphasised experimentation, trust and employee participation. A proposed two-sided measure would examine both organisational outcomes and the experience of people asked to adopt the technology. A separate contrast between seeking permission and seeking forgiveness illustrated different attitudes to innovation and legitimacy, without establishing that one national or corporate culture has solved the problem.



Publishing is being unbundled, not simply replaced



6

The status of the traditional publisher was questioned, but the discussion did not establish that publishing has become obsolete. The more useful distinction is between a corporate label and the actual services a studio needs: financing, production advice, market intelligence, distribution relationships, launch execution, user acquisition, community development and long-term portfolio support.

Some teams can assemble these capabilities through specialist partners or manage them internally. Others need an integrated partner with capital, relationships and the ability to absorb risk. Disintermediation may reduce one dependency while creating several new ones. The question is not whether to have a publisher in principle; it is which capabilities materially improve the probability and economics of success, and how the value created should be shared.

A related tension concerns ownership. Retaining IP can be strategically important, but ownership alone does not finance production or generate demand. Selling rights can provide survival capital while sacrificing future upside. The right decision depends on bargaining power, project risk, access to audiences and the company's ability to exploit the asset beyond a single launch.

The question of the publisher's successor is not merely contractual.

London had already identified a mismatch between financing a product and financing the continuity of a business. In Seville, that issue connected to the possibility of separating publishing into services rather than buying a single bundled relationship. Financing, launch positioning, platform relationships, audience development and lifecycle management are different capabilities. A developer may need some intensely and others hardly at all. The ability to purchase them separately might improve negotiating leverage, but only where the studio can coordinate the pieces and carry the integration risk.

An unbundled service is not necessarily an unbundled power structure.

A specialist marketing partner may be replaceable; access to a major platform or a source of risk capital may not be. A studio could contract with several providers and still have little agency over its commercial destiny. Conversely, a publisher that brings scarce market knowledge, financing certainty and a long-term relationship can be more valuable than the theoretical freedom of assembling suppliers individually. The debate therefore concerns the terms on which intermediation earns its share, not the disappearance of intermediation itself.



6

The unresolved economic question is who finances the time between successes.

Production advances can cover a deliverable while leaving a studio unable to retain senior people, test its next concept or build its own audience after release. A modular publishing model could reduce some fees while failing to address that financing gap. The London discussion of advances, project financing and arrangements drawn from audiovisual industries is relevant precisely because a new contract structure must be evaluated across several projects, not only one launch.

There is a genuine tension between independence and risk transfer.

Keeping rights while taking on distribution and marketing risk can leave a creator more exposed than signing a conventional deal. Surrendering rights may be rational if the alternative is insolvency, but it changes who participates in future upside. A useful test for any proposed model is therefore: which party bears development risk, which bears launch risk, who controls the audience relationship, and who retains an asset or capability after the project ends? The conversation did not select one ideal answer; it made those trade-offs harder to ignore.



The value chain: what must a studio own?



7

The discussion of new structures repeatedly returned to the distinction between a studio's identity and its production footprint. Vision, creative direction, core game design, key talent, technical expertise, relationships with players and IP may each be sources of defensibility, but they are not interchangeable. A company that outsources execution still needs the competence to judge it.

Ideas such as special-purpose project vehicles, risk-sharing partnerships and distributed specialist teams reflected a search for more adaptable structures. These arrangements can align investment with a project rather than the permanent payroll of a company. But they also raise difficult questions about continuity, incentives, accountability and what remains after a project concludes. If every project begins with a new coalition, who owns the accumulated learning?

The industry also needs to reconsider how creative leaders become business leaders. Knowing how to make a game is not the same as knowing how to finance, price, distribute and sustain a company. The discussion raised the absence of systematic preparation for these responsibilities. Training founders to understand their business model may be as consequential as teaching new production tools.

What is the durable asset inside a studio?

The discussion of core teams challenged a common assumption that company size is itself evidence of strength. A small organisation may preserve a coherent vision and avoid expensive coordination, while an established studio may retain the depth of expertise necessary for technically demanding production. The question is what cannot be removed without losing the company's distinctive ability to create value. Depending on the business, that might be creative leadership, a technical platform, a world and its IP, an experienced production nucleus, a player community or the trust that allows a team to work together repeatedly.

The idea of project-specific vehicles and flexible coalitions was considered as a way to align investment and delivery. But such arrangements pose a governance problem. A project can have a budget and a legal entity without having a durable organisation capable of learning. If a different group assembles each time, knowledge about why decisions succeeded or failed may disperse with the team. The resulting structure may look efficient in an individual project's accounts while underinvesting in the next project's capability.



7

Risk sharing requires more than outsourcing invoices.

A specialist partner who is paid for outputs has different incentives from one that shares in success or participates early in product reasoning. Yet sharing upside without clear decision rights can create conflict rather than alignment. Participants' discussion of accountability and ownership points to a distinction between shared execution and shared judgment. The former is comparatively easy to contract; the latter requires transparency, trust and agreement about who can change direction when the evidence changes.

The talent question makes this more than an organisational design debate.

Fewer companies carry permanent teams, the conventional apprenticeship path narrows. Junior developers need opportunities to observe difficult production decisions, recover from mistakes and work alongside experienced colleagues. A fragmented network can provide rich experience, but only if someone deliberately finances mentoring and continuity. Otherwise an apparently flexible structure may rely on senior talent trained under an older model while failing to replace it.

The discussion also exposed a different capability gap: excellent developers are not automatically prepared to run sustainable businesses. Financial runway, pricing, negotiating publishing rights, understanding tax and employment obligations, and deciding when to stop a project are forms of judgment that do not follow naturally from creative excellence. The opportunity is not to turn every designer into a financier, but to ensure that entrepreneurial teams have access to these skills before strategic options have already narrowed.



Pricing, longevity and the economics of attention

8



Several strands of discussion pointed to a market in which consumer willingness to pay, price expectations and the amount of available entertainment are changing unevenly. Full-price premium releases compete with discounts, back catalogues, free-to-play alternatives, subscriptions and games that can absorb years of attention. This makes a launch price only one part of a more complicated lifetime-value equation.

The temptation to interpret the market through one headline is strong. But a player waiting for a discount does not necessarily indicate that games have lost cultural value. A highly successful incumbent does not prove that new IP is easy to finance. Live operations can extend a game's life and deepen a community, but they also create recurring content and service obligations. The sustainable model for one genre can be unsuitable for another.

The strategic consequence is to evaluate a game through the full relationship between development scope, acquisition cost, price, retention, ongoing service costs and the durability of demand. Increasing content output is not inherently a solution when players' attention is already finite. Nor is extending every game indefinitely. Some products are better served by a finite, distinctive experience.

Price has become a signal as well as a revenue decision.

The conversations about premium games and discounting suggested that players' expectations can shift when they learn that a title will become substantially cheaper after release. For a new game, full price must compete not only with direct substitutes but with players' existing libraries, ongoing live games and a growing supply of discounted experiences. That does not establish that premium pricing is no longer viable. It does suggest that price, positioning, release timing and perceived uniqueness must be considered together.

The issue is particularly sharp for new IP. An established franchise can rely on awareness, anticipation and an existing audience relationship. A new property may need to establish its identity before the market will assign it comparable value. Reducing price may increase accessibility but can also undermine the revenue needed to recover a development budget. Raising quality or adding features can increase cost without solving awareness. The apparent pricing problem may therefore be inseparable from the discoverability and audience problems discussed earlier.



8

Longevity is not synonymous with sustainability.

Live operations can produce recurring relationships and revenue, but they also create a promise of future content, support, moderation and technical continuity. That promise changes the economics of the studio and the expectations of players. A successful long-running game can accumulate powerful advantages; an unsuccessful one can become a permanent obligation without the audience required to finance it. The same model cannot simply be prescribed to a premium narrative game, a mobile free-to-play business and a community-centred multiplayer title.

A related contradiction is that lower production costs do not automatically improve the commercial position of developers. If more teams can create more content, competition for the same finite attention may intensify. Players benefit from abundance and choice, while producers face greater uncertainty about which titles can sustain a price. This reinforces the distinction between efficiency within a studio and the economics of the market as a whole.

The relevant unit of analysis may be the whole commercial life of a game.

That includes the cost of earning initial attention, conversion at launch, discount cadence, ongoing content obligations, platform fees and the possibility of building future titles from the same audience relationship. The conversations did not establish a preferred pricing formula. They did challenge the assumption that shipping a high-quality game at a conventional price is a sufficient commercial plan.



Europe: influence, regulation and the capacity to retain value



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Europe's games industry operates within a global system whose key infrastructures are often controlled elsewhere. Distribution platforms, audience gateways, capital markets and foundational technologies shape the options available to European companies. This does not eliminate their entrepreneurial freedom, but it qualifies the extent of their control over commercial outcomes.

Regulation adds a complicated layer. Rules concerning AI, intellectual property, consumer protection and digital services can establish legitimate safeguards. Compliance costs, however, are not distributed evenly. A small studio may face a proportionally greater burden than an incumbent with legal teams and established processes. Regulatory influence does not automatically translate into commercial leverage over the platforms and tools on which businesses depend.

The European conversation therefore needs to move beyond a binary choice between more regulation and less regulation. It should ask where businesses can develop defensible capabilities, where access to finance is inadequate, how skills are renewed and whether greater cooperation can improve access to audiences or bargaining power.

Europe does not need one preferred studio model or one centrally prescribed strategy. Its opportunity lies in understanding the structural conditions that help diverse companies create and retain value. The role of institutions, industry networks and executive forums is potentially important here: not to replace entrepreneurship, but to connect perspectives and capabilities that otherwise remain fragmented.

This dimension of the discussion is less resolved than the questions of audience, organisation and AI. It deserves to remain an open agenda rather than being presented as a settled policy platform.

> The measure of European strength is not simply how much content it produces, but how much agency its companies retain over the value they create.

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European regulation produced no simple consensus. One position treated regulation as a disproportionate burden on small firms and an obstacle to speed. Another defended regulation as valuable for companies and society, and questioned the assumption that less regulation necessarily improves competitiveness. The disagreement should not be erased. Its practical implication is to distinguish the aims of regulation from its uneven compliance costs and from the separate question of who controls commercial infrastructure.

Participants also considered taxation, funding mechanisms, access to capital and the difficulty of maintaining long-term teams when financing is attached to individual projects. These observations point toward a broader problem: industrial capacity cannot be built entirely through short project cycles, yet investors and founders need credible ways to limit downside exposure. A European response would have to reconcile both realities rather than simply advocate more funding. **Europe's problem was described as a mismatch between creative capacity and the systems that allow value to accumulate.** Asturias emphasised cultural identity and collective voice. London made the structural case: support often helps produce a game without sustaining its developer; capital is fragmented; the gap between projects is dangerous; and the terms of finance can shift future value away from its creators. Seville brought those issues closer to operational choices. A studio's freedom to retain IP, employ a stable team or experiment with a new business model depends on the cost and availability of capital and on its access to audiences.

Public support has to be assessed by what happens after production.

Grants and incentives can help ideas become projects, but they do not necessarily create marketing capacity, financing continuity or companies able to survive an unsuccessful release. Equally, simply increasing funding can entrench weak incentives if it rewards production volume rather than viable enterprises. The unresolved question is which combination of instruments enables creative risk while building companies and skills that persist. The London discussion pointed to financing structures in other screen industries as useful comparisons, not turnkey models for games.

European influence is a separate issue from European compliance.

Several concerns converged around the cost and speed of operating in a heavily regulated environment, particularly for small companies. But the discussions also contained a defence of regulation's protective purposes. A credible analysis must hold both positions: rules can safeguard people and markets, and their implementation can impose disproportionate burdens on businesses with limited resources. The important distinction is between a rule's objective, its design, its enforcement and the relative capacity of different companies to absorb it.

A further asymmetry concerns representation. Large platforms and global technology businesses can invest in policy engagement and shape standards while smaller developers struggle to participate. Fragmented national industries may each have talent and ambition but limited leverage over shared European rules or global market infrastructure. A stronger collective voice would not remove disagreement among studios; it could make those disagreements visible early enough to inform better policy rather than merely react to it.

Retaining value does not always mean retaining every asset inside Europe.

Investment, acquisitions, international partnerships and access to global platforms can be essential to growth. The concern raised in London was that too few companies have credible alternatives when negotiating these relationships. The measure of success is therefore not isolation from global capital, but the presence of real options: financing continuity, skilled teams, access to markets and the capacity to negotiate meaningful participation in future value.

Europe's strategic opportunity is to convert its diversity of creative voices and depth of talent into companies that can make consequential decisions, retain intellectual and commercial value, and reach audiences globally. That requires more than supporting individual productions: it requires continuity of capital, market access, leadership capability and institutions able to work across borders. The open European question is institutional as well as entrepreneurial: can the ecosystem develop the connections among capital, talent, policy, platforms and commercial expertise that individual companies cannot build alone? GESE can contribute by connecting experience and sharpening the questions, but the discussions did not produce a single agreed European industrial programme.

The differences that should not be flattened



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These conversations did not produce a universal diagnosis of a declining industry. They produced a more demanding distinction between different positions in the market. An established franchise with strong distribution, a mobile operator with measurable acquisition economics, a premium independent developer seeking an audience and a specialist service provider face different risks and opportunities.

The same qualification applies to the apparent solutions. Community-led development is powerful in some contexts but cannot be copied mechanically into every product. Smaller teams may be more adaptable but not always more capable. AI may improve a pipeline without creating player value. Publishers may be unnecessary in one deal and indispensable in another. Regulation may be both protective and burdensome.

This is not indecision. It is an argument for precision. The industry should stop asking whether one model has won and instead ask under what conditions a model works, what evidence supports it and who bears the costs when it fails.

The editorial value of preserving these disagreements is not to avoid judgment. It is to show where a useful judgment must be conditional: by business model, audience, capital position, time horizon and exposure to risk. Any general recommendation that ignores those conditions would be less faithful to the conversation than the contradictions themselves.



The shared concerns beneath the disagreements



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A number of recurring concerns connected conversations that otherwise appeared to be about separate functions.

The loss of reliable signals.

Wishlists, social reach, production milestones and AI adoption rates can be measured, but their relationship to enduring commercial or creative value is uncertain. Executives are looking for evidence without mistaking convenient proxies for outcomes.

The distance between decisions and consequences.

Platforms shape discovery without bearing all the risk of production. Executives can make community-sensitive choices while junior staff handle the reaction. Lean companies can reduce headcount while expecting the wider industry to train future talent. AI providers can capture infrastructure value while customers carry integration and reputational risk.

The difference between access and control.

More tools, more publishing routes and more available partners do not necessarily give a studio more control over its destiny. Dependency can move rather than disappear.

The fragility of long-term capability.

Project-based funding, externalised work and the pursuit of immediate efficiency can undermine knowledge, trust and continuity. Resilience requires more than a low burn rate.

The continuing importance of human judgment.

Across the discussions, experience, vision, trust, distinctive taste and the ability to challenge assumptions emerged as qualities that cannot be reduced to throughput. They are not romantic alternatives to commercial discipline; they are part of it.

A meaningful convergence is therefore methodological rather than prescriptive:

interrogate assumptions, make the allocation of risk explicit, evaluate outcomes rather than appearances, and resist applying a single fashionable model to every company. This is a synthesis of recurring arguments, not evidence that every participant endorsed an identical statement.



Strategic questions for leaders | Questions worth carrying forward

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The practical output of the conversation is a set of decisions to confront, not a list of agreed recommendations.

The questions below are not resolutions or commitments attributed to participants.

For studios and founders:

What is the evidence of an audience, beyond metrics that are easy to collect? What does the company need to own to retain its identity and bargaining power? Which capabilities can be sourced without losing accountability? Where will the next generation of talent learn?

For publishers and investors:

What commercial expertise is genuinely additive beyond capital? How should original creative bets be evaluated when early traction is weak? What financial structures support experimentation without permanently destabilising teams?

For platforms and discovery intermediaries:

Whose outcomes do recommendation systems optimise? Can curation reward relevance and originality rather than only established success? What data and transparency would make market access more contestable?

For leaders adopting AI:

What outcome is improved for players? What is the full economic return? What new dependencies are being created? Do employees understand and influence the boundaries of adoption?

For European institutions and networks:

Which policies improve the capacity to create and retain value? Where do financing, regulation and training reinforce each other, and where do they conflict? What can collective action achieve that individual companies cannot?

What appears to have been shared, and what remained contested



It is useful to separate **recurring concerns** from **agreed prescriptions**. The former are strongly visible across the documentary sequence; the latter are much more limited. A report that turns every recurring theme into a collective decision would misrepresent the character of GESE.

Areas of substantial convergence

Quality is necessary but not a complete commercial strategy.

The conversations repeatedly linked product development to audience, positioning, financing and distribution. The claim is not that creativity should be subordinated to market research. It is that a credible business must understand the relationship between the game, the people it hopes to reach and the route by which those people will find it.

The traditional organisation of production and publishing is being reconsidered.

Across London, the pre-Seville dialogue and Seville itself, participants returned to modular services, flexible core teams, partnership structures and a more explicit accounting of which capabilities a company must own. There was no demonstrated consensus that every company should be smaller or every publisher replaced.

What appears to have been shared, and what remained contested



Community and audience knowledge are strategic, not merely promotional.

The unresolved question is how to make that knowledge influential without confusing the most vocal users with the whole market or promising players authority the company cannot responsibly give them.

AI adoption needs evidence and accountable leadership.

The conversation moved away from a simple pro-AI versus anti-AI divide. It questioned ROI, costs, employee involvement, creative differentiation and the incentives embedded in player-facing optimisation. Agreement that AI matters does not establish agreement on its pace, uses or limits.

Europe's creative capability is stronger than some of the structures that support it.

The recurrent concern spans capital continuity, access to markets, value retention, regulatory participation and talent. The shared diagnosis is more secure than any particular proposal for public intervention or European coordination.

Human judgment, trust and vision remain difficult to outsource.

This is the most consistent thread from Asturias through Seville. It is not an argument against technology or scale. It is a reminder that leadership must choose purposes, accept trade-offs and be accountable for consequences.





Disagreements that should remain visible

Is discoverability a player problem or a producer problem?

A studio can struggle to reach an audience even when players feel well served by their current discovery habits. Proposed solutions change depending on whose problem is being solved.

Is a smaller studio more resilient, or is risk merely moving elsewhere?

Lean structures may improve survival at company level while weakening training, continuity or the negotiating position of suppliers and freelancers. The answer depends on project economics, contractual relationships and the surrounding ecosystem.

Should community have formal power, or stronger channels of influence?

Senior representation can improve accountability, but companies must still decide how to balance player feedback, creative intent, silent majorities and long-term commercial responsibilities.

Does more evidence make better creative decisions?

Audience signals can prevent expensive mistakes, but excessive reliance on measurable early traction can reward familiarity and make original concepts harder to finance.

Is AI primarily a productivity tool or a change in the creative proposition?

Both perspectives appeared. The available discussion did not establish reliable, comparable benchmarks for the scale of productivity gains, nor a universal operating model for responsible adoption.

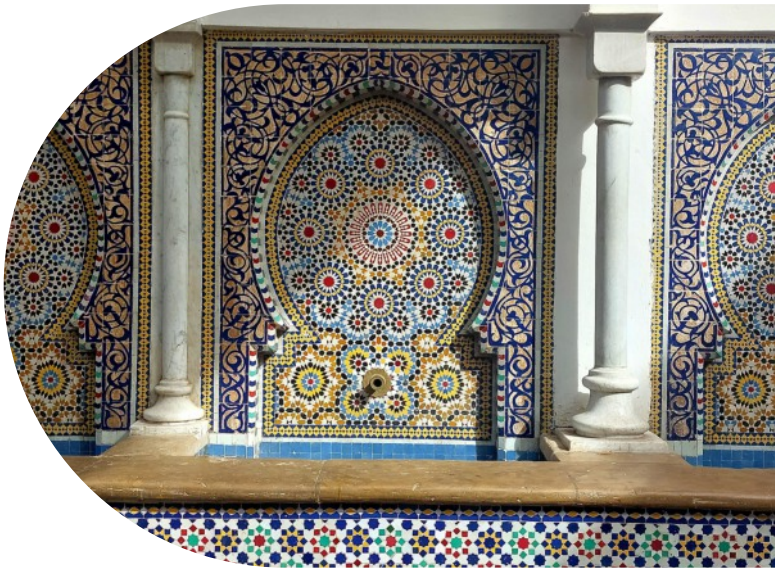
Should European policy protect local value more aggressively?

Stronger instruments for capital, IP retention and talent could help, but burdensome or poorly designed rules may entrench larger players and constrain the same companies policy seeks to support.



Agreements about what to do next: an important distinction

The material supports a set of promising directions for further work, not a signed collective action plan. These include testing more credible audience validation earlier in development; elevating community intelligence into product and executive decisions; designing junior career pathways that survive the shift to lean teams; examining modular publishing and partnership economics; evaluating AI against meaningful business and employee outcomes; and strengthening Europe's capacity to finance continuity and retain value. They should be presented as propositions worth testing, not commitments made by all participants.



A connected set of choices, not five isolated problems



The issues reinforce one another. A studio that cannot finance the period between projects may accept unfavourable publishing terms, reduce its permanent team and lose the capacity to train junior talent. A studio without a direct relationship with players may depend on a platform's visibility, which in turn increases the perceived need for early traction and performance marketing. AI may lower production costs, but also increase the volume of competing products and intensify the challenge of attention. A community relationship may improve product judgment, yet that knowledge is useless if governance gives it no place in decisions. Europe can help create games without necessarily retaining the companies, expertise or value they generate.

This connectedness explains why simple answers were resisted. 'Make smaller games' can be good advice in one context and a damaging general prescription in another. 'Use more data' can improve judgment or narrow imagination. 'Own your IP' can protect future upside or create an underfinanced burden. 'Adopt AI' can improve workflows or conceal costs and organisational tensions. 'Listen to the community' can create trust or turn a small group of vocal players into an unaccountable proxy for the market.

The more durable lesson is not a new universal model. It is the need to be explicit about **where value is created, who carries risk, who makes decisions, who has access to the audience and who can accumulate the benefits over time.** Those questions apply differently to an established franchise owner, a new premium developer, a mobile studio, a specialist service provider, an investor and a platform. Their answers should not be flattened into a single industry prescription.



The next contribution from the community



This edition is intended to give participants something substantive to recognise, dispute and improve. It is not a request for a ceremonial endorsement. Three forms of response would be especially valuable: an argument that has been misunderstood or underrepresented; a contradiction that deserves more attention; and a practical decision that someone is reconsidering as a result of the dialogue. Contributions can inform the final text without being attributed to individuals. Any attributed quotation would require separate permission.

This is also an appropriate way to acknowledge the limits of AI-assisted synthesis. Transcripts and written notes can preserve propositions, but not fully recover why an idea mattered to a person, how a private experience informed it, or which disagreement continued to resonate after the event. Those judgments belong to the people who participated. The purpose of this document is to create a sufficiently faithful starting point for their further thinking, not to replace it.



Source and editorial note



This synthesis draws on three previously circulated GESE documents, *Blind Notes from the GESE 2025 Gathering in Asturias, London GESE Brunch 2026: Strategic Reflections, and Notes from an Ongoing Conversation / Before Seville*, together with the available October 28–29 Seville session transcripts and photographed discussion materials. The earlier documents are already editorial syntheses; they do not provide verbatim records of every prior conversation. Accordingly, statements about Asturias, London and the pre-Seville exchanges are framed as positions reflected in those documents, not as newly verified direct quotations from participants. The Seville material supports the specific arguments and counterarguments discussed above, but the transcripts do not provide a reliable basis for counting endorsements or assigning each view to a named speaker. Unverified numerical claims voiced during discussion have been omitted. The text distinguishes repeated themes, contested perspectives and editorial implications; it should not be read as formal minutes or a statement unanimously adopted by the participants.



Closing: human judgment, trust and vision



The most consequential idea to emerge from Seville may be that the industry has become better at generating possibilities than at deciding which possibilities deserve commitment. Production tools, channels, business structures and sources of data have multiplied. Yet the fundamental obligations of leadership have not disappeared: choosing what matters, building trust, allocating risk and taking responsibility for outcomes.

The industry is not facing a single crisis that one technology, funding instrument or organisational template will solve. It is experiencing a redistribution of value, influence and uncertainty. Some companies are thriving. Others are discovering that familiar assumptions no longer protect them. The challenge is to understand the difference without turning either experience into a universal rule.

Making more is not the same as mattering more.

And reducing the cost of making games is not the same as building an industry capable of sustaining the people, relationships and creative ambitions that make games worth making.



The Value of Hosting the Conversation



The future of the games industry will not be shaped exclusively by the largest companies, the most established markets or the traditional centres of influence. It will also depend on where meaningful conversations take place, which perspectives are brought into them and which relationships emerge.

Hosting a Games Executive Summit Europe gathering offers a territory something different from the visibility associated with a conventional industry event.

It creates an opportunity to bring an international network of senior industry leaders into direct contact with a local ecosystem, allowing both sides to develop a deeper understanding of each other's ambitions, capabilities and challenges.

For regions investing in their creative and digital industries, this can help establish relationships that extend beyond the gathering itself, strengthen international recognition and position the territory as an active contributor to the industry's strategic conversation.

GESE does not operate through a conventional destination bidding process. Each gathering emerges from a shared conviction that bringing this community to a particular territory can create meaningful value for both sides.

GESE welcomes expressions of interest from territories and organisations that share its vision and recognise the value of bringing this independent executive dialogue into their own ecosystems. Future gatherings emerge from a shared ambition to create meaningful connections between the international GESE community and the territories that host it.

Hosting the conversation is, in itself, a way of becoming part of it.

Andalucía: a region investing in its creative and digital future



The decision to bring Games Executive Summit Europe to Seville reflects a wider ambition taking shape across Andalucía: to build an environment in which creative and digital businesses can start, grow, collaborate and reach international markets. The region's appeal is not limited to its cultural heritage or quality of life. It is increasingly defined by a deliberate effort to connect public strategy, private enterprise, specialist infrastructure and global visibility.

A coordinated strategy with the creative industries at its centre.

The Agencia Digital de Andalucía (ADA) coordinates the Andalusian Strategy for Audiovisual Creation and Digital Content, adopted in 2023. Its priorities include competitiveness, public-private cooperation, technological and creative innovation, talent development and international market access. Importantly, the strategy recognises games, interactive media and emerging digital formats as part of the region's economic and cultural future, not as peripheral activities. ADA's role is to help turn that ambition into an interconnected ecosystem with opportunities for businesses and creators.

Industry shaping its own future.

LAND, the Andalusian Audiovisual and Digital Content Cluster, provides a complementary private-sector voice and collaborative platform. Bringing together more than 60 member organisations across audiovisual production, games and digital content, it works to strengthen innovation, talent, financing, competitiveness and international connections. The partnership between ADA and LAND reflects a valuable principle: sustainable ecosystems are built with the companies that operate within them, rather than designed for them in isolation.

Andalucía: a region investing in its creative and digital future



Places where ambition becomes practical support.

In Málaga, the Polo Nacional de Contenidos Digitales, an initiative of the city council, provides incubation, acceleration, training and specialist facilities for games, immersive technologies and audiovisual production. It supported 205 entrepreneurial projects in 2025. In Jaén, Misión Gaming, developed through cooperation between ADA and the city council, has transformed the former Bank of Spain building into a centre for digital entrepreneurship; by October 2026 it housed 35 businesses spanning games, AI, immersive experiences and related technologies. These initiatives have different institutional origins, but together demonstrate how complementary local and regional investments can create tangible opportunities for creators.

Connecting local talent with global audiences.

Major international gatherings are another part of this picture. San Diego Comic-Con Málaga gives Andalucía a high-profile platform for entertainment and popular culture while creating opportunities to showcase regional companies to international industry and audiences. The 2026 edition featured 17 Andalusian startups and studios in its ecosystem showcase. Other initiatives, including Andalucía Play Fest, bring professional and independent games communities together. Such events matter most when visibility becomes sustained relationships, commercial opportunities and long-term value for local businesses.

An emerging industry with room to grow.

Official regional figures identify 107 active games studios in Andalucía in 2024, compared with 82 in 2019, alongside 17 specialised games-training centres. The region is now Spain's third-largest games development hub by active studios. These numbers show progress, but also point to the next challenge: converting creative capacity into resilient companies, access to capital, international reach and the ability to retain talent and intellectual property over time.

For the international GESE community, Andalucía offers a relevant example of a territory seeking to take its creative and digital industries seriously: combining institutional commitment with entrepreneurial initiative, physical infrastructure with networks, and local identity with international ambition. Its experience is still evolving, and its results should be judged over time. But the direction is clear: **a region that invests in its creators, supports its businesses and works to give their ideas a larger place in the world.**



GESE Seville 2026. Executive Notes, *editorial review edition. Developed from recorded conversations on 28–29 October 2026. Perspectives are non-attributable and do not constitute collective endorsement. Short formulations in quotation marks reflect language documented in the source materials; the surrounding analysis is an editorial synthesis. This draft is intended for participant challenge and enrichment before external publication.*

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