



Polish Investment
& Trade Agency
PFR Group

Poland.Business Forward

THE GAMING & GAME DEVELOPMENT SECTOR

Poland.GameDev



Poland is an internationally acclaimed destination for:



Pristine nature

Top 10 country to visit according to Lonely Planet



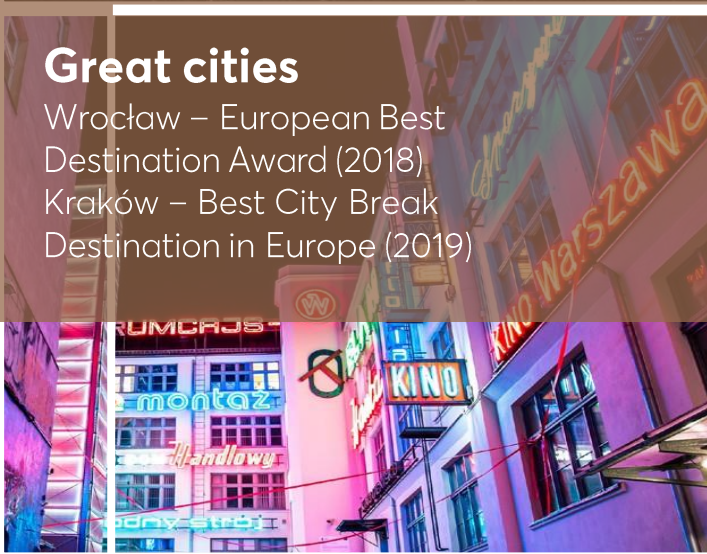
A place where east meets west

Dynamic business hub at the heart of Europe



Vibrant food scene

Warsaw among top 10 vegan-friendly cities in the world



Great cities

Wrocław – European Best Destination Award (2018)
Kraków – Best City Break Destination in Europe (2019)



Attractive place for expats

Young, increasingly international society, with very high level of English proficiency



Rich history

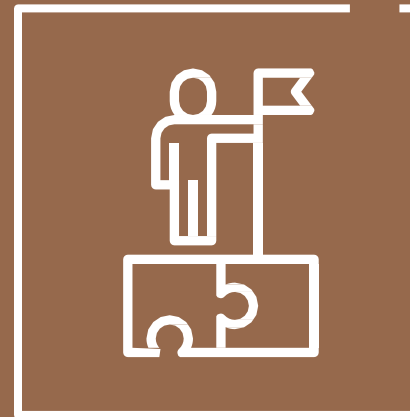
Vast legacy of bravery and resilience



**WHY
POLAND**



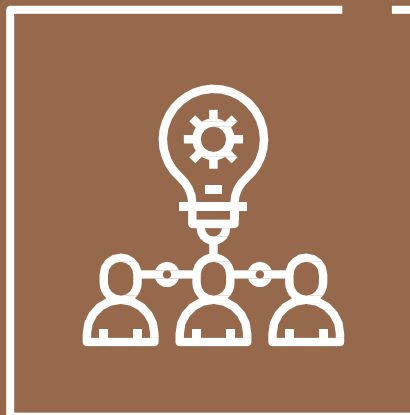
**WHAT THE
POLISH GAMING
& GAMEDEV
SECTOR STANDS
FOR?**



**WHAT MAKES
US
DIFFERENT?**



**DID YOU
KNOW?**



**INSTITUTIONAL
ENVIRONMENT**



**HOW WE CAN
HELP YOU**

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market access

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)

Largest share of the EU budget

EUR 160bn for Poland in subsidies and loans until 2027

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



WHAT THE POLISH GAMING & GAMEDEV SECTOR STANDS FOR?



Poland is an important gaming market:

~480 releases annually
479 m. EUR – industry revenue



Employment in the sector:

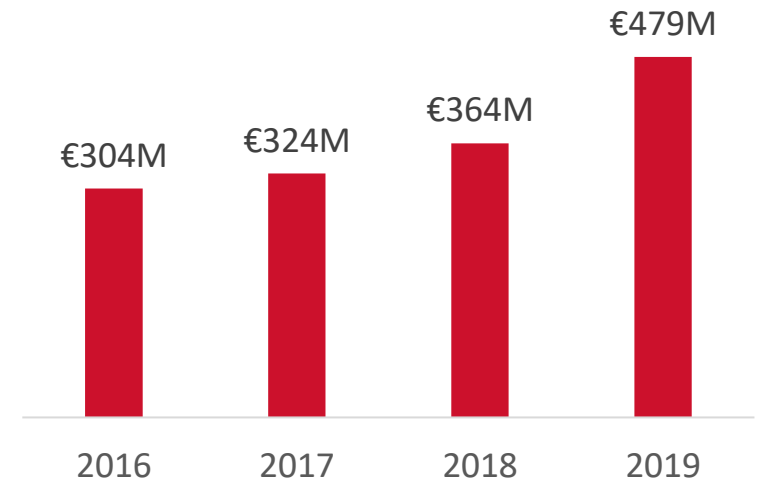
Nearly 10 000 people



Sectoral landscape:

~440 development studios

Revenues of GameDev in Poland:



Game industry growth rate (y-o-y, 2016 - 2019):

~30%



Sources:

Newzoo, „Global Games Market Report“, 2020

PARP (Polish Agency for Enterprise Development), „The Game Industry of Poland – Report 2020“

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

WHAT MAKES US DIFFERENT?



Access to specialists and qualified employees

Polish universities are currently offering 60 degree courses related to game development.



Poland is an important player on gamedev potential map

Every year the Polish companies release almost half a thousand games. That means that Poland is the 7th largest producer of games in Europe and 23rd worldwide. The types of produced games are diversified - Polish developers release around 200 games for PC's and Consoles, 35 VR titles and around 100 mobile games every year. Export generates nearly 96% of the revenue of the Polish game Industry.



Warsaw Stock Exchange (WSE) and the Special Gaming Index

Warsaw Stock Exchange (WSE) takes games so seriously that they created an index exclusively for gaming companies called WIG.Games. There are currently 43 gaming studios listed on the WSE, out of which 12 are on the main trading floor while 31 are on the New Connect Market.

Sources:

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2020”, Krakowski Park Technologiczny: "Kondycja Polskiej Branży Gier 2020", Borys Musialek:

<https://michuk.medium.com/mapping-the-polish-gaming-ecosystem-8cc540c42afc>

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DID YOU KNOW?



Poland is a home to a new game industry giant

Polish CD Projekt is one of the most valuable game company in Europe – ranked 1st in 2020. Its flagship - *The Witcher Trilogy* was sold in over 50 million copies. Their latest game - *Cyberpunk 2077* - was sold in more than 13.7 million copies only in 2020.



Poles are the nation of players

Poland game sector is a consumer market worth 596 mn USD. Number of gamers in Poland is 16 mn.

That provides a good ground for domestic sales, a big potential of hiring involved employees who know the specificity of the game sector – and a potential for acquiring the funds for development.



Polish game industry successfully operates internationally

1.75 bn PLN - that are the Polish game industry revenues globally in 2019 (counting 6 major players on the market + 470 development studios).

1.2 bn PLN - that are revenues generated in 2019 by 46 game companies listed on Warsaw Stock Exchange.

INSTITUTIONAL ENVIRONMENT

Polish Games Association

This organisation counts as 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. creating reports on the industry or good practices sets



Indie Games Poland Foundation

Indie Games Poland is a non-profit foundation, which was created in order to support Polish video game developers.

- The Foundation is a coordinator of one of the most important sectoral website in Poland: <https://polskigamedev.pl>
- Organizes exhibitions abroad to present the history of Polish game industry
- Supports main Polish GameDev conferences
- Runs the acceleration program for game developers – Indie Booster



Polish Gamers Observatory

Polish Gamers Observatory conducts research, develops reports and provides information about Polish gaming market and gaming trends



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 the needs of entrepreneurs will ensure that your cooperation will be as fast and smooth as possible



Information packages
(macroeconomic, HR, legal, sectoral data)



Analysis of export potential



Preparing information packages



Verifying business partners



Organising business missions



Preparing lists of possible business partners



Organising B2B meetings



Supporting in contacts with government agencies

Contact us

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