



# THE GAMING & GAME DEVELOPMENT SECTOR

**Poland.** Business Forward



**Poland is an internationally acclaimed destination for:**



**Pristine nature**  
A top 10 country to visit according to Lonely Planet



**A place where East meets West**  
Dynamic business hub at the heart of Europe



**Vibrant food scene**  
Warsaw among Top 10 Vegan-Friendly Cities in the World



**Great cities**  
Wrocław – most business friendly medium – sized European city (2022)  
Kraków – a TOP 25 Travellers’ Choice 2022  
Łódź – in the „Best of the World 2022” List by National Geographic



**Attractive place for expats**  
Young, increasingly international society, with a very high level of English proficiency



**Rich history**  
Vast legacy of bravery and resilience



WHY  
POLAND



FACTS ABOUT  
THE POLISH  
GAMEDEV SECTOR



WHAT MAKES  
US DIFFERENT



DID YOU KNOW  
THAT



SUPPORT  
INSTITUTIONS



HOW WE CAN  
HELP YOU

## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

## Superb market share

40% of the region's total GDP and a gateway to the wider EU market

## Large, high-quality talent pool

300k+ of well-educated graduates annually

## Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

## Transparent

Regional leader in the Transparency International Corruption Index

## FDI magnet

2nd in the EU, 5th in the world in terms of value of new greenfield projects (2020)

One third of all FDI stock in the region

## Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure (Global Competitiveness Report)

## Ratings remain high despite the turbulent Times

Moody's: A2, S&P: A-, Fitch: A-, as of the first half of 2022

## Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities



# FACTS ABOUT THE POLISH GAMEDEV SECTOR



## Poland is a leading game producer:

600+ releases annually across all gaming platforms



## Employment in the sector:

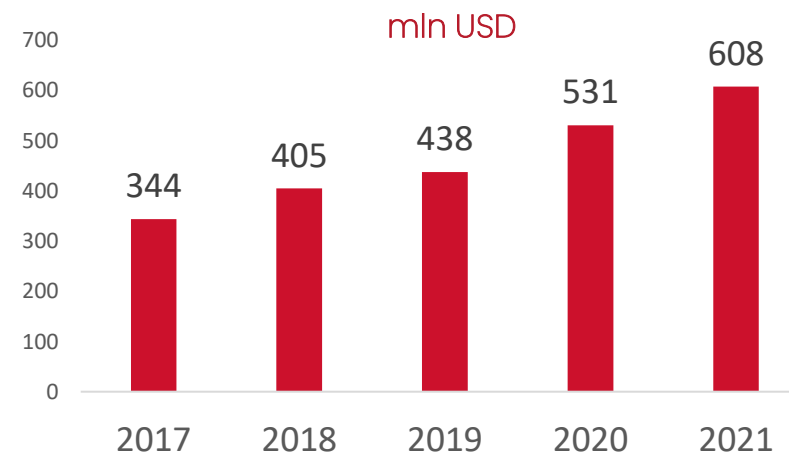
Over 12,000 people



## Number of game sector companies:

~470 game producers and publishers

## Revenue of video game market in Poland:



## Game industry growth rate (CAGR, 2017 - 2021):

~15.3% annually



Source:

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2021”

statista.com, „Revenue of the video game market in Poland from 2017 to 2026”

Growth icon made by iconixar from www.flaticon.com.

# WHAT MAKES US DIFFERENT



## Access to specialists and qualified employees

Polish universities currently offer over 250 degree programmes related to games, including information technology, programming, game design, digital art and games studies. In 2021, the number of employees in the gaming industry in Poland increased by 24% compared to the previous year.



## Poland as an important point on the global GameDev map

The export of Polish games generates nearly 96% of the revenue of the Polish gaming industry. The United States remains the key export destination. The second largest sales market is the European Union + Great Britain. Polish GameDev is a leader in this sector, achieving global success every year.



## The Polish game sector did well during the Covid-19 pandemic

Research by Polish Gamers Research has shown that during the Covid-19 lockdown interest in games increased. During that time, over 30% of the surveyed players admitted that they play more often than usual. According to experts: the Polish gaming sector coped well with the effects of the Covid-19 pandemic, which had a positive aspect. More hours spent on gaming also contributed to better sales results of many video game titles.

Sources:

PARP (Polish Agency for Enterprise Development); „Polska branża gamedev nie zwalnia. Producenci gier z dotacjami Funduszy Europejskich”  
testergier.pl, „Polska branża gamedev na tle świata – czy mamy się czym chwalić?”

OPI PIB, RAD-on database

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# DID YOU KNOW THAT



## There are great opportunities for Polish game producers

The global game market is growing rapidly compared to other parts of the entertainment industry. Polish artists keep up well with the global competition. Many titles are about the development of virtual and augmented reality (VR and AR). Forecasts of the Global Games Market Report assume that the global value of the video game market will increase to approximately \$218.7 bn in 2024, and this creates great opportunities for Polish producers.

## Poles are a nation of players

The estimated number of gamers in Poland exceeded 20 mln in 2020 and this market is still developing.

This provides a solid foundation for domestic sales. Although Poland is only one of the many markets for Polish game producers, the massive popularity of games in Poland means there are great opportunities for hiring enthusiastic employees.

## Poland has become a net game exporter

In the year 2020, for the first time the Polish game industry exported more games than were imported for the local market. This makes Poland a net games exporter and makes games the only Polish cultural product that is exported in greater quantity than is imported. Moreover, Poland is one of only a few countries in the world to achieve this.

Source:

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2021”.  
[www.testergier.pl](http://www.testergier.pl), „Polska branża gamedev na tle świata – czy mamy się czym chwalić?”

# SUPPORT INSTITUTIONS

## The Polish Games Association

This organisation counts among its members the largest and best-known video game developers in Poland. Its chief aim is to support the growth of Poland's video game sector and enhance its ability to compete on the global stage.

- PGA is a part of the European Game Developers Federation
- Represents Polish video game producers
- Supports their activities, e.g. by creating reports on the industry and promoting its best practices.



## The Indie Games Poland Foundation

Indie Games Poland is a non-profit industry organization created at grassroots to support Polish video game developers.

- Coordinates the most important sectoral portal: <https://polskigamedev.pl>
- Organizes international cooperation, trade missions, and exhibitions abroad to present the story of the Polish game industry
- Supports all key Polish gamedev events
- Provides research and reports on the industry





# SUPPORT INSTITUTIONS

## Polish game sector conferences and initiatives

### A Game Industry Conference

GIC, together with the Poznan Game Arena expo, offers a unique synergy of B2B and B2C events available in only a few places. The conference gathers Polish studios, publishers, distributors, other entities associated with the sector, and foreign participants. B2B meetings, inspiring discussions, interesting presentations – all these can be found at GIC, backed up by the B2B exhibition zone and careers event. The newest addition of the 2020 edition is the GameDev Investment Forum.

The PGA expo is the prime target for new titles promotion for everyone wanting to reach the big Polish game market, especially with PC games. GIC & PGA also host the Central & Eastern European Game Awards.

### The Digital Dragons Conference

Organized by the Kraków Technology Park, the annual Digital Dragons Conference offers a series of lectures, business (B2B) meetings, panel discussions, and the opportunity to learn more about the games sector. It also provides access to exhibition space. The whole event culminates with the Digital Dragons Awards gala.

The conference is part of a broader initiative - Digital Dragons Hub. The initiative offers support through a startup accelerator and incubator. In addition, DD Hub conducts industry research and organizes educational activities through the Digital Dragons Academy, which offers free courses to help people start their careers in gamedev.



# The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

## How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



**Information packs**  
macroeconomic, HR,  
legal, sectoral data



**Analysis  
of export  
potential**



**Preparing  
information  
packs**



**Verifying  
business  
partners**



**Organising  
business  
missions**



**Preparing lists  
of possible  
business partners**



**Organising  
B2B meetings**



**Support in contacts  
with Government  
Agencies**

# Contact us

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Polish Investment  
& Trade Agency  
PFR Group

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Strategy and Business Promotion Department,  
September, 2022



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**Poland. Business Forward**