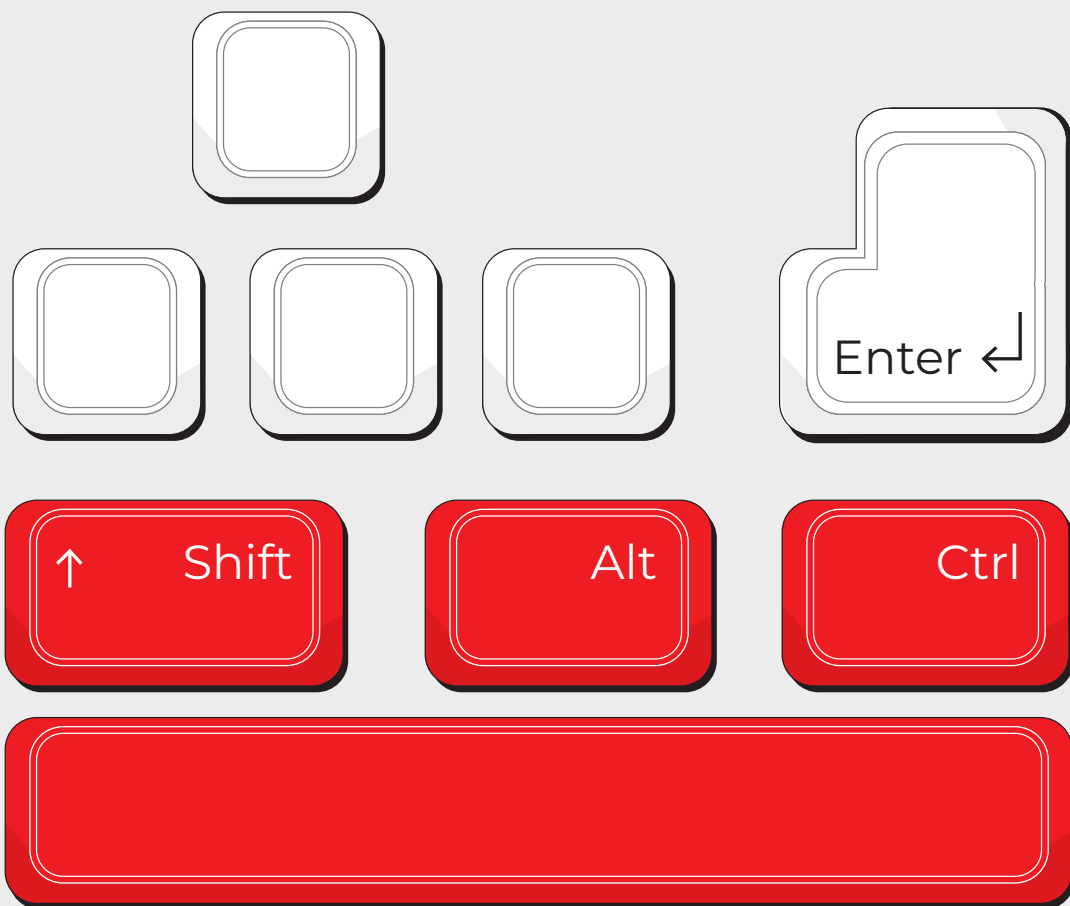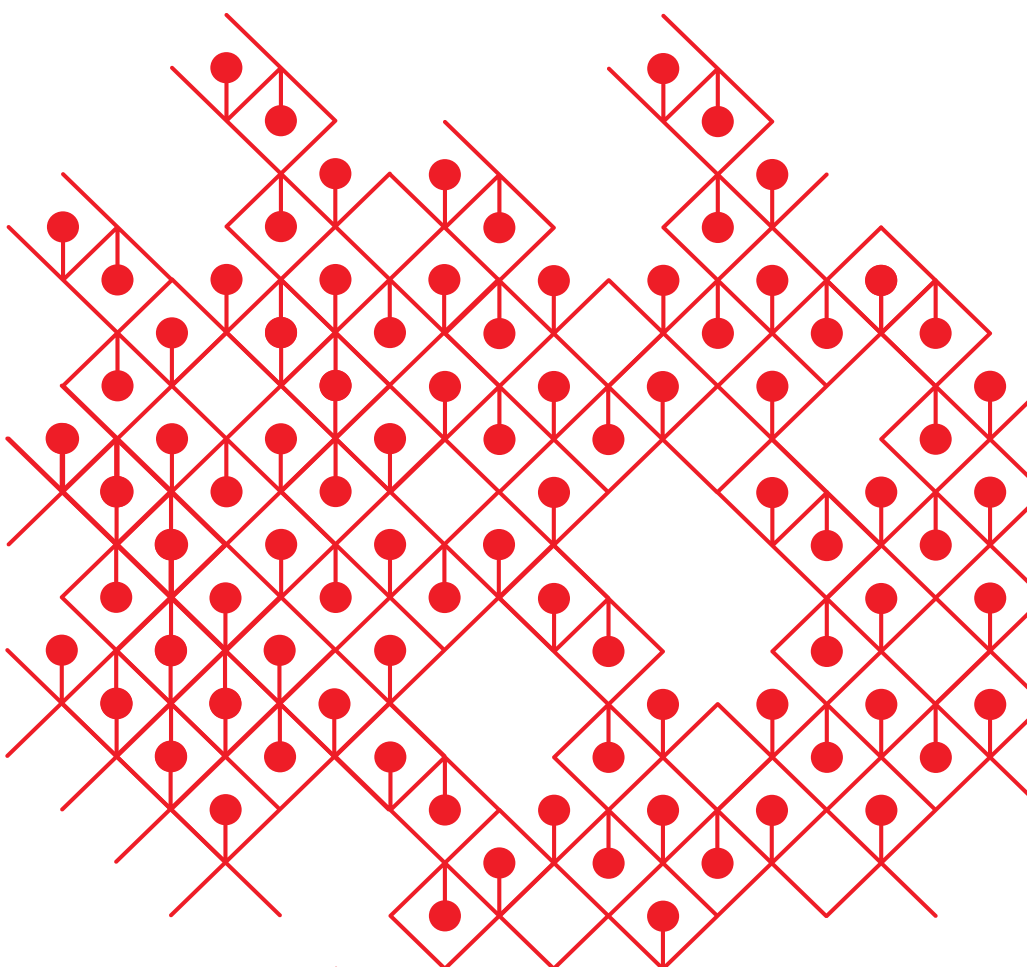# THE GAME INDUSTRY OF POLAND

REPORT

2021

The game industry of Poland — Report 2021

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Mateusz Morawiecki
Prime Minister, Minister of Economic Development and Technology

Last year's edition of the 'Game Industry of Poland' report was well received by the foreign press, sector organizations, and gaming enthusiasts, therefore the Polish Agency for Enterprise Development (PARP), together with the Ministry of Economic Development and Technology has the pleasure to present a new 2021 edition of the publication focusing on the Polish game sector.

We have gone through some of the most difficult months in the development of innovative and creative economy. The COVID-19 pandemic has left an irreversible mark on many sectors of the global economy, forcing some companies to radically change their way of doing business. The pandemic has also made many previously lucrative activities unprofitable, creating a demand for completely new business solutions at the same time. Despite the undeniable difficulties, game development has been one of the sectors that has not weakened, and has become stronger in many ways.

It seems that 2020 has ended relatively well for Polish game producers financially. Among companies listed on the Warsaw Stock Exchange, whose financial statements are publicly available, 73% reported an increase in revenues. The employment in the sector grows over 24% year-over-year. As 25% of the industry is represented by women, Poland is the lead globally in terms of female employment, with only the UK recording a higher percentage.

The aim of the following publication is to outline the profile of the Polish game development industry, its potential and strengths, with a special focus on the last pandemic months. This time we want to show the audience that it is much more than just the final product. We can be also proud of Polish companies offering external development, assets production, localization, quality assurance, and video production.

Even though we couldn't organize a national stand at Gamescom once again due to the pandemic, I still hope to meet you at the next edition, along with a large group of great Polish game developers. In the meantime, please take a look at the report and feel free to contact Polish companies representing this sector.

Kuba Wójcik
Executive Chairman of Indie Games Poland

When publishing the previous report, we realized that the Polish gamedev industry was on the verge of a breakthrough, but no one expected the dynamics of the upcoming changes. The COVID-19 pandemic delayed long-waited premieres, caused component shortages, redefined functioning of game studios, game marketing, and cyberculture perception. We are glad that the Polish gamedev did not collapse under the burden of unexpected circumstances. Paradoxically, it was a successful year, and we ended it much stronger.

A year ago, we wondered how 'Cyberpunk 2077' would affect the game industry. Perspectives were excellent. The CD Projekt RED blockbuster was supposed to reach out to up to 38 million gamers worldwide by the end of 2021. That was the most ambitious goal in Polish history, and we failed. The premiere wasn't easy - especially for older console versions. Thousands of specialists put their hearts into the Night City, which resulted in the title influencing the gamedev globally. Eventually, that was the success that marked a milestone for the Polish gamedev.

When thinking about Cyberpunk, we cannot forget the 'Ghostrunner' from Cracow. One More Level team took a risk and created an entirely new brand dedicated to those who like challenges. Cracovian studio persevered and reached 450 thousand gamers, ensuring brand's success. Cracovians continue working on free extensions and a sequel.

The national gamedev would be incomplete without the indie sector. One of their many successes in 2020 stands out. The 'Carrion', an reinterpretation of B class horrors, won two 'The Game Awards' nominations, and the British Academy of Film and Television Arts statue. 2020 saw the establishment of many new studios in Poland: they pay taxes, create hundreds of jobs, and are becoming a boost to the domestic economy. In October 2020, the Warsaw Stock Exchange became a global leader in the number of listed gamedev companies. Also, the debut of Huuuge Inc. was the most extensive offer of a company from the mobile gaming industry in Europe.

Despite challenges, we closed the year successfully and proved that Polish companies could compete and win against western giants.

The thriving game industry

The Polish game industry, understood as game production, with 96% of its revenues coming from exports should not be mistaken with the Polish game market, with 97% of its value generated by games developed abroad and imported to Poland.

In August 2021, there were around 470 active game producers and publishers in Poland.

There are some reports or even catalogs available that show bigger numbers in this remark. Nevertheless, the indicated number is quite a conservative calculation and does not include student organizations, game jam developers, companies that are being rebranded and especially inactive entities.

Contrary to popular belief supported by simple observation of the market and especially of the job offers and game announcements, the increase of the number of studios is slowing down steadily. This does not mean, however, that new companies are not founded every year – quite the contrary. Nevertheless, they generally replace liquidated ones and do not contribute

The Polish game industry

470

game producers
& publishers

€969M

industry revenue
in 2020

600+

new releases annually,
platform-wise

Sources: Game Industry Conference,
GamingAnalytics.info

Employment in the Polish game industry

12110

people working in
the game production sector

25%

are female

over **24%** growth YOY

over **1000** foreigners

(more than 8% of total employment)

Sources: Game Industry Conference,
European Game Developer Federation

to the overall increase in the number of enterprises in this industry.

According to current estimates, for every ten new studios created, nine that are already on the market have to be considered inactive, often before

delivering any actual product. It cannot be expected that the number of studios will grow indefinitely. For instance, in Finland, after reaching the peak value of 260 in 2014, their number started slowly declining to 200 in 2020, while the employment was steadily growing by around 7% each year[1]. Similar consolidation stage is expected in the Polish game industry as well, yet probably not in the near future.

Employment in game production

No previous reports have addressed the issue of the employment growth rate in the game industry. No data available prior to 'The Game Industry of Poland – report 2020' tight estimate of 9710 employees in the sector was reflected in any statistical sources. Today, it can be confirmed that employment grows at an average rate of over 24% year-over-year. It remains unknown how long this pace can be kept, as companies have for many years been reporting the lack of qualified employees as the main factor limiting their growth.

What has considerably changed is the direction of the expat migration. Although it was never a very significant outflow, for years Poland was rather losing gamedev talents choosing to work in the regions known for higher salaries. Currently, the Polish game industry

[1] The Game Industry of Finland, Report 2020, Neogames.

rather attracts more experienced employees than loses any. Despite the fact that Ukraine, and recently also Belarus, are still the two most popular destinations from where new employees come to Poland, recently we started drawing new talents for this dynamically developing industry from virtually any place in the world.

The estimated number of 1000 foreigners in the industry do not include positions like localization or player support specialists in big companies offering this strictly as a service. With that, the reported number could be even twice as high. Hardly any big or even medium-sized studios and publishers do not have any foreigners among their staff. Only two (i.e., less than 9%) companies with more than 70 employees, do not hire any expats, and both of them are considering it. In this part of the sector, foreigners usually account for around 10% of the team, but in some cases, this goes up to over one-third of the studio. Nearly half of companies with team sizes ranging from 20 to 60, employ foreigners, and this ratio is steady throughout this sector. Only in teams under 20 people the number of foreigners is significantly lower – the smaller the studio, the lower the chances it will have foreigners at all.
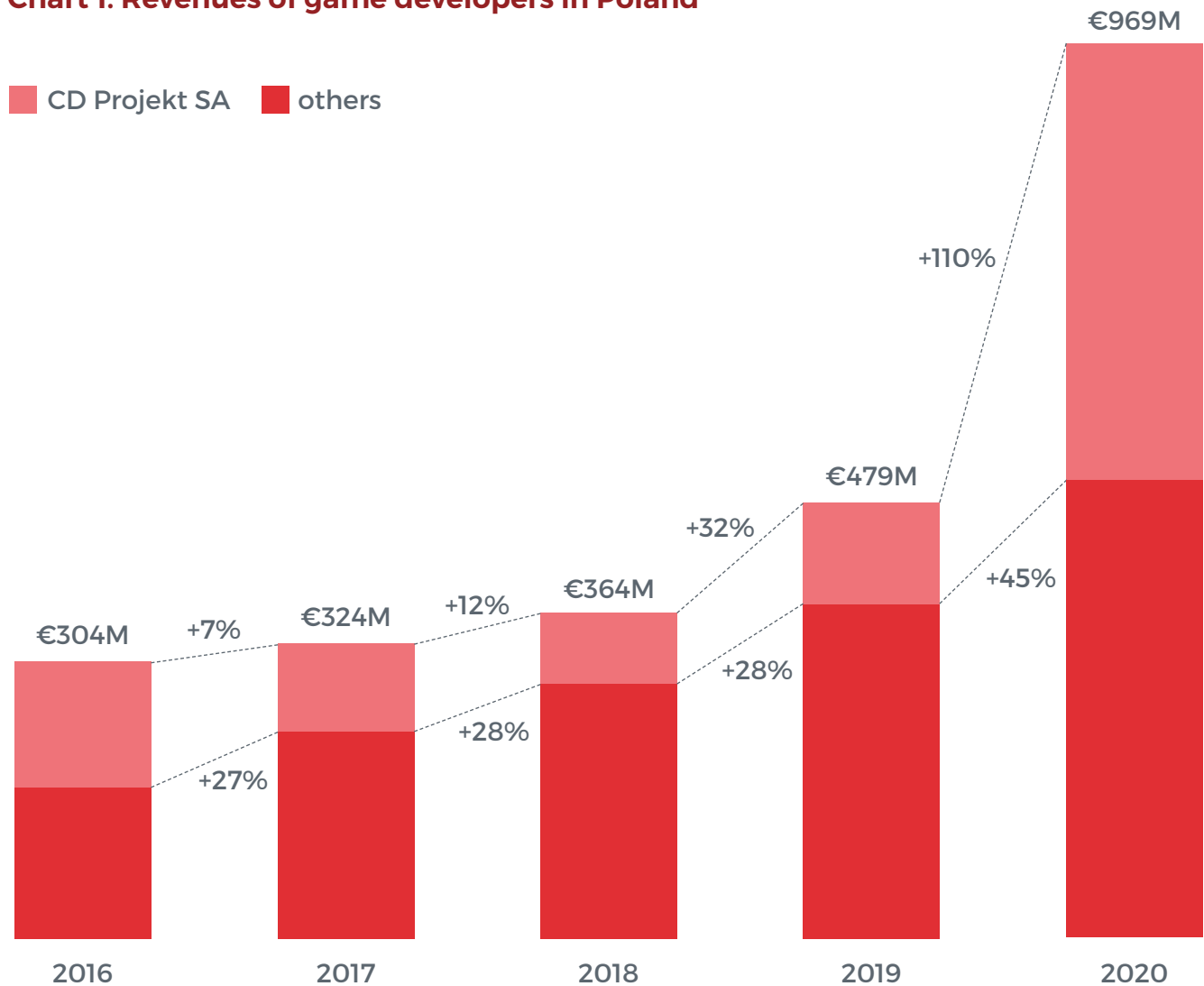
With 25% of the industry being female, Poland is among global leaders in terms of female representation, with only

the UK reporting a higher percentage. Taking into consideration the number of employees, in Europe the Polish game industry remains smaller only compared to the UK and – depending some on sources – the French industry. Numbers concerning companies and employment presented in the report take account of all the stakeholders in the game production sector, including development studios, as well as companies offering external development services (e.g., outsourcers) and global publishers. Only around a dozen active publishers or so are not developers at the same time or offer no in-house development by a dedicated team. On the other hand, external development is either strongly linked to first-party development or there is no practical reason other than work being done by external companies why they should be differentiated from development studios. Employment numbers presented in the report could be higher by at least 2000 people if it was decided to include services not strictly related to game production and offered to the industry by service providers or outsourcers.

Game industry revenues

For as long as it could be tracked the sector has been registering constant growth. However, the observation of this trend is always difficult due to CD Projekt SA revenue fluctuations related to their publishing cycle. This is why the report

Chart 1. Revenues of game developers in Poland

■ CD Projekt SA   ■ others

€969M

+110%

€479M

+32%

€364M

€324M   +12%

€304M   +7%

+28%

+45%

+28%

+27%

2016   2017   2018   2019   2020

Source: Game Industry Conference

presents the revenue of the entire sector, with separate statistics for the makers of 'The Witcher'. From this perspective, it is plain to see that the year-over-year growth of the game industry in Poland has been at a level of nearly 30% for the last three years and it even further accelerated in 2020. In general, 2020 seems to have ended relatively well in financial terms for Polish game producers. Among companies listed on the Warsaw Stock Exchange and publicly

publishing their financial reports, 73% have reported an increase in revenues. The fastest growth, significant both in terms of percentage and absolute numbers, can be observed according to available data for The Square Games, Huuuge Games, and BoomBit (all three from the Free-to-Play mobile sector), followed by PlayWay group, People Can Fly, Creepy Jar, Bloober Team, All in games, Forever Entertainment, 11 bit studios and QLOC.

In 2020, thanks to its massive growth, the Polish game industry finally reached the state where more games are exported than imported. Game production is the only creative and cultural industry to have achieved it. Poland imports far more movies, records, and books than it exports. As a net game exporter, it has joined a very exclusive club. According to global estimates only several countries in the world have accomplished it.

2021 industry revenues are difficult to prognose. It is tempting to claim that it is impossible to repeat the 2020 success, when roughly half of the industry revenues came from CD Projekt SA that quadrupled its 2019 revenues with the release of 'Cyberpunk 2077'. Similarly, after 2016, without further great sales of 'The Witcher 3', the entire industry's revenue forecast for 2017 was not to beat previous year's results. Nevertheless, the rest of the industry always managed to make up for drops caused by the development cycle of the biggest studio. Now the sector revenue growth, even excluding CD Projekt SA, is further increasing, and some big Polish releases have been announced for 2021.
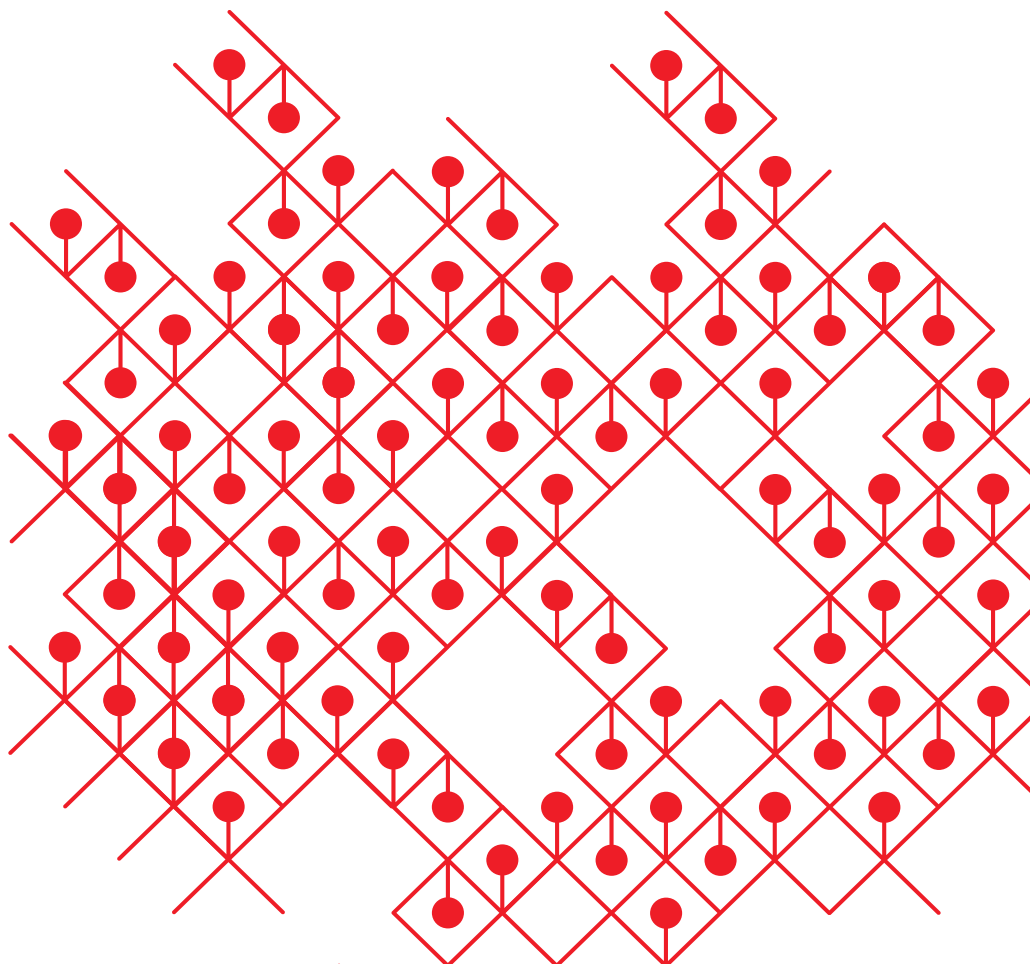
The Donkey's journey
The success story of Donkey Crew

Donkey Crew started as a modding group over 10 years ago. A bunch of friends from all over the world was united by a common passion for modifying computer games. They all worked remotely already and did not feel the need to share an office. As time went by, they decided to move from modding to making their own games to spread their wings in the industry. Currently Donkey Crew hires about 30 people and their most recent MMO (massive multiplayer online) offering 'Last Oasis' receives rave reviews with 35 K concurrent players playing the game on a regular basis. In the meantime, Donkey Crew moved to Poland, where they finally found their place in the global gamedev community.

The name of the company originally came from a donkey avatar that Florian 'chadz' Hofreither, the founder and CEO of the Donkey Crew, used back in the days, when he worked on his first solo project. Over the time, when more people joined and helped him out, the modding community referred to the whole group as 'Donkey Crew'. The name has stayed with them ever since.

It took another couple of years to finally decide that they need to work together in one place to spread their wings in the game industry. This idea led them to establish their first office in Northern Ireland. Their Irish episode did not last too long, as they jumped on the first opportunity to move to China. – That was exciting for us due to the emerging opportunities in the video game industry in relation to Asian markets – says Florian 'chadz' Hofreither, the CEO of the Donkey Crew.

The rocky road to Poland

Their Asian adventure ended in 2018, when they decided to move back to Europe. Picking a suitable 'new home' for Donkeys was a difficult decision. – We wanted a location that was both suitable for expanding Donkey Crew, but we also wanted a place that we would feel comfortable living our lives at – he admits. After doing a lot of research and considering many different cities within the European Union, they decided that Wrocław, a city located in the south-west of Poland, was most promising. – It is a vibrant, modern city with many cultural offerings, with a strong game development community and lots of talents to work with. In hindsight, it was absolutely the right decision – adds Florian.

Access to a large pool of local talent was one of the reasons for the company's move to Wrocław, which is well-known across Poland for its huge game development community with lots of practical know-how and a good academic base. Wishing to further develop their business, Donkey Crew needed to expand their team. Originally they were a group of 10 people from 10 different countries: Italy, Germany, Norway, Poland, Ukraine, Russia, USA, Serbia, Sweden, and Austria. Since moving to Poland the team grew a lot, mainly due to taking on board game developers from Poland, but also from other countries. The company currently employs 30 people, half of whom are Poles.

Despite such a diverse team, they have never had any problems with internal communication since English has always been their primary language. Florian was quite happy to find that almost everyone in the game industry in Poland speaks English flawlessly. Moreover, it also seemed that the company mostly attracted personalities appreciating the international composition of the Donkey Crew.
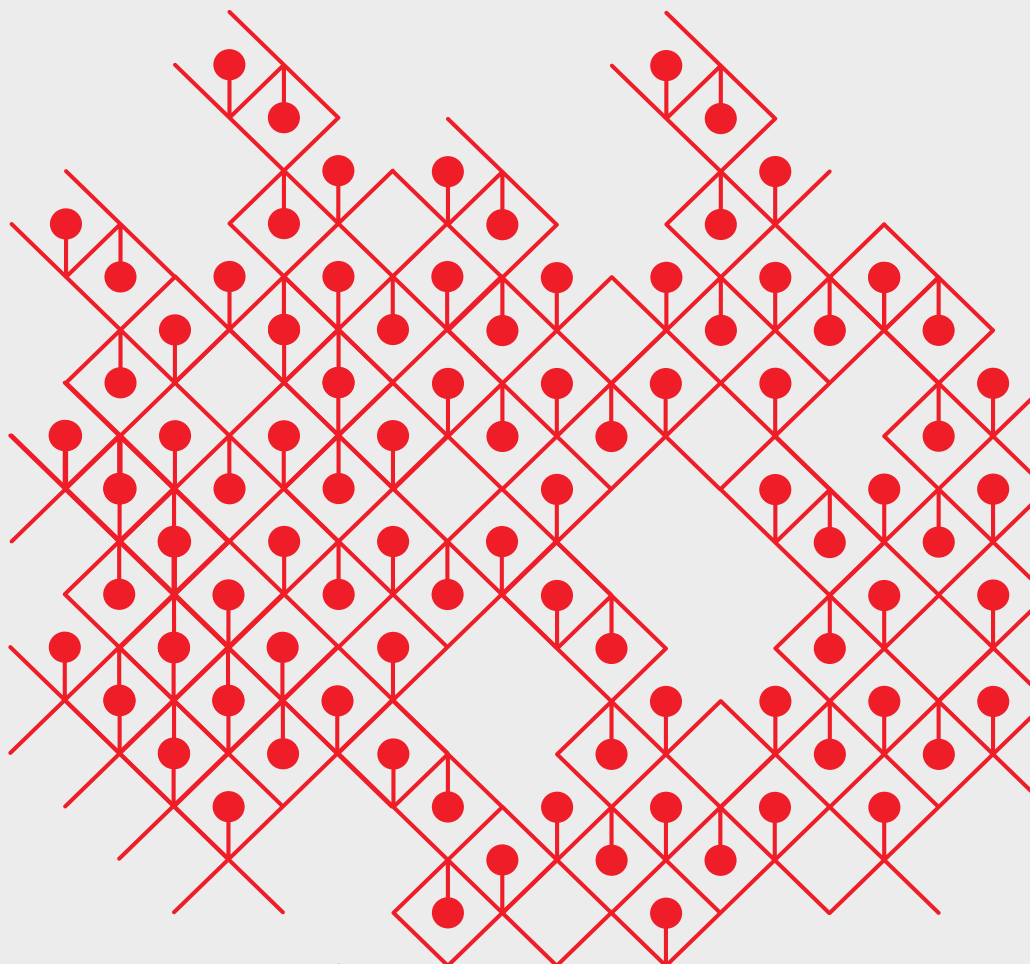
On the way to success

After moving to Poland in 2018, they did not need to wait too long for their first international success. Already in 2019, during the Gamescom fair in Cologne, a larger audience had an opportunity to watch and play 'Last Oasis', their most recent offering on which they had been working on for some time. Inspiration for the already widely recognized title was taken partly from the works of a Dutch artist called Theo Jansen. – We wanted to create a game that captured the essence of ship battles but set in an environment that was more interactive than the wide open sea. So, we looked for inspiration on land-vehicles and, among other things, stumbled across the magnificent 'Strandbeests' (Dutch for 'beach animals') from Theo Jansen – says Florian.

On the one hand, it is noteworthy that the 'Last Oasis' is an MMO (massive multiplayer online) game, which is not a typical Polish genre. On the other, Donkey Crew is not a typical Polish game development studio. Thanks to the international composition of the company, they already had some experience with massive multiplayer games from previous projects, but never on such a large scale. Florian admits they had to learn a lot to bring such a huge project to completion. – While people with the right set of skills were initially hard to find, the Donkey Crew attracted a lot of individuals

with ambition and curiosity to learn the required skills, and building the knowledge on their own paid off even better in the long run – admits the CEO.

Despite the complexity of the project and the company's concerns regarding the result, they were blown away by the initial success so much that they ran into technical difficulties due to server overload. 'Last Oasis' had over 35 000 concurrent players and over 100 000 Twitch viewers at its peak.

At the moment, the Donkey Crew team is focusing on expanding their flagship title, which is still in Early Access on Steam and Xbox. They also want to release it on other consoles and continue adding content until the full release.

Employment, structure and export potential

The employment is undoubtedly growing in this sector. The fastest employment growth has been observed for such development studios as Ten Square Games, People Can Fly and Flying Wild Hog. These three big studios together accounted for almost 15% of the entire industry's growth in 2021.

External development and services make yet another rapidly growing subsector. The most important change however, is the scaling up of the smallest teams. Dozens of studios, counting previously fewer than 16 staff members, is now increasing to 17-40 and contribute the most to 2000 new positions in the industry.

Despite constant changes in the industry, a growing number of studios manage to stay afloat for several years. There are visibly fewer studios that are over 7 years old, while the year 2014 could be pointed as the moment when the industry started to grow more rapidly. The chart most probably does not include many youngest studios, started in 2020 or 2021, but not yet established or networking enough to be surveyed.

Company size in the industry

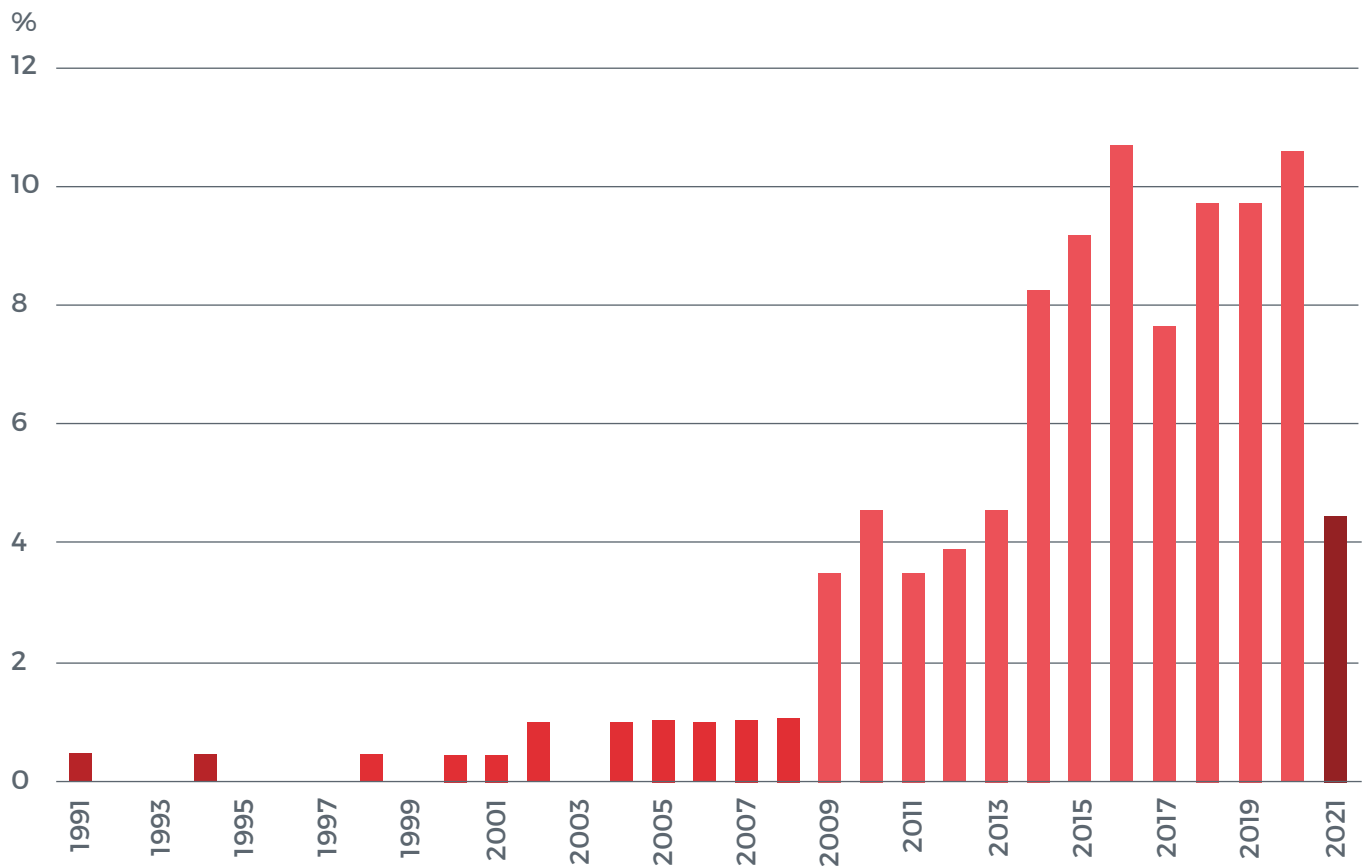**33%**

of studios hire 5 or fewer people

38%

of companies employ 6 to 16 people

50+

of studios have a team of 40 or more people

19

companies hire more than 100 people

Source: Game Industry Conference

Chart 2. Years of studios' market presence (estimation, N=203)

Source: Game Industry Conference

As many as 64 companies representing the gaming sector are Warsaw Stock Exchange-listed, including 17 on the main trading floor, and 47 on the New Connect market, which is a huge change compared to only 44 studios according to our 2020 report. Nevertheless, in 2020 it was more popular to get listed by reverse acquisition than by an actual Initial Public Offering (IPO). Still, the Stock Market has witnessed two big IPOs: Huuuge Games and People Can Fly Group.

Export

Export generates nearly 96% of the Polish game industry revenue. The United States remains the key export destination, with up to half of Polish games sold and monetized there. This tendency is further strengthened by efforts made by the largest and most prominent producers to mark their presence on this pivotal market. These proportions are, however, different for small and mid-sized developers, where the US sales only slightly exceeds figures for the second largest market, namely Europe, understood primarily as the EU, and here mainly Germany, the UK, and France.

Export to all Asian markets accounts for slightly over 10% of the total only, with China generating the highest share.

Chart 3. Global game publishers originating from Poland
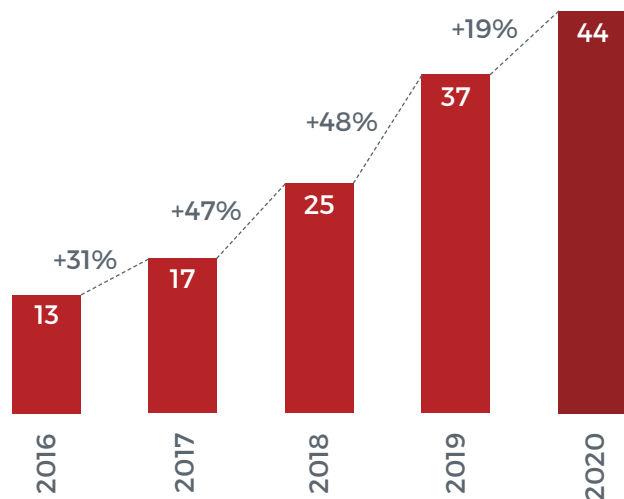
Sources: Game Industry Conference, GamingAnalytics.info

At the same time, Japan and Korea (the third and fourth largest markets globally) have relatively small shares which are due to similar factors for all these countries. All recent reports on global gaming showing China as the largest market are missing the imports statistics, where the USA undoubtedly remains the biggest importer. At the same time, a massive share of Chinese numbers is an internal market. While for entirely different reasons, Japan and Korea also have a relatively bigger share of local titles, especially compared to Western markets. For Poland as an exporter, open, globalized markets, which act as big game importers, will remain the key destinations. On top of that, Polish developers produce fewer games suitable for customers on Asian markets,

focusing on closer and more available ones. Even though the presence of Polish titles on the Japanese market is growing, and some companies even specialize in selling their games there, it is still a small proportion of the Polish game exports, and an even smaller proportion of the Japanese game market.

Growth of global publishers from Poland

Emerging global publishers are one of the key drivers of change in the Polish game industry, which shows the sector's growing maturity. Before 2016 there were just a few of them, and in 2020 their number grew to 44. This leaves only France and UK ahead of the Polish global game publishing sector, at least in the number of publishers[1]. The proliferation of publishers is being continued. By including companies' just claiming to be publishers, already scouting for titles to publish, or even financing game production, but still actual prior releases, these statistics could easily double. Instead, only active publishers of external titles, with the exclusion of self-publishing, were analyzed, not including companies introducing foreign games to the Polish market, as these should be seen as regional distributors. This, however, shows that this sector will grow in years to come, possibly by dozens. At least one-third of publishers should be considered

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[1] EGDF, 2019 European Video Games Industry Insights Report

micropublishers, launching only a few titles or just one. There is, however, no visible trend of leaving the publishing business. It is limited to single cases.

Some factors seem to be the Polish peculiarity in this sector. Many companies engage in both porting and publishing, with specialization in consoles, especially Switch. Excluding occasional mobile ports, there are only four proper Free-to-Play mobile publishers – as F2P has become a market mainly for the biggest players. Roughly one-fourth of all Polish publishers should be seen as part of the PlayWay group. Among PlayWay's subsidiaries, at least Movie Games and Ultimate Games are already creating subsidiaries that are smaller and narrower specialized publishers. It is a common or even prevailing operating model to publish mostly Polish developers or even developers from the same capital group. Similarly, developers from Poland, especially younger ones, often sign global distribution deals with publishers that also come from Poland. Foreign publishers still do very limited scouting in Poland and sign even fewer deals. The ratio of titles released in cooperation with publishers compared to self-publishing

is also changing. According to 2020 data, only 46% of Polish games on Steam were self-published, and this is a historic low, dropping from 72% in 2014 – the earliest year for which it makes sense to track this[2]. This value is far lower than the average for self-publishing for the entire Steam, which is 73% and quite contrary was steadily rising in the same timeframe. This appears to result from relatively young age and limited resources of rapidly growing new studios and the growth of numerous publishers with a big role of the PlayWay group itself. It is noteworthy that the number of self-published games is also growing, but publishing simply grows faster. The share of self-publishing for Polish games is even lower in the console category, where porting deals more and more often include a publishing contract, too.

[2] Source: GamingAnalytics.info

The most gamer-friendly place on Earth
The success story of GOG.COM

– Our ultimate goal is to become the most gamer-friendly place on Earth – says Maciej Gołębiewski, a store director at GOG.COM, a global video game distribution platform established by CD-Projekt Group. Content diversity – from all time classics to the most recent releases – and the deepest respect for both gamers and developers is what makes this platform so unique. The store's latest policy enabling gamers to refund a game up to 30 days after the purchase is unmatched and remains at ridiculously low rate of 1.39 %. This fair and square approach makes GOG's community engagement grow hand in hand with the company's revenue.

Polish Agency for Enterprise Development: You joined the PC digital distribution market when some key players already embraced it. Where did the idea come from?

Maciej Gołębiewski, a store director at GOG: We entered the digital distribution market in its early stage, in 2008, with a unique offer for those who appreciated classics. Back then, most of the games we used to play as kids, like 'Fallout', 'Baldur's Gate', and 'Planescape: Torment', were abandoned and no longer available on modern computers. We believed that these titles should never be forgotten or left behind, and apparently, many players wanted to preserve the art of game creation. But it was not only about games. We perfectly remembered our beloved boxes full of extras and goodies, and we wanted to evoke this feeling in the digital world by releasing games with content packs that would tickle all inner collectors.

After many years, GOG is still a place for hand-picked content, classics, and new releases that we publish and promise to support on modern operating systems in the future.

The key number describing GOG today would be...

MG: I would start with 208%, our monthly active users' growth in 2020 for all GOG services. This number should be followed by 60% - the percentage of our engaged users who play games at least once a day, which gives

you more insight into how engaged our community is. When it comes to revenues, in 2020 the GOG store scored a net revenue growth of 114%.

Where is GOG heading now?

MG: GOG is a company of gamers, and for many years we have been paving our own way on how to deliver the best experience to our community members. It is the core of our identity and a goal that has remained unchanged over the years.

It comes along with a catalog of all-time classics, collections of indie gems, and exceptional AAAs we picked for those who appreciate our recommendations. It also includes single-player modes without copy protection schemes and a refund policy that honors your choices.

GOG is a safe place for all players who expect a more tailored experience, and for creators who want to deliver value to our community. We believe that each game has the right to shine, and that is why we offer developers visibility packages followed by our PR assistance.

These values define our development and growth for now and for the future. Our ultimate goal is to become the most gamer-friendly place on Earth.

All the reports are bombarding us with data that F2P mobile is the key market, as it grows the fastest. You operate on the PC premium market. How do you perceive it? Is it growing still?

MG: The PC market is constantly growing and changing. We see it when we look at a growing number of releases each year, more developers joining the market, bigger revenues, more ambitious projects, and new technical solutions. We have always been PC-oriented, and we believe our gamer-centric approach gives us many opportunities to develop GOG even further.

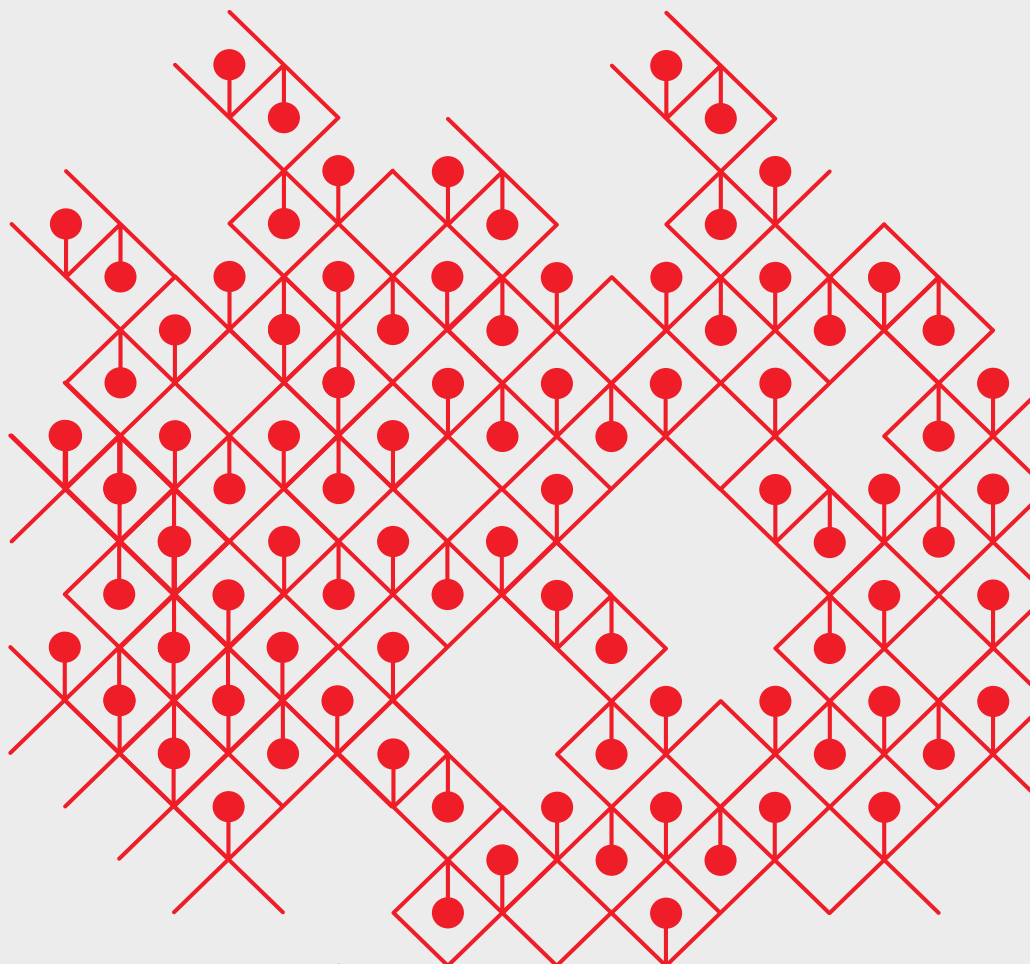**Who are GOG's clients and what attracts these gamers to your platform?**

MG: Most of our core users are super frequent players that have stayed with us for a long time. They are loyal and engaged, sometimes honest to the bone, especially regarding the quality of games. They are passionate and

driven by values that attract them to GOG. They respect developers and appreciate being respected. And they love RPGs but not only!

Since the last year, your refund policy has been unmatched, but at the same time, it was suspected to possibly harm developers. How did it work? What does it tell us about the market?

MG: GOG is a gamer-oriented platform and that has not changed since the very beginning – we make this a strong part of who we are and it differentiates us on this crowded market in many ways.

We always blaze a path when it comes to respecting gamers' rights. The policy we implemented in February 2020 allows users to refund a game up to 30 days after purchase, and a year later, we have maintained a 1.39% refund rate which is an impressively low number. It was a vote of confidence in our customers, and it turned out they exercise their rights with high respect to the developers.

Trends, strengths, and growth factors of the Polish game industry

Developing games for PC still remains the basic and primary area for Polish gamedev. Of course, PC premieres can be easily followed by Xbox and PlayStation editions, sometimes even on day one, but the smaller the studio is the more likely it is to develop a game for PCs first, and port it to consoles later.

This trend has been apparent for years, with temporary fads affecting it to a smaller or larger extent. Mass migration of small developers to Free-to-Play (F2P) mobile and then an escape from this market observed in many neighboring counties has not affected Poland to such a great extent. On the other hand, the new deal that came along with Switch fits Polish premium productions relatively well, as most of them are ported to this platform. In 2019, Switch kept on growing the fastest, and it seems that this trend has continued since. The peculiarity of the Polish scene is that the mobile development is faciliated even without the F2P business model itself. This would

be usually mobile releases of ports from PC premium development. Sticking strictly to F2P development is limited only to few big companies like Huuuge games, Ten Square Games and BoomBit. Actually, even external development is more popular as a business model than F2P production. Still nearly three quarters of the companies declare premium games development to be their primary business model.
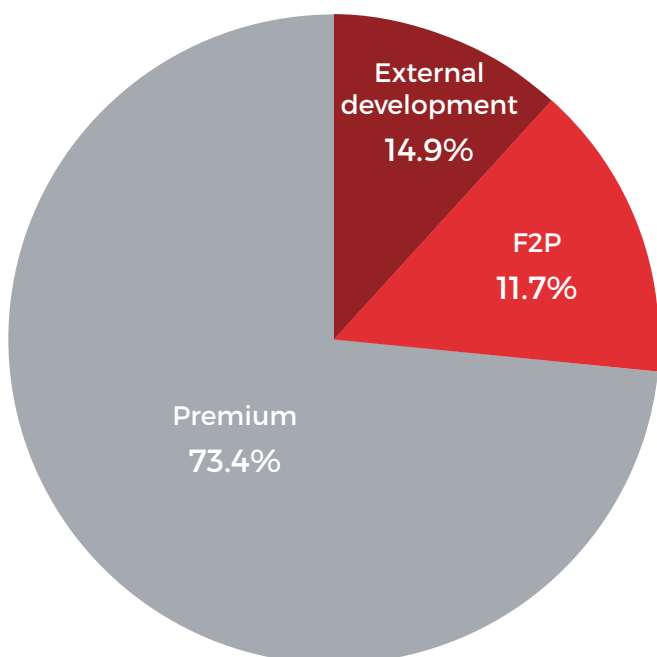
Other business models mentioned include licensing, premium with in-game purchases, and PlayToEarn (blockchain gaming). Nearly half of the developers surveyed did not specify a clear primary

Chart 4. Business models facilitated by Polish developers and platforms they develop for, based on their declarations.
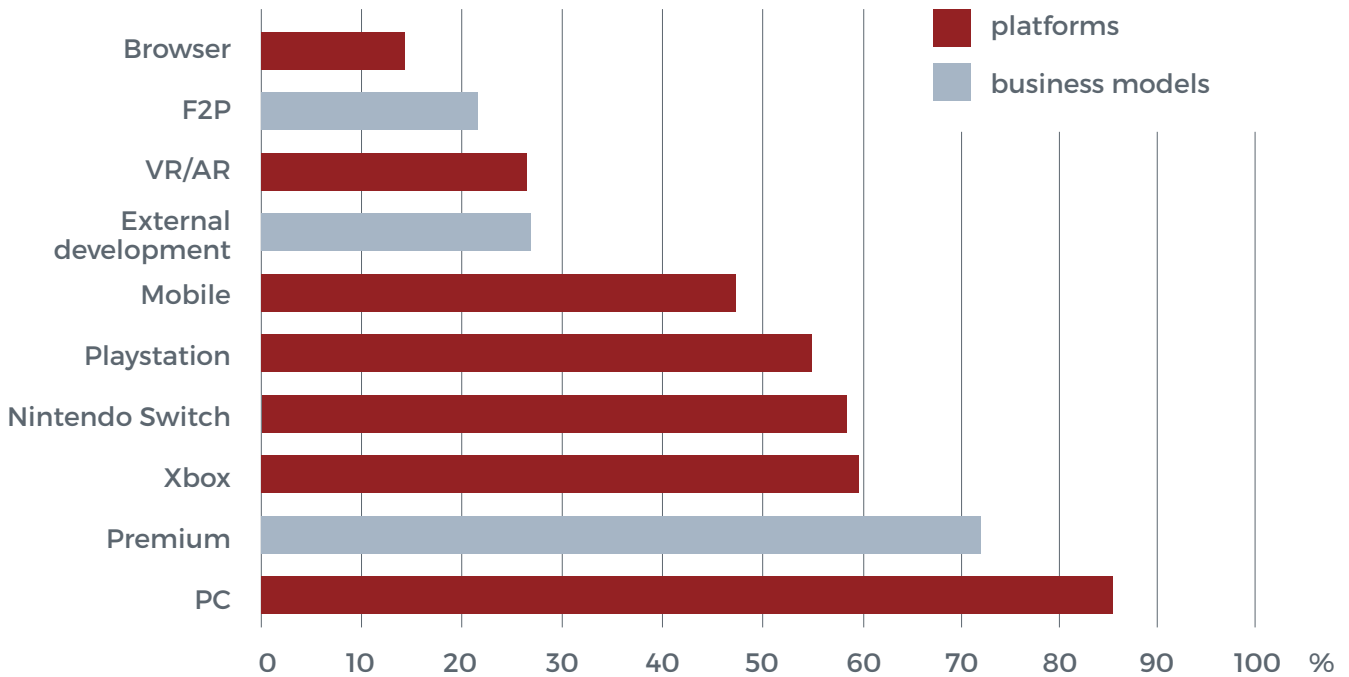
Source: Game Industry Conference

Chart 5. Declared primary business model among Polish developers.

Source: Game Industry Conference

business model. Other platforms mentioned included Mac, Google Stadia, Linux, Retro hardware, Amazon Luna, Apple TV, Tesla cars, ChromeOS, GeForce NOW, custom hardware platforms, and e-boards, all ranging from 2% to 0.5%. A careful review of these cases shows that games for such non-mainstream platforms are indeed developed. What's more is these are making actual money. Nearly one-third of developers surveyed did not declare clear primary platforms.

Poland is one of the leaders in PC game production and especially in Steam production. In the Top200 Steam wishlists (a ranking of most anticipated titles), Poland is taking the global

Chart 6. Primary platforms declared by Polish developers.

Consoles 19.1%

PC & Consoles 17.3%

Consoles – 1.8%

VR/AR 5.40%

VR/AR & Mobile 0.9%

VR/AR 4.5%

Mobile 10.0%

Mobile 11.8%

PC 53.6%

Nintendo Switch 10.0%

Nintendo Switch & Mobile 0.9%

PC 71.8%

Nintendo Switch 11.8%

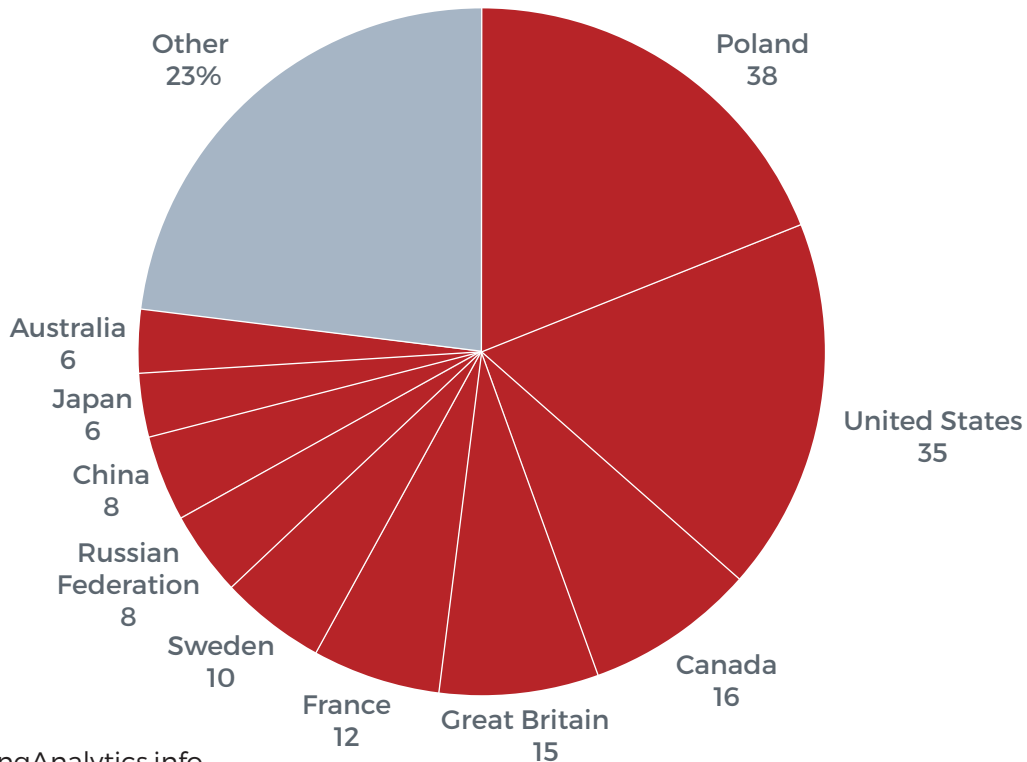PC & Nintendo Switch 0.9%
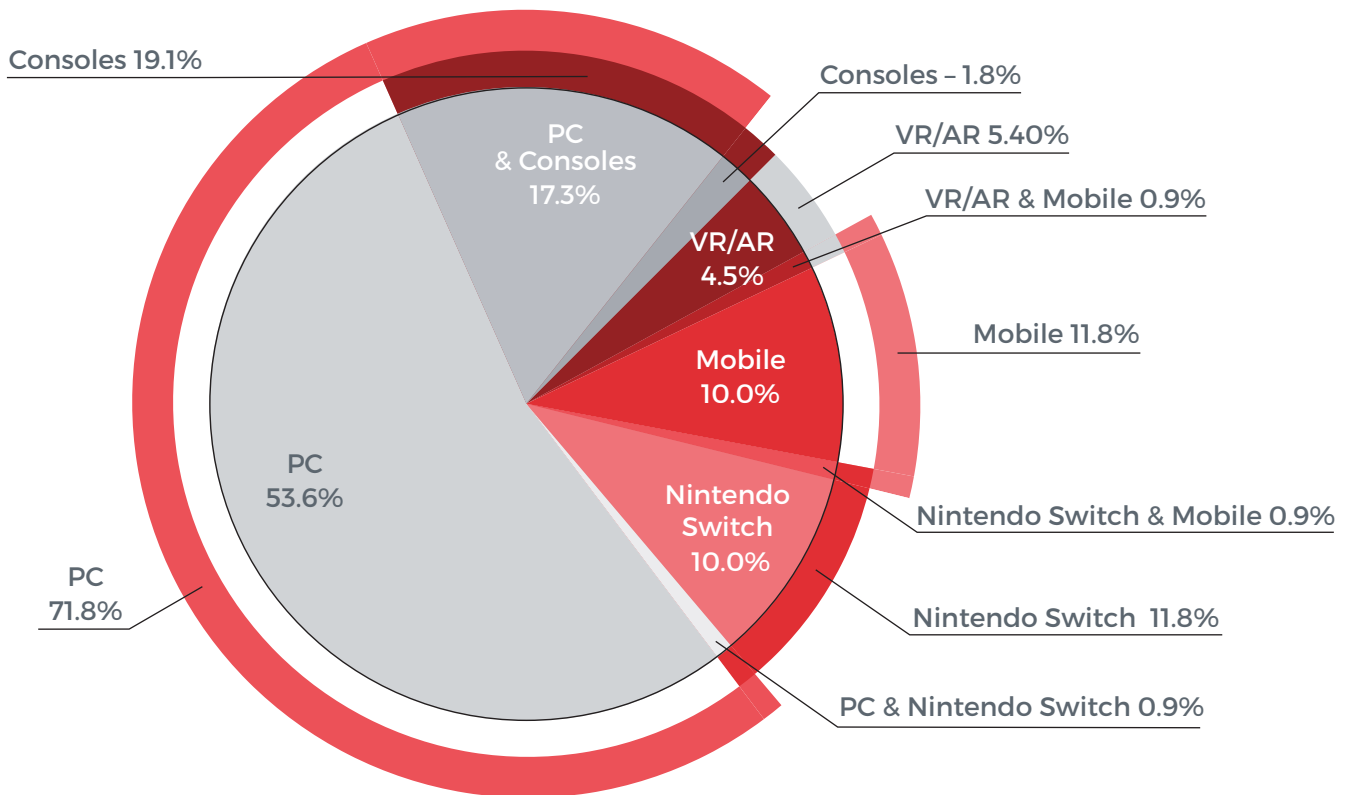
Source: Game Industry Conference

lead with 38 games in August 2021. Different conclusions can be drawn here depending on what section of the Top wishlists ranking will be analyzed. If we look at the Top100 only, the USA takes the lead over. Considering just the Top 20, also Sweden outperforms Poland. But if we analyze any cut bigger than Top200, the Polish advantage will further increase. This might mean that Poland's advantage is more immense in indie and AA+ game production.

AAA

In 2021 the list of Polish specializations has to start with this most prestigious one due to even more reasons than earlier.

Our most awarded AAA representative, namely 'The Witcher 3: Wild Hunt' maintained the position. Still, the list of other excellent AAA productions from Poland, including 'Dead Island' and especially 'Dying Light' from Techland, 'Gears of War: Judgment' from People Can Fly, and several others, was strengthened by 'Cyberpunk 2077' by CD Projekt RED and 'Outriders' first AAA game of People Can Fly after parting with Epic Games.

And the near future will bring much more, for instance, the 'Dying Light 2' from Techland which is the unrivalled Steam wishlist leader. Flying Wild Hog under new ownership is revealing more details of the 'Shadow Warrior 3', but

Chart 7. Origin countries of games in Top200 Steam wishlists

Other 23%

Poland 38

Australia 6

Japan 6

China 8

Russian Federation 8

Sweden 10

France 12

Great Britain 15

Canada 16

United States 35

Source: GamingAnalytics.info

also of three other titles. 11 bit studios comments and declarations suggest that their still undisclosed 'Project 8' that follows 'FrostPunk' will also be an AAA production. CI Games is a slightly different case – they entered the AAA sector with titles like 'Sniper: Ghost Warrior 3' or 'Lords of the Fallen' but then decided to settle for somewhat lower budgets for the 'Sniper: Ghost Warrior Contracts' series. In the end, numerous Polish studios work on ambitious AA+ premium games in an effort to push the state of the art a little.

Simulators

If we would have to indicate Polish 'FIFA' that definitely would be the 'Car Mechanic Simulator', with series

numbered 2014, 2015, 2018 and 2021, plus some mobile or pocket editions in-between and lots of new content coming in DLCs. Sales growing with each edition, totaling over 4 million now, plus DLCs on top of that, are what the popularity of the simulator genre among Polish developers is associated with. Over time, it turned out that virtually everything can be simulated, as long as it is done properly, for instance, the 'Thief Simulator', the '911 Operator' series, or the 2021 best-sellers: 'Tenants' with its landlord simulation or 'Medieval Dynasty' simulating... a medieval dynasty. Even smaller titles, which are to break even at tens of thousands of copies, are vastly manufactured by small studios, often financially affiliated to the PlayWay group that seems to have perfectly

mastered the secrets of this genre. Separate trend are the survival simulators with high production values like 'Green Hell' from Creepy Jar studio that sold in over 1.5 million copies, now followed by 'Chernobylite' from The Farm 51 that has been released only recently, and has already sold hundreds of thousands of copies.

Distribution

Global game distribution, going more and more digital, is usually controlled by a few companies, mostly operating from the US and in some cases Japan. Poland having GOG.COM that specializes in game distribution for PCs – is probably the only big exception to this rule. GOG was first known for its care for further life of classic titles, and then for its campaign against the Digital Rights Management (DRM). Then in 2019 it was clear that GOG. COM became the vice-leader of PC game distribution, outpaced only by Steam. As more big players, like Epic Games Store or Microsoft Game Pass, joined the game, the ranking became difficult to track. GOG.COM remains one of the key players in the PC digital distribution sector, with track record of affecting the rules in the whole market, for the benefit of players.

External development, porting, and services

In Poland there is also a large – yet less publicized sector – offering external development, porting, asset production, localization, voiceovers, quality assurance, and video production services. There is also another group of services not directly related to game production like PR and marketing, player support, community management, law services, investment, or stock exchange-related services. At least seven companies, namely Keywords, Lionbridge, QLOC, Roboto Global, Sperasoft, Testronic, and even Platige Image hire hundreds of people each and offer top quality services to clients from all over the world. With the exception of the last one, these companies form something that could be called Polish quality assurance and localization hub, the Europe's biggest concentration of QA&Loc industry working with games. But similar services are offered by dozens of smaller companies, too. Two opposite trends can be observed here. Companies either tend to combine such activities with teams doing first-party development, and are often perceived as developers rather than service providers. Others prefer to limit their specialization to external development or services.

Ownership structure

Even with some big Merge&Accquisition transactions affecting the industry, the general view remains unchanged - the gaming sector in Poland is very... Polish. Nearly all companies have domestic owners. One could say that every game developer in Poland is independent.

In fact, in numerous interviews, most successful Polish game studios stress that this autonomy serves them in achieving the best game quality. In 2020, the biggest inflow of funding came from local investors active on the Warsaw Stock Exchange or about to enter it.

It is difficult to clearly point the reasons for this state of affairs, since in the subsector specializing in external development, five out of seven largest firms have foreign owners. But no industry giant, like EA or Ubisoft, has dared to open their branch in Poland, even though they are present in neighboring countries. Nevertheless, two reverse trends can be observed. Firstly, every year at least one or two companies decide to come to Poland from abroad, often together with their teams. Secondly, at least several big Polish companies, both in AAA and mobile development, have bought foreign development studios to transform them into their international offices. The range of locations varies from Northern America to Southern Europe.

Horror games

For several years now, no ranking of best horror games can be made without at least 2-3 Polish titles. Polish companies develop a wide selection of horror games that can be categorized in many ways. There are solo-dev titles like 'Darkwood' or prestigious productions that are announced on the biggest Xbox shows

like 'Medium'. The genre varies from psychological horrors such as 'Layers of Fear' series and 'Observer' or 'Lust from Beyond' and 'Agony' with an erotic tinge, through walking simulators like 'Kholat' and 'Husk' or classicizing horrors like 'The Beast Inside', to games referring to certain art styles like 'Inner Chains' or 'Apocalipsis'. The most successful recent releases do not fit into any of the above categories. The 'Carrion', a BAFTA winner, is a reverse horror, while 'World of Horror' is based on Japanese culture and bicolor graphics from MS Paint. The growth in development is followed by advances in publishing. At least one new publisher, namely Feardemic from Bloober Team, is dedicated to indie horror publishing, while some other ones, in spite of not declaring a tight specialization in this category, still have an inclination towards indie horror games.

Virtual Reality

The VR game production has now stabilized after a wave of overenthusiastic developers joining it and a reverse wave of devs leaving it with disappointment. While external development for VR reached profitability relatively quickly, in many countries first-party production and successful original IP games for VR are not particularly common. A Polish production called 'Superhot VR' is one of the top titles defining market and one of the reasons why people actually buy VR equipment. Still, several other studios have managed

to produce and sell VR titles in tenths of thousands of copies, which even many non-VR studios would consider tempting. This includes Carbon Studios with their 'The Wizards' series and Gamedust, especially with 'Neverout'.

Gamedev education

Even if the gamedev education sector is considered relatively young in the Polish higher education system and is believed to need to build tighter bonds with the industry, it has to be at least partially accounted for the tremendous growth of the employment in the game industry sector. Poland was generally believed to teach excellent programmers even before gamedev dedicated classes or courses started to occur, and this is one of the industry success factors. Over the last 10 years the teaching offer has been considerably enriched.

Universities in Poland offer 71 degree courses related to games. Nearly half of these courses, namely 30, are meant for programmers. This confirms a popular view that Poland is highly successful in educating such specialists. The teaching offer of studies related to game development or games[1] covers a whole range of options from dedicated programs designed strictly for gamedev education to majors with a more general

Universities in Poland

71
degree courses
are offered countrywide

course profiles:

30
programming

24
arts

9
design

4
game studies
(Ludology)

Number of universities

56

of which:

32
are public
universities

24
are private
universities

Source: Indie Games Poland, PolskiGamedev.pl

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[1] For more information visit regularly updated directory: https://polskigamedev.pl/ksztalcenie-dla-branzy-gier/ Indie Games Poland, PolskiGamedev.pl – Kształcenie dla branży gier (in Polish)

profile where at least one subject is strictly related to games. The latter is more common, for example, modern programming studies with a slight skew towards games. Still, there are 24 art courses already including gamedev specialized classes. Nine courses focus chiefly on educating designers, some of which have been designed from scratch with that very purpose in mind. Additional courses focus on game studies, train musicians and sound engineers, narrative designers, or management specialists.

This teaching offer is provided by 56 universities, of which 32 are public, and 24 are private. This means that, for example, almost a quarter of public universities offer at least one educational program related to games, while for those not having any area of specialty often is not suitable for it, for example medical,

natural science, agricultural, etc. In Europe, only the UK, France, and Germany have a broader offer. This sector is still significantly expanding. Even if most discussed courses were being first started between 2013 and 2017, growth of 3 to 5 new ones is still observed yearly.

The educational offer aiming at gamedev is not limited to degree-level teaching. Even as non-degree courses seem to be less prevalent in Poland, these are part of the process as well. New things are happening in high school education, either locally as gamedev schools or classes or altogether opposite picking talented pupils from regions for after-school educational programs.

Big, bigger, HUUUGE
The success story of HUUUGE Games

When Anton Gauffin, the CEO of HUUUGE Games, was seeking opportunities to develop his mobile gaming business, back then called Gamelion, he came to Poland in search of talented people who could help him out. Now 3 out of 10 HUUUGE Games global offices are located in Poland and the Company is present at the Warsaw Stock Exchange. – It enabled us to raise funds and allows for executing our strategy at a truly global scale – Anton Gauffin says. Since its' establishment, the company launched roughly 300 titles, but as the CEO says, its' true history has only started now. The company's ambitious development is propelled by diversity within its' staff, the 'build & buy' business strategy and a set of technological tools dubbed as Huuuge Fuel.

Although HUUUGE Games was formed in 2014, the company's roots can be traced back to 2002, when Anton Gauffin established in northern Finland his first gaming venture called Gamelion. Five years later he sold his company just to reacquire it after some time, in 2014 to be precise. – I had an opportunity to put the band back together and reunite the team. Then I realized that what I have here, is Huuuge, as for me it meant an opportunity to go beyond greatness and do something truly remarkable – he recollects.

The company's mission and long-term goal is to empower billions of people playing together and become the global leader in real time free-to-play casual gaming. To that end, a special set of tools was created to boost game monetization. – We have built a great foundation to grow, namely Huuuge Fuel which is one of the best technological capabilities to do free-to-play (F2P) at scale – CEO says. Up to date, thanks to combined efforts of Gamelion and HUUUGE Games roughly 300 games have been published!

Build&buy

It is quite an impressive amount, but as Anton says, this is just a beginning of what HUUUGE Games may become in the future. Apart from technology that makes the work easier and faster, the company is growing due to its' 'build & buy' business strategy based on the expansion of the games developed internally and growth through publishing and M&A.

– We build new experiences, and equally importantly, we actively develop our relationships with the best creators and developers out there, doing publishing and acquisitions. When you combine all that, we can say that every year we release several new titles. Some of these are taken all away to a global launch, whereas some of may be killed earlier, at the soft-launch phase – the CEO explains.

HUUUGE releases a lot of games and drops a lot of them either. That is a normal production process in the mobile free-to-play business, completely different from games for PC or consoles, where the budgets are huge, games are published once every couple of years, and abandoning a concept is very risky and costly. – We have developed a smart process that allows us to create and test many items. The cost of a soft launch is not high, roughly tens of thousands of dollars – Anton Gauffin says.

Recently HUUUGE Games has debuted on the Warsaw Stock Exchange and has raised funds to execute its' build&buy strategy at a global scale. The company's first post-IPO transaction took place in April 2021 with the acquisition of Traffic Puzzle, which is now the top-grossing match-3 hit game within its' publishing portfolio.

– We are now focusing on scaling the game, using the analytical tools we have. We also continue to analyze other possibilities in terms of M&A. As for the organic growth – the 'build' part of our strategy – we have many more titles in development and at different stages of the life cycle that we want to monetize, one of them is currently on its way to a global launch – the CEO adds.

Global team of teams

Three out of ten HUUUGE Games global studios are located in Poland in Szczecin, Bydgoszcz and Warsaw. Why? As the CEO says, it was all about the people and talent. While actively looking for individuals who could accelerate the company's growth, he came to Poland. – I got in touch with a Szczecin-based game developer that blew my mind, as they were both super talented and humble and hungry to learn the ins and outs of mobile game development. It did not take long for me to figure out that it made sense for me to relocate myself from Finland to Poland to work closely, hands-on, with these people, and that is how we started in

Szczecin. In hindsight I think it was probably the best and most important business decision I have made so far in my carrier – he admits.

Soon after getting things started in Szczecin, Anton was lucky enough to meet a similar high-caliber talent from Bydgoszcz, and now one of his closest colleagues, Marcin Moys, who took the initiative and proposed to open a studio, and that is what they did.

All HUUUGE Games studios have their own specialties, specific product and game focus areas, but at the same time there is also a lot of cross-location collaboration, and much of the company's global success is due to being a global team of teams.

– Our hiring philosophy is to do global recruiting, meaning that our operational structure allows us to bring in the best talent for a specific role vs. only looking for the right talent on a local level. Altogether we have over 20 different nationalities coming from different parts of the world, and we see this diversity as important to our success, as we believe that the more diverse we are, the better equipped we are to understand this global audience we are thrilled to serve – the CEO explains.

Currently, HUUUGE Games hires over 600 people globally, and more than one million users from 195 countries play their games on a daily basis, which results in 200 million player connections. This is huge!
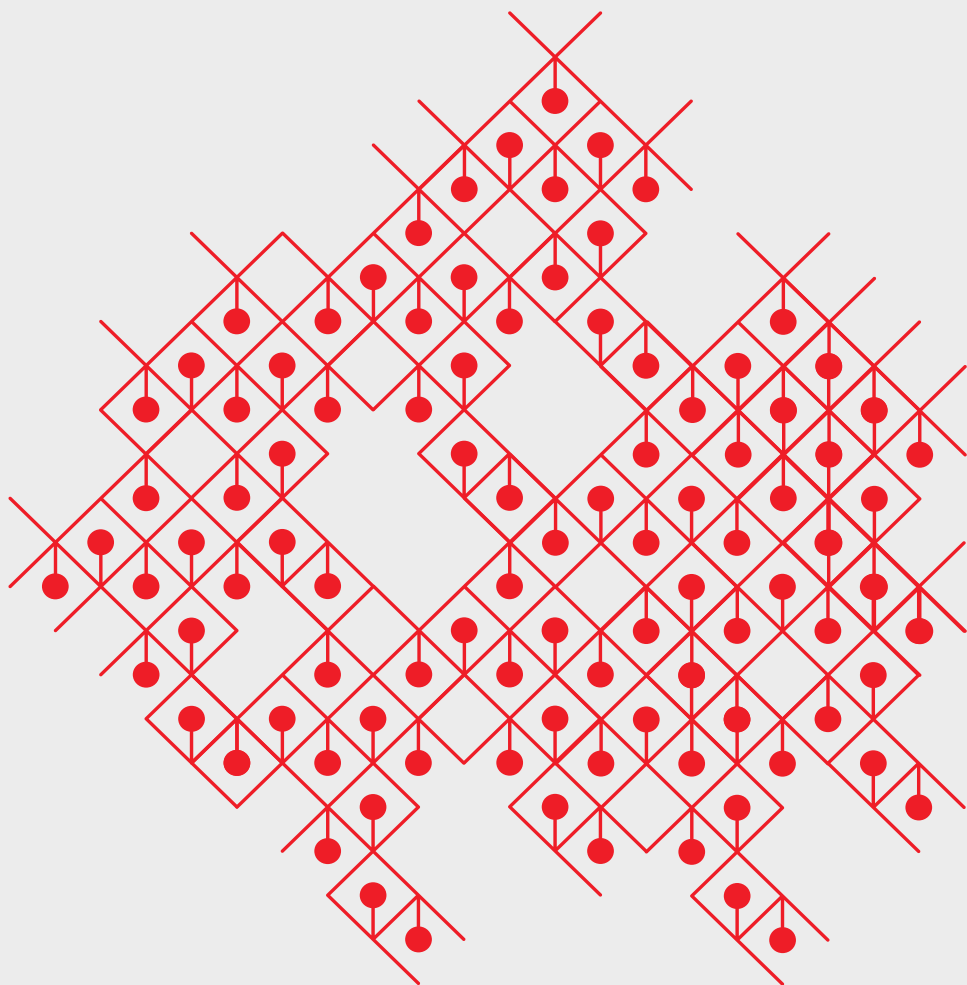
The game market in Poland

The Polish game market is a local market where games are distributed to Polish gamers. Having 97% of its value generated by games developed abroad and imported to Poland, should not be mistaken with the Polish game industry, understood as game production, with 96% of its revenues coming from exports.

Euromonitor International values Polish game market at USD 924.2 million in 2020, and ranks it 19th biggest globally. The growth at 17% year-over-year is higher than on most Western markets and places Poland among faster-developing countries in this respect. The entire Polish consumers market value is likely to reach USD 1 217.6 million in 2022. The change in the market tears down to two completely opposite processes, the physical games market is estimated to be shrinking by 2.3% year over year, while the digital one is growing by 20%. In the static console market, Euromonitor data shows that Sony PlayStation holds 56.9% of the Polish market, while Microsoft's Xbox share is 33.5%.

Newzoo estimates look somewhat different. With the consumer market value of USD 792 million in 2020, Poland holds the 24th place globally. It remains

Game market

$924.2M
consumer market value in 2020

$11.5M
eSports market value in 2020

TOP 19
market globally

+17% YOY
market growth

over **83%**
digital distribution

Source: Euromonitor International, a market research provider

Gamers in Poland

over **20M** gamers

over **80%**
gamers
are adults

49%
are female

Source: Newzoo, Polish Gamers Research

Poland position in gaming

Polish PC gaming
is in

Polish language
is in

TOP 10

in the market
and community
comparison
(usually
ranked 3rd-9th)

in terms of
localization and
community
popularity
(usually
ranked 5th-10th)

Source: Game Industry Conference

uncertain if both these data sources are correctly reflecting the Polish specificity of strong PC gaming. The Steamspy report ranks Poland at seventh position in regard to the indie games revenues[1]. Polish players are also the third largest group of GOG.COM customers, in terms of their share in sales, closely following Americans and Germans[2]. At the same time, according to the Epic Games Store statistics, Polish gamers are the seventh largest community on this platform[3]. This quality of the Polish PC market should also be reflected by Valve's suggested

price on Steam. Polish recommended prices are at the level for the European Union, or very slightly reduced. Contrary, markets shown to have more gamers and even bigger sales volumes, like Turkey, Brazil, or even Russia, have prices 40% to 80% lower than Poland[4].

A Steam survey shows that Polish is the 8th most popular language among platform users[5]. The Polish market and language are also becoming more noticed. In recent game localization surveys[6,7] Polish language usually ranks

[1] Galyonkin S., (2018), Steam in 2017, https://galyonk.in/steam-in-2017-129c0e6be260

[2] CD PROJEKT, (2021) Management Board report on the activities of the CD Projekt Group and CD Projekt S.A. in 2020
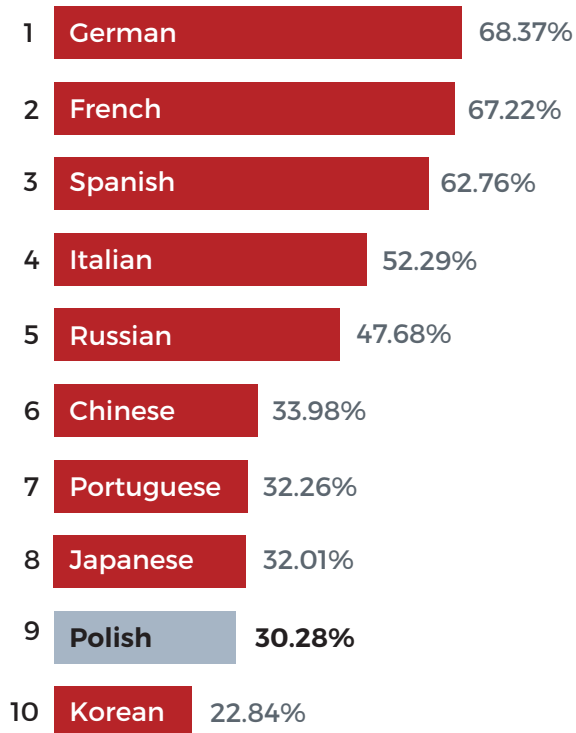
[3] Epic Games Inc., (2020), Epic Games Store Weekly Free Games in 2020!, https://www.epicgames.com/store/en-US/news/epic-games-store-weekly-free-games-in-2020

[4] SteamDB, (2021), https://steamdb.info/

[5] Steam, (2021), Steam Hardware & Software Survey: June 2021, https://store.steampowered.com/hwsurvey/Steam-Hardware-Software-Survey-Welcome-to-Steam

[6] M. Shvetsova, (2021), Top 10 Languages for Game Localization in 2021, https://blog.alconost.com/en/game-localization-languages

[7] UKIE, (2020) The Most In Demand Languages For Game Localization In 2020 – Report from Localize Direct, https://ukie.org.uk/news/the-most-in-demand-languages-for-game-localization-in-2020-report-from-localize-direct

Chart 8. Localization stats for Steam games with the Metacritic score

1	German	68.37%
2	French	67.22%
3	Spanish	62.76%
4	Italian	52.29%
5	Russian	47.68%
6	Chinese	33.98%
7	Portuguese	32.26%
8	Japanese	32.01%
9	**Polish**	**30.28%**
10	Korean	22.84%

Source: GamingAnalytics.info

9th or 10th which is a considerable increase from trailing the Top 15 of the rank just a few years ago. Our analysis also shows that at least on Steam Polish is the 9th localization language.

The importance of Polish localization in games is growing. Among games dated 2007-2008 on Steam only under 10% have Polish localization compared to over 37% for titles launched in 2019-2020, and this percentage continues to grow.

Foreign corporations are the key players on the Polish consumer market, mainly distribution platform holders such as Valve (Steam), Google, Apple, Sony and Microsoft, or the biggest global developers like Electronic Arts or Ubisoft.

Chart 9. Polish localization share among Steam games with the Metacritic score

2007-2008	10%	
2009-2010	19%	
2011-2012	31%	
2013-2014	30%	
2015-2016	32%	
2017-2018	35%	
2019-2020	37%	
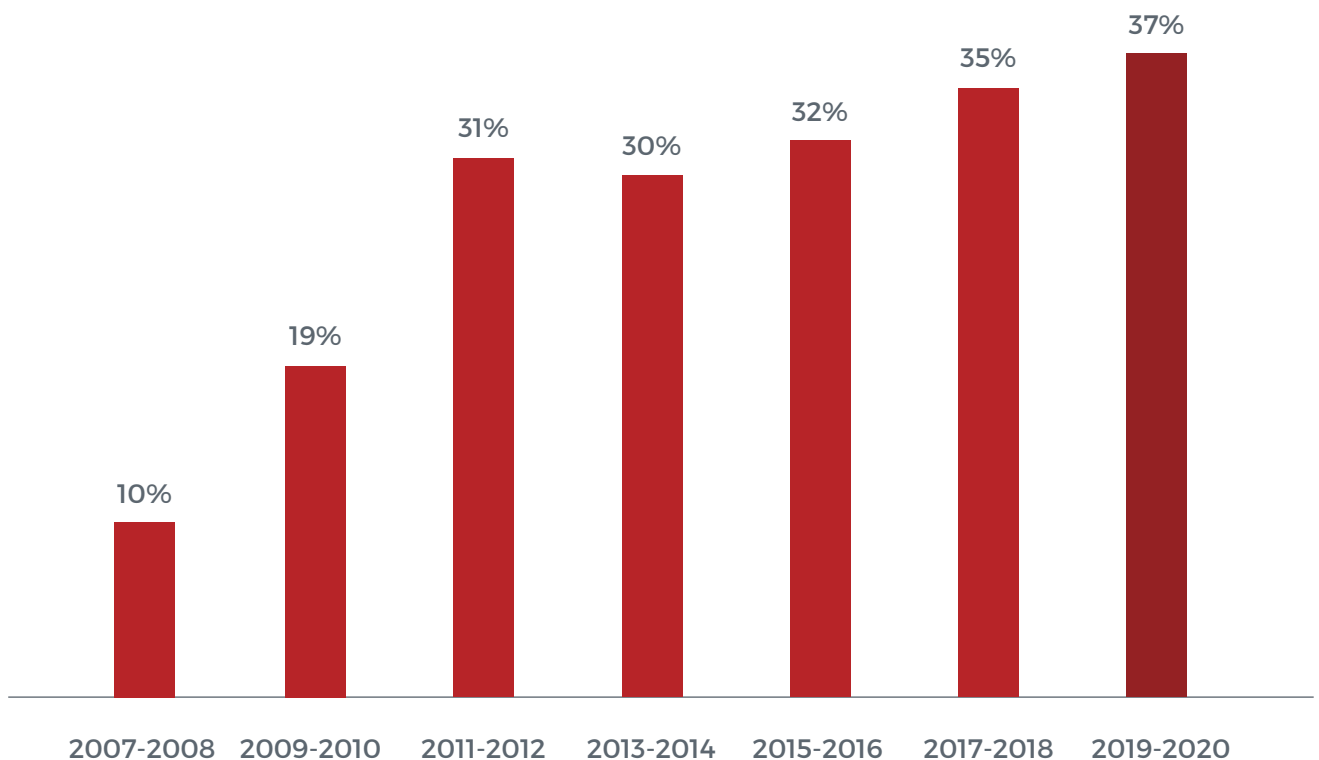
Source: GamingAnalytics.info

The highest ranked Polish company is CD Projekt SA, thanks to 'The Witcher' series and 'Cyberpunk 2077' game sales and digital distribution results of GOG, which is a part of the group. Share of Polish companies in distribution on this market is declining as digital distribution is replacing boxes and retail.

Currently, no agency is estimating the eSports market value in Eastern Europe on a country level. Based on all data available, in 2020 the Polish eSports value is rather unlikely to exceed USD 11.5 million estimated in the 2020 edition of the report. Nonetheless, Intel Extreme Masters Katowice remains one of the biggest esports events internationally, while content related to it reaches sports fans all over the world.

Sometimes you have to fall before you fly
The success story of People Can Fly

Sebastian Wojciechowski, current CEO of People Can Fly (PCF) and a person behind their latest successes admits that he wasn't a part of the company's team at the time when they were acquired by Epic Games in 2007. Nevertheless, he states that this situation was viewed at the time as a natural path since the company (originally founded in 2002, among others, by Adrian Chmielarz, one of the pioneers of the Polish gaming industry) encountered some financial troubles due to the termination of a project that they were developing for an external publisher. Epic was so impressed by their achievements at the time, that they decided to invest and become a majority shareholder.

The relationship between Epic Games and PCF and the role of the latter as a part of the American gaming tycoon has gone through many different stages. From game porting, through participation in development of Unreal Engine technology, to more and more ambitious projects and games that were to be developed in the coming years.

– As the collaboration grew, PCF got a chance to work on their own game, 'Bulletstorm'. Then we developed the next title, 'Gears of War: Judgment'. However, after its launch PCF became more of a co-developer for Epic. That's how we got involved in development of titles such as 'Infinity Blade', 'Spyjinx' and 'Fortnite'. This was also a root cause for PCF to go independent a couple of years later – states the PCF CEO.

Chance to work hand in hand with the best developers in the world and with the most advanced engine turned out to be a key part of the PCF experience and DNA as a developer.

Going independent

Parting ways with Epic was something that began as a personal idea of Sebastian and was based on his assessment of the role that PCF was taking within Epic Games.

– Epic Games changed its strategy from AAA price box games to F2P, and PCF stopped being as important as it was when we were working on large-scale AAA titles. PCF started being tasked with co-dev work and it wasn't exactly a role that we saw ourselves in – admits the CEO.

Supported by his partners Bartosz Kmita, Bartosz Biełuszko and Krzysztof Dolaś, as well as the rest of the team, Sebastian Wojciechowski made Epic an offer to acquire PCF (Epic Games Poland at the time). Epic's board approved it and PCF became an independent studio again.

– From the technical standpoint we didn't have to purchase the brand or 'Bulletstorm' IP back since those were PCF assets. I just bought all shares in Epic Games Poland that is known today as PCF Group, and everything else was already attached to it – adds Sebastian.

New challenges

After parting with Epic, the company had to face two challenges. The first was to secure the company's financial situation:

– As our departure from Epic was on friendly terms, we agreed to sign a contract to support Chair, Epic's studio in the development of 'Spyjinx', so we had a kind of a 'runway', but it wasn't super long. So, we had to come up with the idea for the next game we wanted to build, create a demo and a pitch, and find a publisher that would be ready to work with us. This process concluded in February 2016, when we signed a deal with Square Enix to develop the game that is currently known as 'Outriders' – says CEO.

The second was to expand the team which at the time of parting with Epic consisted of less than 40 people. It was a very experienced team, but far too small to live up to PCF's ambitions in terms of creating a successful AAA title. Over the years – through organic growth and takeovers – the company was able to open new studios in Poland (Rzeszów and Łódź), UK (Newcastle), USA (New York and Chicago) and Canada (Montreal), increasing its size to more than 350 people worldwide. PCF CEO states that the decision to grow overseas was based on the analysis of the talent pool available locally and internationally.

– We concluded that further growth just in Poland will be difficult, especially since we are looking for experienced AAA developers with Unreal Engine expertise – adds CEO.
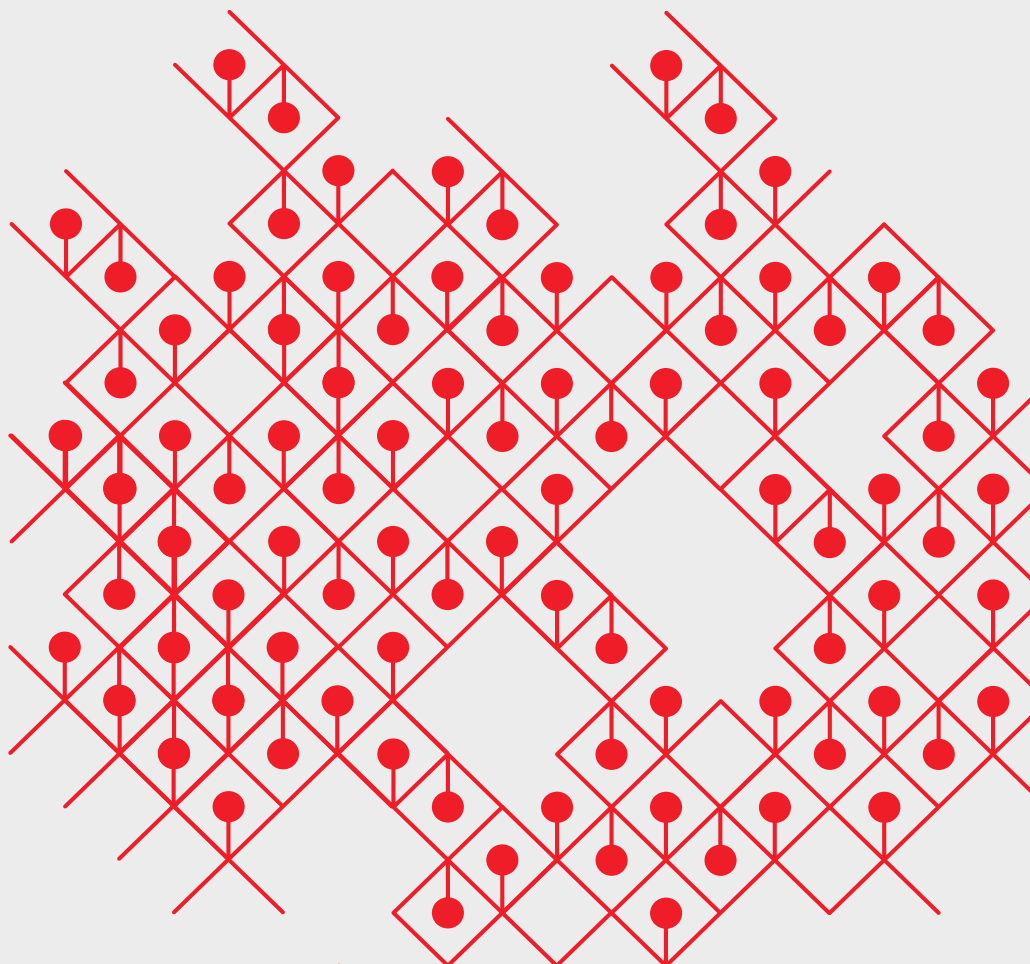
Gaming and business success

The undoubted success of the company is their latest title, 'Outriders' developed for Square Enix, which had more than 3.5 million unique players during the first month after launch (April 2021).

– Generally, finding a publisher – in our case Square Enix – was a logical choice for us as we went independent. Through a publishing agreement we were able to secure s budget to develop the game, grow the team and strengthen PCF as a company. Moving forward, as we have stated before, we intend to work towards more of a mixed model – working with publishers on one side, but self-publishing some titles as well on the other – admits CEO.

The latest decision to go public opened up completely new development prospects for the company, which led to, among others, opening new office in the United States (Chicago) and acquiring Game On in Canada (Montreal). This was only the beginning and PCF CEO has already set the company further ambitious goals. Currently, they are working on Project Gemini with Square Enix, Project Dagger with Take-Two Interactive and the first project that PCF intends to self-publish. Planned budget for the Project Dagger is around 40-60 million EUR and the time for its implementation is a minimum of several years.

Although PCF is still somehow not recognized among more casual audiences, their achievements from the time they worked within Epic Games, as well as their recent growth and successes with 'Outriders', and ambitious plans for the future, show that they are already among the top AAA game developers in Poland and Europe.

Methodology and data sources

A well-constructed research methodology is of crucial importance for branch specific reports such as this one, focusing on the game industry in Poland. The topic is attracting high interest and numerous new reports and analyses published every year are based on data obtained from various, often different sources, leading to diverse presentation of similar issues.

The collection of data for this report was a comprehensive process and with the exception of Charts 3, 4 and 5, no data comes from a single survey. Particular effort was made for the data sample to cover as much of the industry as possible, to be representative, possibly complete and relevant. Nevertheless, certain decisions made in relation to the content of the report requires additional clarification in this chapter.

The first significant challenge is to determine an actual number of studios which are actually operating. The database created for this research currently counts in excess of 1000 records, obtained from several other databases. This number takes into account around 230 errors, most common of which are misspelled country of origin, industry (usually

software houses not being an actual game developers or companies producing e-gambling games), or double entries – the latter usually caused by rebranding or use of more than one brand by some developers. In addition, more than 300 studios were identified as inactive. A definitive determination of studio's status is at times quite difficult. Studios often emerge from informal teams having a game half-developed, and teams doing recruitment probably have to be counted as active regardless of what other visibility they miss.

The ongoing discussion on what should be considered as relevant for the game industry statistics should acknowledge the grey area between first-party development and external development or outsourcing and services. For this report, an approach was taken that

only an actual game production can be counted as relevant. The statistics could be different by including more services, even if only those which are production-related and excluding those which are market-related. For example, employment in the sector could reach or even exceed 15000 people. Similarly, the estimated number of foreigners in the industry does not include, among others, corporate player support specialists, which contribute their effort strictly as a service. With that in mind, the total number of foreigners could be even twice as high.

Existing European reports on the game industry adopt two different approaches towards presentation of teaching programs on digital art and new media courses. One approach is to not include courses that have no classes explicitly dedicated to gamedev. The other is to include all digital art, 3D art, or computer animation degree courses. As a result, the broader interpretation of what is relevant results in the number of courses could be significantly higher. However, the latter would raise further point that, by the same measure, all programming courses are also relevant to gamedev.

This report refrains from comparing or juxtaposing data from different methodologies, albeit with one exception - the analysis of Polish game exports and imports cannot be done without comparing data from different

sources, which were using different methodologies.

Data sources

The report uses all valid data sources available at the time of preparing this publication. The main data sources and short explanation of them are discussed below.

GIC (Game Industry Conference)

The GIC has been performing research on Poland's game industry for several years now. The primary aim was to fill the principal holes in knowledge about the sector. In the project, continuously updated databases, connected with constant data gathering and regular updates, allow to keep up to date all the relevant knowledge about the industry. The data is gathered from public data sources like financial reports of companies publicly listed and others by availability, surveys, and private queries and maintained relations with the game sector in Poland.

Gaminganalytics.info

Gaminganalitics.info is a market intelligence data and statistics provider on video games. Comprehensive, current and historic, data about bestselling and most-wished games were gathered by the means of automated data mining, supported, where possible, by manual data curation. This includes extensive data from Steam and a growing amount of

data from other platforms. Data used in this report include information publicly available or to be published soon on the portal, but also queries designed and run in direct cooperation with the authors of this report.

IGP (Indie Games Poland)

The IGP is a game industry organization in Poland, overseeing support programs for indie developers and conducting research of the whole game production industry in Poland. The gathering of data was recently concentrated around polskigamedev.pl portal, which includes databases of game releases and teaching programs, and in-depth game journalism covering the industry, studios, games, and other information. A particular part of this is research and data collected by Michał Król. All data is manually gathered, and all estimates are carefully tailored to the needs of appropriate projects.

Euromonitor International

Euromonitor International data includes insights from 'Video Games in Poland – May 2021' report, as well as other sources. The research shows the latest market trends and future growth opportunities for the video games market in Poland and was prepared by a team of in-country analysts – experts by industry and geographic specialization. The research methodologies include the best methods of data science: market analysis of key supply-side and demand trends, trend analysis, global surveys, and others.

Euromonitor provides regular insights on consumer markets and trends for numerous industries.

PARP (Polish Agency for Enterprise Development)

As a key authority responsible for creating a business-friendly environment in Poland, PARP contributes to the creation and effective implementation of the state policy related to enterprise, innovation and staff adaptability. For the purposes of this report, based on questionnaires from companies, PARP collected partial data on the overall size of employment in the industry, including employment of foreigners, as well as information on the length of operation of individual companies that completed the questionnaire.
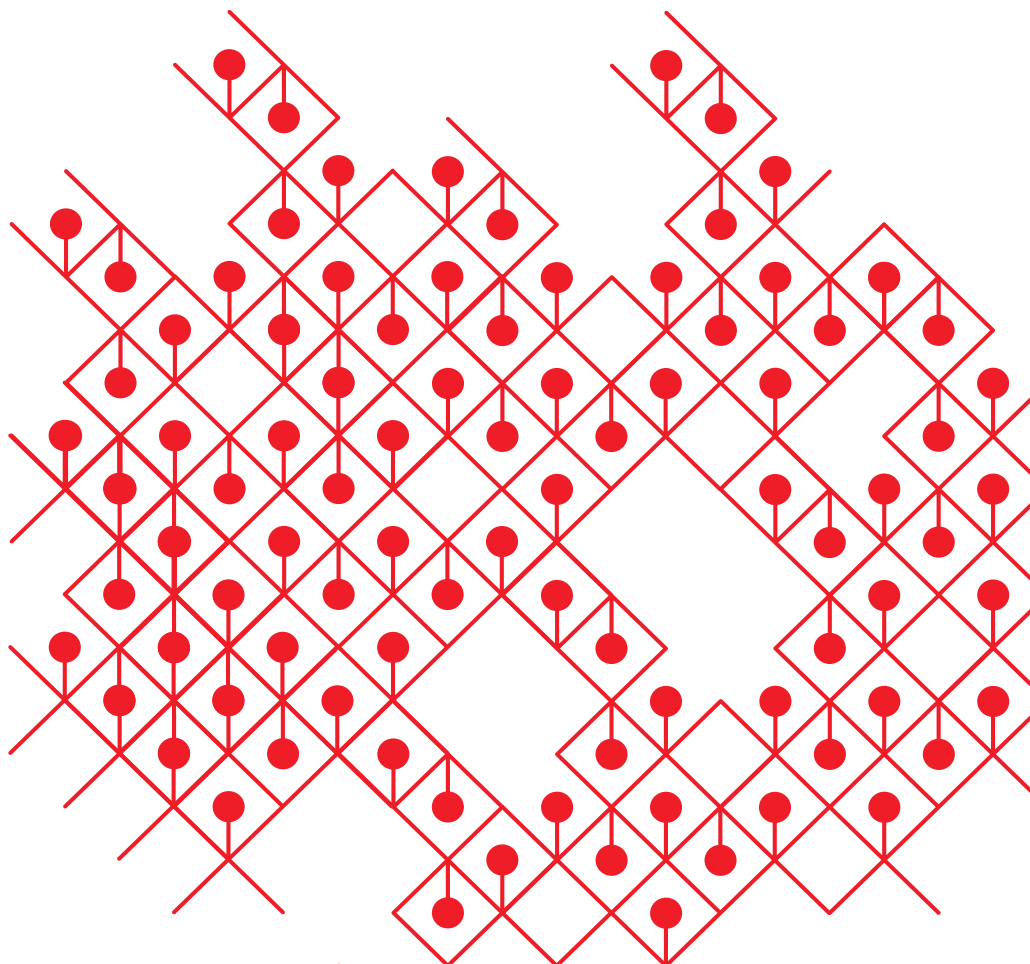
Linguistic lighthouse to ship your game globally
The success story of Roboto Global

– Well executed localization boosts product quality and helps to enter new markets. That is our contribution to the gamedev industry, says Bartosz Lewandowski – the CEO of Roboto Global and Roboto Sound. The company delivers all necessary services to make good games even better – multilanguage text localizations, QA services, dubbing and voice-overs. Within a couple of years, the enterprise grew to a medium size company that employs over a hundred people and has roughly 200 clients in its catalog, including such global entities as THQ Nordic, EA, SEGA, RIOT Games, Koch Media, or 11 bit studios.

– Last year alone we covered projects for more than 160 clients from the game world. We translate up to 20 million words each year, and this number is consistently growing. Since our beginnings, we have localized hundreds of games – explains the Roboto founder, for whom the quality of services and pride derived from the final product is crucial, always a half-step ahead of profit margins in the corporate philosophy. Every year the company gains recognition as one of the best game localization creators, and receives rave reviews for its projects.

Game localization, which in a nutshell means adapting the game language to the native language of the country where it is marketed, has become a standard, even amongst smaller publishers. A well made localization is much more than just translation. It should include cultural references, local idioms, and flavor. The more natural and smoother it is – one might even say sinking in the subconscious, the better, adds the CEO and advises less experienced developers to create game engines that enable full localization, to implement other voices than the English original.

It is the only localization company in the industry that retains 100% innate Polish ownership structure and has its own dubbing studio enabling Roboto Global to execute 360-degree projects, in Polish and English. Depending on needs, it delivers multi-language text localization, full localization with dubbing, and voice-overs (creating voice-over from scratch). Roboto teams are capable of doing all that work fully in-house and offer localization into 70 languages.

– We love all projects; however, our core clients include mostly medium to big publishers. They have budgets for a whole host of our services and land several titles on our desks to localize year by year. That said, we are equally eager to work with smaller companies, transferring our experience from big productions, and scaling it down to the needs of indie devs – stresses the CEO.

Out of passion for games and the English language

In the mid nineteen eighties, when Bartosz was only 9, he decided to become an English-language translator and was given his first Polish-English dictionary by his parents as a birthday gift. About the same time, computers and games entered his life. Since then, passion for both the language and games grew hand in hand. During his years at the university, he met another fan of the English culture, and a computer games aficionado – Michał Nowakowski, the current VP of business development at CD Projekt, who at the time worked as an editor for 'Świat Gier Komputerowych', a Polish monthly dedicated to computer game reviews. He recruited Lewandowski to work as a reviewer and a game journalist.

– That is where I translated my very first computer game, namely 'Riverworld' by Cryo, for a bonus game CD offered to the magazine readers. Then other titles followed. I just stepped for a while, but eventually stayed for a few beautiful years – he recollects with a smile.

After graduating from the university, he combined journalistic efforts with his own business venture, which he founded with books, movies, and game translation in mind. Steady work on his own, at home, soon evolved into a serious enterprise, particularly when he established close cooperation with CD Projekt in 2005 as a game localization subcontractor.

Embracing new opportunities

He quickly realized that relying his business on two or three major clients was a risky foundation and would topple his venture immediately if just one of them suddenly decided to withdraw. To avoid that, the company focused its efforts on expanding the circle of clients and establishing long-term relations with them. In the meantime, the Polish gamedev industry was booming and expanded on the international level, which opened new opportunities for Roboto.
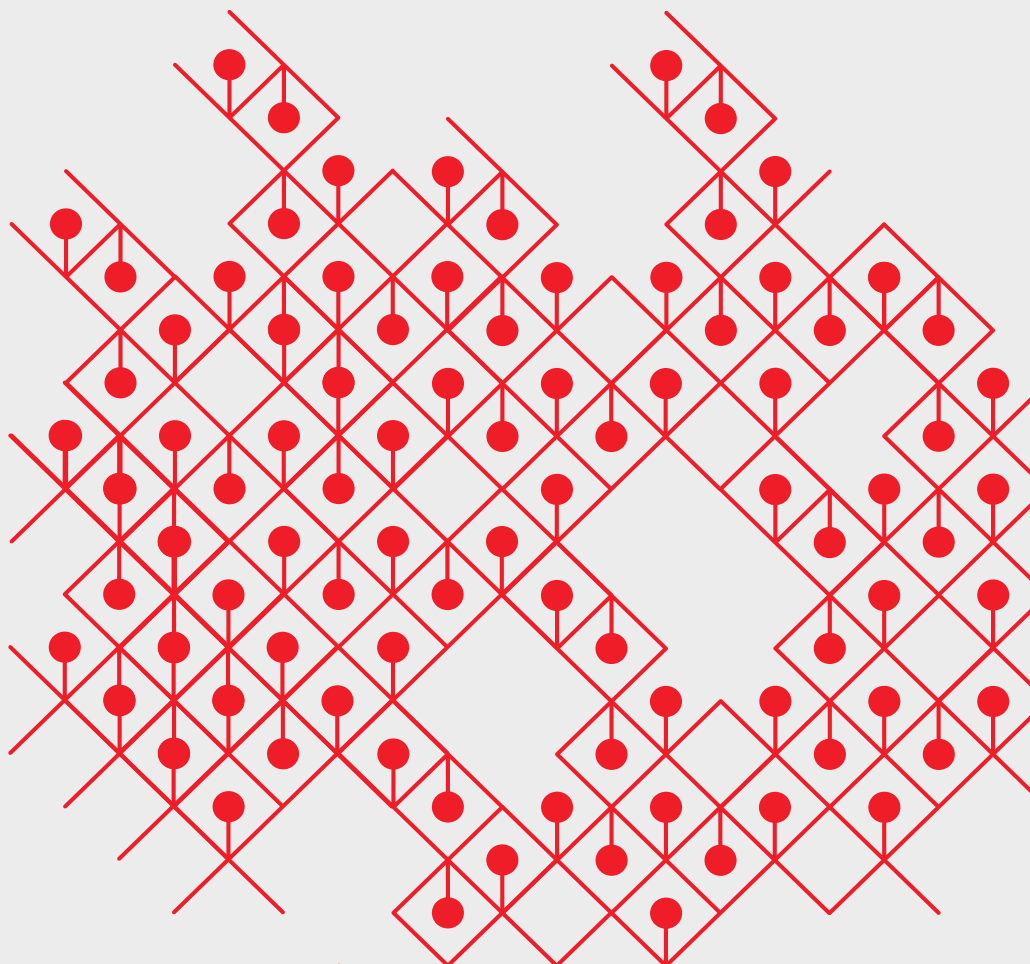
Roboto was one of the first companies in the industry to use CAT (Computer Aided Translation) software which accelerates the translation, boosts quality and – above all – allows for keeping consistency in the localization process.

– It was 2006 when I boasted about using CAT and presented the tool to potential business partners during industry events and b2b meetings, claiming that soon it would be in wide use. People were asking 'what is this stuff?', not treating it very seriously. Today, the industry virtually cannot operate without such software. Having introduced all those novelties, we decided to go for multilingual localization as the next step towards scaling up and thrusting ourselves onto global markets – he recollects.

Roboto Global gained even greater flexibility and business capacity by acquiring Sound Tropez dubbing studio and expanding it with additional booths to construct the current Roboto Sound label. This move further increased the company's control over the VO production process and quality.

Currently, Roboto employs over a hundred people in its two HQs in Warsaw and plans to open new branches, potentially overseas. Including additional workers recruited on a project basis, this personnel headcount grows to more than 200.

– To make it all click, you need to coordinate the work of multiple departments – project managers, translators, testers, editors. In the case of full localizations or voice-overs, VO producer, sound engineer, dubbing director and actors are added to the equation. If a publisher decided to make it on their own with freelance workers, it would be a complete mess and drain on their budgets – Lewandowski explains and reassures that Roboto is taking the whole process on their chest, so clients do not have to worry and can simply wait for a top-notch product.

Companies catalog

The catalog is by no means
a complete list of companies in
the Polish game industry. Instead,
it contains entries of those that
volunteered to fill in. The data was
provided by the companies themselves
and was not revised by the authors of
the report.
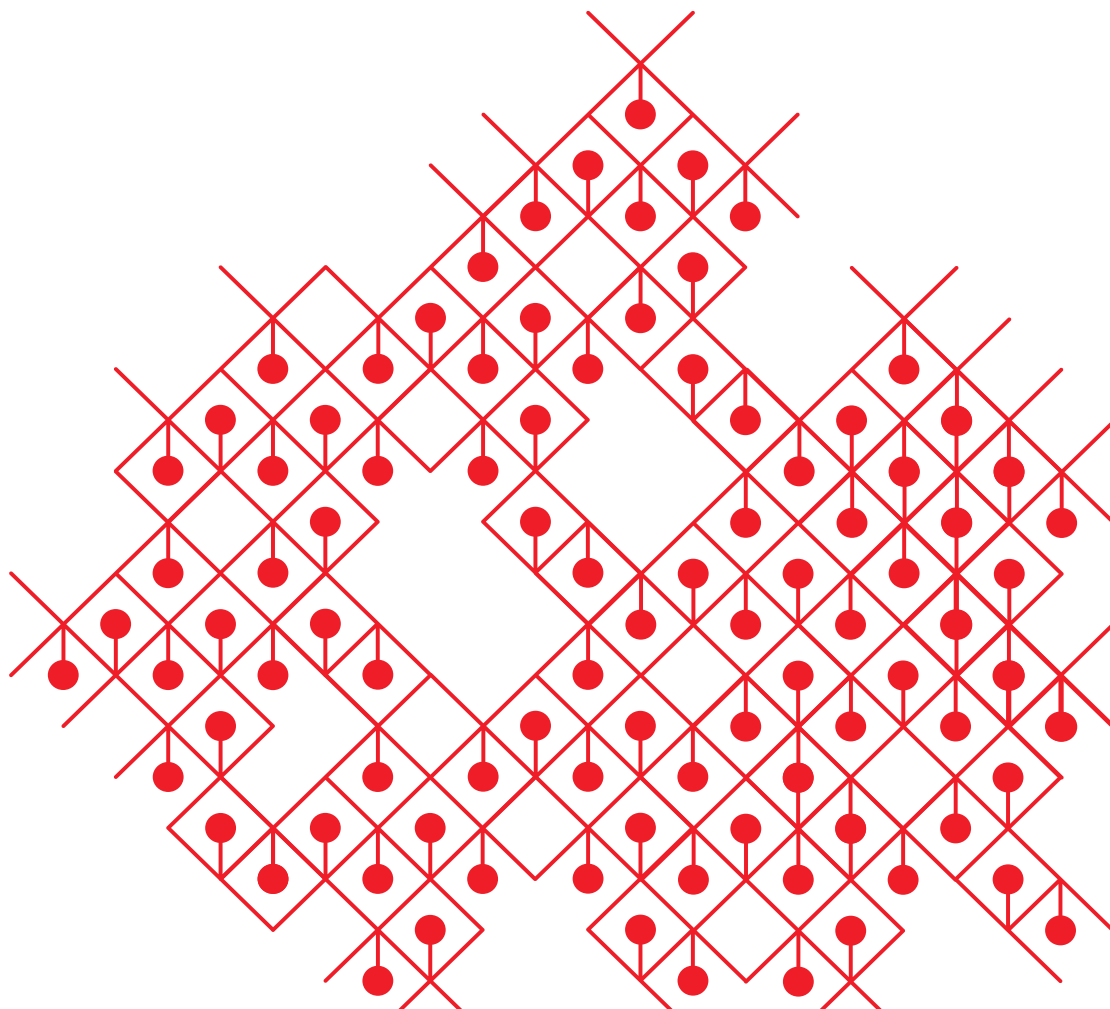
11 bit studios

www.11bitstudios.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium, Publishing

Best known for:

'This War of Mine' – over 100 awards and 'Frostpunk' – BAFTA-nominee, over 3 million copies sold. We have also published indie hits like 'Moonlighter' and 'Children of Morta'.

The next big thing:

We are working on 3 internal titles now and another 3 in the publishing division.

Operating since: 2009   **Team size:** 180

We are a Warsaw-based game developer and publisher mostly known for 'This War of Mine' and 'Frostpunk'. Our work is driven by philosophy summed up in the MEANINGFUL ENTERTAINMENT phrase which means creation of thought-provoking games that make you think.

2B Games

www.2b-games.com, contact@2b-games.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services, Premium

Best known for:

Due to partnership agreements, we cannot disclose details of our projects.

The next big thing:

Due to partnership agreements, we cannot disclose details of our projects.

Operating since: 2018   **Team size:** 8

We are a studio founded by veterans with over ten years of experience in creating a range of recognized and award-winning commercial projects from the AA+ segment, published on many platforms. The idea behind our company is to create ambitious and demanding titles (for creators and players alike), using the Unreal Engine with a number of in-house extensions growing from project to project.

4Experience

www.4experience.co

Platforms and models:

VR/AR, External development/Outsourcing/Services

Best known for:

'Attack of the snacks' – VR food game, fight with junk food 'Starship Survivor VR' – shooter game 'VR Fitness' – innovative approach to fitness.

The next big thing:

We are working on custom projects such as the paintball VR game for multiple users as well as on the VR fight arena and VR darts game.

Operating since: 2015   **Team size:** 52

Virtual and augmented reality development is our core competency. We offer full-stack solutions and software development services at the highest quality, on all existing platforms and devices. We have developed over 150+ projects so far for customers from 14 countries. We make games, VR training simulations, business & marketing solutions e.g., R&D and consulting.

7Levels S.A.

www.7lvls.com, office@7lvls.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'Castle of Heart' - one of the first Polish exclusive titles made for Nintendo Switch with digital and limited physical release.

The next big thing:

Biggest but still unrevealed project yet! First created from scratch for all most popular platforms: Switch, PC, Xbox, PlayStation. New 2.5 D action-adventure platformer in a realistic world.

Operating since: 2014   **Team size:** 5

We are best known for 2.5D action-platformers exclusively made for Nintendo Switch. 3 in-house projects have already been released. Now we are also working with other most popular platforms: PC, Xbox, PlayStation. We are also a boutique-publisher with 10+ indie titles in the portfolio (and still growing).

8Bit
www.8bitplay.com
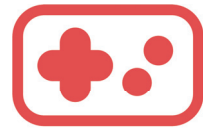
Platforms models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services

Operating since: 2015   **Team size:** 7

We are a company offering recruitment services in the game industry. Our offer includes consultation services that help in finding a job in the gamedev sector.

A2 Softworks
contact@a2softworks.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, F2P, Premium

The next big thing:

'Gatewalkers' – a cooperative action RPG game with survival elements, where players travel across different worlds in order to save their own, to be released in 2022.

Operating since: 2017   **Team size:** 20

We are game developers specializing in multiplayer cross-platform games on PC, mobile, and consoles. We are looking for partners with whom we can create games based on our ideas as well as third-party's IP.

Acram Digital

www.acram.eu, contact@acram.eu

Platforms and models:

Mobile, Nintendo Switch, PC, Xbox, External development/Outsourcing/Services, Premium

Best known for:

Being widely recognized for our attention to intuitive UI and maintaining the authentic feel of the board game with the convenience of the digital platform.

The next big thing:

'Concordia: Digital Edition' - the digital adaptation of the strategic board game of trade that has consistently been among the top 20 board games of all time ever since its release.

Operating since: 2014   **Team size:** 13

We develop and publish the best digital board game adaptations in the industry. By focusing on the UI design, AI development, user feedback, communication with the board game's developer, and genuine love for board games, we maintain the balance between the convenience of the digital platform and the authentic feel of playing board games on the tabletop.

Addonrock / Rock&Bushes

www.jupitermoons.org, info@jupitermoons.org

Platforms and models:

PC, Premium

The next big thing:

'Jupiter Moons: Mecha' – battler mixed with mecha simulation – choose your mech, customize your loadout, and build your perfect deck.

Operating since: 2019   **Team size:** 2

Rock&Bushes is a new gamedev studio founded in 2019 by Artur Karpiński. Prior to game development, Artur worked for 16 years as a Developer & Project Manager in Business IT. The studio is currently developing its first game called „Jupiter Moons: Mecha".

Adria Games

www.adriagames.com, team@adriagames.com

Platforms and models:

Nintendo Switch, PC, Premium, PlayToEarn

Best known for:

'Epifrog' - our first 2.5D adventure/survival game with strategy elements.

The next big thing:

We are in pre-production of our second game, first blockchain game, called 'Crypt0 Mayhem'.

Operating since: 2020   **Team size:** 10

We are a new independent game development studio. Our core includes people who love games and our history that started with a group of friends who had a great idea for a game. We played a lot of games in our lives, so we have experience from both sides. Each of us likes different things, plays different games but there is one thing that we have in common - a passion for games.

Afterburn

www.afterburn.games, hello@afterburn.games

Platforms and models:

Mobile, Nintendo Switch, PC, Xbox, Premium

Best known for:

'Golf Peaks' – an award-winning sports-puzzle game, featured by Apple, Google and Nintendo.

The next big thing:

Two unannounced projects - late 2021/early 2022.

Operating since: 2018   **Team size:** 2

We are a tiny game development studio based in Łódź, Poland. Focused on small-scale, premium experiences for mobile and other platforms.

Ahoy Games

www.ahoygames.com

Platforms and models:

Mobile, F2P

Best known for:

'Okey' – 50 million downloads, 'Backgammon Legends' – 3 million downloads, 'Rummy Club' – 2 million downloads.

The next big thing:

Creating a unique hyper-social ecosystem in our games.

Operating since: 2013   **Team size:** 12

We are an independent and self-publishing mobile game studio with several highly successful titles under the belt. Our crew cultivates a balance of relaxed and goal-oriented professional approaches to game development. Our mission is to bring a spark of authentic fun and a highly social environment to mobile board games.

All in! Games

www.allingames.com,   contact@allingames.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Publishing

Best known for:

'Ghostrunner' - a game that sold over half a million copies within two months after the release (IP later sold for EUR 5 million), 'Chernobylite' – one of the most anticipated Polish games of 2021.

The next big thing:

'Chernobylite' (PC – July 2021, PS4, Xbox One – Q3 2021), 'Arboria' (PC – August 2021), 'Alaloth: Champions of the Four Kingdoms' (PC, PS4, Xbox One, Nintendo Switch), 'War Mongrels' (PC, PS4, Xbox One).

Operating since: 2018   **Team size:** 110

We are a publicly traded video game publishing and production house. Our team creates and supports local and international games for PC and consoles. We were the co-publisher of 'Ghostrunner'. Our portfolio features titles such as 'Chernobylite' (The Farm 51), 'Paradise Lost' (PolyAmorous), 'Tools Up!' (The Knights of Unity).

Ancient Forge Studio

www.ancientforgestudio.com, contact@ancientforgestudio.com

Platforms and models:

PC, Premium

Best known for:

'The Tenants' – broke even in 15 hours after its Early Access launch on March 25th, 2021. Now sitting at over 2600 Very Positive reviews as of early July 2021.

The next big thing:

Unrevealed management/simulation game for PC & nextgens – will be announced around mid-2022.

Operating since: 2019   **Team size:** 11

We are all gamers at heart, and we only make games that we want to play ourselves. Our studio is led by experienced game developers with a strong passion towards mechanics-heavy games. Our whole team works fully remotely without an office. We think that it is the optimal way to run a small game development company in this day and age.

Another Angle Games

www.anotherangle.games, contact@anotherangle.games

Platforms and models:

PC, Premium

The next big thing:

'Shadow of the Road' – thrilling turn-based RPG set in the blood-tinged dusk of feudal Japan.

Operating since: 2021   **Team size:** 16

Our studio is made up of people with prior experience in both AAA and indie projects, banded together by their passion for the development of ambitious and immersive games. We love what we do, but you're the reason we do it.

Anshar Studios S.A.

www.ansharstudios.com, office@ansharstudios.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox,
External development/Outsourcing/Services, Premium

Best known for:
Comprehensive third-party support for companies like Larian Studios, Bloober Team and Nacon.

The next big thing:
'Gamedec' – isometric, narrative, cyberpunk, RPG – release on September 16, 2021 (PC).

Operating since: 2012   **Team size:** 130

Craftmanship is our way. We follow the radical truthfulness philosophy to communicate and – as a result – to bring impactful, first-party ideas to life and deliver perfected third-party projects. Skilled team, well-crafted portfolio, and ambition to grow.

Arclight Creations

www.arclightcreations.pl, contact@arclightcreations.pl

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:
'Help Will Come Tomorrow' – a survival strategy game presenting a fictional story set in the Siberian wilderness in a wake of the October Revolution.

The next big thing:
Unrevealed 2D adventure game with farm/life sim mechanics inspired by the work of Albert Uderzo.

Operating since: 2019

We are a small, independent development studio willing to deliver games that combine an original and engaging story with beautiful hand-painted 2D graphics.

ARP Games

www.arpgames.pl, office@arpgames.pl

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, F2P, Premium

Best known for:

Over 200 submitted game proposals, 7 investment agreements signed, 5 incubated independent companies, 5 games released.

The next big thing:

Undisclosed VR project – late 2022.

Operating since: 2016

We are a stimulator of various projects in the area of gaming. The company is owned by ARP, a government agency supporting the development of Polish industry. We support promising Polish game developers, help them seek financing and assist them in finding a suitable publisher for their first game. Over 30 teams have already benefited from our support.

Artifex Mundi S.A.

www.artifexmundi.com, contact@artifexmundi.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, F2P, Premium

Operating since: 2006   **Team size:** 91

We are an F2P game developer. So far, we have released over 100 games developed both by us and many other talented developers. Our company has been listed on the Warsaw Stock Exchange since 2016. Our team combines family atmosphere and common values.

Artificer

www.artificer.com

Platforms and models:

PC, Premium

Best known for:

The studio was founded in 2019 and the legacy of Hard West and Phantom Doctrine development team.

The next big thing:

Unrevealed turn-based tactical for PC – scheduled for release in 2022.

Operating since: 2019   **Team size:** 44

Our company was founded by veterans of the tactical genre and is co-owned by Good Shepherd Entertainment. We are a 'Measure twice, cut once' organization. We operate on the principle of true meritocracy, and focus on craftsmanship, expertise, and excellence.

Atomic Jelly S.A.

www.atomic-jelly.com, contact@atomic-jelly.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'303 Squadron: Battle of Britain' and 'Project Remedium'.

The next big thing:

'Truck Mechanic: Dangerous Paths', 'Space Mechanic Simulator' and 'Rally Mechanic Simulator' - three innovative, complex simulator games.

Operating since: 2016

We are a team aiming to create ambitious games based on interesting and unconventional ideas. A team full of competent and experienced specialists who not only love jellybeans, but also what they do. Nothing is impossible for us, and with each new project we set our bar even higher to deliver the best possible games by listening to our community.

Atomic Wolf

www.atomicwolf.games
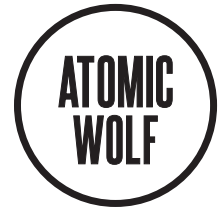
Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Liberated' - an action-adventure game, in which the comic book story intertwines side-scrolling shooter. 'Fire Commander' – a tense tactical game where you fight against fire.

The next big thing:

'4 minutes to the apocalypse' – a first-person action-adventure game in a post-apocalyptic vision of the future. 'Once upon a time, far far away' – action-adventure game in the world of classic fairy tales.

Operating since: 2017   **Team size:** 14

We are a small indie game development studio founded with the purpose of creating games based on amazing stories and unforgettable characters. We are a team of talented individuals, creative professionals, and promising enthusiasts from many different backgrounds.

Aurora Studio

www.aurorastudio.games, contact@aurorastudio.games

Platforms and models:

PC, Premium

The next big thing:

'HARM' – a survival adventure game whose plot is inspired by the inventions of Nicola Tesla and their subsequent use by the US Army, which influenced the weather phenomena – to be released in 2022.

Operating since: 2021   **Team size:** 10

We are a new studio that focuses on producing and developing one large project.

Awesome Games Studio

www.awesomegamesstudio.com,
contact@awesomegamesstudio.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Yet Another Zombie Defense' franchise – a top-down zombie shooter where you build your base by day and defend it by night. Over one million units sold on PC and consoles.
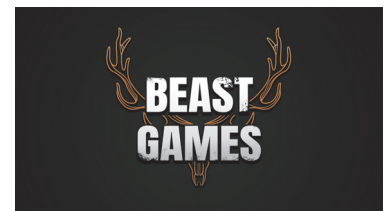
The next big thing:

'Fury Unleashed' – a roguelite platformer shooter where you shoot your way through the pages of an ever-changing comic book.

Operating since: 2009   **Team size:** 5

Over the years we have developed multiple games for Steam, Xbox One, PS4, Switch, and Xbox 360. We are dedicated to staying independent by self-funding and self-publishing our creations. We love making games as much as we love playing them, and we always strive to create something we would enjoy ourselves.

Beast Games S.A.

beastgames.kontakt@gmail.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'Animal Rivals: Up In the Air' – a sequel of well known 'Animal Rivals' party game which will include many customizable plane parts, multiple game modes, many race courses, and local but also online multiplayer mode – release in late 2021.

Operating since: 2020   **Team size:** 9

We are a sister company of the Console Labs S.A. We specialize in making various game genres. Our first product 'Animal Rivals: Up In The Air' has already been announced. Moreover, we are making high quality 3D assets for the game dev industry which are sold on the Turbosquid platform.

BeautifulBee

www.beautifulbeeteam.com, info@beautifulbeeteam.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'Strings Theory' – Go on an adventure on a subatomic level! Test your wits in a freaky, tricky logic game with an abstract concept and colorful heroes. Planned Release Date: Q3 2021.

Operating since: 2015

We are BeautifulBee – a group of friends working together as a team. We use our skills to create games that we ourselves would love to play. Check out our projects to find something awesome for yourself.

BeCREO Technologies

www.becreo.com, contact@becreo.com

Platforms and models:

Mobile, PC, VR/AR

Best known for:

More than 150 thousand games sold in 50+ countries and our 'Scottie Go!' apps translated to 25 languages.

The next big thing:

'Scottie Go! Dojo' – visual environment and programming language for children. The first and only product to teach coding using both virtual and physical programing blocks and AR technology.

Operating since: 2018

We are a Polish IT company developing innovative and intuitive, educational solutions for coding and mechatronics. We closely cooperate with a broad range of educational sector players and authorities, R&D institutions, and technological partners both in Poland and abroad. Our products are the result of human-centric design process, based on an in-depth analysis of educational needs.

BeeFlame Studio

www.grey-skies.com, contact@grey-skies.com

Platforms and models:
PC, PlayStation, Xbox, Premium

Best known for:
'Dreamreaper: Grey Skies' – a blend of first-person melee combat and immersive storytelling set in a mystery/horror genre.

The next big thing:
The newest build of our 'Dreamreaper: Grey Skies' game which will feature combat and story elements.

Operating since: 2016   **Team size:** 7

We are a 7-person studio, working remotely and without a budget. We are connected by the desire to produce and release a game that will both fit in with popular tastes and will tell our own story in an original and engaging way.

Bit Golem

www.bitgolemgames.com, contact@bitgolemgames.com

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:
'Ultimate Fishing Simulator' – best rated fishing game on Steam.

The next big thing:
'Dagon' – a free narrative game based on H. P. Lovecraft's horror story.

Operating since: 2013

We are a small development studio from Kraków, passionate about narrative games and experimenting with the medium. After years of working mainly for publishers, we have decided to concentrate on our own gamedev endeavors which, despite belonging to different genres, will have a strong common thread – the focus on story.

Black Drakkar Games

contact@blackdrakkar.games

Platforms and models:

PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

The next big thing:

Two different cutting edge projects: movie-like experience in TPP and stylish mega fun in FPP.

Operating since: 2021   **Team size:** 40

We are a new and independent studio, built upon creativity, friendship, and a strong commitment to our projects. We are industry veterans specializing in PC and consoles working on our own projects, but we could also co-develop or build your dream game from ground up. We all love what we do, and believe high quality and fun are both founded on passion and teamwork.

Black Eye Games

www.gloriavictisgame.com, info@gloriavictisgame.com

Platforms and models:

PC, Premium

Best known for:

'Gloria Victis: MMORPG' – a unique medieval open-world experience with epic PVP battles and castle sieges that sold more than 300 000 copies.

Operating since: 2012   **Team size:** 21

We are independent, passion-driven game developers. Our team consists of people who gained experience either in multiple commercial projects or in the modding scene.

Bloober Team S.A.

www.bloberteam.com, biuro@blooberteam.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:

'Layers of Fear' games, 'Blair Witch','Observer: System Redux' and 'The Medium'.

The next big thing:

Two big in-house projects still to be officially revealed.

Operating since: 2008

We are internationally recognized for creating truly psychological horror games. We are an independent development studio dedicated to delivering engaging storytelling based on disturbing mysteries and meaningful themes.

Blue Sunset Games

www.bluesunsetgames.com, info@bluesunsetgames.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

High community impact on the 'Go All Out' game featuring legends like Zorro, Breakbone, Teslakid and more. 'Madness Beverage' – an FPS that brings together shooting, guns blazing, and powerful drinks.

The next big thing:

'Skinny & Franko: Fists Of Violence'

Operating since: 2016

We are an indie game studio. We aspire to create games that will satisfy the community and make us proud. Thanks to our passion, knowledge, and constant feedback from the said community, we were able to discover the whole new world of game development, which made us want more in the process.

Bold Pixel
www.boldpixel.com

Platforms and models:

Mobile, Nintendo Switch, PC, Xbox, Atari VCS, Premium

Best known for:

'Back to 1998' on Steam and 'Side B' on a Nintendo Switch.

The next big thing:

Unreleased dungeon crawler for Android & iOS – release in Q4 2022.

Operating since: 2018   **Team size:** 3

We have a fresh, creative, and unusual approach to creating electronic entertainment. We are a family business run by Inez Górska-Brzezińska, responsible for the creative part, and Kamil Brzeziński, responsible for production and the IT part. Our studio has released several titles for the Gamebuino platform, Pixel Heaven mobile game, 'Back to 1998' on Steam, 'Side B' on Nintendo Switch.

Brave Lamb Studio S.A.
www.bravelambstudio.com, contact@bravelambstudio.com

Platforms and models:

PC, PlayStation, Xbox, Premium

The next big thing:

'War Hospital' - first society survival game outside 11 bit studios – release in Q4 2022. It is 1917. Your name is Major Henry Well. You are a retired British medic, reinstated and thrown into the hell of World War I.

Operating since: 2020   **Team size:** 20

We are a company that produces computer games from the premium indie segment. Our strategic goal is to create games focused on a deep narrative supported by the player's need to make morally difficult choices. Production independence, combined with the focus on the high quality of our projects, makes us a unique venture on the Polish gamedev market.

Bulbware

www.bulbware.com, contact@bulbware.com

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, Mac, F2P, Premium

Best known for:
Working with most famous Felix ‚PewDiePie' Kjellberg youtuber since company's beginning. First Polish publisher on Nintendo Switch. Winners of Google Masterpiece, nominated for Golden Joystick Award.

The next big thing:
'Bulb Boy: Jar of Despair' – second installment of beloved horror adventure game for nextgen & PC – coming in mid-2022.

Operating since: 2015   **Team size:** 5

We create enlightening games in cooperation with the biggest influencers in the world. Our indie games are bold and unusual. From the beginning, we have released 4 games and 9 ports, both in premium and freemium models – 'Bulb Boy', 'Poopdie: Chapter One & Chapter Two' and 'They Breathe'. Our current line-up consists of 4 indie projects that are targeted at a larger audience.

Byte Barrel

www.bytebarrel.com, contact@bytebarrel.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:
'MythBusters: The Game' - created under the license of the popular science program MythBusters in cooperation with Movie Games S. A. and Discovery.

The next big thing:
A retro shooter with a horror mood, referring to the Lovecraft Universe and presenting in a comic book graphic design.

Operating since: 2017

We are a studio that aims to create interesting, unique, and ambitious independent computer games. We are distinguished by great passion and enthusiasm for what we do. We offer participation in very interesting and promising projects based on Unreal Engine.

Carbon Studio S.A.

carbon studio

www.carbonstudio.pl, contact@carbonstudio.pl

Platforms and models:

VR/AR, External development/Outsourcing/Services, Premium

Best known for:

'The Wizards' VR game series – where players use hand gestures to cast spells.

The next big thing:

'Warhammer Age of Sigmar: Tempestfall' – an action-adventure VR-exclusive game set in the Warhammer universe scheduled for release in 2021.

Operating since: 2015

We are VR pioneers, working with the technology ever since the first Oculus Rift devkit. With great enthusiasm, we went on to create innovative VR games and applications. The unique and original system of casting spells with hand gestures in The Wizards series earned worldwide recognition and a strong foothold in the market for the studio.

ChaosForge

JUPITER HELL

www.jupiterhell.com, epyon@chaosforge.org

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Jupiter Hell' (Early Access) – 8 years in the making on a 3D custom engine, turn and grid-based roguelike, set in a 90's style sci-fi universe.

The next big thing:

Jupiter Hell updates, console ports of the game, and unannounced next roguelike on the same engine.

Operating since: 2012   **Team size:** 4

Founded by a veteran of the old school of traditional roguelike development, ChaosForge team is dedicated to bringing back a genre that for a decade has been misnamed, misunderstood, and badly represented. We are a small team utilizing our completely ground up built 3D engine to compete against others with easily available and approachable engines.

CHRONOSPACE

www.chronospace.pl

Platforms and models:
Browser, Mobile, PC, VR/AR, Premium

Best known for:
VR game on the Oculus Quest platform, prepared for the Castle Museum in Baranów Sandomierski. This is the first production of this type intended for an educational institution (Escape Room VR game).

The next big thing:
An arcade game with elements of VR Experience – a combination of these features will be a novelty on the market – release in June 2022.

Operating since: 2019   **Team size:** 24

We create proprietary solutions based on VR/AR/MR technologies. Educational and entertainment games, applications, simulators and virtual walks in full 3D graphics and a full script. We prepare visualizations, 3D animations and we deal with post-production. We have received many awards, including Sketchfab Stuff Pick 2020, Sketchfab Top10 2020, Eagle of Innovation of the Republic of Poland 2020.

Cobble Games

www.cobble.games, chris@cobble.games

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:
We have co-developed and ported 'Vampire the Masquerade: Shadows of the New York' for Draw Distance – our long-term client.

The next big thing:
We are developing metroidvania boomer shooter called 'Chains of Fury'.

Operating since: 2017   **Team size:** 8

We are a group of trained and experienced professionals with various backgrounds who came together as a team to build something more significant than each of us would be capable of achieving on their own. What makes us different is that we do not do this just for money. We share common goals and values.

Cocomo

www.cocomo.pl

Platforms and models:

Mobile, PC, Xbox, External development/Outsourcing/Services, Premium

The next big thing:

'There and Then' – a story about contrasts in our lives, set in a historical place and time. 'Aura' – a project devoted to the immaterial world, with a soul and magnetic field.

Operating since: 2008

We are in love with synergy between art and tech, when you mix pixels and colors, music and tempo, solids and vectors in your cup.

Console Labs S.A.

www.console-labs.com, contact@console-labs.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Thief Simulator' for Xbox, 'Tank Mechanic Simulator' for Xbox and PS4.

The next big thing:

'Madness Beverage' – an old-school shooter imbued with comedy 'Contraband Police' – a border post-commander simulator 'Animal Rivals: Up In The Air' – a party game 'Succubus' – an action-oriented horror game.

Operating since: 2018

We specialize in porting games from PC to other platforms, such as Xbox One, PS 4, and Nintendo Switch. We deal with the customization of the game for the platform, optimization, certification, and post-premiere support. We work with other publishers and game developers on bringing their games to a wider audience, but we also develop our own games for consoles.

Creepy Jar S.A.

www.creepyjar.com

Platforms and models:

PC, PlayStation, Xbox, Premium

Best known for:

'Green Hell' – an ultra-realistic simulation game about surviving in the Amazon jungle – over two million copies sold.

The next big thing:

'Chimera' – a base building simulator with survival elements in the Sci-Fi setting.

Operating since: 2015   **Team size:** 30

We are the publisher and developer of 'Green Hell', a critically acclaimed survival game. Our studio is a collection of seasoned developers and creators combining years of experience with an impressive list of titles on our collective resume. We are passionate about making our games the best they can possibly be, focusing on listening to our community and giving the utmost attention to every detail.

Critical Hit Games

hello@criticalhitgames.pl

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

We are working on a top-notch quality, story-driven FPP game, set in an alternative vision of the future world. The project has been rewarded by Epic MegaGrants and has received a grant from the Polish Ministry of Culture.

Operating since: 2020   **Team size:** 17

We are a team made of highly experienced industry veterans that previously worked on many AAA projects. Our mission is to become a widely recognizable developer, focused on story-driven, remarkable games that will become strong multimedia brands. This means for us significant games with unique gameplay experience, outstanding visuals, and top-notch quality.

Detalion Games S.A.

Detalion Games

www.detaliongames.com,
aleksandra@detaliongames.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox

Best known for:
'Nemezis: Mysterious Journey III' - a puzzle adventure game with countless brainteasers.

The next big thing:
'Chernobyl 1986' – a decision-based game about one of the largest nuclear power plant disasters. Play as the manager of a nuclear power plant in a time of a crisis that can cost millions of lives.

Operating since: 2018   **Team size:** 15

We are a Polish AA game development studio. Our core team consists of people who have been working in this industry for many years, since the 1990s. We want to make games with 'old soul' but with the new technology. We develop simulators, adventure games, strategies, and tower defense games.

Devsh
Graphics Programming

DEVSH GRAPHICS PROGRAMMING SP. z o. o.

www.devsh.eu

Platforms and models:
Mobile, PC, VR/AR, ChromeOS, Linux, External development/Outsourcing/Services, Consulting and Engine Development

Best known for:
GPU Path Tracer used by Ditt B.V.

The next big thing:
Build a World EDU ChromeOS port – late 2021

Operating since: 2018   **Team size:** 7

We are owners and developers of the open source Nabla Modular Rendering framework. We specialize in High Performance Computing. Our main areas of expertise include the creation and optmisation of renderers with Vulkan, Dx12, CUDA, OptiX, OpenCL, and OpenGL.

Different Tales

www.differenttales.com, info@differenttales.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Wanderlust: Travel Stories' – an anthology of interactive travel literature. 'Werewolf: The Apocalypse – Heart of the Forest' – a game that won us the Polish 'Paszport Polityki' mainstream cultural award.

The next big thing:

Unrevealed life-sim RPG, a bittersweet game about friendship in a magical, ever-changing world (PC & consoles, 2023).

Operating since: 2018

An indie game studio founded by AAA industry veterans. We are a diverse team of artists, writers and developers who want to challenge the limits of the gaming medium and ask questions rooted in common human experience. Our games tell stories with the potential to bring about a change. When our games let players be vulnerable, unsure and human without fear of losing, we know we did our job right.

Digital Hussar

www.unrealbucket.com, michal@unrealbucket.com

Platforms and models:

PC, External development/Outsourcing/Services

Best known for:

'Unreal Bucket' – a tool that allows users to manage game-ready assets and integrate high quality Unreal Engine content with any project.

The next big thing:

'MyBucket' and 'BucketCloud' – online collaboration tools designed for game developers and content creators within the Unreal Engine ecosystem.

Operating since: 2016

We provide game development services with the main focus on the digital content creation.

Digital Melody Games

www.digitalmelody.eu, hello@digitalmelody.eu

Platforms and models:

Mobile, Nintendo Switch, PlayStation, Xbox, F2P, Premium

Best known for:

'Timberman', 'Car Mechanic Simulator mobile', 'Stencil Art', 'Pack Master'.

The next big thing:

A couple of mobile games for the next two quarters of 2021. Some of them based on the well-known and popular IP Timberman and other ones on completely new ideas.

Operating since: 2014

We are a company founded by a group of friends to develop most playable games in the world. We focus on the mobile market. Simple, innovative gameplay and unlimited fun is our motto.

Dogged
Jakub Kusik

kusik.jakub@gmail.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, Premium

The next big thing:

An unannounced VR game with weapons crafting.

Operating since: 2018

I am a young one-man company that can provide assets, levels, and animation. Currently working on an in-house VR game.

DOJI S.A.

www.doji.com.pl, jakub.ryfa@doji.com.pl

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/ Outsourcing/Services, F2P, Premium

Best known for:

Serious and educational games created for corporate clients and gamers who seek clever entertainment.

The next big thing:

Publication of 2 mobile, educational games in late 2021 as a result of external development for clients who share our vision. Unrevealed independent casual-education game for PC and consoles in 2021.

Operating since: 2014 **Team size:** 10

Merging video games and educational tools to create entertaining, absorbing, and thought-provoking applications, both for business and casual needs. We hope to change the image of educational games to be as appealing, immersive, and memorable as good video games can be. We develop our own games and offer complete external development for schools and corporate clients.

Donkey Crew

www.donkey.team, hello@donkey.team

Platforms and models:

PC, PlayStation, Xbox, Premium, In-Game Purchases

Best known for:

'Last Oasis' – a nomadic survival MMO – released to Early Access on Steam and Xbox.

The next big thing:

Expanding 'Last Oasis', releasing it on other consoles and continuing to add content until its full release.

Operating since: 2018 **Team size:** 30

We are an independent studio made up of talented, experienced developers from every corner of the world. Starting as a small team of passionate gamers working together within a large Mount & Blade modding community, we grew into a professional company developing indie titles.

DRAGO entertainment S.A.

www.drago-entertainment.com, press@drago-entertainment.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Gas Station Simulator'

The next big thing:

'Winter Survival Simulator' – a unique approach to survival that focuses on the mind as much as it does on the body.

Operating since: 1998   **Team size:** 30

We are among the oldest and most experienced game development companies in Poland. The scope of our development capabilities ranges from high quality simulator games to full scale MMORPGs. Since 2019 we have been developing exclusively our own IPs.

Dream Storm Studios

www.dreamstormstudios.com, hello@dreamstormstudios.com

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, F2P, Premium

Best known for:

More than 20 projects completed over the last 3 years.

The next big thing:

'Natural Instincts' – an interactive nature documentary simulator (PC) – release in August 2021.

Operating since: 2018   **Team size:** 24

We are a young, determined team ready to take any challenge. Our passion guides us in the process of creating unique games, applications, and VR/AR solutions. We follow unusual paths of reasoning to design better solutions, services, and experiences.

Dreamgrit

www.dreamgrit.pl, igor.hardy@gmail.com

Platforms and models:

Mobile, Nintendo Switch, PC, Premium

Best known for:

'Snakes of Avalon' – an award-winning, meaningful niche title that has been praised by mainstream media.

The next big thing:

'The Saragossa Manuscript' – improvised tales of romance, honor duels, and trolling curses – narrative roguelike – release in 2022.

Operating since: 2011

MANIFESTO: Become an indie game studio with modest means but BIG dreams! Pour your heart into your PUNK mishaps. Die, fluff, die! Make ONLY essential games. Give the player scenarios with improvisation opportunities. Proc-gen can get UGLY, so let's go for it!

Elmak

www.savio.net.pl, kontakt@savio.net.pl

Operating since: 1990

We are the owner of the Savio brand and a producer of remote controllers, LED lighting and gaming accessories. We design, test and manufacture all products in our own facility.

Enclave Games

www.enclavegames.com, contact@enclavegames.com

Platforms and models:

Browser, Mobile, Licensing

Best known for:

More than a decade of experimenting, building, and teaching about HTML5 game development: own games, organizing js13kGames competition and Gamedev.js Jam

The next big thing:

Mixing HTML5 Game Development with Web Monetization and Blockchain / NFTs.

Operating since: 2012   **Team size:** 2

We are an indie studio building mobile HTML5 games. We are delivering hyper-casual experience to browsers and are open to license our games to publishers. We are also running the js13kGames competition and fostering the #gamedevjs community through organizing Gamedev.js Jam.

Enginious

www.thehungrybeast.com, ksenia@thehungrybeast.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, Premium

Best known for:

Award-winning art for brands like 'Cyberpunk 2077', 'Ghostrunner', 'Dying Light' or 'The Witcher'.

The next big thing:

We are busy producing marketing assets for Techland's upcoming title 'Dying Light II' using our cutting-edge Virtual Production pipeline. We are also helping 505 Games with the 'Ghostrunner' sequel.

Operating since: 2020

We are The Beast – a creative agency focused on gaming. Our bread and butter include creative brand & product expertise, scripts and cinematics (both trailers and in-engine), creative marketing assets strategies, top quality marketing art assets, virtual production with the use of Unreal Engine and LED walls, as well as creative in-game assets.

Eremite Games

www.eremitegames.com, contact@eremitegames.com

Platforms and models:

Mobile, PC, Premium

The next big thing:

'Against the Storm' – a roguelite city builder set in a fantasy world where it never stops raining (the finalist of Digital Dragons Indie Showcase and PAX Online East Indie Showcase). Coming to PC in 2021.

Operating since: 2017   **Team size:** 5

We are a team of 5 friends with years of experience in AAA, indie, and mobile games development. Passion for memorable, genre-defining strategy and RPG games is what brought us together. You will not see us grow in numbers dynamically. Tending to a project in a creative and supportive work environment is our recipe for success. This is the Eremite's way.

E-sportsponsorship

www.e-sportsponsorship.com, office@e-sportsponsroship.com

Platforms and models:

Mobile, PC, F2P

Operating since: 2021

E-sportsponsorship.pl is the first interactive portal about e-sports in Poland. Our mission is to connect people and sports by providing athletes, fans, and e-sport sponsors/investors with an automatic process of matching the portfolio of marketing rights to the individual marketing and social needs of sponsors and investors. Currently the portal is under construction, and we are looking for investors.

Event Horizon

www.evehor.com, contact@evehor.com

Platforms and models:

PC, PlayStation, Xbox, Premium

Best known for:

'Tower of Time' – a story-rich dungeon crawler with innovative real-time combat that lets you pause or slow time. Tactical thinking is essential to succeed.

The next big thing:

'Dark Envoy' – sci-fantasy RPG set in a dark world where mana-fueled technology defies the innate magical order. As two sibling relic hunters, you may change the fate of the world with your actions.

Operating since: 2016   **Team size:** 24

We are an independent game studio. In 2018 we have released our debut title 'Tower of Time' and now are working on 'Dark Envoy', a much more ambitious project, a non-linear RPG where Players' choices really do matter, and with deep tactical combat rewarding experimentation and clever approach to each engagement.

Evil Indie Games

www.evilindiegames.com, games@evilindiegames.com

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, F2P, Premium

Best known for:

'NO THING', 'Extra Color'

The next big thing:

'SAD RPG: A Social Anxiety Role Playing Game' – release in Q3 2021.

Operating since: 2010   **Team size:** 2

We are an indie games development studio founded by two brothers, Michał and Piotr Stalewski. Currently the heart of studio consists of Michał and his wife Natalia, together designing games they want to play.

EXOR Studios

www.exorstudios.com, wojciech.lekki@exorstudios.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'The Riftbreaker', 'X-Morph: Defense', 'Zombie Driver', and 'D.I.P.R.I.P'.

The next big thing:

'The Riftbreaker' – a base-building, survival game with Action-RPG elements for PCs and consoles.

Operating since: 2007   **Team size:** 15

We are an independent game development studio. We are a team of passionate veterans focused on delivering high-quality titles to the core gaming platforms – PCs and consoles.

False Prophet

www.falseprophet.dev

Platforms and models:

PC, PlayStation, Xbox, Premium

The next big thing:

'BEAST' – a brutal and dynamic tactical turn-based RPG set in the dark world of the late Middle Ages in AA + quality (PC and consoles).

Operating since: 2019   **Team size:** 20

We are video game developers, mostly AAA talents from CD Projekt RED, Platige Image, and CI Games.

Fantasyexpo

www.fantasyexpo.pl

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, Premium

Best known for:

Esports tournaments (e.g., BLAST Rising), developing the esports ecosystem in Europe and the #GamingWithoutBarriers project enabling deaf people to experience esports like never before.

Operating since: 2014   **Team size:** 50

We are a leading European gaming agency. Effective project implementation consistent with our partners' and viewers' needs is our motto. Our experience, developed strategies, and proven tools help us achieve goals in a way that stands out on the market. Our projects are appreciated by the gaming community.

Far From Home S.A.

www.farfromhomegames.com, info@farfromhome.games

Platforms and models:

PC, PlayStation, Xbox, Premium

The next big thing:

'Project Oxygen' – sci-fi action survival game for PC and major next gen consoles, Early Access in 2022.

Operating since: 2020   **Team size:** 15

We are a crew of experienced AAA and indie game veterans focused on AA+ development, driven by community and supported by marketing experts. We plan to tackle games with a deeper meaning, mature subjects, with a strong emphasis on unique gameplay and quality visuals. So far, we worked on such titles as 'Dying Light', 'Dying Light 2', 'Dead Island', 'The Medium', and many others.

Flybridge Studio

www.flybridgestudio.com

Platforms and models:

Mobile, PC, External development/Outsourcing/Services, F2P, Premium

Best known for:

An indie developer & publisher, proud to deliver educational and therapeutical elements in games for entertainment, e.g., 'Space Gliders'.

The next big thing:

Turn-based western-style bar fight strategy for PC and mobile – to be released in mid-2022.

Operating since: 2020   **Team size:** 10

We are a group of people originating from different industries (gaming, IT, media) brought together by a common passion for high quality games and game-related technologies & services. We believe in combining theory with practice: more than half of our team have a degree in game design and/or development.

Flying Wild Hog

www.flyingwildhog.com

Platforms and models:

PC, PS, Xbox

Best known for:

Hard Reset & Shadow Warrior franchise — action-packed, fast-paced, and wholeheartedly unique, always at full throttle, no holding back!

The next big thing:

4 projects in development: 'Shadow Warrior 3', 'Evil West', 'Trek To Yomi', 'Space Punks'.

Operating since: 2009   **Team size:** 325

The name of the independent Flying Wild Hog game studio founded in 2009 in Warsaw, Poland, evokes the same core feeling as its acclaimed catalog of titles – action-packed, fast-paced, and unique. From 'Hard Reset' to the 'Shadow Warrior' series, the studio has been continuously growing across its three locations. Following its acquisition by Koch Media and Embracer Group, FWH seeks to continue delivering original, high-quality game experiences.

Folia Soundstudio
Paweł Uszyński

pawel.uszynski@foliasound.pl

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/
Outsourcing/Services

Best known for:

'Metamorphosis' by Ovid Works – sound design and spatial mix.

The next big thing:

'Nemesis' by Awaken Realms – sound design and adaptive music.

Operating since: 2008   **Team size:** 3

Sound designing, composing, producing and mixing music for computer games (and
movies!).

Fool's Theory

www.foolstheory.com,   biz@foolstheory.com

Platforms and models:

PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'Seven: The Days Long Gone' - 3D isometric RPG collaboration with Larian Studios -
providing gameplay and tools programming support for 'Baldur's Gate III'.

The next big thing:

'Vitriol' - code name for an RPG project based on a new IP. The game will be
comparable in terms of budget and content to 'Frostpunk'. The official reveal is
planned for the second half of 2021.

Operating since: 2018   **Team size:** 52

We are a collective of AAA veterans who have contributed to the making of major
commercial achievements and indie standouts as 'The Witcher 2: Assassins of Kings',
'The Witcher 3: Wild Hunt', 'Ancient Space', to name but a few, and our own in-house
property called 'Seven: The Days Long'. We also provide content support for Taliespin,
Larian Studios, and other major undisclosed AAA productions.

Forestlight Games

www.forestlightgames.com, office@forestlightgames.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox,
External development/Outsourcing/Services, Premium

The next big thing:
'The Pope: Power & Sin' – a sim/strategic game inspired by the life of Rodrigo de Borja and 'The Borgias' movie series to be released in 2022.

Operating since: 2019   **Team size:** 20

We certainly have our favorite games that we like to play and make, but we love creating games in general. Whether it is our own idea or one of our clients', we believe in making the best games we can.

Forever Entertainment S.A.

www.forever-entertainment.com,
office@forever-entertainment.com

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Google Stadia, Amazon Luna, Premium

Best known for:
'Panzer Dragoon: Remake' – original SEGA's IP – a remake of a classic 1995 game.

The next big thing:
'The House of the Dead' 1&2 – modern remakes of classic games from the 90s.

Operating since: 2010

We are one of the biggest Switch publishers in the world – with over 90 titles released. We work mainly with indie developers, helping them port and market their games on almost every platform available.

Frozen District

www.frozendistrict.com, contact@frozendistrict.com

Platforms and models:

PC, PlayStation, Xbox, Premium

Best known for:

'House Flipper' and its DLCs – over 3 million copies sold (as a developer and publisher), 'The Tenants' (Early Access) – over 200 000 copies sold within the first 4 months after the release (publisher).

The next big thing:

New expansions (Luxury DLC and Pets DLC) for 'House Flipper'. 'The Tenants' – final release.

Operating since: 2017   **Team size:** 50

We are a game development and publishing company, made of experienced specialists who have extensive knowledge about the video game industry. We create unique and exciting content for PCs by developing innovative and high-quality games.

Galaktus

www.galaktus.pl, biuro@galaktus.pl

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services, F2P, Premium

Best known for:

Working for Green Hell, People Can Fly, War Thunder, Enlisted, SteelSeries, MSI, LG and EA.

The next big thing:

We are currently growing our QA department and Galaktus Games – a board game studio – we have just released 'Green Hell: The Board Game' and we are yet to announce our new project by the end of 2021.

Operating since: 2011   **Team size:** 35

We are a PR&marketing agency operating in the EU and US aiming to deliver communications to the global gaming audience. We can help any game get amazing PR, SM services, community marketing services, influencers, QA, events, ads, and more. We also work for hardware and e-sports brands to help with cross-promotions, bundle actions, and sales.

Game Factory

www.fabrykagier.pl, mail@fabrykagier.pl

Platforms and models:
Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/
Outsourcing/Services, F2P, Premium

Best known for:
'Brain Buddies', 'Monster World', 'Diamond Dash' (Facebook), 'Cookie Jam' and 'Panda Pop' (mobile).

The next big thing:
A venture into self-publishing with a small internally developed PC/console title.

Operating since: 2005   **Team size:** 40

We are an outsourced game development studio. Most of our experience comes from free-to-play, casual and mid-core social games for web and mobile, but we are also a licensed PS, XBox and Nintendo developers working on porting projects and indie games both externally and internally.

Game The Same

www.gamethesame.com, contact@gamethesame.com

GameTheSame

Platforms and models:
Mobile, PC

Best known for:
'Rosemary's Fate' – the first Dynamic Audio Game in the world.

The next big thing:
We are developing new 3D sound algorithms to create an audio RPG and another audio adventure.

Operating since: 2019   **Team size:** 8

Use the World's Best Graphic Card: Your Imagination! We love to hear good stories. Audiobooks, podcasts, interviews. But where are the audio games? They have yet to be discovered and defined! This is our mission.

Gamedust

www.gamedust.co, office@gamedust.co

Platforms and models:

VR/AR, Premium

Best known for:

'Yupitergrad' – a unique puzzle-platformer that uses VR for dynamic movement; released on Oculus Quest, PS VR, and PC VR.

The next big thing:

An unannounced new project for VR devices.

Operating since: 2015   **Team size:** 13

We started out in 2015 as the Virtual Reality division at Setapp – a Polish software house. We became a separate company in 2017 and delivered 'Neverout', 'Overflight', 'Spuds Unearthed' and most recent 'Yupitergrad' to over 15 VR and non-VR gaming platforms. In each of our games, we focus on a blend of unique gameplay mechanics and art direction.

GameHunters S.A.

www.gamehunters-studio.com, krzysztofplawski@gmail.com

Platforms and models:

PC, F2P, Premium

Best known for:

'Gunsmith Simulator' – a game where players become gunsmiths and work in their own workshop.

The next big thing:

'Samurai Simulator' – the first life simulator in feudal Japan. Planned release date: TBA.

Operating since: 2019   **Team size:** 17

We are a game development studio creating simulation games for the PC platform. Our publisher is PlayWay S.A., one of the largest computer game producers and publishers in Poland.

Games Operators S.A.

www.gameops.pl

Platforms and models:

Mobile, PC, External development/Outsourcing/Services, Premium

Best known for:

Publishing, investing, releasing, and promoting video games. Best known for the success of '911 Operator' (over 1 million copies sold on Steam only).

The next big thing:

'Infection Free Zone' – a city builder in a zombie post-apocalyptic world based on real maps.

Operating since: 2017   **Team size:** 32

We support the development of innovative and unique games. We are involved in projects on various levels of progress – from concepts to almost finished productions. Our company offers technical and conceptual consultations, provided by our internal development team – Jutsu Games, behind the success of '911 Operator'.

Gameset

www.gameset.co, contact@gameset.co

Platforms and models:

External development/Outsourcing/Services

Best known for:

The biggest network of gaming influencers in Poland and the most awarded agency for gaming projects.

The next big thing:

Expansion in Poland and the entire CEE region with influencers and services tailored to gaming market.

Operating since: 2017

We are a professional gaming marketing agency. We help brands create effective communication targeted at modern consumers. We operate in Poland and the CEE region, offering our services to publishers and brands. We represent over 250 gaming and technology creators, 15 of whom have more than one million subscribers. We are the most awarded gaming agency – we have won over 20 prizes.

GameUP

www.gameup.org, stowarzyszeniegameup@gmail.com

Platforms and models:

Mobile, PC

The next big thing:

An unrevealed visual novel in the H.P. Lovecraft style for PC and mobile – autumn 2021.

Operating since: 2019

GameUP – Games' Research and Development Association is a group of specialists and game development enthusiasts with a mission to educate young people who would like to start their career in game dev. Our main goal is to create a friendly environment for young wannabe designers and graphic artists and guide them into making their first games with us.

Gaming Analytics

www.gaminganalytics.info, contact@gaminganalytics.info

Operating since: 2018

We are a market intelligence data and statistics provider for video games. We deliver a wide range of comprehensive and up-to-date data to gaming industry players – developers, publishers, gaming stock analysts, investors, gaming editors and other parties that need them in their business. We also work on and deliver market surrounding insights based on statistical/AI models, estimating current and predicting future sales of video games.

GeoGames

www.geogames.pl, kontakt@geogames.pl

Platforms and models:
Browser, Mobile, VR/AR, F2P

Best known for:
Open beta of our platform and geolocation sports game built.

Operating since: 2019 **Team size:** 6

We are a company and a content managing system for spatial data and augmented reality apps/games and gamification. With our tools, we can develop such products for a fraction of their market price and in a significantly shorter time.

Gruby Entertainment

www.grubyentertainment.com,
contact@grubyentertainment.com

Platforms and models:
PC, Premium

Best known for:
The founding team worked on the 'Outriders' project during their time at People Can Fly.

The next big thing:
An unannounced first-person shooter game for PC.

Operating since: 2020 **Team size:** 18

We are a small, independent, fully remote, Polish game development studio founded in 2020. Our goal is to manufacture solid, high-calorie gameplay for hardcore players, granting them action-packed hours accompanied by crucial and meaningful decisions.

Hyperstrange

www.hyperstrange.com, wojtek.mroczek@hyperstrange.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:

Development – 'Elderborn', 'Rayze', 'Blood West', 'Postal: Brain damage' Publishing - 'Crossbow: Bloodnight', 'Frozenheim', 'Jupiter Hell'

Operating since: 2015

We are a game development and publishing studio. Founded on the day of 2015 solar eclipse, we continue to bring metal, fantasy, action and hyper-strangeness to gamers worldwide. We use our experience to aid other indie devs in surviving – and striving! – in the market.

Hypnotic Ants Studio

office@hypnoticants.com

Platforms and models:

Nintendo Switch, PC, Xbox, VR/AR, Premium

Best known for:

'Dreamo' available on PC, Switch and in near future on Oculus Quest.

The next big thing:

'Medic: Pacific War' – third-person action game in which the player gets an opportunity to become a medic of the US Army during the Second World War's biggest battles on the Pacific front.

Operating since: 2018   **Team size:** 10

We are a small independent team of experienced game developers who create passionately twisted games. We want our games to make an impact by being relevant, meaningful, unusual, and fresh. In the past, we were involved in the development of games like 'Witcher', 'Sniper Ghost Warrior 2', and many others.

Ice Code Games

www.icecodegames.com, info@icecodegames.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Re-Legion' – a cyberpunk RTS about becoming a cult leader.

The next big thing:

An unrevealed game based on a successful brand.

Operating since: 2017   **Team size:** 40

We are a fast-growing studio that has developed games in several genres and has distributed them on all leading platforms. We focus mainly on premium PC and console strategy titles.

Ignibit

www.ignibit.com, office@ignibit.com

Platforms and models:

PC, VR/AR, External development/Outsourcing/Services, Premium

Best known for:

'Zero Killed' – a multiplayer strategic VR shooter – for pros only!

The next big thing:

An unrevealed VR survive-in-space simulator set, in a galaxy far, far away.

Operating since: 2016   **Team size:** 10

We are a team of VR evangelists with a mission to deliver awesome product experiences. We are passionate game developers with over ten years of industry experience. Moreover, we introduce VR/AR technologies to non-gaming sectors such as education, automotive or military.

Image Games

hello@image.games

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

An unannounced project in cooperation with Anshar Studios, Movie Games and Platige Image.

Operating since: 2021   **Team size:** 10

In 2021, Movie Games combined their extensive knowledge of the gaming industry and publishing with Platige Image's considerable skill in art and networking. Together they established Image Games, an Indie Premium developer. At the moment we are working on our first, yet unannounced, cRPG title together with Anshar Studios. We are also in the process of building our own internal studio.

IMGN.PRO

IMGN.PRO
HOUSE OF GAMES

www.imgn.pro, jakub.rylko@imgn.pro

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

Developer of 'Kholat', 'Seven: Enhanced Edition'. Publisher of 'Euro Truck Simulator 2', 'Superhot' and many more.

The next big thing:

Currently focusing on building our new publishing portfolio.

Operating since: 2010

We are an indie-friendly PC, console and mobile publisher. We became a developer in 2012, pursuing our ambition to have an in-house gamedev studio on top of being a global publisher.

Impakt S.A.

www.pl.genesis-zone.com,   contact@genesis-zone.com

Best known for:
We make gamers' life more gaming! Thanks to Genesis keyboards and mice they are more deadly effective, and with our chairs and desks this effectiveness comes with greater comfort.

The next big thing:
Our next big product will be the world's first, modular, gaming ....oops sorry, You need to wait for this one, still a secret. We are working very hard to introduce even more thrilling products.

Operating since: 1997

We are one of the leading Polish companies engaged in the production and distribution of computer hardware and peripherals, gaming accessories, network solutions and widely defined consumer electronics. Our portfolio includes a wide range of well-known and valued brands. In 2011 we launched the Genesis brand dedicated to gamers. The brand was established to address players' growing needs. Genesis is one of the most recognizable gaming brands in Poland. Currently, we are conducting a series of activities to extend its success to other European markets.

Indago

www.indagovr.com

Platforms and models:
Mobile, PC, VR/AR, External development/Outsourcing/Services, Premium

Best known for:
Unity Award 2019 in the Best Artistic Content (Forest Environment – Dynamic Nature), and one of the first escape room games in VR – 'Escape Room VR' for Oculus Gear VR and Oculus Go.

The next big thing:
'Condensation game' - coming late 2022. Get behind the controls of a huge mech as a pilot and explore the post-apocalyptic world of steampunk in VR!

Operating since: 2014   **Team size:** 4

We are a team with many years of experience in the industry and specializing in assets, game design, 3D graphics, and VR/AR technology. As virtual reality entertainment enthusiasts, we put all our creativity and devotion into productions, and the same is true for our Unity assets realizations. Let's shape remarkable projects together!

Indeep Studios

www.indeep.io

Platforms and models:

Mobile, Nintendo Switch, F2P, Premium

Best known for:

'Sole Light' – an isometric puzzle game for iOS, Android, and Switch. Discover the dystopian world by pushing rocks and controlling clones to solve puzzles.

The next big thing:

Multiple unrevealed hyper casual games – Q4 2021, 'Sole Light' – Nintendo Switch release – Q4 2021 or Q1 2022, an unrevealed multiplatform (Mobile, Switch) game – 2022

Operating since: 2019   **Team size:** 6

We always put players first and work for them tirelessly in an atmosphere of pure partnership and unrestricted creativity. We make sure we develop games of highest quality that offer much more than mere entertainment. We believe entertainment does not have to be trivial. Therefore, our mission is to develop games which address complex issues and inspire reflection in a fun and accessible way.

Infinite Dreams

www.idreams.pl, office@idreams.pl

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Cars (Tesla), F2P, Premium

Best known for:

'Sky Force' – classic arcade shoot'em up, 'Crazy Dino Park' – casual family friendly, 'Let's Create! Pottery' – unique, zen-like experience. We have more than 150 million downloads.

The next big thing:

'Sky Force III' – the next generation of shoot'em ups.

Operating since: 2001

We are experienced game developers with focus on innovation and quality. It always begins with a passion and crazy idea that is turned into a high-quality game. We do all the funding, development and publishing ourselves. People seem to like our games, for example, 'Sky Force Reloaded' has been selected by Elon Musk to be installed in all Tesla cars.

INTERMARUM S.A.

www.intermarum.com, office@intermarum.com

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, F2P, Premium

Best known for:

'Pocket Waifu' – an F2P title with over 2,5 mln players.

The next big thing:

'Workshop Simulator' – a relaxing renovation simulator with a heart-warming story for PC and consoles launching in Q4 2021, 'Orange.2' – dark action shooter co-developed together with Destructive Creations.

Operating since: 2010   **Team size:** 40

We are an independent game developer. Our company's goal is to provide top products and to continuously develop our skills through self-improvement and innovative technologies.

Iron VR S.A.

www.ironvr.pl, contact@ironvr.pl

Platforms and models:

VR/AR, External development/Outsourcing/Services, Premium

Best known for:

Helping developers bring their titles to the exciting Virtual Reality universe as well as developing our very own IPs.

The next big thing:

'Lust for Darkness VR' – we are bringing a psychological horror of seeking satisfaction to the realm of Virtual Reality – coming in 2021.

Operating since: 2020

We are a company founded by veterans of the computer games industry related to VR technology.

Keywords Studios

www.keywordsstudios.com,
administration.katowice@keywordsstudios.com

Platforms and models:

PS, Xbox, Switch, PC, mobile, handheld, VR/AR, browser; Player Support, Community Management, Trust and Safety, Localization QA, Functionality QA, Compliance QA, stress & load testing

Best known for:

Providing world-class technical services to the global video games industry, with our Katowice studio offering Localization and Player Support, customized Compliance solutions, and QA services.

The next big thing:

DevQA, test automation and the expansion of Player Support VIP and concierge services, as well as continued growth of existing services, both with current and new clients.

At Keywords Studios, we harness our passion for gaming, technology, and media to create a global service platform for video games and beyond. We are trusted and relied upon by many of the world's leading video game companies to work alongside them during concept, development, and live operations by leveraging the breadth and depth of our industry-leading service lines every step of the way.

Klabater S.A.

www.klabater.com, contact@klabater.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

Crossroads Inn – a fantasy tavern tycoon!

The next big thing:

'The Amazing American Circus' – a single-player deck-building game with elements of resource management, 'Moonshine Inc' – an illegal alcohol distillery tycoon.

Operating since: 2007   **Team size:** 30

We are a developer and a publisher. We offer comprehensive services to devs. Our involvement includes anything from financial support, production to PR and console ports. In addition, we internally develop our own brands: 'Crossroads Inn', 'Heliborne', 'The Amazing American Circus', and 'Moonshine Inc'. We develop and publish titles – especially ones with an uncommon story and long-lasting gameplay.

Kobylańska Lewoszewski Mednis Law Firm

www.legalplay.pl, marcin.lewoszewski@klmlaw.pl

Operating since: 2018

We are a team of lawyers dedicated to video game developers and publishers (both AAA and indies, including mobile), as well as investors. We offer expert legal advice and business support regarding game development activities in Poland to ensure success of future projects .

Korba Games

www.korba.games, hello@korba.games

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:
'Under the Counter' – a narrative simulation of a bar on the local market.

Operating since: 2019   **Team size:** 5

We are an indie game development studio ready to deliver some weird stuff.

Kubold

www.kubold.com, kuboldgames@gmail.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR,
External development/Outsourcing/Services, Premium

Best known for:

'Hellish Quart' – 100k copies sold in 4 months just on PC (Early Access).

The next big thing:

'Hellish Quart' – a full game premiere on all platforms in late 2022.

Operating since: 2007   **Team size:** 1

I am an indie game developer and a mocap animator best known for a realistic 3D fencing game called 'Hellish Quart' and a big (over 2000) library of mocap animation sets for game developers, available on Unity Asset Store or Unreal Marketplace.

L.INC

www.linc.games, contact@linc.games

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'LIBERATED' - the first title that uses our PGN framework. General media awe and awards received show its potential in terms of new ways of expression it can bring to players around the world.

The next big thing:

Next projects in which we are implementing the PGN framework which will bring a truly next-gen experience to the players.

Operating since: 2017   **Team size:** 5

We are the producer behind 'LIBERATED' – an action-adventure playable graphic novel, which we co-developed with the Atomic Wolf studio. The game was made with PGN (Playable Graphic Novel) - a comic book framework for video game developers that helps to create video game experiences that play on the pages of a fully interactive 3D comic book.

Last Qubit

contact@lastqubit.com

Platforms and models:

Browser, Mobile, PC, VR/AR, F2P, Premium

Best known for:

'Advent Games Festival' – with its enthusiastic and cheerful community, growing year by year. 'Idle Mine Breakout' - our idle project, currently being enriched with new graphics and easier game flow.

The next big thing:

'Alchemy Pipes' – given its promising retention and CPI values, we are currently improving players' playtime and monetization solutions.

Operating since: 2018 **Team size:** 8

We are a solid and hardworking team, always eager to support the development process of Unity-based projects. As for now, we are focusing on mobile/f2p products, and are currently at the soft launch phase of the 'Alchemy Pipes' game.

LICHTHUND

www.lichthund.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'LICHTSPEER' – an unforgiving fast-paced lightspear-throwing simulator set in an ancient Germanic future. It has been played by more than 115 thousand gamers across all major platforms (PC, consoles, mobile).

The next big thing:

'Rockbeasts' – lead a band of misfits on a roller-coaster ride to stardom in the age of MTV, rock anthems and bad haircuts. Platforms: PC, consoles. Planned release date: Q4 2022.

Operating since: 2015 **Team size:** 14

Founded in 2015 as a two-man effort, Lichthund quickly became an award-winning studio focused on unorthodox game ideas. Today we are a group of industry veterans focusing their creative might on building fresh and exciting experiences for a worldwide audience. Tight design, fresh art direction, and the courage to try new things are the core values of our team.

Limited Responsibility

contact@limitedresponsibilitygames.com

Platforms and models:

PC, External development/Outsourcing/Services, F2P, Premium

The next big thing:

'Get Tanked!' – local/online combat arena with dynamic tanks. Forget about physics laws and challenge your friends in dynamic and rule-free clashes on one of many exciting arenas. Early Access in Q3/Q4 2021.

Operating since: 2021

We are a small, independent company based in Warsaw. Our first game – 'Get Tanked!' is yet to come.

Live Motion Games S.A.

www.livemotiongames.com

Platforms and models:

PC, Premium

Best known for:

'Car Trader Simulator' – 20 000 copies sold, 'Train Station Renovation' – almost 70 000 copier sold.

The next big thing:

'Chernobyl Liquidators'

Operating since: 2017

We are a game development studio. Our company's business model is to create medium-budget projects and then sell them around the world in a digital model, via the Steam platform.

Marcin Makaj

www.themoonwalls.com, martin@themoonwalls.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Bohemian Killing' – one of the most awarded solo-developed games (inc. Pixel Award and Game Connection Development Award) and showcased all around the world.

The next big thing:

Commander 85 – another artistic achievement with many nominations (inc. Indie Prize USA and GCA Indie Development Awards).

Operating since: 2011   **Team size:** 1

I am a lawyer and economist, engaged in creating games in my own one-man studio. I am also an academic lecturer and a doctoral student at the Academy of Art in Szczecin. Furthermore, I have taught game development at a private art school in South Korea.

Mass Creation

www.mass-creation.com, pr@mass-creation.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Shing!' – a classic arcade beat'em up gameplay in a lighthearted, action-packed adventure. Released on every major platform (PS4/PS5, X1/XSX, Switch, PC) with a physical release for PS4/Switch.

The next big thing:

An unannounced project, developed on Unreal Engine.

Operating since: 2010   **Team size:** 16

We are a group of industry professionals, making action-packed games with passion and expertise. We create new versions of arcade genres which we grew up on – games we would like to play as players. We were forged by arcades and arcade saloons, that is why our focus is to bring back somewhat forgotten game genres in a new, more market–fitting version.

Metal Mantis Games

office@metalmantisgames.com, mateusz@metalmantisgames.com

Platforms and models:

PC, External development/Outsourcing/Services, Premium

Best known for:

'Cartonfall' – a well-received puzzle platformer game, created in collaboration with a famous YouTuber.

The next big thing:

„Cryospace" – a game developed in collaboration with Games Operators S.A. We are also working on an experimental title called 'Hypersomnia'.

Operating since: 2021   **Team size:** 3

We are a company established by two cousins, experienced game developers, Mateusz Kukla and Marcin Nowak, who earlier worked together as a company called Kuklam Studios (the team behind 'Cartonfall', 'Cartonfall: Fortress' and 'Shape of America'). Currently we are cooperating with a few talented people to make unique, atmospheric games.

Monster Couch

www.monstercouch.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'Wingspan' – a relaxing, award-winning digital adaptation of a strategy card game about birds for 1 to 5 players.

The next big thing:

'Wingspan: European Expansion'

Operating since: 2015   **Team size:** 14

We are a game development and publishing studio with a proven track record of bringing games to consoles. We make games that you can play together with friends. We help game development studios port their games to consoles.

Moonlit Games

www.moonlit.games, contact@moonlit.games

Platforms and models:

PC, Premium

The next big thing:

'Model Builder' – the first scale model building simulator.

Operating since: 2013   **Team size:** 20

We are an independent game-dev studio with a software house pedigree. Our goal is to create complete and timeless games. We have been developing projects and technologies for major companies in Poland and abroad for over ten years.

Movie Games

www.moviegames.pl

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:

'Drug Dealer Simulator' – No 1 Steam top seller on the launch day, 'Lust for Darkness' – Digital Dragons Award 2018 finalist

The next big thing:

'Alaskan Truck Simulator', 'MythBusters: The Game', 'Fire Commander', 'War Hospital'.

Operating since: 2016   **Team size:** 25

We are a company established by two cousins, experienced game developers, Mateusz Kukla and Marcin Nowak, who earlier worked together as a company called Kuklam Studios (the team behind 'Cartonfall', 'Cartonfall: Fortress' and 'Shape of America'). Currently we are cooperating with a few talented people to make unique, atmospheric games.

MythicOwl

www.mythicowl.com

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, Xbox, F2P, Premium

Best known for:

'Hexologic' – the winner of The Best Polish Mobile Game during Digital Dragons, and many more awards.

The next big thing:

'Harmony's Odyssey' – a 3D adventure puzzle game, which is a unique take on tile-based puzzles that will showcase novel gameplay ideas.

Operating since: 2014   **Team size:** 11

We are an indie puzzle games developer from Warsaw, passionate about creative and valuable entertainment that helps players to relax and enjoy accessible and well-designed riddles. Authors of an award-winning 'Hexologic', as well as 'Trancelation', 'Parenting Hero' and 'One Line Coloring'.

Nakana

www.nakana.io

Platforms and models:

Nintendo Switch, PlayStation, Xbox, Premium

Best known for:

Artistic/Experimental/Meaningful games which won prestigious awards at A MAZE., Tokyo Game Show, IGF, IndieCade and others. 71 Metacritic career score. Over 10 000 euros donated via DLC-donations.

The next big thing:

'A Night at the Races' and another award-winning game not yet announced.

Operating since: 2019

We are a publisher of indie games with a meaningful or experimental twist! We work with passionate creators to port and publish their titles to all major consoles.

NAPTIME.GAMES

www.naptime.games, contact@naptime.games

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/
Services, F2P, Premium, Licensing

Best known for:

'Coloring Book' and 'Puzzle Book' – family-friendly games targeted at parents and
children under 13, with more than 3 million users.

The next big thing:

'Planet Quiz - Learn & Discover' – an educational and challenging environmental quiz,
with over 1000 entries, all beautifully designed and packed in a 3D planet with areas
and precise locations.

Operating since: 2021   **Team size:** 12

We are a premium indie games publisher and developer. We put a lot of attention to the
educational value of our games, primarily to support the natural growth of our youngest
players. Our mission is to create and distribute games for kids and families.

NeatWare
Grzegorz Kiernozek

www.neatware.pl, gkiernozek@neatware.pl

Platforms and models:

Mobile, PC, VR/AR, External development/Outsourcing/Services, F2P

The next big thing:

Next games/KPI prototypes incoming Q3/Q4 2021.

Operating since: 2016   **Team size:** 3

Our company is specialized in professional Unity3D development, desktop/mobile/VR/
AR apps and games, rapid prototyping and much more.

Neurodio

www.neurodio.com

Platforms and models:

Mobile, Nintendo Switch, PC, External development/Outsourcing/Services, Premium

Best known for:

'Numbala' – a math game winning several important awards (Best Game Art at Casual Connect in London 2018 and Editors' Choice at Digital Dragon 2018).

The next big thing:

'Seedy the Seed' – a creative adventure 3D game that will introduce the player to the world of seeds. The demo version is planned for Q3 2022.

Operating since: 2017

We are an independent game studio focusing on meaningful games. We believe that through games we can learn, sensitize and talk about important topics. Our games are designed responsibly. We would like to recommend them to our relatives and players looking for meaningful experience.

NEXT LEVEL Agency

www.nextlevelagency.pl

Platforms and models:

Marketing

Best known for:

We create communication for greatest games in Poland and worldwide on numerous platforms & media.

The next big thing:

We are responsible for global marketing of 3 game titles to be revealed in the upcoming months, and more are coming.

Operating since: 2020   **Team size:** 7

Our services include marketing, social media, events, media planning, buzz management, creative strategies.

Nibble

support@nibble.games

Platforms and models:

Mobile, F2P

Best known for:

'Idle Islands' – idle/tycoon-like game with more than 1 million copies.
'Agenite – Empire of Awakened Civilization' – in Early Access.

The next big thing:

An unrevealed Action RPG game.

Operating since: 2020

We are a small independent game studio of two, dedicated to making life more fun with games.

No Gravity Development S.A.

www.nogravitydevelopment.com, contact@nogravitydevelopment.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services

Best known for:

'REKT Hight Octane Stunts' (port for PC, XBOX, PS4), 'Good Night Knight'

The next big thing:

Two unrevealed projects, a narrative adventure game and an action couch co-op game for PC and Nintendo Switch.

Operating since: 2018   **Team size:** 8

We are a team of specialists who have dedicated their years of experience in programming and Quality Assurance to relieving passionate game developers from the tedious work of porting. We rewrite, we write from scratch, we overwrite (if the project needs fixes or enhancements), we can even co-develop games if that is what you need. Just show us your source code and we will do rest for you.

Noble Fox Games

www.noblefoxgames.com, contact@noblefoxgames.com

Platforms and models:

PC, External development/Outsourcing/Services, Premium

Best known for:

'S-Copter: Trials of Quick Fingers and Logic' – our debut PC project with Unity engine.

The next big thing:

An unrevealed strategy game for PC set during the Cold War – release in late 2022 and unrevealed Hack'n'Slash game with procedural level construction – release in TBA.

Operating since: 2012   **Team size:** 12

We are focused on creating and delivering games that we would personally like to play. We are not bound by any genre or mechanics – we just do whatever we want, trying to find new ways to challenge our development capabilities and engage players in new, unpredictable ways.

One More Level S.A.

www.omlgames.com, info@omlgames.com

Platforms and models:

PC, PlayStation, Xbox, Premium

Best known for:

'Ghostrunner' – a hardcore FPP slasher packed with lightning-fast action, set in a grim, cyberpunk megastructure, released in 2020 and positively rated by 91% of Steam users.

The next big thing:

'Ghostrunner 2' created in cooperation with the 505 Games world-wide publisher.

Operating since: 2014   **Team size:** 30

We are dedicated to creating unique, bold, conceptually independent games ensuring quality and audiovisual setting matching AAA productions. We believe that team, coherent vision, and transparency are the fundamental values of One More Level, on which we build every element of our activity.

Outerspace

www.outerspace.pl, hello@outerspace.pl

Platforms and models:

Browser, Mobile, Nintendo Switch, VR/AR, F2P, Premium
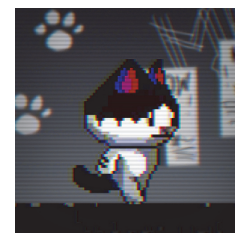
Best known for:

'Hero Kitty' – mobile platformer, 'Miracle 1920' - tower defense strategy, 'FutuAR Space Designer' – augmented reality app.

The next big thing:

'Hero Kitty' – releases for iOS and Nintedo Switch + many improvements.

Operating since: 2016

We are a team of independent thinkers, designers, artists, and technology freaks focused on augmented reality, virtual reality, and game development. We constantly explore new areas and dimensions of digital technology in search of new solutions and ideas. We carry out projects comprehensively, from idea to implementation. We are open to various forms of cooperation, including outsourcing.

Ovid Works S.A.

www.ovidworks.com, contact@ovidworks.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:

'Metamorphosis' – a FPP puzzle platforming adventure inspired by Kafka where you play as a tiny bug. 'Interkosmos' – a whimsical VR game about the sheer terror of falling towards the Earth in a space capsule.

The next big thing:

'Nemesis Distress' – a sci-fi horror multiplayer game set aboard a spaceship where exploration, co-op and treason are key to survival. 'Interkosmos 2000' - low-orbit spaceflight simulator in VR.

Operating since: 2016   **Team size:** 20

We are an independent video game developer based in Warsaw, Poland, making story rich and immersive games for PC, consoles, and VR. Our passion is to tell expressive stories through fun moment-to-moment gameplay.

P1X

www.p1x.in, hello@p1x.in

Platforms and models:
Browser, PC, External development/Outsourcing/Services, F2P

Best known for:
'Tanks of Freedom' – more than 33 000 downloads on itch.io, available on most Linux distributions and F-Droid. 916 GitHub stars and 134 forks!

The next big thing:
'Tanks of Freedom 3D' – a sequel to our strategy game now in a 3D engine – to be released when it is completed. 'VollayBay' – third edition of our simple and addictive fun volleyball game.

Operating since: 2014   **Team size:** 4

We are a truly independent team of passionate programmers and game designers. We started by participating in numerous game jams. We have earned our fame with 'Tanks of Freedom' and our pixel-art style. We are one of the first and best-know studios employing and promoting the Godot Engine.

People Can Fly

www.peoplecanfly.com, office@peoplecanfly.com

Platforms and models:
PC, PS, Xbox, Nintendo Switch, Stadia, Premium

Best known for:
'Painkiller' (2004), 'Bulletstorm' (2011), 'Gears of War: Judgement' (2013), 'Bulletstorm: Full Clip Edition' (2017), 'Bulletstorm: Duke of Switch Edition' (2019), 'Outriders' (2021).

The next big thing:
'Project Gemini' – an unrevealed game published by Square Enix & 'Project Dagger' – an unrevealed game published by Take-Two Interactive.

Operating since: 2002   **Team size:** 350

We are a public company listed on Warsaw Stock Exchange since December 2020. We are one of the leading AAA game development studios in Poland. With several locations in Poland, the UK, the US and Canada, and partnerships with such publishers as Square Enix and Take-Two, our company aims to deliver visually and technically advanced shooter games – and most insane in the genre!

Perimeter Games

www.perimetergames.eu, contact@perimetergames.eu

Platforms and models:

PC, External development/Outsourcing/Services, Premium

The next big thing:

'HeatWave' – a sandbox, non-linear guerrilla group simulator set in Alaska affected by climate change.

Operating since: 2020   **Team size:** 8

As developers with over 15 years of experience, we love to create games and we do it the right way! We focus on creating mid-size, extraordinary titles with complex mechanics and an attractive setting.

Pixel Crow

ir@pixelcrow.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Beat Cop' – over 700 000 copies sold.

The next big thing:

'Fire Commander'

Operating since: 2014   **Team size:** 7

We are an independent game development studio founded by Maciej Miąsik and Adam Kozłowski who met during the production of 'The Witcher' and teamed up to create the critically acclaimed 'Beat Cop'. The standout quality of our company is the fact that every key member is involved in the creative process. This is the secret behind the well-defined vision and wide appeal of our games.

Pixel Perfect Dude

www.pixelperfectdude.com, contact@pixelperfectdude.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, F2P, Premium

Best known for:

'#DRIVE' – over 12 million downloads, the Indie Game of the Year 2019 on Google Play, the Best Polish Mobile Game at Mobile Trends Awards 2019.

The next big thing:

An unrevealed driving game – 2022.

Operating since: 2011

We are a small yet successful game developer, known for titles like '#DRIVE' and 'Ski Jump'. With over 15 million players and multiple 'Game of the year' awards and nominations, we always aim to produce the highest quality entertainment for all gaming platforms.

Pixel Storm

www.pixelstorm.pl, info@pixelstorm.pl

Platforms and models:

Browser, Mobile, F2P

Best known for:

Best team ever.

Operating since: 2020   **Team size:** 35

We are a small team of passionate people located in the beautiful city of Wrocław. If you want to contact us, support us, or share with us your thoughts, we will be thrilled to hear from you. You can either visit our web page or find us on our community discord channel where other people like you help us to make our games.

Platige Image S.A.

www.platige.com

Best known for:

We have been producing cinematic game trailers for 10 years, starting from 'The Witcher 2'. Since then, we have produced over 115 cinematics for various Polish and foreign game developers.

Operating since: 1997   **Team size:** 300

We are a vehicle for creative endeavors specializing in designing CG imagery, 3D animation, and digital special effects. We combine film and advertising work with a strong passion for art, education, and entertainment. Our company attracts and creates revolutionary ideas and innovations. Our studio has been internationally recognized with over 200 awards and honors.

Played With Fire

www.playedwithfire.com, contact@playedwithfire.com

Platforms and models:
VR/AR, Premium

Best known for:
'Stargaze' – VR game experience mixing parascience and fairy tale, inspired by 'The Little Prince'.
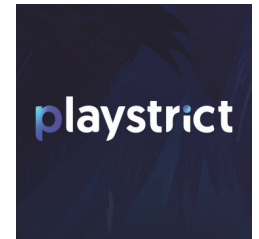
The next big thing:
An unrevealed stylized fantasy action-adventure game – release in 2022.

Operating since: 2019

We focus primarily on VR games. We love fantastic settings of adventure game epicness, and the painterly feel to the world for the player to immerse in.

Playstrict

www.playstrict.com, ziemowit@playstrict.com

Platforms and models:
Mobile, External development/Outsourcing/Services, F2P, Premium

Operating since: 2019   **Team size:** 5

Playstrict is the idea of building a platform for game developers, supporting soft launch of games, and providing them with marketing tools. We believe that we can build a strong community that will reinforce each other's values, giving game developers an opportunity to come up with their valuable ideas.

PlayWay S.A.

www.playway.com, contact@playway.com

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/ Outsourcing/Services, Publishing and Porting.

Best known for:
'Car Mechanic Simulator 2018' – 2 million copies sold on PC and consoles, 'House Flipper' – over 2 million copies sold on PC and consoles, 'Thief Simulator' – over 1 million copies sold on PC and consoles.

The next big thing:
'Builders of Egypt' – a PC city-building economic strategy taking place in the ancient Nile Valley. Immerse yourself in a world full of pyramids, where you will become a part of the ancient world.

Operating since: 2011

The company was created to build games for PC, Xbox, PlayStation, Nintendo Switch, Android, and iOS. Since 2011 we have produced and released dozens of games that are sold or downloaded worldwide. We sell our products via our account on platforms such as: STEAM, Xbox, PlayStation, Nintendo, AppStore, and Google Play.

PM Consulting
Przemysław Marmul

www.48group.pl, pm@consulting.mail.pl

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services, F2P, Premium

Best known for:

We help small and medium-sized developers to find the right investor or publishing partner. Our latest releases include 'Ghostrunner' and 'Medieval Dynasty'.

The next big thing:

We will release about 10 projects with our partners in the next couple of months. We are working on 'Rogue Spirit', 'Odyssey', 'Hell Architect', 'Signum Temporis', 'Ghostrunner 2'.

Operating since: 2019   **Team size:** 7

We specialize in business development by helping small and medium-sized developers to find the right investor or publishing partner. We cooperate with 19 studios from Poland. We are running almost 30 projects. Our partners include Render Cube SA., Noobz from Poland S.A., Black Eye Games, Sonka S.A., Thing Trunk, All in Games S.A., One More Level S.A. Kids With Sticks, ECC Games S.A., Woodland Games S.A., Weird Fish S.A., Virtual Magic Games S.A., Duality S.A., Games Operators S.A., SimFabric S.A., Anshar Studios S.A.

PolyAmorous

office@polyamorousgames.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Paradise Lost' – the first game in our portfolio.

The next big thing:

An unrevealed game focusing on fragility, with beautiful environments – planned release in early 2023.

Operating since: 2017   **Team size:** 12

We aim to create brands and IPs that will leave an everlasting impression in the gaming culture, with each game production exceeding the value of the previous one. We want to excel in creating TPP action-adventure games with roguelike elements and branching narratives.

PrimeBit Games S.A.

www.primebitgames.com, office@primebitgames.com

Platforms and models:

Mobile, Nintendo Switch, PC, Xbox, VR/AR, External development/Outsourcing/Services, F2P, Premium, Freemium

Best known for:

'Caveman Chuck' – over 500 000 downloads in total, 'Magic Nations' – over 100 000 downloads in total.

The next big thing:

'Clash II' – a turn-based, dark fantasy strategy game – (Xbox & PC) – release in early 2022.

Operating since: 2016

Our team is made up of qualified programmers and graphic designers, working with technologies like Unity 3D, Flutter, Xamarin, React, Vue, PHP, Blender, Pixologic Zbrush, Substance Designer, Substance Painter, Adobe Photoshop. If you want to learn more about our games, please visit our newest, proprietary sales platform at www.primebitstore.com, where you can find all our productions.

Punk Notion

www.punknotion.com, contact@punknotion.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'The Last Show of Mr. Chardish' – a high-rated (around 80/100 Metacritic) storytelling adventure in the abandoned theatre with a collection of extraordinary performances. Mostly 3D hand-painted, with the use ofVR.

The next big thing:

An unannounced project.

Operating since: 2018

Positive impact is our credo! We started from a passion for games, animation, engaging storytelling and focus on creating narrative-driven projects and support others with animations. We want to spread a positive vibe everywhere!

Pyramid Games S.A.

www.pyramid.games

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, Xbox, External development/Outsourcing/ Services, F2P, Premium

The next big thing:

'Occupy Mars: The Game' Highly technical, open-world sandbox game about Mars colonization. Top 50 most wishlisted game on Steam globally (over 180k wishlists). Early Access coming soon to PC.

Operating since: 2012

We are a game development studio located in Lublin. We are gamers and we love making games. Our goal is to deliver the best possible quality in our games. We are also very passionate about science and science-fiction.

QED Software

www.qed.pl, contact@qed.pl

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, AI and game analytics tools implementation

Best known for:

'Grail' – a paradigm shifting tool for advanced AI in games: both for creating engaging in-game experience and for automated exploratory testing, 'Sensei' – a game and player data analytics platform.

The next big thing:

Implementation of AI toolset in games with hidden and uncertain information – for creating realistic human-like behavior. Automatization of game QA and exploratory testing based on human-like bots.

Operating since: 1999   **Team size:** 49

We create tools for creating engaging bots, streamlining of AI implementation in games, implementation of data analytics and game monitoring services, as well as automatization of exploratory tests for games. If you want your games to shine thanks to better AI – contact us!

QLOC S.A.

www.q-loc.com, bizdev@q-loc.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, OtherArcade Systems, External development/Outsourcing/Services

Best known for:

'Cyberpunk 2077' – Stadia port of the game and co-development/QA, 'Dark Souls Remastered' – a remastered version of the cult classic for PC/PS4/XBO, 'Plants vs Zombies: BfN' – the first Frostbite game for Switch.

The next big thing:

'Gotham Knights' – PC, PS4 and XBO versions of the game + co-development, Frostbite Engine upgrade and co-development for EA, Multiple other games in the pipeline – remastering and porting.

Operating since: 2009   **Team size:** 500

Although we are recognized worldwide as one of the best porting, co-development, and remastering vendors, we are more than just a bunch of cross-platform devs. Our team includes over 500 specialists who are also experienced in quality assurance, localization, and art design. We provide functional, compliance, localization, and compatibility testing, translate and localize games into 35 languages.

QubicGames S.A.

www.qubicgames.com, info@qubicgames.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox,
External development/Outsourcing/Services, F2P, Premium, Licensing

Best known for:

'Robonauts', 'Pocket Mini Golf', 'Air Race' series, and Nintendo Switch publisher of 'Blazing Beaks', 'Mana Spark', 'Dex' or 'BIT.TRIP'.

The next big thing:

'BADLAND' and 'Real Boxing 2' on Nintendo Switch, 'Pocket Mini Golf 2' for Nintendo Switch and Mobile, other unrevealed projects by QubicGames, Untold Tales, and naptime.games (QubicGames Group).

Operating since: 2004

We are a premium indie games publisher and developer. 55+ games and over 10 milion units sold. We can bring your game to Switch (we have been working with Nintendo since 2006) and mobile. The QubicGames Group consist of QubicGames S.A., Untold Tales and naptime.games.

Rage Quit Games

www.ragequitgames.com

Platforms and models:

Mobile, F2P

Best known for:

'The Wolf' – an online multiplayer RPG with advanced 3D graphics. Downloaded over 60 million times.

The next big thing:

'Tomorrow' – a post-apocalyptic online RPG for mobile that will deliver a cutting-edge, never-before-seen gameplay experience. Currently soft-launched with full release expected in late 2022.
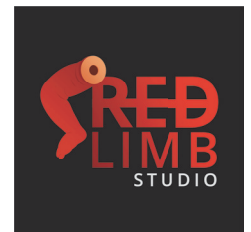
Operating since: 2013   **Team size:** 100

We are a game development studio based in Kraków. We specialize in high-end mobile multiplayer 3D games. All our releases have been downloaded over 145 million times, with 'The Wolf' in the lead.

Red Limb Studio

www.redlimbstudio.com, redlimbstudio@gmail.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, Premium

Best known for:

'Rise of Insanity' – an immersive psychological horror released on PCs, consoles and VR.

The next big thing:

'Suicide Vegetables' – a stealth adventure game for PC and consoles with absurd humor and a beautiful universe.

Operating since: 2016

We are a small team from the south of Poland. 'Friends from the childhood'. We love gaming, rock music, and Quentin Tarantino's films.

Red Zero Games

www.redzerogames.com, contact@redzerogames.com

Platforms and models:

Mobile, Nintendo Switch, PC, Premium

Best known for:

'Here Be Dragons'

The next big thing:

An unrevealed strategy for the premium market – 2022.

Operating since: 2014   **Team size:** 4

Our team consists of life-long fans of board games, retro games, and the 80s/90s pop culture, all of which play a significant role in our company's approach to the design and creative process. The company was created by Marek Panczyk, former co-founder of Big Daddy's Creations, a company responsible for digital adaptation of such board games as 'Neuroshima Hex', 'Eclipse' or 'Caylus'.

REDI

www.redigames.com, office@redigames.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

Unique gameplay and art style in our board games (like 'Penny Dreadfun Second Edition') as well as in mobile and PC games (like 'Nor'Easter', 'The Great Mind of Tesla', 'Lovecraft Escape', 'SpaceShift').

The next big thing:

We are currently working on an unrevealed unique party game. All we can say now is that it will be set in our own fantasy universe with a strong retro vibe both in terms of visuals and the gameplay.

Operating since: 2016   **Team size:** 9

We are a game studio founded by people with a passion for games and graphics design. We work on our own games and operate comprehensively on the market of services and technologies of mobile, computer and board games. We approach each project individually, to best reflect the nature of the game and enhance the experience associated with its reception.

Road Studio

www.roadstudio.pl, kontakt@roadstudio.pl

Platforms and models:
PC, PlayStation, Xbox, VR/AR, Premium

Best known for:
'Alaskan Truck Simulator' – thanks to the cooperation of our Partner – Movie Games with Discovery Adventures, our game faithfully reflects the wild areas of North America.

The next big thing:
'American Motorcycle Simulator', 'Car Wash Simulator'

Operating since: 2020

We are a developer of automotive and survival-themed simulation video games. Thanks to modern development tools with the Unreal Engine at the forefront, digital distribution, experienced members, and unique business relationships, our studio will allow the players from around the world to become drivers of various vehicles and visit many faithfully reflected, exotic corners of this world.

Robot Gentleman

www.robotgentleman.com, hello@robotgentleman.com

Platforms and models:
Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:
'60 Seconds! Reatomized' – a remastered version of the original '60 Seconds!' and its spiritual successor called '60 Parsecs!' – games that offer a unique survival experience, with over 3 million copies sold.

Operating since: 2012   **Team size:** 15

We are an independent game developer, easily recognizable by our signature headgear. If you have ever seen a robot in a top hat, that is probably one of us! We are a joyful ensemble of developers who are keen on storytelling experimentation. Creating captivating narratives, bending design ideas, and crossing boundaries is what we aim for in our titles.

Rock Square Thunder

janusz@rocksquarethunder.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'The Lightbringer' – our debut game, an action-adventure platformer, mixing combat with boomerang, platforming and puzzles with a poetic story written in verse.

Operating since: 2020   **Team size:** 10

The origin of RST goes back to 2014, when the founders met at the Bloober Team – hanging out together, playing video games, partying, and coming up with game ideas, after hours. In 2019, the trio decided to form a team and pitch their game to publishers, which resulted in finding a match in Zordix Publishing. The Lightbringer is coming out soon, and the team has already grown to 10 people.

Serious Sim

www.serioussim.net, pr@serioussim.net

Platforms and models:

Mobile, PC, VR/AR, Premium

Best known for:

'Radio Commander' – an innovative strategy game with more than 80% positive reviews on Steam and 100k copies sold, followed by successful DLC, mobile, and console ports.

The next big thing:

'Heading Out' – a Narrative Road Movie Racing Game – Hop into a muscle car and drive through the American West in a game inspired by 1970s road movies – release in late 2022.

Operating since: 2018   **Team size:** 4

We are a small team of 4 people – games and culture enthusiasts, focused on providing interesting perspectives and stories. We want to tell stories and redefine genres. We think that games can do better. We believe in collectivism, co-ownership, transparency. Accessibility is important. We will make only 11 games, to be like Quentin Tarantino, but better!

Silesia Games

rafal.blahut@silesiagames.com

Platforms and models:

Nintendo Switch, PlayStation, Xbox,
External development/Outsourcing/Services, Premium

Best known for:

Porting and publishing to the Nintendo Switch: 'Ultra Foodmess', 'Hero-U: Rogue to Redemption', 'Summer Paws', 'Galaxy Champions TV', and over 20 more.

The next big thing:

'Zombo Buster Advance' for Nintendo Switch and 'Ultra Foodmess' for PlayStation 4/5

Operating since: 2013   **Team size:** 10

We are a game development and distributing company. We work with the best indie game developers from around the world and bring their games to Nintendo Switch, PlayStation 4, PlayStation 5 and Microsoft Xbox.

Silver Lemur Games

www.SilverLemurGames.com, silverlemurgames@gmail.com

Platforms and models:

Nintendo Switch, PC, Premium

Best known for:

'Stellar Monarch' – a complex 4X in space, 'Legends of Amberland' – over 90% positive ratings on Steam.

The next big thing:

'Stellar Monarch 2', sequels to 'Legends of Amberland' series.

Operating since: 2005   **Team size:** 1

Making turn-based strategies and RPGs for PC and consoles since 2005.

Simteract S.A.

www.simteract.com, contact@simteract.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:
Vast experience in the professional simulation industry.

The next big thing:
'Train Life: A Railway Simulator' – manage your railway company and drive across Europe, 'Carpool Simulator' – become a ride-hailing driver completing tasks in the streets of real European cities.

Operating since: 2014   **Team size:** 50

We are independent game developer creating vehicle simulation games in the premium category. We are the creator and owner of Traffic AI - intelligent traffic system and automatic 3D City Generator. In the past we were involved in creating professional simulators, like train driver simulator for US trainees. Since 2021 we have been listed on the Polish NewConnect stock market.

Slavic Monsters

www.slavicmonsters.pl, kontakt@slavicmonsters.pl

Platforms and models:
PC, VR/AR, F2P

Best known for:
'Slavic Monsters' (Beta) – a mobile geolocation game with AR, containing a universe of over 100 monsters based mainly on the Slavic Mythology.

The next big thing:
Two projects in the same Slavic Universum. One with the use of 5G and the second bringing Slavic monsters to PC.

Operating since: 2016   **Team size:** 4

We are an indie game studio focused on geolocation, AR, and Slavic mythology.

Space Fox Games

www.spacefox.games, contact@spacefox.games

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox,
External development/Outsourcing/Services, Premium

Best known for:

12 games released, the most recent of which include : 'Ocean Merge', 'Maggie's Movies
– Second Shot', 'Scarlett Mysteries – Cursed Child', and 'Lost Grimoires 3'.

The next big thing:

'Metroidvania' – a branching story with a unique spellcrafting system. PC and consoles
– Q3 2022

Operating since: 2014   **Team size:** 14

We originate from a studio created in 2014 and called World-Loom Games, carrying
it into the future with its well-knit team and experience gathered over the years. We
value teamwork, creativity, and courage to create something new within the genres
we explore in our works, while still having in mind that we are here to serve the players
with the best game possible.

Star Drifters

www.stardrifters.com, business@stardrifters.com

Platforms and models:

Nintendo Switch, PC, VR/AR, AtariVCS, GeForce NOW, Tilt5, Linux, macOS, Premium

Best known for:

'The Magic Revival' – our first critically acclaimed best-selling RTS title on PC. Take on the
role of a powerful mage capable of moving floating lands and develop a mighty empire.

The next big thing:

We work on 3 new games: a game in Driftland world, a craft beer sim/tycoon, an action
game with unique light/terrain mechanics.

Operating since: 2014

We are fueled by the creative energy of experienced and passionate developers. We
turn our dreams into original games that are meaningful, engaging, and unforgettable
experiences for the players. Starting from 2020, we have also been helping out
selected independent creators with production, design, market positioning, financing
and more.

Starward Industries

www.starwardindustries.com, info@starward.co

Platforms and models:

PC, PlayStation, Xbox / Premium

The next big thing:

The company is developing an RPG game based on 'The Invincible novel by Stanisław Lem. The FPP game is a narrative adventure and Sci-Fi thriller, set in the retro-futuristic atompunk art style.

Operating since: 2018   **Team size:** 28

An independent developer of AA+ games, created by a team with many years of experience working for companies such as CD Projekt Red, Reality Pump, Techland. The company is now developing a role-playing game based on 'The Invincible' novel by Stanisław Lem – a famous Polish writer, whose books have sold in tens of millions copies around the world. The company is listed on NewConnect.

Storm Trident S.A.

www.storm-trident.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Ultimate Fishing Simulator', 'Assault On Metaltron', 'Tiny Hands Adventure', 'Sparkle 4 Tales'

The next big thing:

'Kursk' for Xbox, PlayStation and Nintendo Switch, 'Sparkle 2' Evo for PlayStation and Xbox, 'Professional Fishing' for Nintendo Switch.

Operating since: 2020

We focus mainly on developing games for PlayStation, Nintendo Switch, Xbox, PC and porting games to consoles, such as PlayStation, Nintendo Switch or Xbox.

Strategy Forge

www.strategyforge.pl, contact@strategyforge.pl

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'Punk Wars' – a 4x turn-based game set in a post-apocalyptic world is the first to combine four different styles of speculative fantasy: Steampunk, Steelpunk, Atompunk and Dieselpunk.

Operating since: 2020

Our studio is part of the Jujubee S.A. capital group. We primarily focus on the production of strategic games (grand strategy, RTS, TTS, city builders, 4x) for all major platforms. We create our own medium-sized games, using the Jujubee group original tool.

Tate Multimedia S.A.

www.tatemultimedia.com, contact@tatemultimedia.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Kao the Kangaroo' – a 3D platformer, the 'Urban Trial' series, and the award-winning 'Steel Rats' game.

The next big thing:

'Kao the Kangaroo' – the legendary character is back in the most adventurous 3D platformer ever!

Operating since: 2000   **Team size:** 40

We are an independent developer and game publisher. Our studio develops exclusive titles based on their own IPs and publishes them on all major consoles and PC.

T-Bull S.A.

contact@t-bull.com

Platforms and models:

Mobile, Nintendo Switch, PC, F2P, Premium

Best known for:

'Top Speed' and 'Moto Rider GO' – two hundred million total downloads.

The next big thing:

'INTERASTRA', 'Birding Simulator', 'Empires & Kingdoms', 'Bike Clash', 'Outlaw Driver Simulator' – release in 2021/2022.

Operating since: 2010   **Team size:** 50

We are one of the largest game development studios in Poland. We have been building and expanding our portfolio with new titles for 11 years. Our mobile productions have accumulated over 550 million downloads worldwide. We are currently diversifying our activities and entering new markets with our games, namely PC, Nintendo Switch, etc.
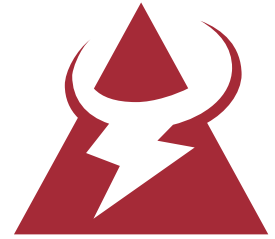
Techland S.A.

www.techland.net, gdpr@techland.pl

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Dying Light', 'Dead Island', 'Call of Juarez'

The next big thing:

'Dying Light 2' – a continuation of the FPP action game very well received by the media and players. Release planned for December 7, 2021.

Operating since: 1991

We are an independent developer, distributor, and global publisher of AAA games available on PC, PlayStation and Xbox. We have been operating since 1991 and so far have opened three branches – in Warsaw, Wrocław, and in Ostrów Wielkopolski – employing about 400 people in total.

Ten Square Games S.A.

www.tensquaregames.com,
bartlomiej.piekarski@tensquaregames.com

Platforms and models:
Browser, Mobile, F2P

Best known for:
'Fishing Clash' – a free simulation game for fishing enthusiasts, a top 50 grossing title on Google Play. FC has been recently approved to enter the Chinese market; the game will be launched in 2021.

The next big thing:
'Hunting Clash' – a leading mobile hunting game. The game is distinguished by superior quality 3D graphics and realistically animated animals, which make it unique on the mobile market.

Operating since: 2011   **Team size:** 400

We specialize in free-to-play hobby games. Our flagship title is 'Fishing Clash' - one of the world's most popular 3D simulators. Other products let you enjoy, for example, a realistic animal chase and flying high in the sky. We strive to give gamers the most excellent outdoor experience on their mobiles, so we continuously improve our products and expand our portfolio.

Tendokore

www.tendokore.com

Platforms and models:
Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:
'Castle of No Escape 2', 'Get Me Outta Here', 'Odium to the Core'.

The next big thing:
Working on a retro arcade endless driving game, a shooter, an action-adventure game, a PRG, and a few other titles soon to be announced.

Operating since: 2019

We are a boutique retro games publisher focused on good old single-player experiences influenced by early PC/PS1 and 8&16-bit classics.

Teyon S.A.

TEYON

www.teyon.com, katarzyna@teyon.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/ Services, Premium

Best known for:

'Terminator: Resistance' – a single-player shooter with RPG elements based on the official license for the legendary 'The Terminator' & 'Terminator 2: Judgement Day' movies (over 6350 positive reviews on Steam).

The next big thing:

'RoboCop: Rogue City' – a video game based on the first three films in the original 'RoboCop' universe featuring a new story – coming to PC and consoles in 2023.

Operating since: 2006   **Team size:** 70

We are best known for developing 'Terminator: Resistance', but we have a a long history and an extensive portfolio. Our company has two development studios focusing on high-quality action & racing games. Since 2011 we have been operating a publishing branch in Japan, which launched 'Human Fall Flat' in digital & physical distribution, making it one of the best-selling games in Japan.

The Epic Lore

THE EPIC LORE

www.theepiclore.com

Platforms and models:

PC, PlayStation, Xbox, Premium

The next big thing:

'Forsaken Martian' – AA+ survival game with a TPP experience based on not-so-distant and inspired by many science-fiction genres.

Operating since: 2021   **Team size:** 12

We are a fresh & creative studio that consists of people who have worked on the largest AAA productions, who have come together to create truly exciting and ambitious independent games, strongly focusing on immersion and lore, the epic lore.

The Knights of Unity

www.theknightsofunity.com, contact@theknightsofunity.com

THE KNIGHTS OF UNITY

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services

Best known for:

'Disco Elysium' – development support for a massive, multi-award-winning RPG game called 'Scythe: Digital Edition' – a video game adaptation of a popular board game set in the dieselpunk universe.

The next big thing:

An unrevealed mobile sports game – in development for over 2 years, expected release in late 2021, 'Death Roads - Mad Max' – inspired deck-building roguelike, to be released as both a board game and a PC game.

Operating since: 2015   **Team size:** 120

We are a work-for-hire studio. Since the very beginning, we have been developing Unity projects for companies around the globe, such as CD PROJEKT RED, Ubisoft, or InnoGames. After 6 years, over 100 completed projects and 45 Unity developers on board, we have become one of the top Unity development companies in the world.

THE PARASIGHT S.A.

www.theparasight.com, info@theparasight.com

Platforms and models:

PC, PlayStation, Xbox, Premium

Best known for:

We area team of experienced developers who have worked on some games you may have heard of: the 'Layers of Fear' franchise, 'Observer', 'Blair Witch'.

The next big thing:

'BLACKTAIL' is a surreal, first-person, open world, action-adventure game. Create the myth of Baba Yaga by living out the origins of this classic Slavic folk story.

Operating since: 2019   **Team size:** 25

Myths, legends, and fairy tales – we have a thing for surreal and haunting experiences with engaging narratives.

Thing Trunk

info@thingtrunk.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

The first installment of our 'Return 2 Games' series called the 'Book of Demons', sold over 500000 copies on Steam.

Operating since: 2014

We are a small game development studio and a creative team behind 'Return 2 Games' - a series of original mid-core games inspired by the golden days of PC gaming. The first installment, the 'Book of Demons', was a smash hit on Steam selling over half a million copies.

True Games

www.truegames.pl, kontakt@truegames.pl

Platforms and models:

PC, External development/Outsourcing/Services

Best known for:

'Night Club Manager' – a daring and realistic game.

The next big thing:

'Night Club Manager: Violet Vibe', 'Gangster Simulator'

Operating since: 2020

We are indie game developers focused on realistic, immersive games. Our studio is not afraid to take on projects featuring the topic of street gangs, drugs, prison, etc. To expand our horizons, we also experiment with simulator games with multiple themes.

Try Evidence

www.tryevidence.com, michal@tryevidence.com

Platforms and models:

Browser, Mobile, PC, PlayStation, Xbox, External development/Outsourcing/Services

Best known for:

We did UX studies, confidential expert game pre-launch reviews, quantitative research, and open-source intelligence for clients such as CD PROJEKT, KOCH Media, Bloober Team, and many more.

Operating since: 2019

We are group of passionate gamers, data scientists and psychologists all in one. We are here to introduce you to data driven game design / production, as well as to show you what gamers think about your game and why, and what should or could be improved to increase the warmth of their reception. We are happy to analyze all projects, as we believe that everyone has the right to strive for excellence.

Ububoo games

www.ububoogames.com, office@ububoogames.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, F2P, Premium

Best known for:

'Kobo Forest Sweets' – F2P Mobile

The next big thing:

'Heroes of Dimgard' – a multi-style game with multi- and singleplayer (battle royal, roguelike, and RPG) modes, with a story embedded in the world of Midgard.

Operating since: 2021

The founders of Ububoo games are an extraordinary duo – a programmer and a lawyer. Hardly anyone thought that these two would give up everything to start creating games. What distinguishes us from other companies is the desire to combine unconventional education and entertainment, both in "what" and "how" we create.

Unnamable Arts

www.unnamable-arts.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'Selenwald' – an action roguelike RPG in which Lovecraftian dark fantasy meets alternative history of the 18th century Europe.

Operating since: 2020   **Team size:** 5

We are a game development studio with a lot of creative energy and ambition to become one of the world's leading developers of games from the broad RPG spectrum. Core team members have worked on several critically acclaimed games including 'Metro: Exodus', 'Arktika. 1', '60 Seconds! Reatomized' and '60 Parsecs!'.

Untold Tales S.A.

www.untoldtales.games, contact@untoldtales.games

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, Premium

The next big thing:

'Golf Club: Wasteland' – Human life is wiped out. Earth is now a golf course for the ultra-rich - new title coming to PC and consoles in August 2021.

Operating since: 2020   **Team size:** 16

We are an indie publishing label focused on single-player games delivering meaningful narratives to the players. We offer development funding, a simple, transparent deal and full range of publishing services. We abide by a strong developer-first mentality. In our story, developers are the main heroes of the adventure. We are just the trusted sidekick that helps guide the way and carry the burden.

Vavel Games AB

www.vavelgames.com

Platforms and models:

Browser, Mobile, PC, F2P

Best known for:

Developers and publishers of 'Imperium: Galactic War' – an MMORPG/MMORTS originally created by Kabam. The game was played by over 750 000 players worldwide.

The next big thing:

We are working on the HD version of our game and getting it ported to more platforms.

Operating since: 2013

We are a global Digital Entertainment and Technology company providing Games as a Service. We are mostly known as the developer and publisher behind the MMO game 'Imperium: Galactic War'. We own and build upon our proprietary online persistent world technology called the ATX Engine. We do not just make games, we make the tech to build them.

Vile Monarch

www.vilemonarch.com, scribe@vilemonarch.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'Oh...Sir!' series, 'Weedcraft Inc.' – a tycoon simulator, 'Growing Up' – a coming of age life simulator.

The next big thing:

Two unannounced games in the sim/management/strategy genre that are in full development and will be coming out in 2022 on PC & consoles.

Operating since: 2015   **Team size:** 70

We are a hard rock game studio from Warsaw specializing in unique games that tell engaging stories through game mechanics, primarily in the strategy and management genres. While our main focus is the development of our own games, we also assist other developers and publishers with co-development, outsourcing of assets or porting of projects to new platforms.

Vixa Games S.A.

www.vixagames.com, contact@vixagames.com

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Jumping Joe!' franchise – over 150 000 copies sold on Nintendo Switch.

The next big thing:

'The Crackpet Show' – a post-apocalyptic cartoon-styled action roguelike 'Unrevealed Survival Horror game'- release in Q4 2021/Q1 2022 'Unrevealed Action Trading game' – release in Q1-Q2 2022

Operating since: 2016　　**Team size:** 10

Our main focus is to create innovative entertainment suited for all platforms. Our studio develops premium indie games mostly in casual genres but also undertakes more mature narrative-driven titles. Vixa is proud of its internal family-like atmosphere, thus the cooperative mode is present in its games. The team strives for a unique and eye-catching art style as well as an uncommon mix of genres.

Vulpesoft

www.vulpesoft.pl

Platforms and models:

Nintendo Switch, PC, Premium

Best known for:

Beneficiaries of the Digital Dragons Incubator who turned a hobby project into a commercial production, working fully remotely.

The next big thing:

An unannounced puzzle adventure title for PC and consoles.

Operating since: 2020

Creator and publisher of independent games with a rich narrative layer. Our company made its debut in the first-person puzzle game about a lost African traveler – 'Dr Livingstone, I Presume?'. Based on strong values that 'nothing great comes easy', we work hard to ensure you get the best video game experience.

Walkabout Games

www.walkabout.games, hello@walkabout.games

Platforms and models:

Mobile, Nintendo Switch, PC, PlayStation, Xbox, Premium

Best known for:

'Werewolf: The Apocalypse – Heart of the Forest' – our latest and at the same time best-selling title so far, with great reviews from both media and players (around 88% positive reviews on Steam).

The next big thing:

Working on 3, titles not announced yet, to be published in 2022-2023 on PC, Switch and nextgen.

Operating since: 2018   **Team size:** 8

We are an indie games publisher. We always welcome new projects designed for players and to build communities. We seek just a few, carefully selected games per year – games we adore with all our might.

Wastelands Interactive

www.wastelands-interactive.com, contact@wastelands-interactive.com

Platforms and models:

Browser, Mobile, Nintendo Switch, PC, PlayStation, Xbox, VR/AR, External development/Outsourcing/Services

Best known for:

Making art for our clients' games.

Operating since: 2009

We are a team of 2D and 3D artists building an empire.

Wayward Preacher

www.waywardpreacher.com, waywardpreachergames@gmail.com

Platforms and models:

Nintendo Switch, PC, PlayStation, Xbox, External development/Outsourcing/Services, Premium

Best known for:

'God's Trigger' – with One More Level development team, 'ROKI' – with Polygon Treehouse, 'Dread X Collection' – a global indie horror project series counting 4 chapters so far.

The next big thing:

'Dread Delusion' – a narrative driven, indie-RPG project. Undisclosed music-based narrative game: release in early 2022.

Operating since: 2015

I am a one-man army with a bunch of talented people around to help. I am focused on solving other people's problems, aiding them mostly in the programming and optimization area, no matter the engine or platform. Aside from the work-for-hire model, I am developing my own project as well.

Wooden Alien

www.woodenalien.com, info@woodenalien.com

Platforms and models:

Nintendo Switch, PC, Premium

The next big thing:

An unannounced project – system-driven twist on a survival genre in a distinctive sci-fi setting, conveyed through grim themes, stylized comic-book graphics and black humor – release in 2022.

Operating since: 2019　　**Team size:** 12

We are a team of professionals with many years of experience in making indie and AAA games. We are united by burning ambition and shared belief in production processes based on regular gamer feedback and iteration. With a mix of strong themes, engaging mechanics, and stylized graphics, we aspire to create games that are the first you notice and last ones you forget.

Yaza Games

www.yazagames.com, kontakt@yazagames.com

Platforms and models:

Nintendo Switch, PC, Xbox, Premium

The next big thing:

'Inkulinati' – an ink-based strategy straight from medieval manuscripts, which will hit the stores early next year. We are planning to add a lot of content after the release, so that is what consumes all our attention at the moment.

Operating since: 2019

Met by pure chance, we want to surprise you with our hand-crafted worlds that may contain a bit of absurd humor. One of us wants to do over-complicated strategies, while the rest never read tutorials. We are currently working on our first game called 'Inkulinati' – an ink-based strategy game straight from medieval manuscripts.
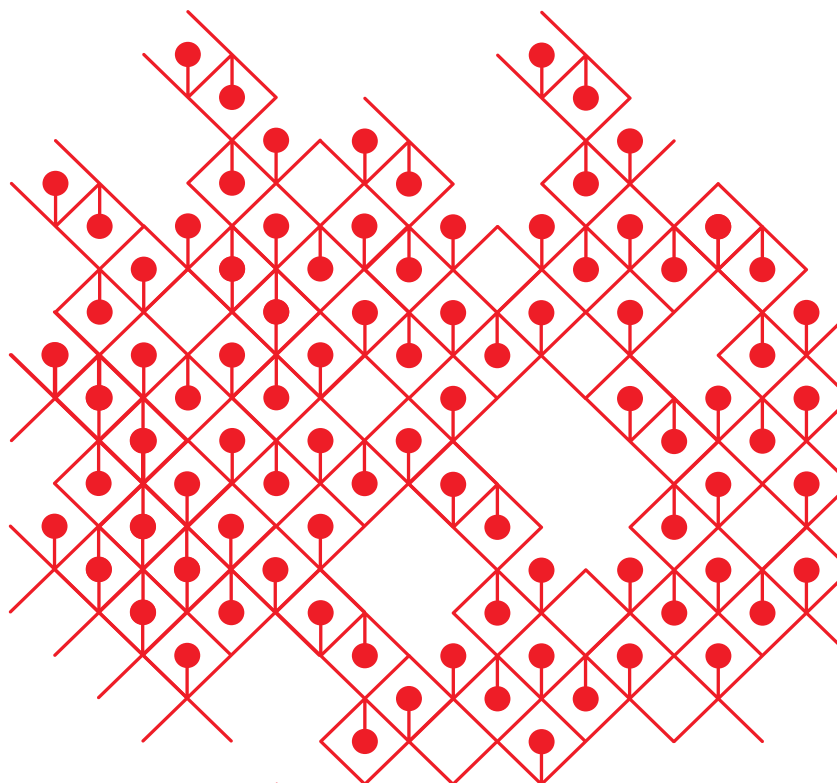
Infographic The Polish game industry

Source: Game Industry Conference, Gaming Analytics.info

//Data from the infographic are presented in the table.//

470	game producers & publishers
EUR 969M	industry revenue in 2020
600+	new releases annually, platform-wise

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Infographic Employment in the Polish game industry

Source: Game Industry Conference, European Game Developer Federation

//Data from the infographic are presented in the table.//

12110	people working in the game production sector
25%	are female
over 24%	growth YOY
over 1000	foreigners (more than 8% of total employment)

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Chart Revenues of game developers in Poland

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

year	Revenue	YOY growth – total with CD Projekt SA	YOY growth – others with CD Projekt SA
2016	EUR 304M		
2017	EUR 324M	+7%	+27%
2018	EUR 364M	+12%	+28%
2019	EUR 479M	+32%	+28%
2020	EUR 969M	+110%	+45%

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Infographic Company size in the industry

//Data from the infographic are presented in the table.//

33%	of studios hire 5 or fewer people
38%	of companies employ 6 to 16 people
50+	of studios have a team of 40 or more people
19	companies hire more than 100 people

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Chart Years of studios' market presence (estimation, N=203)

//Data from the infographic are presented in the table.//

1991	**0.49%**
1992	**0.00%**
1993	**0.00%**
1994	**0.49%**
1995	**0.00%**
1996	**0.00%**
1997	**0.00%**
1998	**0.49%**
1999	**0.00%**
2000	**0.49%**
2001	**0.49%**
2002	**0.97%**
2003	**0.00%**
2004	**0.97%**
2005	**1.46%**
2006	**0.97%**
2007	**1.46%**
2008	**1.94%**
2009	**3.40%**
2010	**4.37%**
2011	**3.40%**
2012	**3.88%**
2013	**4.37%**
2014	**8.25%**
2015	**9.22%**
2016	**10.68%**
2017	**7.77%**
2018	**9.71%**
2019	**9.71%**
2020	**10.68%**
2021	**4.37%**

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Chart Global game publishers originating from Poland
Source: Game Industry Conference, Gaming Analytics.info

//Data from the infographic are presented in the table.//

Year	Number	YOY Growth
2016	**13**	
2017	**17**	**+31%**
2018	**25**	**+47%**
2019	**37**	**+48%**
2020	**44**	**+19%**

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Chart Business models facilitated by Polish developers and platforms they develop for, based on their declarations

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

Browser	14%
F2P	22%
VR/AR	26%
External Development	27%
Mobile	47%
Playstation	55%
Nintendo Switch	58%
Xbox	59%
Premium	72%
PC	85%

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Chart Declared primary business model among Polish developers
Source: Game Industry Conference

//Data from the infographic are presented in the table.//

Premium	73.4%
External development	14.9%
F2P	11.7%

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Chart Primary platforms declared by Polish developers
Source: Game Industry Conference

//Data from the infographic are presented in the table.//

#1

PC	53.6%
PC & Consoles	17.3%
Consoles	1.8%
VR/AR	4.5%
VR/AR & Mobile	0.9%
Mobile	10.0%
Nintendo Switch & Mobile	0.9%
Nintendo Switch	10.0%
PC & Nintendo Switch	0.9%

#2

PC	71.8%
Consoles	19.1%
VR/AR	5.4%
Mobile	11.8%
Nintendo Switch	11.8%
Xbox	59%
Premium	72%

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Chart Origin countries of games in Top200 Steam wishlists
Source: GamingAnalytics.info

//Data from the infographic are presented in the table.//

Poland	**38**
United States	**35**
Canada	**16**
Great Britain	**15**
France	**12**
Sweden	**10**
Russian Federation	**8**
China	**8**
Japan	**6**
Australia	**6**
Other	**23%**

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Infographic Universities in Poland

Source: Indie Games Poland, PolskiGamedev.pl

//Data from the infographic are presented in the table.//

71	degree courses are offered countywide
course profiles:	
30	programming
24	arts
9	design
4	Game studies (Ludology)

56	number of universities
of which:	
32	are state universities
24	are private universities

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Infographic Game market

Source: Euromonitor International, a market research provider

//Data from the infographic are presented in the table.//

USD 924.2M	consumer market value in 2020
USD 11.5M	eSports market value in 2020
TOP 19	market globally
+17% YOY	market growth
over 83%	digital distribution

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Infographic Gamers in Poland

Source: Newzoo, Polish Gamers Research

//Data from the infographic are presented in the table.//

over **20M**	gamers
over **80%**	gamers are adults
49%	are female

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Infographic Poland position in gaming

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

Polish PC gaming is in	Polish language is in
TOP 10	
in the market and community comparison (usually ranked 3rd-9th)	in terms of localization and community popularity (usually ranked 5th-10th)

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Chart Localization stats for Steam games with the Metacritic score
Source: GamingAnalytics.info

//Data from the infographic are presented in the table.//

German	68.37%
French	67.22%
Spanish	62.76%
Italian	52.29%
Russian	47.68%
Chinese	33.98%
Portuguese	32.26%
Japanese	32.01%
Polish	**30.28%**
Korean	22.84%

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Chart Polish localization share among Steam games with the Metacritic score
Source: GamingAnalytics.info

//Data from the infographic are presented in the table.//

2007-2008	**10%**
2009-2010	**19%**
2011-2012	**31%**
2013-2014	**30%**
2015-2016	**32%**
2017-2018	**35%**
2019-2020	**37%**

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