Institutional Entrepreneurship in the Context of Game Industry: comparative study of Brazil Finland and South Korea

Introduction

This paper aims to discuss the role of institutional entrepreneurship in shaping macro cultures in an emerging industry, that of digital games in Brazil and Finland. It draws on literature related to macrocultural discourses and local actor's role in the structuration of new institutional fields (Lawrence and Philips, 2004).

Research questions

The aim of the proposed research is to contribute to innovation policy research by introducing the concept of macro cultures and linking it to the intangible assests of a) relational capital and b) adaptive capability.

The research is guided by the following research questions is how is decision strategic decision-making on innovation and renewal affected buy macro-cultures 1) on the level of firms in industry and on the level of innovation policy-making. What is the possible role of selected innovation-pollicy instruments in affecting macro-cultures?

Methodologies

The study design in this project is case study, which utilises both quantitative and qualitative data and multiple methods. Case study suits well to explorative research setting, and serve as a valuable research method in situations in which researcher has little or no control over events (Stake 1995; Merriam 1998). Due to the abstract concepts to be studied research, triangulation has an important role in the research (Stake 1995). Besides including multiple researchers to carry out the research process, we also plan to use multiple data sources and different analysis methods to increase the validity of the study.

In addition in the multiple case study design (e.g. at the country level comparisons) emphasis is put in to the careful replication of the research design in order to produce comparative data. The qualitative research design requires flexibility as research is often designed while being done and is highly dependent on the access to the data (Gephart 2004). Given that the study employs different levels of analysis, the demand for research methods also varies accordingly.

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Institutional Entrepreneurship in support to emerging of industries

Although digital games datas are illustrative of the importance of market growth trends, it is difficult to compare them because the methodologies, concepts and selections from market sources are different. Despite these difficulties and considering different agencies data, software revenue may reach US$ 100 billion by 2017, of which software for online and mobile device digital games (DG) represents 60% (DIGI-CAPITAL, 2014). The Gartner Group's estimate for the DG hardware and

software market in 2013 was US$ 93.3 billion (GARTNER, 2013). Estimation for PwC estimated the 2013 global software industry and services was at US$ 65.7 billion. The estimated annual growth rate of the global market for 2013-2018 is 6.2%. Growth is different for each segment: mobile devices (9.6%), online (7.4%), console (4.9%), desktop (-0.5%) and advertising in digital games (11.9%). Revenue in 2017 is estimated at US$ 84.1 billion.

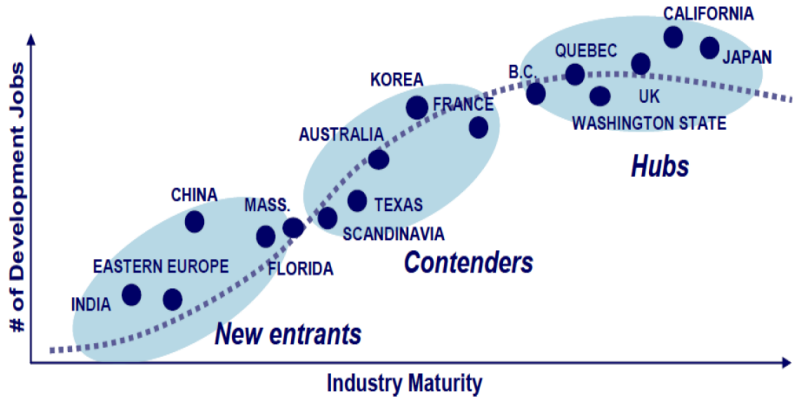

Figure 1: Maturity and size of digital games development centers

	Finland	Brazil	South Korea
Development Phase	Growth	Nascent	Mature/ Renewal
Industry Structure	200+ companies, mainly small/ micro, vibrant star-up scene and numbers of firms growing	150+ companies mainly in on line in on line & mobile sectors, micro and small , vibrant indie game community	2000+ companies, big &small, concentration of market to large(some listed) corporations and start-ups
Focus	Entertainment game driven, success particularly in mobile also but in console games	Entertainment games are growing in importance, in addiction strong capabilities in serious/educational and advergames	entertainment game driven , pioneers in on line games, expansion of mobile games as on line game based large corporations and social network service providers enter the market
Perceived competitors & cooperators	Competitors: game companies on global market Cooperators: Various actors incl. public &private funders	Competitors: foreign game producers, free to play model Cooperators: companies' attitude open minded, network of developers	Competitors: entertainment/ content providers, Chinese game companies Cooperators: domestic game companies, other content business, foreign companies
Perceived critical features of own and other organizations	Competent people (tech and business capabilities')	Creativity and enthusiasm (opportunity & treat) Business & entrepreneurial capabilities'	Game Development capability Ability to adapt to paradigm change in game business

	Finland	Brazil	South Korea
Perceived Strategic issues and priorities	Business capabilities of start-ups Sustainable growth of game business	Legitimation/ institutionalization of game industry Easiness to do business More comprehensive game education Brain Drain	Regulation and bad sentiment on gaming Paradigm shift from on line to mobile games International and especially Chinese Market(Challenge & opportunity)

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Figure 1: **Towards dimensions of macroculture in game industry - interview based insights**