



Polish Investment
& Trade Agency
PFR Group



CREATIVE INDUSTRIES SECTOR

GameDev

Poland. Business Forward



Poland is an internationally acclaimed destination for:



Pristine nature

A top 10 country to visit according to Lonely Planet



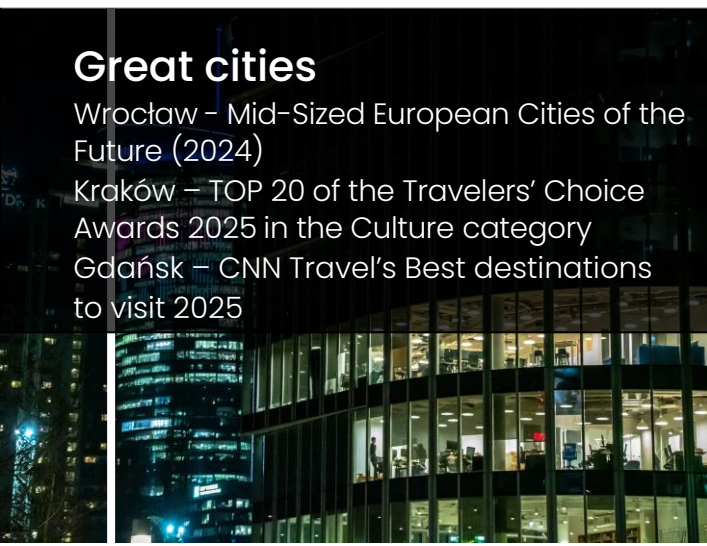
A place where East meets West

Dynamic business hub at the heart of Europe



Vibrant food scene

Warsaw among Top 20 Vegan-Friendly Cities in the World (HappyCow 2024)
Poland ranked 11th in the TasteAtlas awards 24/25 of the 100 best cuisines in the World



Great cities

Wrocław – Mid-Sized European Cities of the Future (2024)

Kraków – TOP 20 of the Travelers' Choice Awards 2025 in the Culture category

Gdańsk – CNN Travel's Best destinations to visit 2025



Attractive place for expats

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



Rich history

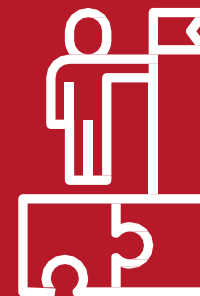
Vast legacy of bravery and resilience



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

Poland is the sixth largest economy in the European Union in terms of GDP

Large, high-quality talent pool

Nearly 300k of well-educated graduates annually

Resilient economy

Poland is considered to be one of the most economically stable and fastest developing countries in the world.

Transparent

Regional leader (2nd in CEE) in the Transparency International Corruption Perceptions Index

FDI magnet

In 2023, Poland was ranked highest in the CEE region and sixth in Europe in terms of the number of inward foreign direct investments.

Top-notch infrastructure

5th longest highway network in the EU
Over 5,205 km total length of motorways and expressways

Ratings remain high despite the turbulent times

Moody's: A2, S&P: A-, Fitch: A-, as of the second half of 2024

Competitive, well-developed cities

European Cities of the Future 2024 (fDi Intelligence):
Warsaw – 4th position overall (ahead of Paris and Munich)
and 2nd in the business friendliness category among major cities;
The Silesia region ranked 3rd in the “cost-effectiveness” category;
Western Pomerania – European Entrepreneurial Region in 2022–2023,



FACTS ABOUT THE POLISH GAMEDEV SECTOR



Poland is a leading game producer:

530+ releases annually across all gaming platforms



Employment in the sector:

Over 15,200 people (2023)

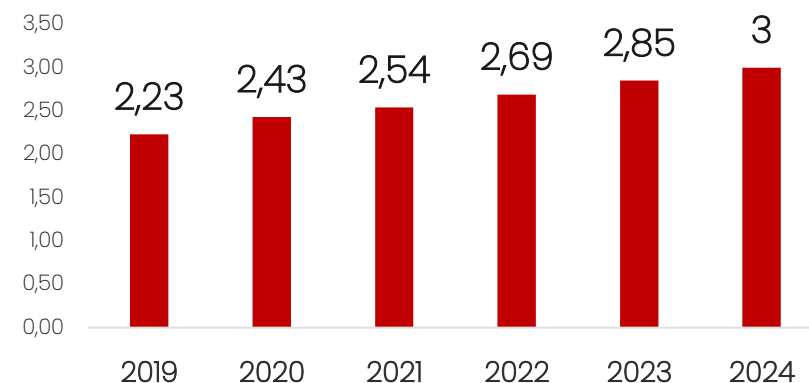


Number of game sector companies:

~494 game producers and publishers (2023)

Revenue of video game market in Poland:

In bn PLN



Game industry growth rate (CAGR, 2019 - 2024):

~6.11% annually



Sources:

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2023”

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

Polish Gamers Observatory, polishgamers.com

Itselecta.com, „IT Recruitment – Is Poland the best place for gaming development in 2023?”

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

WHAT MAKES US DIFFERENT



Access to specialists and qualified employees

There are 65 degree courses across 52 Polish universities related to games, including game programming, game design, digital art and games studies. About 14,5% of employees in Polish gaming industries are foreigners and 24% are women.



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. 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”

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2023”

testergier.pl, „Polska branża gamedev na tle świata – czy mamy się czym chwalić?”

Indie Games Polska Foundation, „PolskiGameDev.pl 2022/23”

OPI PIB, RAD-on database

Icons made by Freepik, Good Ware and Eucalyp from www.flaticon.com.

DID YOU KNOW THAT

There are great opportunities for Polish game producers

The global game market continues to grow 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). Current forecasts of the Global Games Market Report estimate that the global value of the video game market will reach \$213.3 bn by 2027, and this creates great opportunities for Polish producers.

Poles are a nation of players

The estimated number of gamers in Poland ranges between 17 and 20 mln, as of 2023. The overall value of the Polish consumer market is projected to reach USD 1,575 million by 2026.

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. Presently Poland exports 97% of its game production.

Sources:

PARP (Polish Agency for Enterprise Development): „The Game Industry of Poland – Report 2023”.
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.

Find out more at: <https://polskiegry.eu/en/>

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

Find out more at: <https://igp.org.pl/en/>



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.

Find out more at: <https://gic.gd/>



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.

Find out more at: <https://conference.digitaldragons.pl/>



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**

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Strategy and Analysis Division
Promotion Department
2025



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