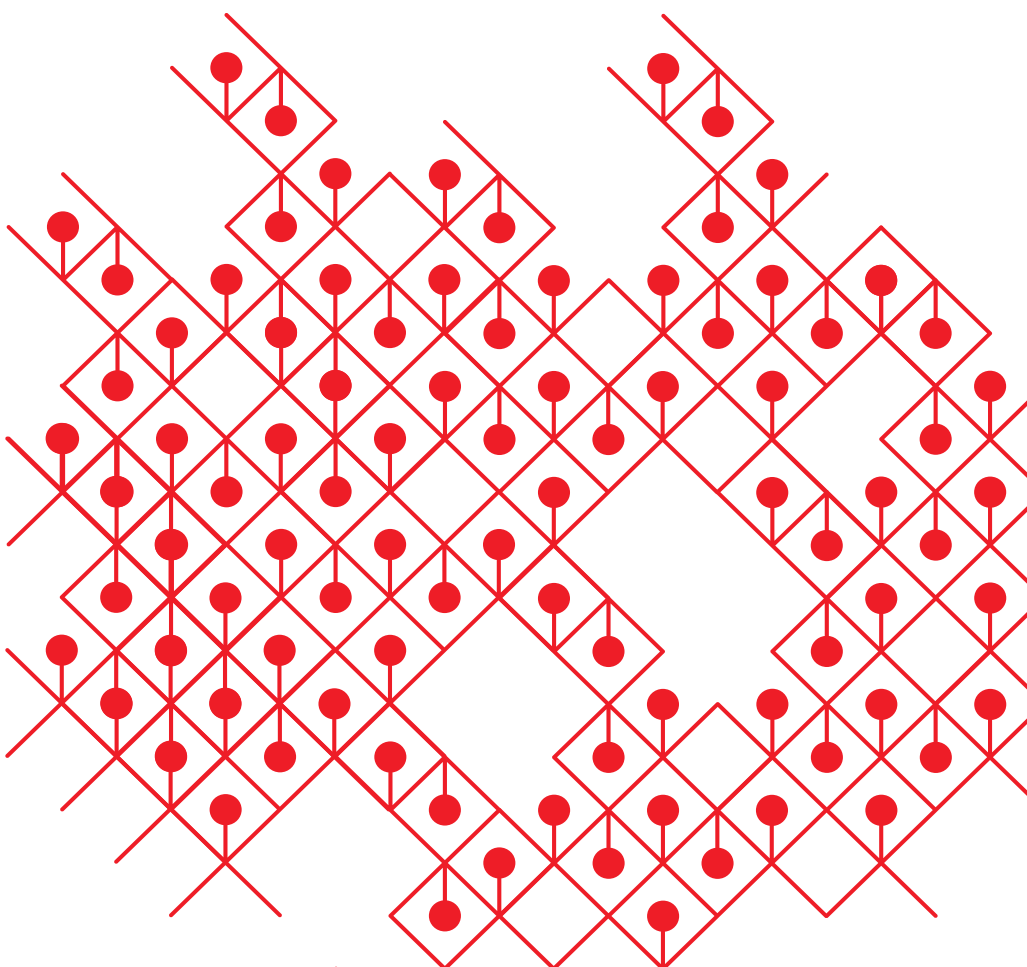




THE **GAME INDUSTRY** OF POLAND

Report

The game industry of Poland – report 2023



Collective work under the direction of Jakub Marszałkowski

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Dariusz Budrowski

President of the Polish Agency for Enterprise Development

Almost a year ago, on behalf of the Polish Agency for Enterprise Development (PARP), I had the opportunity to participate in the Gamescom trade fair, which is one of the world's largest events for the computer games industry.

During the event, I was glad to observe not only numerous Polish companies, but also considerable interest in the products they offered. Polish entrepreneurs stood out from the foreign competition, both in terms of the number of titles presented and their technological or graphic level.

Today, the Polish computer game industry is the synonym of quality, creativity, and innovation. It is worth remembering, however, that this was not always the case. This sector of the economy has transformed over the last twenty years from a niche into a billion-dollar business. I am glad that PARP has also participated in this development. Back then, we provided Polish entrepreneurs with information, assistance in establishing international partnerships, and with financial support.

The international promotion of the Polish video game industry will be supported by The Sectoral Promotion Program, which will be implemented between 2024 and 2029 by the Ministry of Development and Technology together with the Polish Agency for Enterprise Development. As part of this program, PARP will organize several national stands at the largest trade fairs. Polish entrepreneurs will also have an opportunity to take advantage of funding we offer, including means available under the: "Promotion of the brand of innovative SMEs" 2.25 measure within the European Funds for Modern Economy program, supporting the promotion on foreign markets. I hope that thanks to this help, Polish game developers will grow their ideas, create new products, and increase their share in the global market.

PARP together with the Creative Industries Development Center are pleased to present the third edition of the report dedicated to the Polish computer games industry. Its aim is to familiarize foreign audience with the Polish gamedev sector - to present its potential, strengths, and development prospects.



Mateusz Dzieduszycki

General Manager of the Creative Industries Development Center

This comprehensive report demonstrates that, as in previous years, the game industry has grown to magnificent proportions. Our native gamedev has already implemented innovative ideas, rising to the challenge of the global market's gaming giants who focus on profiting from replicated productions.

It is also immensely gratifying that games are gradually starting to occupy their rightful place in the Polish culture. *This War of Mine* has been added to the school reading list as the illustration of the horrors of war in the contemporary context, while literature enthusiasts are eagerly awaiting the premiere of *The Invincible*, a game based on the works of the great Stanisław Lem. Even the Institute of National Remembrance has released its highly rated *Cyphers Game*, available for free to users worldwide.

These changes and recognition of the game market is accompanied by a simultaneous shift in the gamer's image. In recent years, the average age of a fan of electronic entertainment has increased to over 30, yet many still think of games as products for children and adolescents. Fortunately, this perception continues to change, and games are becoming a medium that connects generations, no less important than literature and cinema.

The Creative Industries Development Center (CRPK) was established precisely to assist creative industries. This support is essential in times of economic and geopolitical turbulence, so regardless of difficulties, CRPK will stand alongside new creators, doing everything to ensure that new and extraordinary productions see the light of day.



Kuba Wójcik

Executive Chairman of Indie Games Poland

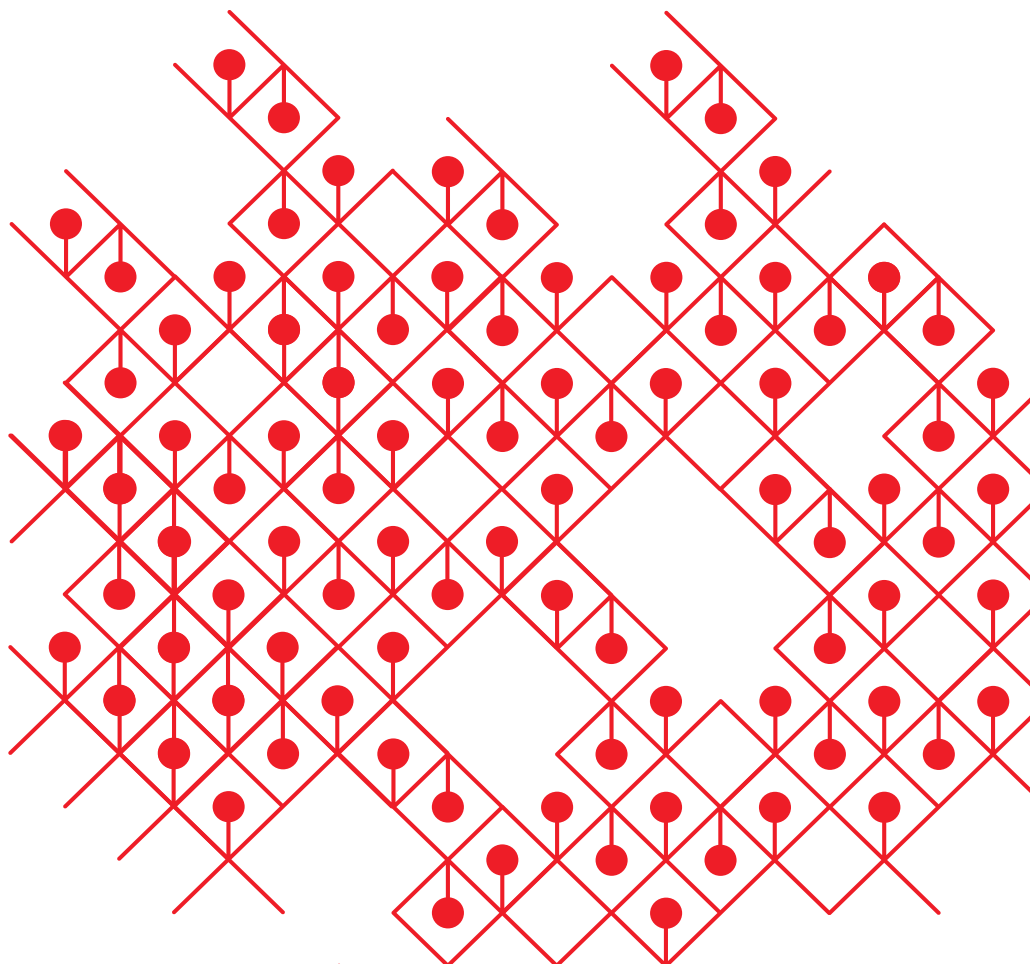
Last year was a period of contrasts for the Polish video game industry, witnessing both significant successes and new challenges standing in the way of the entire sector.

Leading AAA game studios, such as CD Projekt Red and Techland, constantly fought for player recognition. After initial difficulties with *Cyberpunk 2077*, CD Projekt Red focused decisively on rebuilding its reputation, hard work and dedication paid off, regaining players' trust. Thanks to the release of *Dying Light 2*, Techland strengthened its position as one of the global leaders in AAA game production, demonstrating the strength and talent of Polish creators on the international stage.

However, 2022 was not a year of success only for large studios. As the Indie Games Poland Foundation, we are particularly proud of independent creators' achievements. Games such as *Timberborn*, *Against the Storm*, and *Papetura* have won the hearts of players worldwide, and on top of that *Papetura* has been awarded at the Independent Games Festival.

Nevertheless, 2022 brought also challenges, such as market volatility, increasing competition, and rising expectations of players towards the quality and innovation of games. We also noticed a decline in stock market sentiment compared to previous years. Companies that took a bold step and went public, bearing tangible consequences, often faced negative verification of their initial assumptions. The investments of foreign entities, which have recently focused intensely on the Polish industry, pose yet another threat.

Poland, already known worldwide for its high-quality game production, is making its mark on the global scene, strengthening the so-called soft power of our country. The growing interest in Polish games translates into an increasing interest in our country, culture, history, and values. All of this means that the prospects for the Polish game development industry are up-and-coming. Despite current challenges, we are confident that the Polish gamedev scene will continue to grow and gain international recognition, further strengthening Poland's position in the global market.



1. Top tier game industry

Undoubtedly, the Polish game industry continues to grow, and most of its indicators reach record-high values year after year. The fact that 15 000 people are employed in game production in Poland confirms that we have enduringly surpassed the German sector in terms of workforce size. The percentage of women in the industry is also one of the highest in the world, while the Polish gamedev is so attractive that it can attract talent from all over the globe.

In May 2023, there were around 494 active game producers and publishers in Poland (cf. section 9.2. Methodology). The number of studios almost stopped growing after it more than doubled in the last ten years. At this point, it is not possible to say if this statistic has reached some kind of plateau from which it will start growing again after meeting certain criteria, or if we should expect a decline in the number of studios soon. Nevertheless, some rotation can still be observed. New companies are founded every year, and many of them have much better fundamentals than in the past. However, they generally replace liquidated ones and do not contribute to the overall increase in the number of enterprises in this industry as much as they did earlier.

We have been expecting a slowdown in the growth of the number of studios for

The Polish game industry



494

game producers & publishers



hiring **15 290** people



€1286M

industry revenue in 2022



530+

new releases annually, platform-wise

Sources: Game Industry Conference

Table 1. The biggest European game industries, workforce-wise

	Country	Workforce size	Trends YoY in last years
1	UK	20975 ⁽²⁰²¹⁾	↑ 1%
2-3	France	15000-19000 ⁽²⁰²¹⁾	N/D
	Poland	15290	↑ 24% - ↑ 16%
4	Germany	11242 ⁽²⁰²²⁾	↓ 13% - ↑ 8%
5	Spain	8000-9500 ⁽²⁰²⁰⁻²⁰²¹⁾	N/D
6	Sweden	7944 ⁽²⁰²¹⁾	↑ 11% - ↑ 20%
7	Romania	6700 ⁽²⁰²¹⁾	↑ 3%
8	Finland	4100 ⁽²⁰²²⁾	↑ 6%

Sources: GIC, EGDF European Video Games Industry Insights Reports, national reports

some time now, as it cannot continue to increase indefinitely. Global market trends show demand for games produced with growing budgets, which requires larger teams. Our industry seems to be entering a consolidation phase, with teams growing in size rather than number (cf. section 1.4. Studios growing bigger).

The industry's strength can be measured better in the workforce size or revenues than in the number of companies while the Polish gamedev excels especially in the number of employees (cf. section 9.2. Methodology). In Europe, only the British game industry is noticeably larger. As regards the next contender, namely France, the shortage of quality data makes the comparison more difficult. For a few years now, figures reported from France seem to be rough estimates only, moreover, there are

some signals suggesting rotation rather than actual growth, with big studios performing layoffs or even facing strikes. So, for now we must consider it a tie for the second place.

1.1. Industry revenues

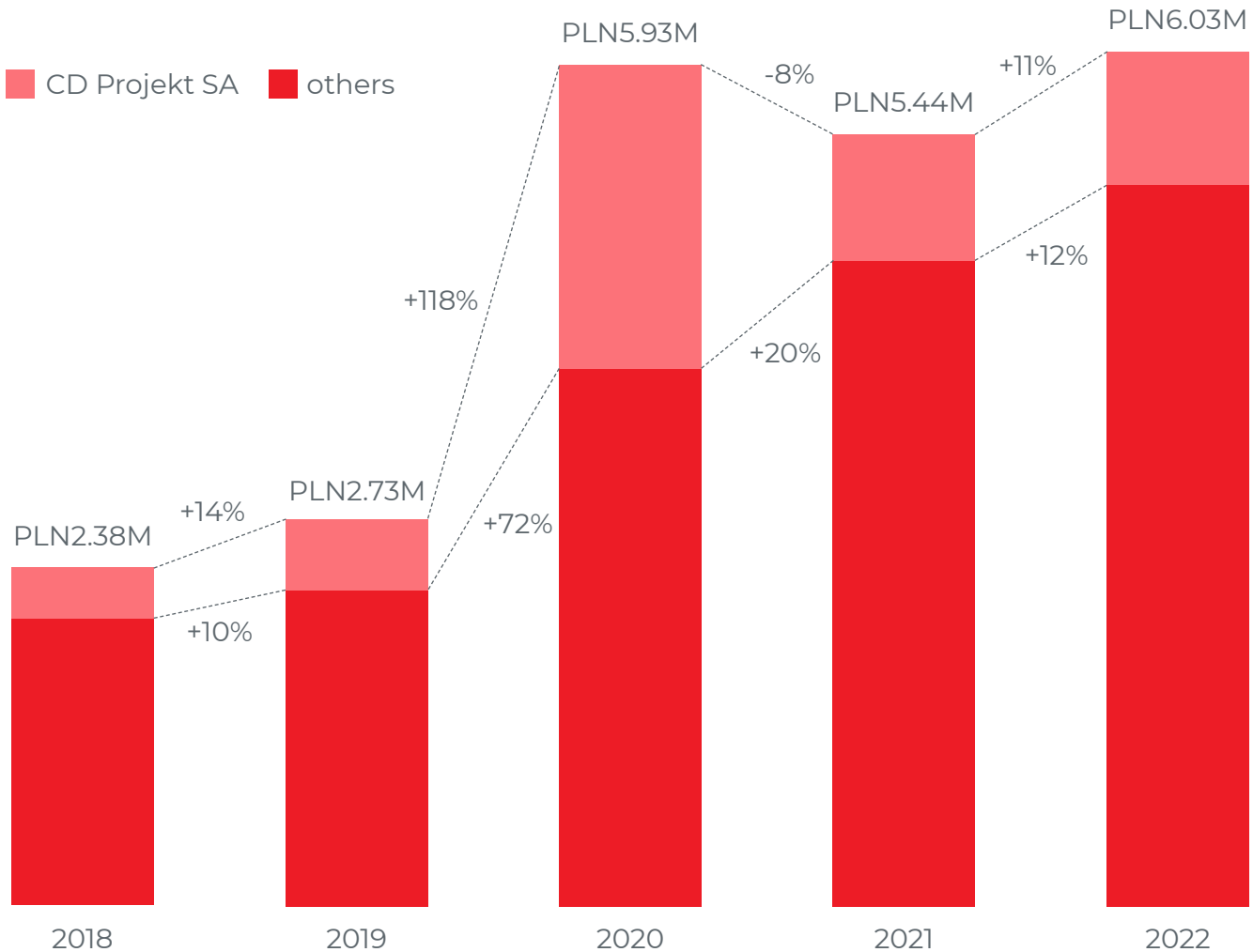
If the workforce size poses as the biggest strength of the Polish game industry, then most of financial factors would be the key challenges, regardless if considering revenues, profitability, budget, or funding availability as a whole. This could be seen as typical both for a relatively young industry and for Eastern European countries.

Among the financial indicators, the most striking ones that instill optimism are the year-on-year growth rates (cf. Chart 1), even despite an 8% decrease in

2021. Considering the sector's revenues in 2020, particularly with the release of Cyberpunk, analysts had expected a more pronounced and prolonged decline. Indeed, this year, the CD Projekt SA revenues accounted for 1/3 of the total revenues of the Polish game industry, compared to half of it, not long ago. The production cycle of the largest developer, combined with the sales of their latest title falling below inflated expectations, seemed to foreshadow a significant

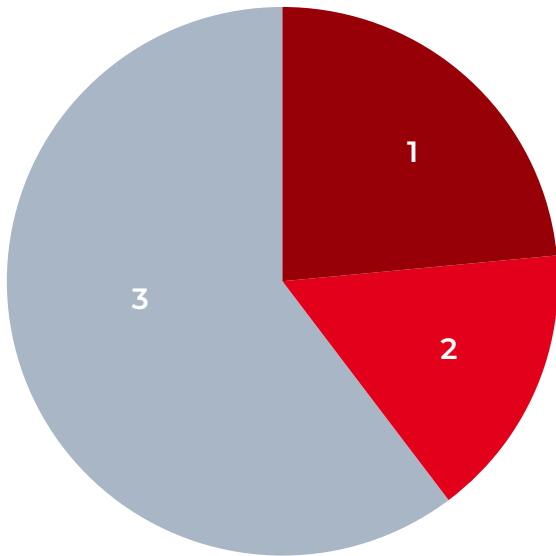
decline. This is why the report presents the revenues separately for the rest of the sector and for the makers of The Witcher. This shows how the rest of the industry has managed to efficiently cover this setback, swiftly bridging the gap. While we always aspire to see higher YoY growth rates than in 2022, considering the first-ever year where the global game market experienced a decline instead of growth, a 11% YoY increase in the revenues of the Polish game industry still signifies that we

Chart 1. Revenues of game developers and publishers from Poland (million PLN)



Sources: Game Industry Conference

Chart 2. Yearly releases vs production cycle of Polish studios



- 1. 1 release – 23.5%**
- 2. 2+ releases – 16.2%**
- 3. no release this year – 60.3%**

Sources: Game Industry Conference

are striving to catch up with the industry leaders. Particularly considering the fact that the industry's total revenues over the last five years grew by 250%.

Despite a strong growth rate, the revenue of EUR 1286 million generated by the Polish game industry in 2022 does not allow it to rank second or even third in Europe in this category. We are outperformed not only by the United Kingdom and France, but also by at least Germany, Finland, and Sweden. A further comparison would be needed for the revenue of the Spanish and Turkish game industry, as it is also likely to exceed Polish results. Therefore, in terms of revenue,

we are ranked 3 to 5 places lower than in employment, which indicates that there are still significant achievements to be made in this area.

It should be noted that less than one-third of the sector generates significant revenues. studios have not generated revenues yet, as they are working on their first titles. This is characteristic of a young industry building its scale on credit, to some extent. The cyclical nature of revenues due to production cycles is a well-understood phenomenon within the industry but can be problematic outside of it. For example, it typically takes two to three years to produce a game before its release, which leads to periodic revenue fluctuations (cf. Chart 2). Unfortunately, more often than we would like, Polish studios release titles that underperform against expectations. It is often due primarily to the pressure to launch a game when the budget for its production has already been depleted.

Even among nearly 90 companies listed on the Warsaw Stock Exchange, the revenues vary significantly. For example, in 2020, as many as 19 companies reported revenues below PLN one million (€ 220 000), and for several others, the reported revenue was primarily of an accounting nature. One can only hope that investors, recognizing the industry's permanent underfunding despite its significant potential, will show increased

interest and treat it as a good prediction for the future.

1.2. Employment structure and trends

We estimate the employment growth at 23%-27% year over year since 2017, or even a few years earlier, which is the fastest rate in Europe. Such exponential growth results in employment doubling approximately every three and a half years, and our industry has experienced at least two such leaps. Currently, it is down to 16%, which is still impressive and one of the best paces of growth for a game industry of this size. This growth slowdown seems to result from the fact that the talent pool in Poland is overexploited and is expanding slower than the industry's demand for experienced senior workforce. This might be confirmed by the number of foreigners hired by the Polish game industry growing by 57% within a similar timeframe.

All 40 largest studios, i.e., ones with a team size of 54 and more, employ at least several foreigners. At half of these foreigners account for over 9.26% of their staff. Furthermore, over half of smaller companies, with team sizes ranging from 20 to 54, hire foreigners, and their ratio is steady throughout this sector. Only in teams under 20 people, the share of foreigners drops – the smaller the studio, the lower the chances it will have foreigners

Employment in the Polish game industry



15290

people working in the game production sector



24%

are female



over **16%** growth YOY

over **2200** foreigners

(more than **14.5%** of total employment)

Sources: Game Industry Conference

at all. Without expats, the YoY employment growth would be only at 10% now.

Even if Ukrainians are the biggest group among foreigners (cf Section 1.3. Migrations within Eastern Europe), Poland's game industry is able not only to protect its talent pool from being brain-drained by richer Western countries but it is appealing enough to attract talent from everywhere, including

Companies size structure

Of **494** studios:



16

companies hire
200+
people

56

studios have a
50+
team

106

studios have a
25+
team

78%

of teams are below
25
people

34%

are with teams of
6-15
people

32%

of studios hire up to
5
people

Sources: Game Industry Conference

Northern America. Still, the Polish talent pool delivered over 2100 new employees for the industry last year, which would be a truly impressive percentage for any industry with workforce not exceeding 10 000. This also shows that in absolute values the number of employees in the

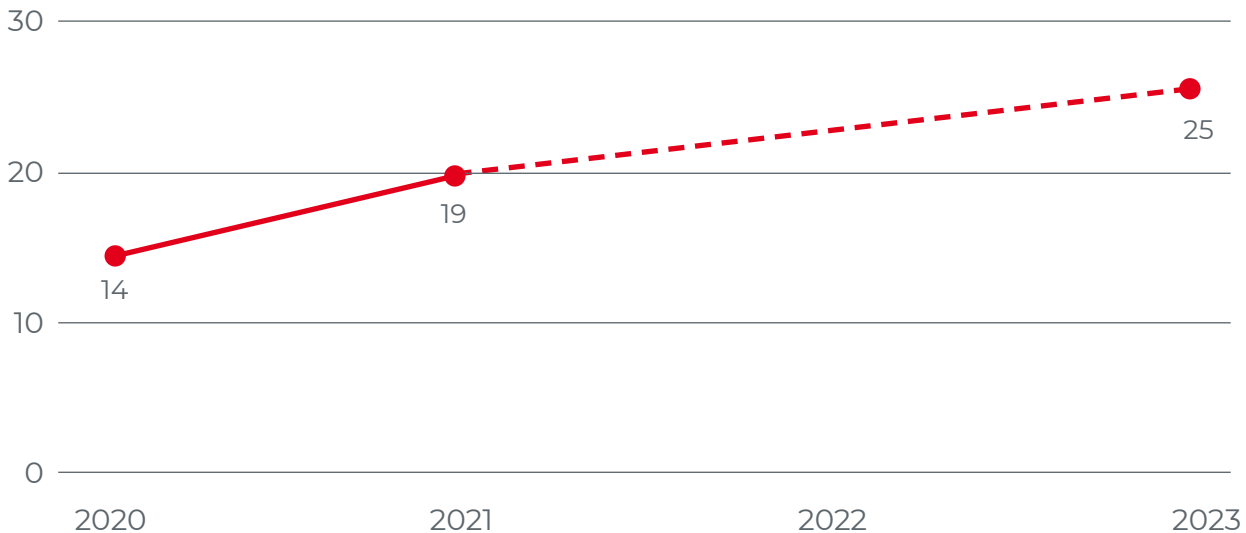
Polish game industry is growing at a fairly steady rate.

1.3. Migrations within Eastern Europe

Even if Poland is safe as a prominent NATO member, disastrous events harming our Eastern neighbors are affecting migration across half of Europe. And contrary to the Western viewpoint, this started long before the 2022 invasion of Ukraine. The 2014 annexation of Crimea, Donbas, and Lugansk or the Belarusian turmoil after the 2020 elections sent waves of expats West, through Poland, or just to Poland.

Poland has made an unprecedented effort to support Ukraine in 2022, sending support and accepting millions of refugees without a single camp being built. This also applies to the game industry, with Polish companies having numerous partners in Ukraine and Polish employees having many Ukrainian friends. The most notable Polish studios were the first to give an example by arranging aid, and even the smallest teams provided help: in the biggest charity game bundle for Ukraine, 20% of games came from Poland. The scale of local help, such as studios offering office spaces for refugees and developers personally driving private cars to the border and beyond to transport refugees, has yet to be fully documented.

Ukrainians are the biggest group of foreigners in the Polish game industry,

Chart 3. Companies with a team size of 100+

Sources: Game Industry Conference

but this has been the case for as long there is data available, at least since 2017. Belarussians are another top group, and here a more noticeable wave came after the suppressed protests in the fall of 2020. The number of entire companies relocated to Poland is very low, as Baltic countries, especially Lithuania, seem to have been chosen instead. It might result from the fact that these countries may be seen as more convenient for Russian-speaking people to live in. Most of the expats coming to Poland through the Eastern border found their place in numerous Polish studios. Not counting the relocation, the number of foreigners hired by Polish companies has still grown by 45% YoY and employment has increased by over 15%.

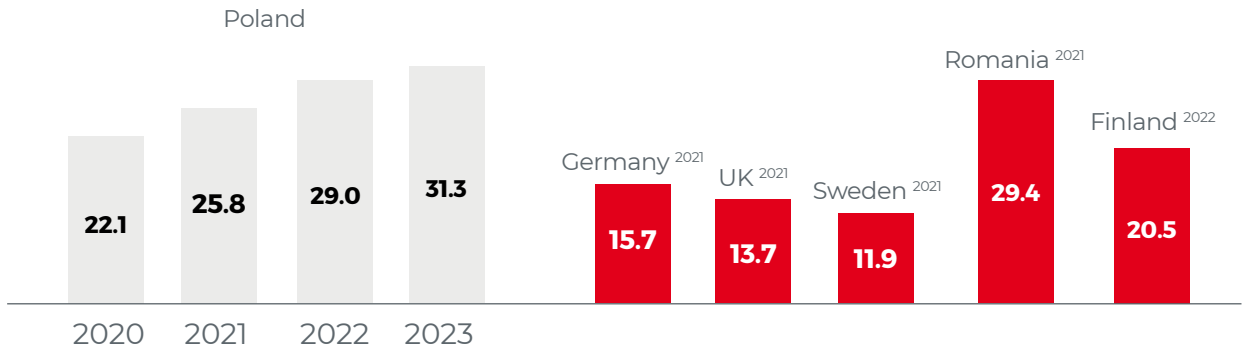
The war in Ukraine has also affected the investment landscape, as the third event following Covid and the stock exchange

gaming overheating, considerably reducing foreign spending in Poland. Even though Wrocław is around 1525 km from center of the conflict, only 40 km closer than Vienna, sentiments of investors who tend to see Eastern Europe as one place are changing slowly. Things have been, however, gradually getting back to normal since autumn 2022, and this trend has been speeding up even more with Poland's policy of strengthening the entire eastern flank of NATO, becoming a safeguard of security in the region.

1.4. Studios growing bigger

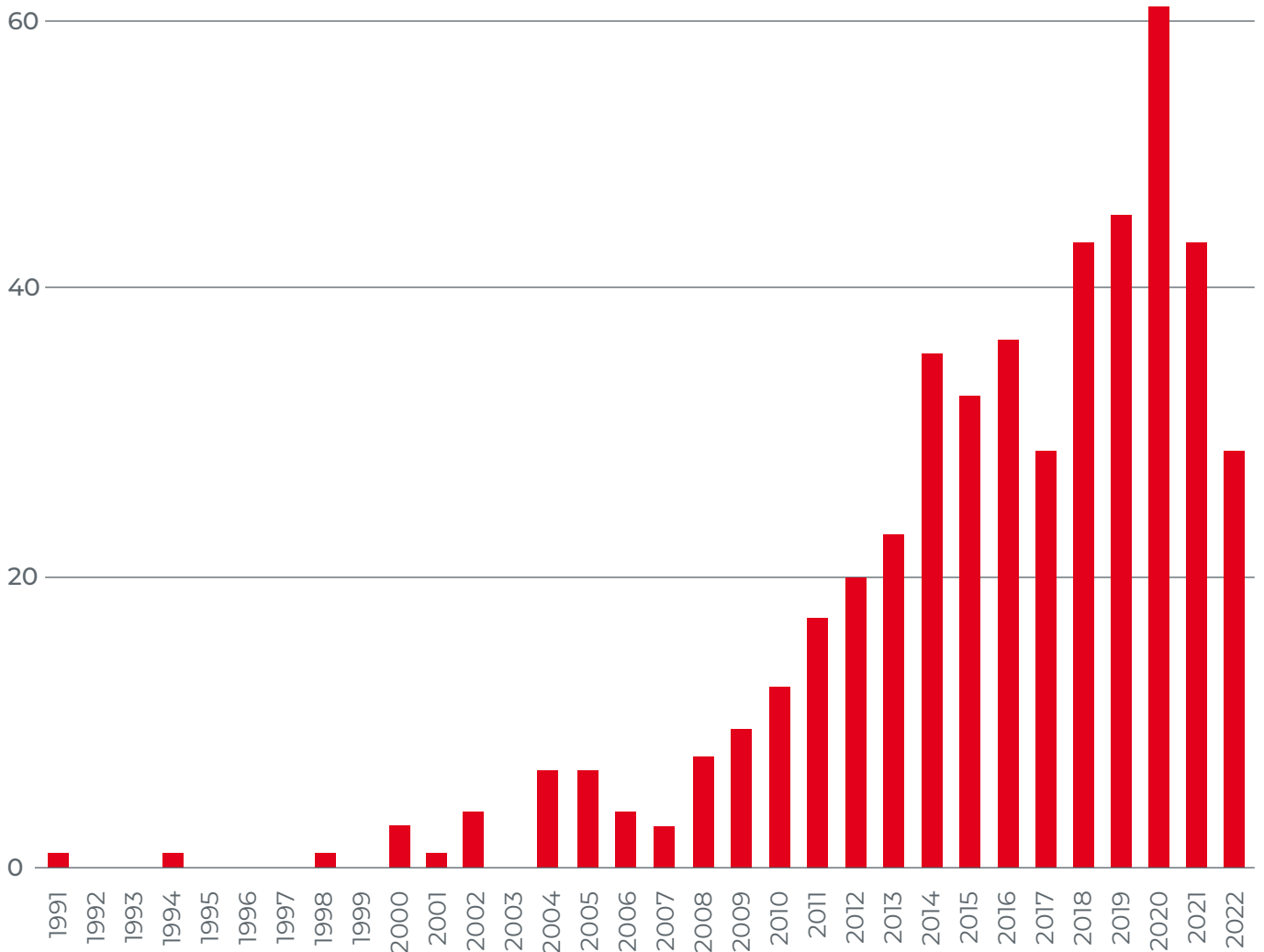
As employment is undoubtedly growing in this sector and the number of studios has ceased to grow, the size of the studios must be expanding instead. Most major studios, especially over 200 or 100 employees, noted less growth during

Chart 4. Average team size



Sources: GIC, EGDF European Video Games Industry Insights Reports, national reports

Chart 5. Years of studios' market presence



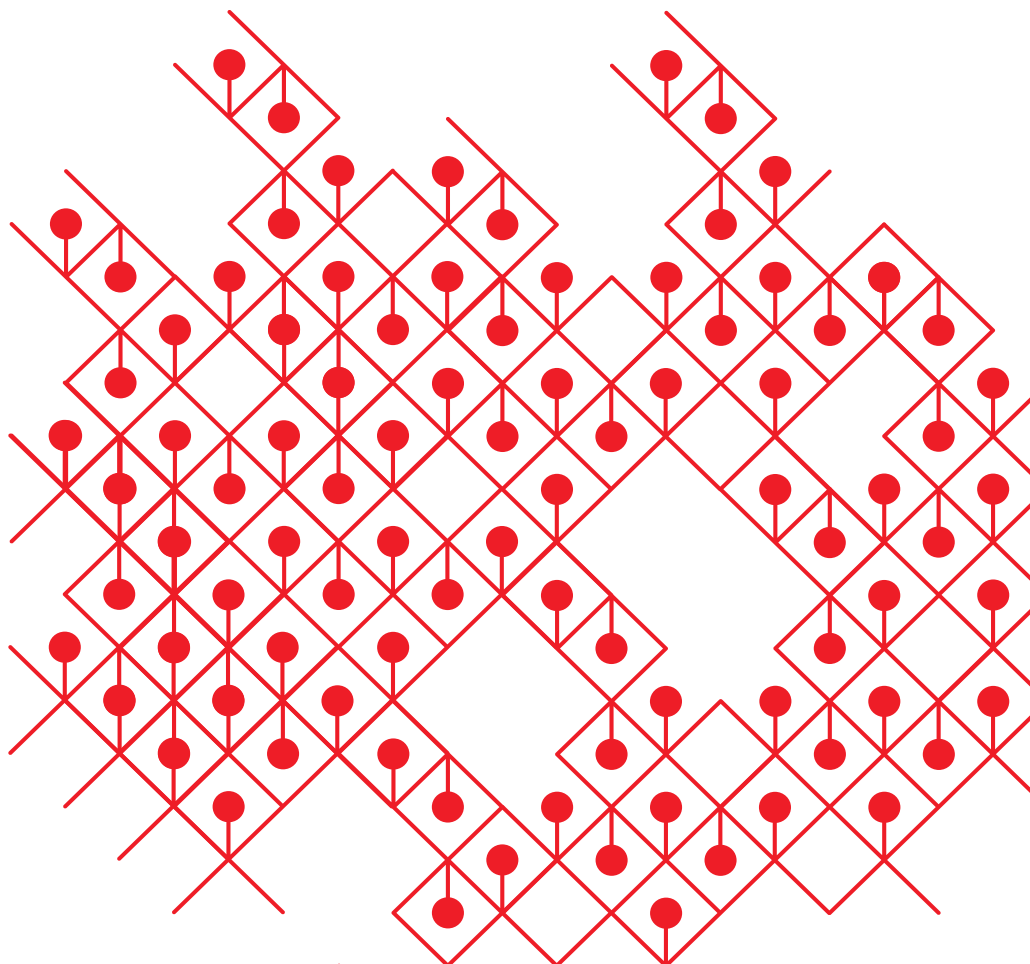
Sources: Game Industry Conference

the explored period, after several years of substantial expansion. In many cases, their growth was negligible, and some studios seem to have reached a point of equilibrium in terms of their team size, ceasing to expand further. Moreso, the two biggest studios producing free-to-play mobile games, namely Ten Square Games and Huuuge Games, announced and performed group layoffs. However, it is important to note that this process seems to be related less to the condition of the game industry in Poland and more to the evolving challenges within the mobile free-to-play gaming market.

The most important change is that the growth can now be observed largely in the sector of medium-sized and small studios. This includes both teams growing from 5 to 10 people, but also scaling up from 40-60 to 100 employees (cf. Chart 3). As of 2020, small teams with up to 16 members accounted for as much as 79% of the industry. Today that number has decreased to 66%. Still, even with all the growth, the median studio size is only 8, i.e., half of studios are bigger than 8, but at the same time, half are smaller. Moreover, the growth has become less uniform for smaller studios, with a significant number of teams having shrunken recently, too. This can be a planned and expected result. With project closure, a reduction is carried out, as a smaller team is needed for early stages of the next project. Nevertheless, at least some of the team cuts can be accounted for by budget

reductions and business model problems, particularly for insufficiently successful game releases. All in all, the average studio size has been increasing over time, which is probably the best illustration of the process (cf. Chart 4), comparing Poland to some other big game producers in Europe. The differences are difficult to analyze, some of them might result from different methodologies, especially the British figures. Sweden, on the other hand, is proud of its abundance of small studios trying to produce interesting games, with lower need for team growth (increasing costs at the same time) that might be associated with better business environment and more supporting ecosystem.

Despite constant changes in the industry, a growing number of studios manage to stay afloat for several years and several game releases to become the backbone of the gamedev community in Poland, after having achieved sustainability, so highly desired in the industry globally. There are far fewer studios that are over nine years old, as 2014 was the moment when the industry started to grow more rapidly (cf. Chart 5). The chart most probably does not present a proper share of the youngest studios, which started in 2021 or later, as some of them might not even be announced yet.



2. The kings of remakes

The success story of Forever Entertainment

This Gdynia-based gamedev company is a vivid example of finding and executing the right business strategy that elevates the entire endeavor. In just five years the Forever Entertainment revenue increased fifteen-fold! The team expanded from 16 to as many as 200 people. Finding the right niche and tightening the ties with Nintendo turned out to be the main driving force behind Zbigniew Dębicki's company's success. Currently it is one of the global leaders in delivering games dedicated to Nintendo Switch.

'I've always been a huge Nintendo fan and dreamed of a console that would enable me to either play on the run or at home with my TV set. That is why the simple concept of Nintendo Switch seemed so genius to me', says Zbigniew Dębicki, the founder and CEO of Forever Entertainment which currently has 113 games for this particular platform in its' portfolio.

The most recognizable and successful titles produced by Forever Entertainment include FRONT MISSION 1st: Remake, Panzer Dragoon: Remake, THE HOUSE OF THE DEAD: Remake, Rise Eterna, Green Hell, Thief Simulator, Cooking Simulator and Hollow. Some of these games are remakes which is yet another strategic choice for the company that decided to base the large part of its' portfolio on IP. But it has not always been this way.

Modest beginnings, impressive gains

The company's beginnings can be traced back to as late as 2010 when Dębicki decided to make his own games. As he admits, at first it was very hard, as it is with all newly established businesses. Initially, he focused on the mobile game segment, because back then it was highly popular, but also because the capital required to develop console games was out of his reach.

As time went by and the company developed and gained some capital thanks to its Warsaw Stock Exchange debut, the real breaking point occurred in 2017 when Forever Entertainment redefined its' strategy and dived into completely new territories chiefly due to the debut of Nintendo's brand-new console Switch. It soon became the main platform for the games produced

by Dębicki's company. On the other hand, Forever Entertainment focused on video game remakes production based on IP.

'Obtaining a license to remake the 'Panzer Dragoon' and then presenting it to the world at Nintendo Direct in L.A., California in 2019 was one of the most important and breakthrough moments in our career. Literally, just a few minutes after the audition the first business offers poured in. Within a short period of time we managed to sign deals for more famous IP remakes.' recalls the CEO.

Tightening the ties with Nintendo which introduced its' breakthrough Switch console that enables both stationary and mobile gaming and sold as many as 120 million copies, was one of the main driving forces behind the Forever Entertainment's commercial success during the 2017-2022 period. They witnessed a 15-fold increase in revenue, from just roughly EUR 700 000 to EUR 10 million. The staff expanded from 16 to as many as 200 people.

'We reinvest almost every penny to increase employment and our capacity to engage in future endeavors. Most of our revenue comes from game development and publishing. Beside covering the production costs, we are also entitled to additional profits from sales. Such a solution lets us increase our revenue and profits from games that we eventually support as a publisher.' Zbigniew Dębicki stresses out.

Challenging and rewarding

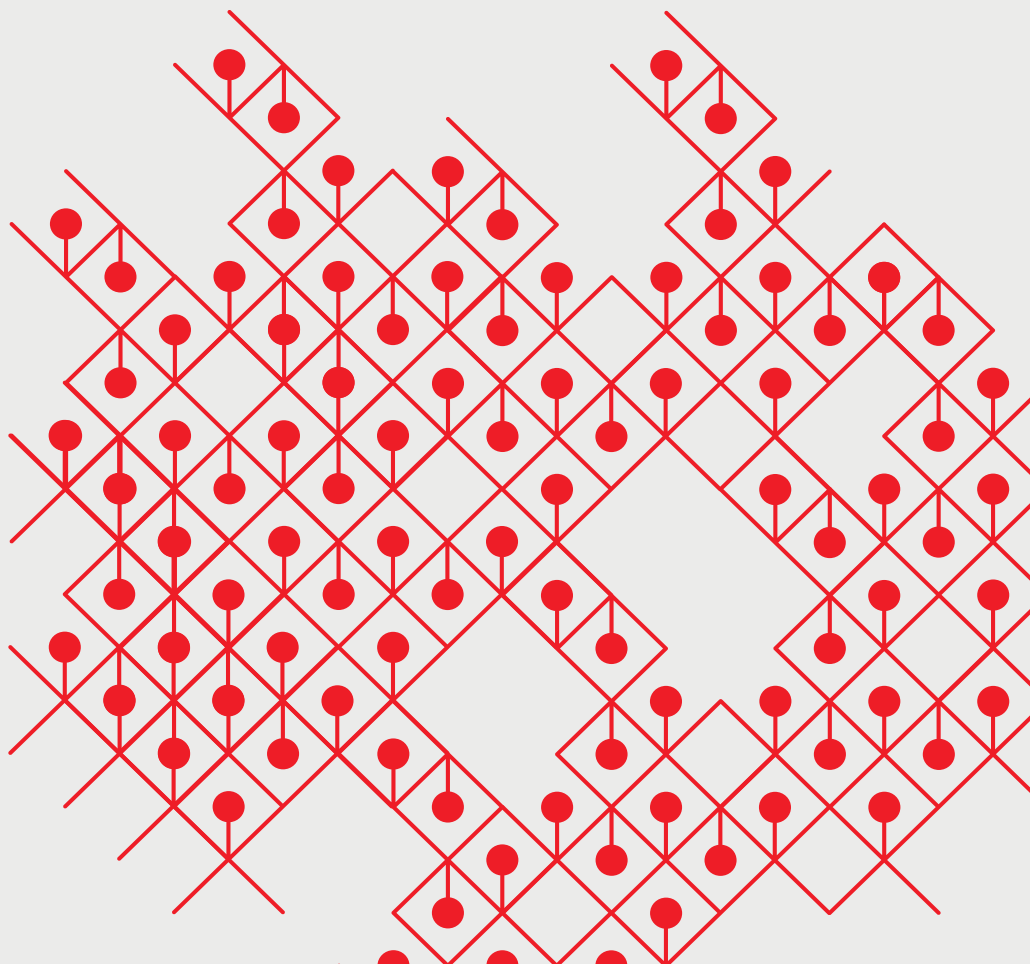
The segment of video game remakes is not a piece of cake. In terms of production, it is actually one of the toughest challenges out there. When Forever Entertainment engaged in their first remake production, initial deadlines had to be postponed. In reality, the production process of remakes and original games does not differ much, and it requires a lot of time spent on research to thoroughly replicate a quarter a century old title and put it in the context of the contemporary video games industry. All the code and graphic content is made from scratch.

'The only difference between the original games and remakes is that you already have the characters, the script, and the story the game is based on. On the one hand, it is a handicap, on the other, we feel great expectations from both the IP owners and the die-hard fans themselves, who wish to relive their emotions from the past. Another challenge is to introduce the

title to the new players who are quite often young, sparking the curiosity and the desire to play among them. So, you can just imagine the plethora of emotions that we have to handle from the start of the production up to premiere and the first reviews.' he admits.

But making a good game is just a mere introduction to commercial success. It is the well-thought out marketing and sales strategies that make the title successful on the extremely competitive global market. That is why Forever Entertainment focused on developing its' own marketing and publishing divisions as well as the distribution on almost all digital platforms and physical channels. The company is also reinforcing developer teams, both in and outside Poland, to boost their skills and versatility on the production level.

'We do not limit ourselves to just working with the teams structured within our capital group. Currently, we work together with tens of developers from all over the world, including Japan, France, Germany, Belgium, Switzerland, the USA, the Netherlands, China, and Brazil. Our goal is to bring our titles to perfection in terms of quality and to reach out to as many players as possible. This is our way to build and sustain competitive advantage and secure our place in the rapidly growing video games industry.' the CEO stresses with confidence.



3. Achieving globally

3.1. Export and presence on global markets

The key regions for Polish game sales are North America, Europe, and Asia. Each of these three continents accounts for 20-40% of total sales, depending on relevance of a particular title. Generally, continents of the Northern Hemisphere account for 75% to 90% of total sales of games from Poland.

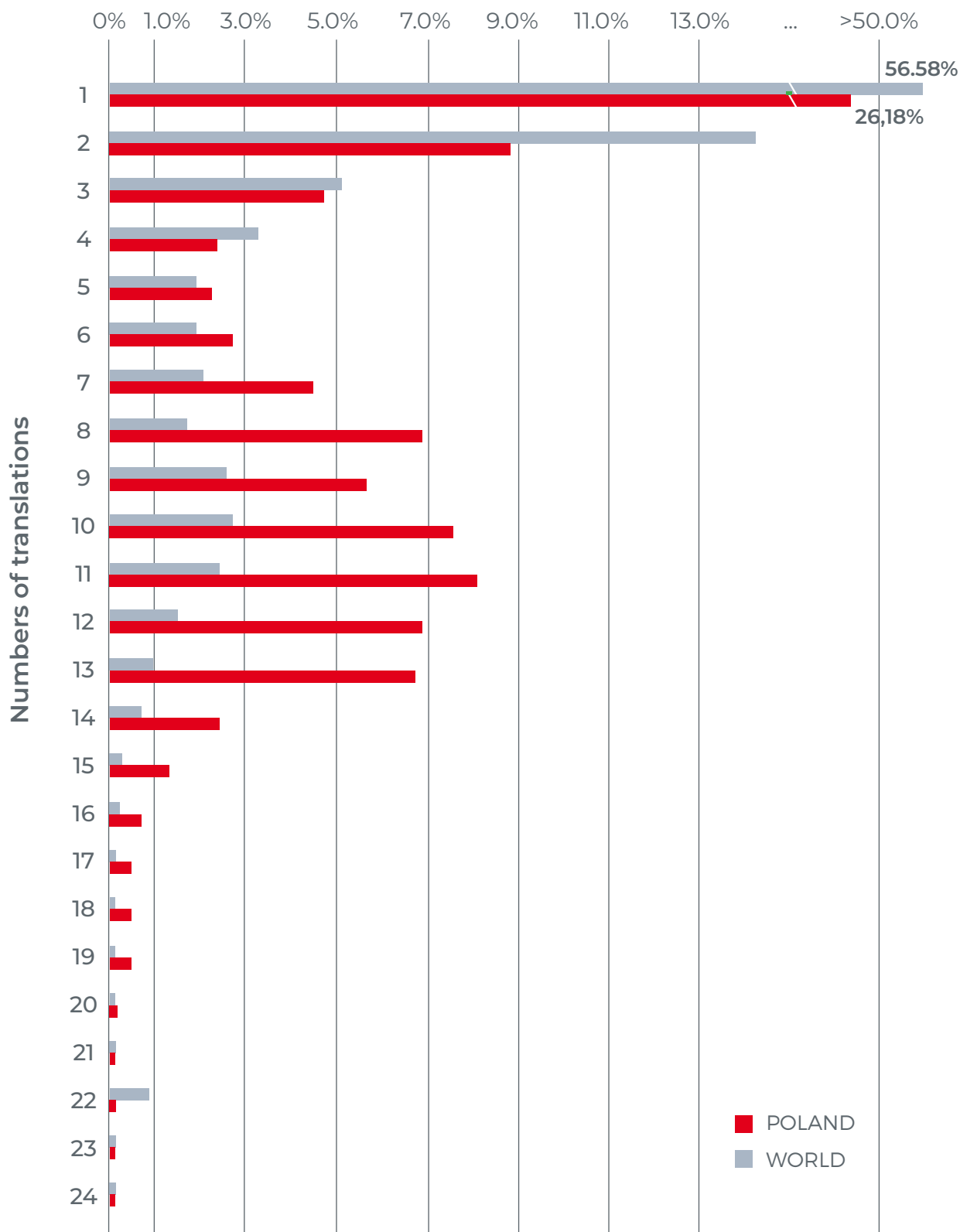
The USA and China are the largest and roughly equal markets according to a global rankings. When it comes to Polish games, typically one of these countries takes the lead in sales, contributing between 20% and 40% of the total sales revenue. The European Union as a whole may have a comparable share of sales. However, more commonly top rankings of markets for Polish games feature instead three populous European countries, namely the United Kingdom, Germany, and France, in varying order. Although they are smaller than the Korean and especially the Japanese market, they often have a larger share in the export of Polish games. Players from Cologne or Birmingham, for example, show significant interest in our strategy games or simulators. In Japan, we

have achieved some success, on Steam, consoles, Switch, and PlayStation. Japanese players appreciate our horror games, and we sometimes produce titles specifically targeting the Japanese audience. On the other hand, Korea can positively respond to certain titles on Steam, particularly strategy games, but it is difficult to consider these two countries regular consumers of Polish games.

Other markets that are often considered significant include Brazil, Russia, and Turkey. However, given the fact that game prices in these markets are 40-50% lower than in Europe or Poland, they typically account for a mere 2-4% of sales (with exception of some titles). Australia and Canada can have a similar share, and Poland's domestic market ranks even lower, with an average of 3%, but as little as 1% for specific titles. Further down the long tail, even populous markets with a strong gaming culture have at most a one percent share in total sales.

Polish game development studios put significant effort into exporting their titles, confirmed by the number of languages games on Steam are translated into, comparing Polish and foreign games

Chart 6. Number of localizations, Polish vs foreign games¹



Sources: GamingAnalytics.info

¹ Marszałkowski J. (2022/2023), *Jak sprzedają się polskie gry*, PolskiGamedev.pl Magazyn 2, p. 132-137, <https://polskigamedev.pl/polskigamedev-pl-2-zawartosc-numeru/>

(see Chart 6). More than 65% of games produced in Poland are translated into more than two languages compared to only 29% outside Poland. This could be another piece of the puzzle when considering factors behind the success of the Polish game industry.

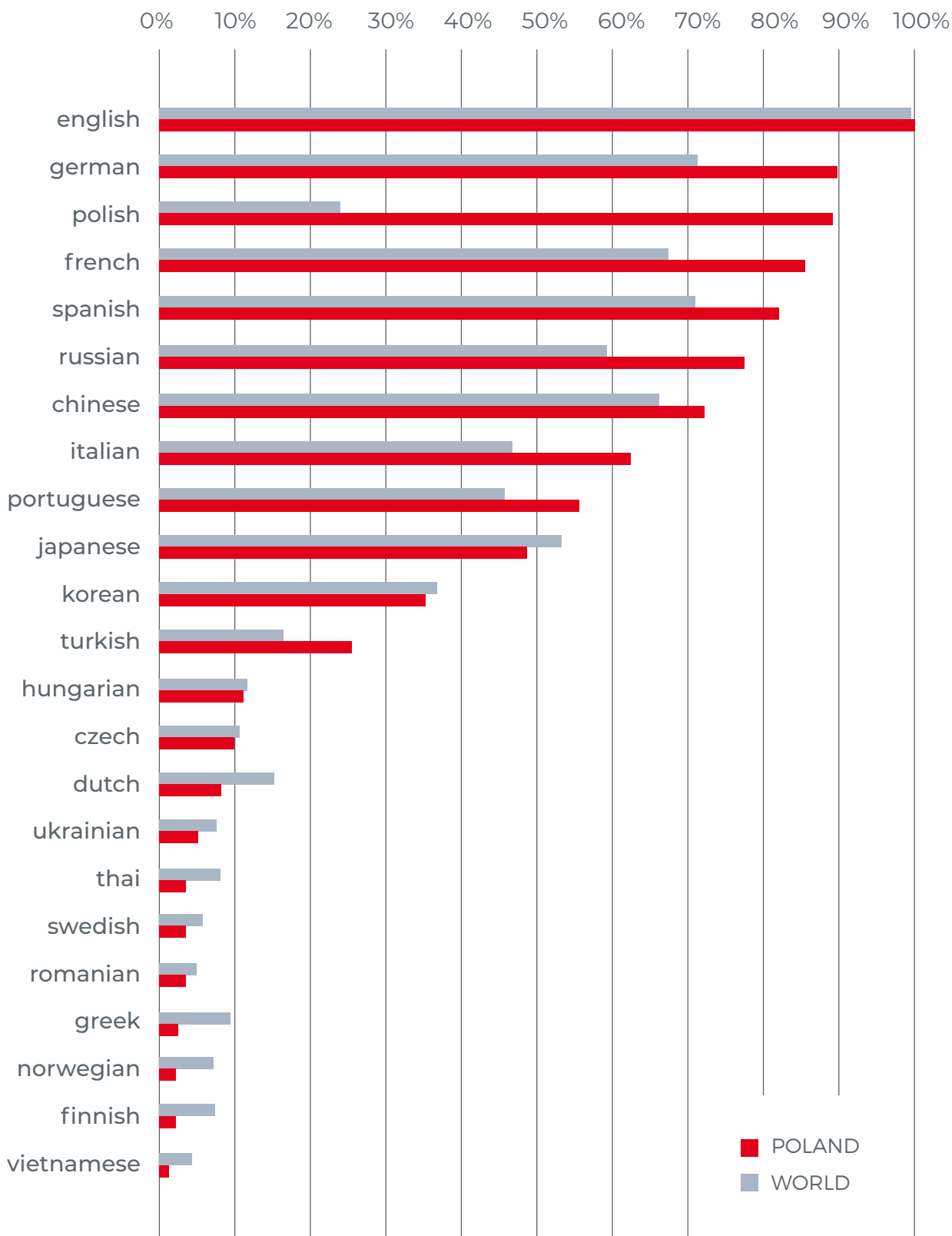
We also have our preferences regarding markets and languages (cf. Chart 7), influenced by the experience of our studios or Polish localization agencies they work with. Several trends are plain to see. Of course, nobody produces more Polish localizations than Polish studios themselves. Moreover, we tend to focus more on larger markets than the global average, investing less in a long list of smaller ones. Additionally, our interest in further translations decreases rapidly: optimistically, we prioritize around 12 languages, but realistically, it narrows down to 7. These values for games from outside Poland decrease at a much slower rate.

The share of digital distribution in the global sales of Polish games is estimated to have exceeded 85% in 2020 and is still growing. More so, the remaining 15% of the retail primarily consists of the biggest titles. According to CD Projekt Red, less than 30% of *Cyberpunk 2077* copies were sold in physical form... and this likely remains a record for recent Polish games. No other company in the country

has had such a large team traveling around the world to sign distribution agreements in each market before the game's release. Nevertheless, even for CDPR, the share of physical copies in sales has dramatically declined, compared to a remarkable 68% for *The Witcher 3*, in its premiere year seven years earlier! Smaller studios achieving satisfying revenues on local physical distribution deals a few years ago, now estimate them at 2-3% of the digital market or have decided to completely abandon this sector. It is part of a global process and is not related to the COVID pandemic, as in certain markets no acceleration in the shift from physical boxes to digital formats could be observed in 2020-2021.

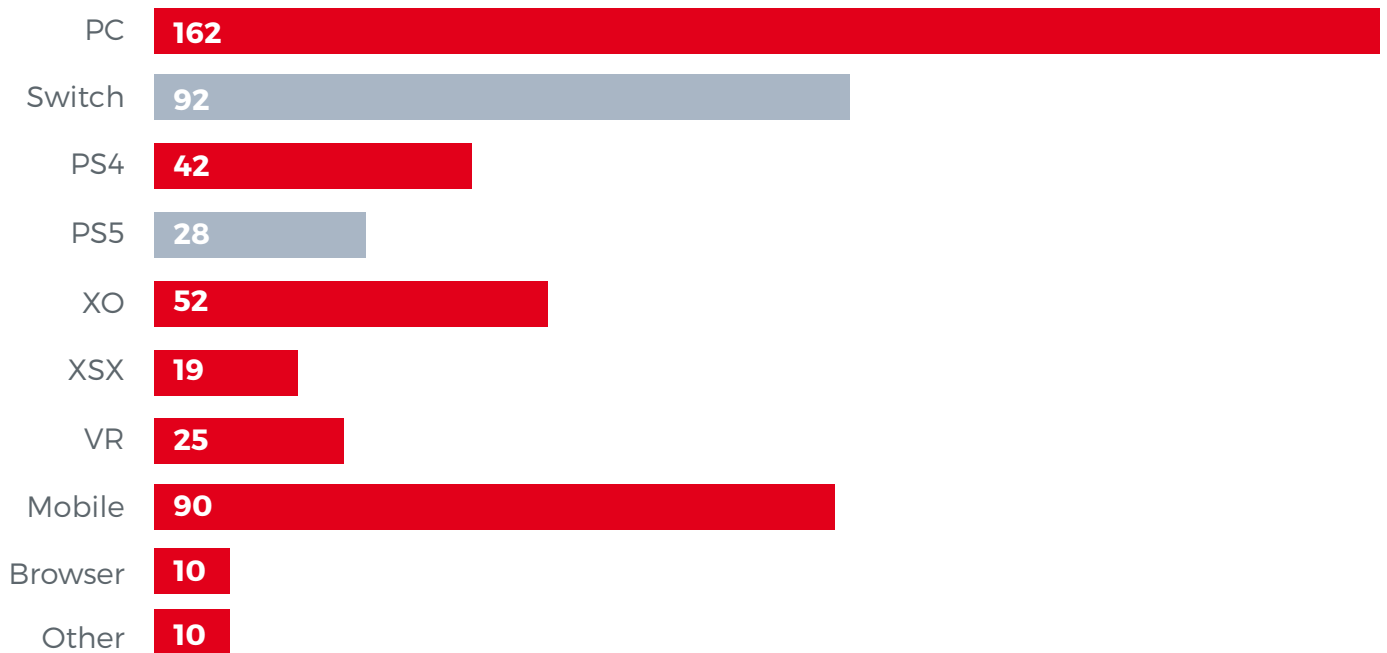
There is one more important Polish contribution to the global gaming market. Even if there is a prevailing norm that global game distribution platforms come from the United States or Japan, it has one significant exception - GOG.com, headquartered in Warsaw, a subsidiary of CD Projekt SA. Even if their market share in PC digital distribution has probably never reached double digits and shows no signs of such growth in the near future, they have served as the number two platform by game developers globally, for years. Currently, it seems that GOG is being outpaced by the Epic Games Store, which has invested millions of dollars to secure its position. Epic's giveaways of over 300

Chart 7. Localization languages, Polish vs foreign games²



Sources: GamingAnalytics.info

² Marszałkowski J. (2022/2023), *Jak sprzedają się polskie gry*, PolskiGamedev.pl Magazyn 2, p. 132-137, <https://polskigamedev.pl/polskigamedev-pl-2-zawartosc-numeru/>

Chart 8. Polish game releases structure in 2022

Sources: Game Industry Conference

titles, including top hits like GTA 5 and Civilization 6, which amounted to around 2.5 million copies and an estimated cost of approximately 1.5 billion dollars, gave them a reported milestone of 200 million registered users. Still, it does not come with conclusive evidence that the sale of games on this platform, excluding special deals, outperforms GOG. International games are sold throughout GOG.com in Warsaw. Is that re-exportation? The new digital world might never even consider that question, actually.

3.2. Millions of copies sold

It is important to understand that for most countries not placed in the middle of the Hollywood culture, games are the biggest chance for cultural exports.

This applies to all Polish games since we export 97% of our production, but the titles that have achieved global sales exceeding one million copies (cf. section Methodology) serve as the best illustration of this phenomenon.

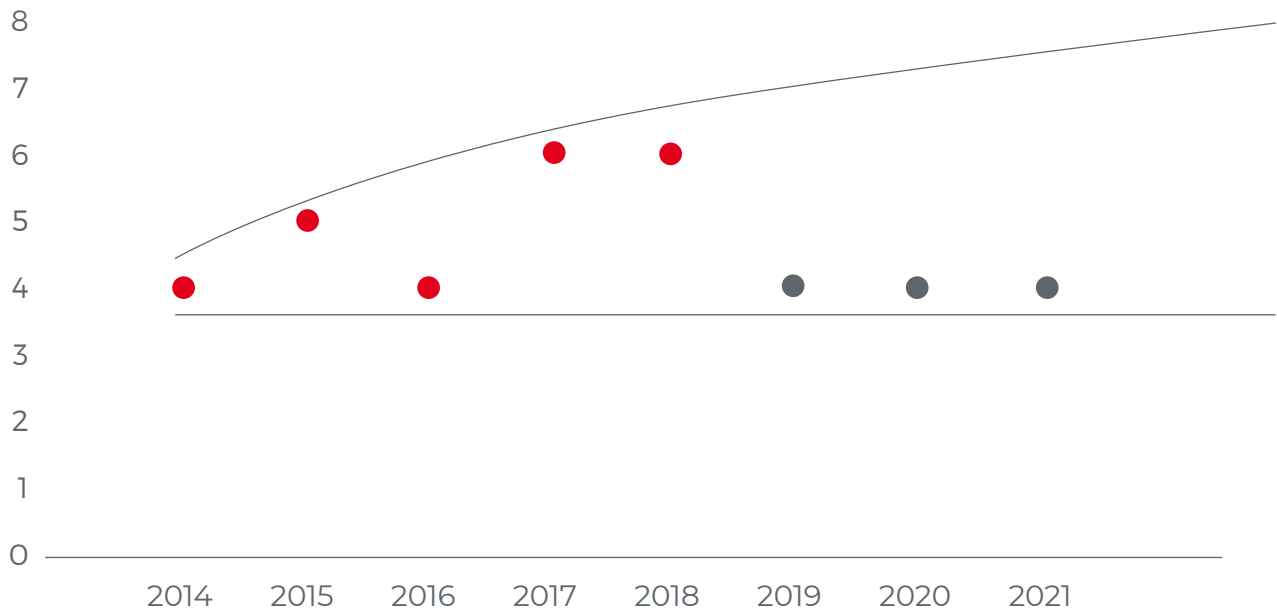
One can also expect that with each passing year, the number of such titles from Poland (cf. chart 9) will increase. Especially given the fact that this is not only a domain of the biggest studios. In our tally, not more than a quarter of titles are AAA, while on the other end such success can be achieved by studios as small as three people (with some outsourcing and external support usually). Indie titles, of course, do not immediately reach one million copies upon release. Sometimes it takes a year or two of

Million+ copies club



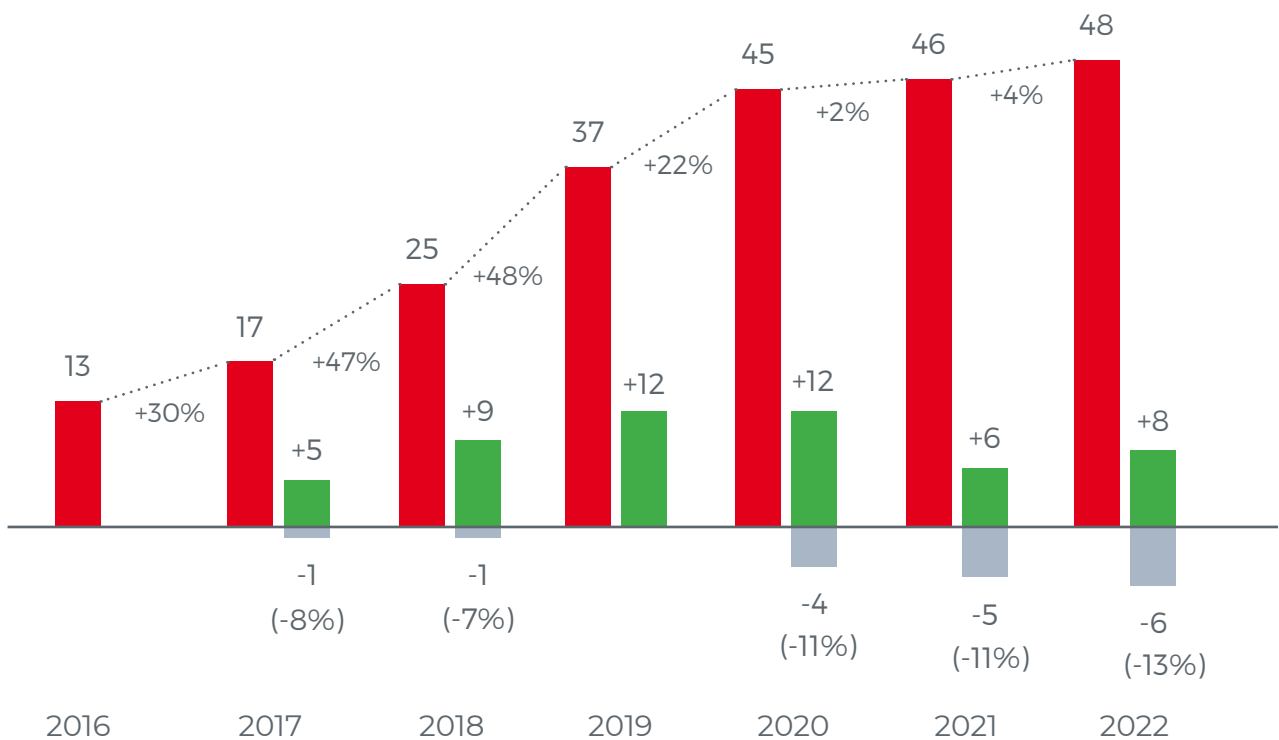
Platinum brands (games and series) in Polish games since 2014
compilation by

Chart 9. Polish titles that sold over a million copies globally



Sources: Indie Games Poland

Chart 10. Growth of the 3rd party publishing sector in Poland



Sources: Game Industry Conference

sales, or even the release on one or two additional platforms, most commonly consoles, to achieve such numbers in the long tail. Therefore, considering 2020-2022, additional games are likely to join this prestigious ranking. After all, the last two updates it had included two independent games from 2019 and 2018.

3.3. Global publishing

The Polish game industry has recently experienced a boom of global publishers originating from Poland. It might be seen as a sign of growing maturity of the sector. Before 2016, there were just a few global publishers in Poland, and this is still a norm for most game industries in Europe except several biggest ones (cf. section 9.2. Methodology). But there is still some space for growth. At least one-third of reported entities should be considered micropublishers, launching only up to a few titles yearly or even not having a release every year.

Publishing houses are becoming increasingly specialized in platforms like consoles, especially Switch, and genres or niches where they can effectively provide promotion. Roughly one-fourth of all Polish publishers should be seen as part of the PlayWay group, and they have a common or even prevailing operating model for publishing mostly Polish developers or even developers from the same capital group. Other Polish publishers, however, tend to look for titles globally. Their

operations are often built upon previous experiences and ventures. Only around a dozen active publishers are not developers at the same time, or do not offer any in-house development by a dedicated team.

Once again, as previously mentioned, a two percent increase in the number of publishers in 2022 does not necessarily mean the emergence of a single new entity. Rather, it indicates the addition of six new publishers, as five existing ones have ceased their publishing activities (cf. Chart 10), and this natural rotation is something that should be acknowledged.

3.4. Educational offer

Although the gamedev education sector is relatively young within the Polish higher education system and is recognized to need stronger ties with the industry, it should be acknowledged that it has played a significant role in the remarkable growth of employment in the game industry sector. Over the past decade, the educational offers have undergone significant enrichment, further enhancing the quality and diversity of available training options.

The demographic trends among university students in Poland have been persistently negative since 2010, with a nearly 33% decline in the student population. However, the rapid growth in the game-related education has been opposing this trend since the very beginning. More so, universities responded to the decreasing

Formal education targeted at game industry

65

degree courses at **52** universities of which

29

are private universities (33 courses)

23

are state universities (32 courses)

Courses:



26

programming courses with game related classes or game programming



23

art courses with game related classes or game art



10

game design courses



4

game studies (ludology)



1

game audio course

number of applicants by introducing newer, more fashionable programs. The peak in the number of courses and universities was reached in 2020, and since then a slight correction has taken place (cf. section 9.2. Methodology). Nine majors have been closed (six in private institutions and three in public ones), while four new majors have opened in private institutions. Furthermore, three universities have completely discontinued their game development related programs.

Nearly half of these courses (26), are meant for programmers. Poland has long been renowned for producing excellent programmers, even before the introduction of dedicated gamedev classes or courses, which has been a key factor contributing to the industry's success. Courses related to game development in fields of programming and art tend to be bachelors or majors. These commonly have more general profile, where subjects strictly related to game development range from a few classes within a learning track, up to an entire specialization at higher years. On the other hand, game design courses are more often built from scratch as centered around teaching game developers.

Still, almost a quarter of public universities offer at least one educational program related to games, while others are often not suitable for it, due to their profile, for example, medical, natural science, agricultural, theological institutions. This ratio is higher within specializations,

Table 2. Formal education for gamedev in Europe

	Country	Universities offering such	per 1M of citizens
1	France	150	2.2
2	Germany	109	1.3
3	UK	135	2.0
4	Spain	67	1.4
5	Poland	52	1.4
6	Finland	37	6.7
...			
15	Serbia	10	1.4

Sources: Game Industry Conference

as 40% of technical universities teach game programming, and 43% of art academies teach game art. If we compare the gamedev education to the rest of Europe, we can see that it has nearly reached the Western figures. In Eastern Europe, the closest contender is Serbia. Other countries usually have an even poorer offer (cf. Table 2). If we look at the education per capita rates, we can see that the current abundance of courses in Poland is on par with other countries and might be stable for some time unless we can follow in Finland's footsteps.

The fact that the only educational field that is consistently growing is ludology (game studies) could be concerning, even more considering the fact that it is the least practical area of study. The industry certainly does not require so many game theorists. However, this is probably

also a benchmark of the challenges in education. This is the only field that does not face teaching staff shortages. All other disciplines should have instructors with practical experience, but universities are unable to compete with industry salaries.

The educational offers for future game developers in Poland extend beyond degree-level teaching. While non-degree courses may be less common, they are still an integral part of the process. Exciting developments are taking place in high school education, with the establishment of gamedev schools or classes at the local level as well as the selection of talented students from various regions for after-school educational programs. These initiatives contribute to nurturing the skills and talents of aspiring game developers at an earlier stage, fostering a pipeline of talent for the industry.

4. Out of passion to retro FPS and Heavy Metal

The success story of Hyperstrange

A 7-year journey from a rented modest studio apartment shared by a creative duo, without a working toilet, to a modern spacious office in Warsaw's business district with a versatile team of 70 employees. A 5-year struggle to create a single game, which paved the way for a long list of titles developed and published regularly. This is the story of Hyperstrange.

The idea for the company hatched in 2015 in the minds of two friends, Przemysław Miliński and Łukasz Jarzab, who shared a passion for games and heavy metal, and as they say, 'had nothing to lose'. 'Just after starting our company, we set the direction of the first project, a game that we would like to play ourselves, with gameplay that did not yet exist.' says Przemysław and adds, 'In the beginning it was just the two of us, developing in our own time, financing it with loans, but after 3 years as the team grew to 4 people, we realized that we were running out of funds.' Having already poured their life savings into the project, Przemysław and Łukasz started looking for an investor. After months of searching for a suitable partner, after a deal that fell through at the last minute, and as hope was running out, a company with no connection to gaming stepped up. 'At first, we were unsure until we found out that they were gamers. One investor was a fan of Dark Souls, and the other was a fan of Quake. Our Project was a mix of these two (our elevator pitch was 'Quake Souls', to be exact!), and this is how we found a dedicated investor with whom we have been developing Hyperstrange to this day.' says Łukasz.

Do or do not. There is no try.

There was no plan B when Przemysław and Łukasz started their work on their first title, Elderborn.

'Do or do not. There is no try.' says Przemysław and adds, 'In 2012 retro-inspired FPSs were coming back into fashion, and we felt that this genre still had some undiscovered potential, just there for the picking. As personal fans of Dark Souls and Quake, we combined the brutality of the former with the dynamics of the latter. The passion for heavy metal also re-emerged during the production. As it turned out, this genre perfectly matched the style of

Elderborn. The game had its premiere in 2020 and as of today Elderborn has reached over 300k players on Steam.

In the following years, Hyperstrange developed a number of titles including POSTAL: Brain Damaged, to which they owe their global recognition as an independent developer. 'The fact that today our adaptation has such high ratings (4K reviews on Steam, with 96% positive – editor's note) is a great honor for us. We are very proud that our 6 games have an average rating of 91% on Steam, it is clear that what we do resonates with gamers.' says Łukasz.

Game development, publishing and.... a record label

Today Hyperstrange has 6 well-received titles in its development portfolio, including Blood West and CROSSBOW: Bloodnight. But game development is not their only activity. 'The first milestone on Hyperstrange's road to success was the creation of Elderborn. The second was our decision to help other studios publish their games.' says Przemysław and continues, 'Since we were able to successfully launch our own game, we wanted to help others achieve the same success as well.'

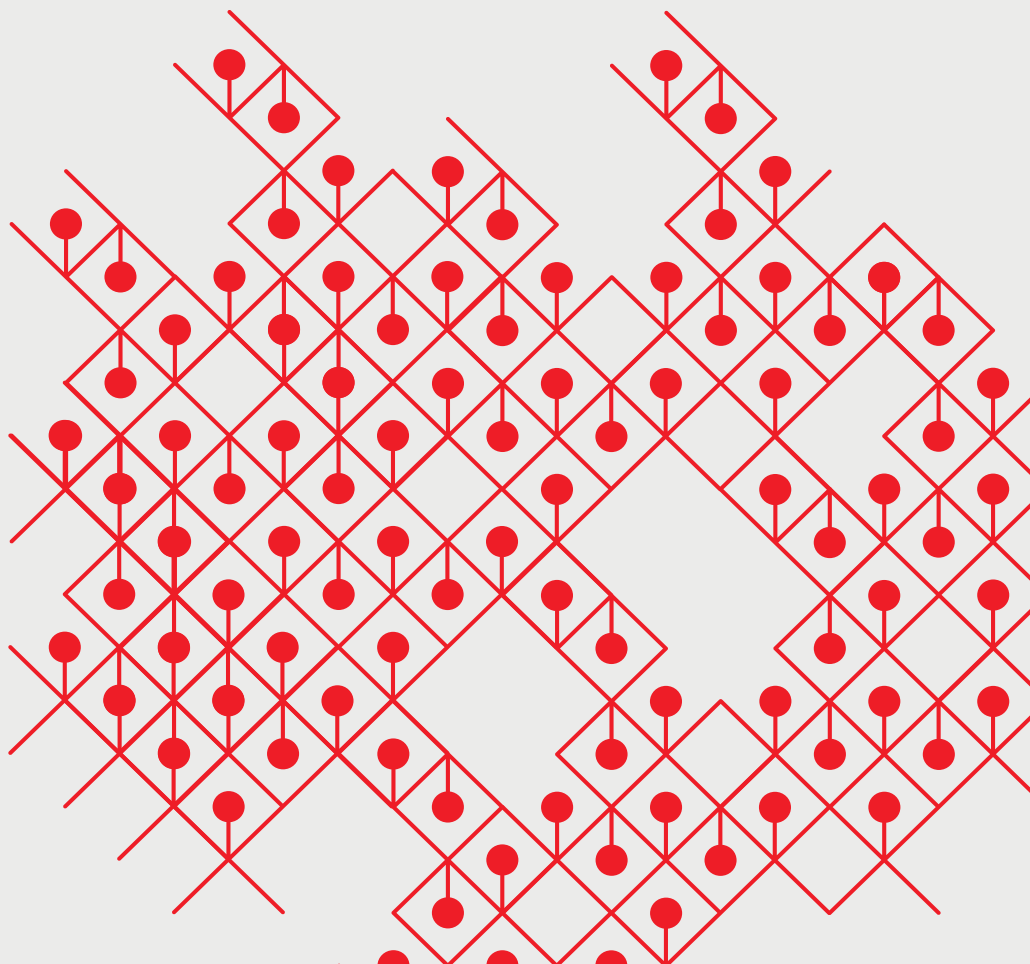
As a publisher, HyperStrange has launched a total of 7 games and is already working on another 6 releases. Thus far their biggest international success as a publisher has been Frozenheim, a mix of the strategy and city builder genres. 'Frozenheim was a bit outside of our comfort zone in terms of its genre, but we loved the Viking theme, its visual style, and the gameplay idea.' admits Łukasz. Frozenheim (in early access) paid for itself in about an hour from the premiere and by the end of the first day it earned the production costs of the full version. Undoubtedly, their own experience in the production and the release of Elderborn has had a significant impact on how they currently support other indie studios and specific approaches they have developed in this area.

More curious, perhaps, is that the youngest branch of their activity is a record label. Recently, they have started publishing music created for their own productions under the Hyperstrange Records label and in 2023 they are going to release their first original album containing several tracks from their games. Music videos, Q&A sessions with musicians, and even vinyl records or concerts are in their sphere of interest, too. 'It is going to happen. We are committed to promoting games as a culture.' says Przemysław.

Stay Indie? Stay Metal!

In just 7 years Hyperstrange has come a long way from an idea that was born out of passion for retro-inspired FPS games and music to a thriving development studio, a publishing house, and a music business. From one title developed in 5 years, to a portfolio of 18 titles and many more in production, including a multiplayer party game, the first Unreal Engine 5 title (Hordes of Hunger), and two unannounced AA projects.

When the two co-founders are asked whether Hyperstrange is still an indie studio their reply 'yes and no'. They are quick to add that, 'From an indie perspective, intuition is more important than business analysis. We have several teams, and everyone is working on something fresh and free, we do not want to change that. At the same time, we are planning to hit the mainstream. Structurally, when managing 70+ people, internal solutions and procedures are needed, which can hardly be called 'indie'. But one thing we promise is that we plan to... Stay Metal!'



5. Specializations

5.1. Steam

Steam, based on how it revolutionized indie development worldwide, has always been a great fit for Polish studios. To this day, it remains the first-choice platform, and most frequently used distribution means for them (cf. chart 11). This is facilitated by the fact that self-publishing on Steam is potentially the most straightforward and easily accessible option (cf. chart 12). This chart, being the most accurate measurement of Polish game releases, tracks both growth and changes. The apparent leap in 2021

mainly comprises of DLCs for the Sniper Ghost Warrior Contracts 2 due to the new business model of the CI Games title: 22 DLCs instead of 1. Still, we might be beyond a certain peak of cheaper mass-production of games.

Another Steam-related Polish specialization could be wishlists...

5.2. Producers of the most anticipated PC games

In the 2021 report, we observed that Poland became the global leader in the

Chart 11. Leading platforms as declared by studios

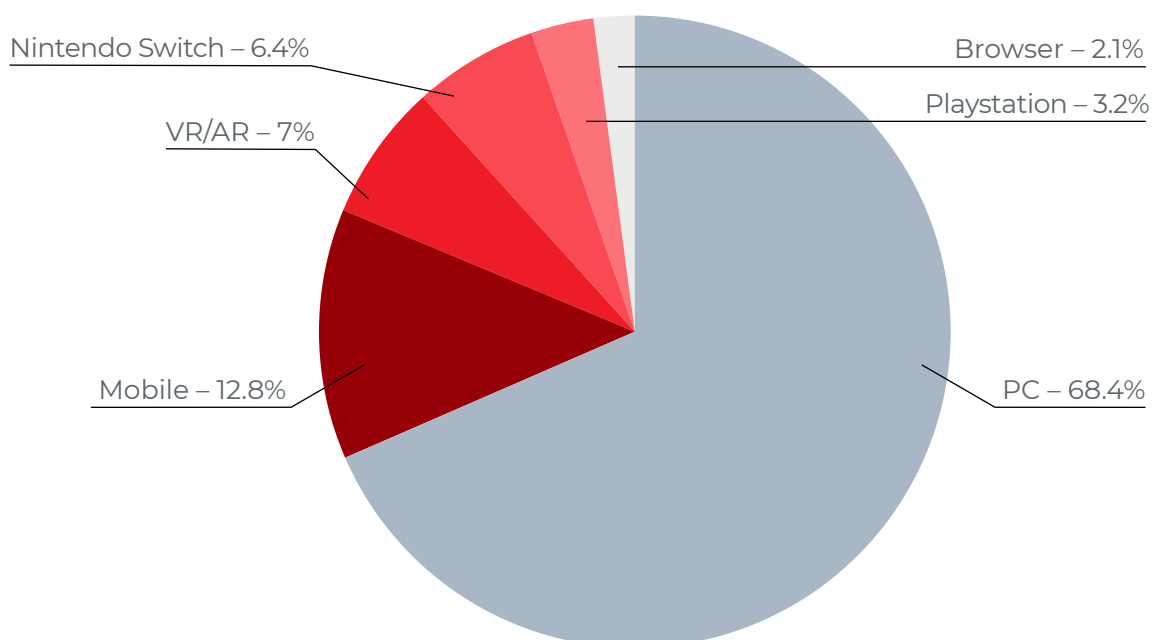
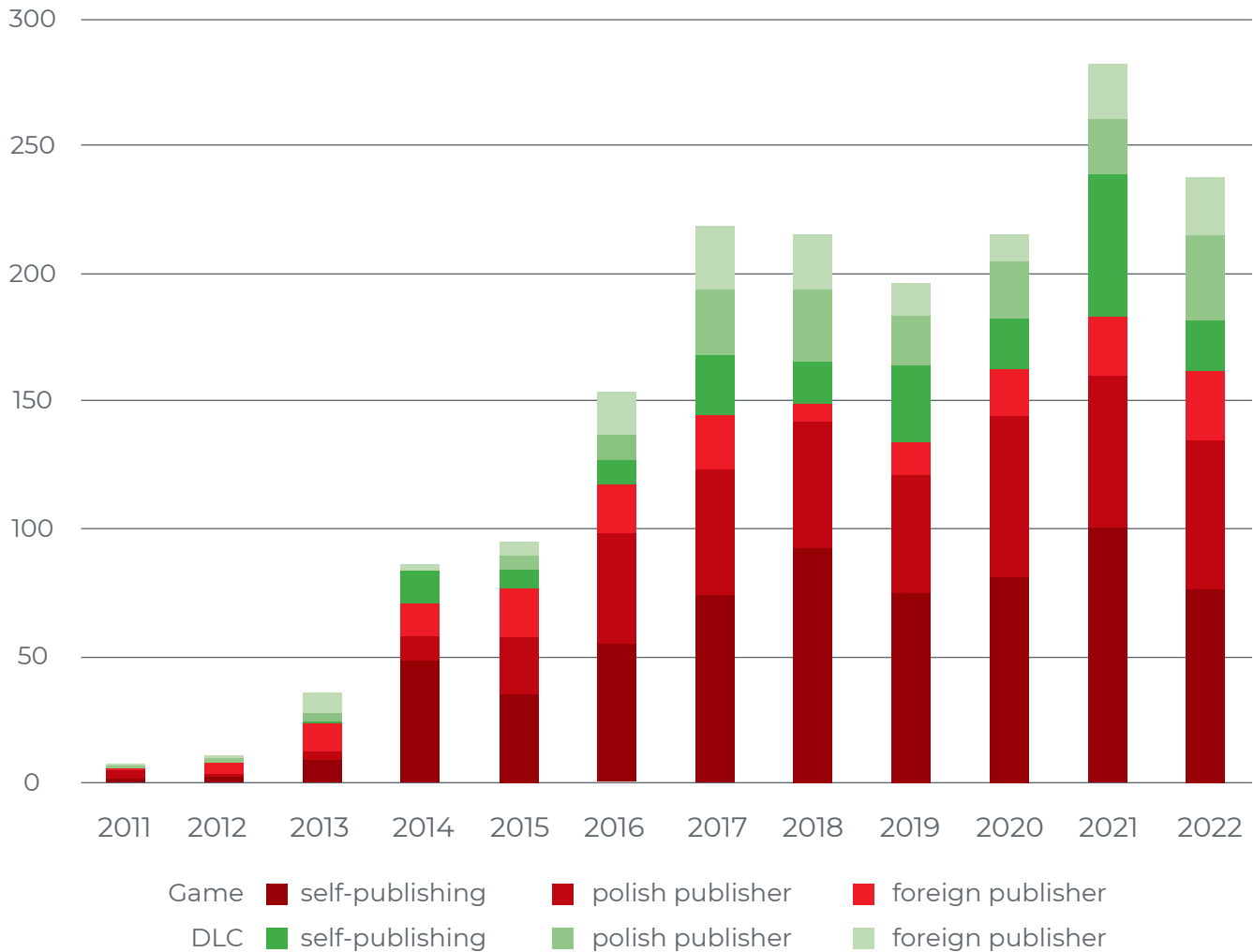


Chart 12. Polish releases on Steam



Sources: GamingAnalytics.info

Top 200 Steam wishlists, a global ranking of the most anticipated PC games. This ranking also witnessed other Polish records, as we occupied the first place on the list for 31 consecutive months. Cyberpunk 2077 held the top position unquestionably since June 12, 2019, when it took it by storm just two days after the famous presentation with Keanu Reeves at the E3 trade fair. However, as it premiered on December 11, 2020, the position of the leader was taken over by Dying Light 2 Stay Human.

So, what does it look like today? The most anticipated Polish game, Manor Lords, ranks fourth while is interestingly presented as a one-person project. Frostpunk 2 is just three places below it. Both titles are steadily climbing, but will they reach the top position currently held by the mighty Bethesda?

Let's return to the analysis of the Top 200 Wishlist. For at least 30 months, the number of Polish games in the

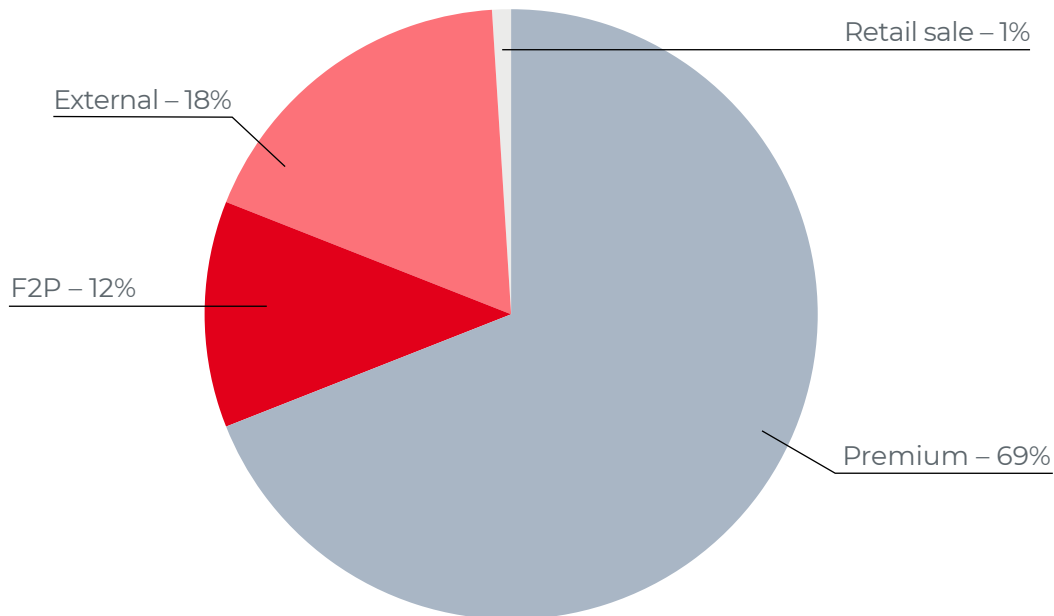
rankings hovered around 40, and we reached a record of 47 listings in January 2021. It was during this peak of game production quantity that Poland was recognized as an independent leader in the classification. Currently, we have around 30 Polish listings in the Top 200, indicating that the United States is now taking the lead. Still, the difference between Poland and the US is just a few titles, while we have twice as many titles as the next contender, regardless of it being Great Britain, Canada, or recently ascending Japan.

When making further comparisons with other industries in this report, we must pay attention to another interesting phenomenon. Germany has jumped from the 15th position to the 3rd. This significant growth of 350% can be attributed to the largest industry support program in history, reaching up to 70 million euros annually. Such programs have a direct and indirect impact, influencing the mindset of entire sectors and investors. Polish support programs, on the other hand, have experienced a pause in the meantime but are expected to start up again soon.

Table 3. Origin countries of games in Top200 Steam wishlists (May 2023, compared to Aug 2021)

Country of origin	Share	Games count	Change
USA	16.75%	33.5	↓ 1.5
Poland	15.25%	30.5	↓ 7.5
Great Britain	8.00%	16	↑ 1
Japan	6.75%	13.5	↑ 7.5
Canada	6.75%	13.5	↓ 2.5
France	5.50%	11	↓ 1
Sweden	5.00%	10	–
Germany	5.25%	10.5	↑ 7.5
Russia	3.00%	6	↓ 2
Spain	2.25%	4.5	↑ 1.5
China	2.50%	5	↓ 3
Netherlands	2.50%	5	↓ 2
Other	20.50%	–	–

Sources: GamingAnalytics.info

Chart 13. Leading business models as declared by studios

Sources: Game Industry Conference

5.3. AAA

The Polish specialization list must start with the most prestigious category for even more reasons than ever. The highly acclaimed *The Witcher 3: Wild Hunt* continues to be the most awarded AAA. However, the list of exceptional AAA productions from Poland is further enhanced by titles such as *Dead Island*, notably *Dying Light*, and *Dying Light 2* from Techland, *Gears of War: Judgment* from People Can Fly, and several others. *Cyberpunk 2077* by CD Projekt RED, *Outriders* by People Can Fly, their first AAA game after parting ways with Epic Games, bolster the lineup.

Looking ahead to the near future, even more promising developments are on the way. For example, 11 bit studios incoming

in-house productions are more and more expected to be either AAA productions or very close to that. CI Games follows a slightly different scenario - while they initially attacked the AAA sector with titles like *Sniper: Ghost Warrior 3* or *Lords of the Fallen*, they later opted for relatively lower budgets for the *Sniper: Ghost Warrior Contracts* series... and are now back with the a new *Lords of the Fallen* game, declared as AAA again. Ultimately, numerous Polish studios are actively working on ambitious AA+ premium games, striving to push the boundaries of the game industry.

5.4. External development, porting, and services

In Poland, there is a significant yet relatively less publicized sector that offers a range

of services related to game development, including external development, porting, asset production, localization, voiceovers, quality assurance, and video production. It is accompanied by the offer of various other services indirectly associated with game production, such as PR and marketing, player support, community management, legal services, investment, and stock exchange-related services. The seven largest companies in this sector, including Keywords, Lionbridge, QLOC, Roboto Global, Sperasoft, Testronic, and Platige Image, can be seen as a flourishing external development and service hub, employing approximately 4500 professionals who deliver high-quality services to clients worldwide. This hub should be currently regarded as the largest in Europe, in terms of workforce surpassing the entire game industries of many European countries. Moreover, numerous smaller companies also offer similar services (cf. Chart 13). Two distinct trends can be observed within this sector. Some companies combine these activities with their first-party development teams, often being perceived as developers rather than service providers, while others prefer to specialize exclusively in external development or services, providing niche expertise in their respective domains.

5.5. Simulators

'If something exists, some Polish game studio will make a simulator of it.' It is a well-known Polish specialty, so let's keep it as short as possible. If we were

to point to the Polish FIFA that would definitely be the Car Mechanic Simulator, with series numbered 2014, 2015, 2018 and 2021, plus some mobile, pocket, and VR 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. Almost any situation can be creatively modeled into a simulation, as evidenced by games like Thief Simulator, the 911 Operator series, and the Tenants and Medieval Dynasty as recent best-sellers. Recently, titles such as House Flipper and Cooking Simulator have also gained popularity. Smaller titles, aiming for more modest sales figures also tend to succeed, often backed by the PlayWay group. Additionally, a new trend has emerged in the form of survival simulators, marked by high production values. Green Hell from Creepy Jar studio and the earlier released Chernobylite from The Farm 51 serve as excellent examples. This illustrates the broad and dynamic nature of the simulator genre, with Polish developers at the forefront of its expansion.

5.6. Horror games

Horrors, horrors and some more horrors from Poland. For several years now, no ranking of best horror games can be made without at least 2-3 Polish titles. Polish companies create an extensive

array of horror games that span diverse categories. This range includes solo-developer titles like *Darkwood*, as well as prestigious productions like *Medium*, showcased at major Xbox events. The genre encompasses psychological horrors such as the *Layers of Fear* series, with the upcoming reboot, *Observer*, and erotically tinged games like *Lust from Beyond* and *Agony*. There are also such classically styled horrors as *The Beast Inside*, and games referencing specific artistic styles, for instance, *Inner Chains* and *Apocalipsis*. Other successful releases do not fit into conventional categories. *Carrion*, a BAFTA winner, reinvents the genre as a reverse horror, while *World of Horror* incorporates elements of Japanese culture and bi-color graphics from MS Paint. This expansion in development is paralleled by the progression in publishing. *Fearademic*, a spin-off from Bloober Team, focuses on small indie horror game publishing.

5.7. Retro shooters

Not sure if the world at all noticed there is such a new wave... and maybe there will not be too much of a wave after all, as it is a bit over a dozen titles now. The name of this trend is not cut in stone yet, we have seen the use of boomer shooters or throwback shooters, with the one used to name the section being probably most intuitive. But with almost a third of the most prominent titles within that trend and two publishers specializing in it, Poles

are the trendsetters here. If you are into shooting and value interesting game mechanics with some twists more than photo realistic graphics that cooks your GPU, some Polish games to try might include *Project Warlock*, *Forgive Me Father* and very well perceived *POSTAL: Brain Damated*. More will come soon.

5.8. City builders

The popularity of this subgenre of strategy games among Polish studios has probably been inspired by the great success of *Frostpunk*. Its makers, 11 bit studios, have managed to hype everyone for its sequel, and their another announced title, mysterious *The Alters*, is expected to be a city builder as well. Forther, *Riftbreaker* should also be considered a city builder, merging some defense game mechanics while *Medieval Dynasty* with a simulator. Two most recent titles, namely *Timberborn* and *Against the Storm*, have managed to become staples of the genre while still in Early Access. Numerous other titles will end their production cycle soon and will hit the markets.

5.9. Remakes of global hits

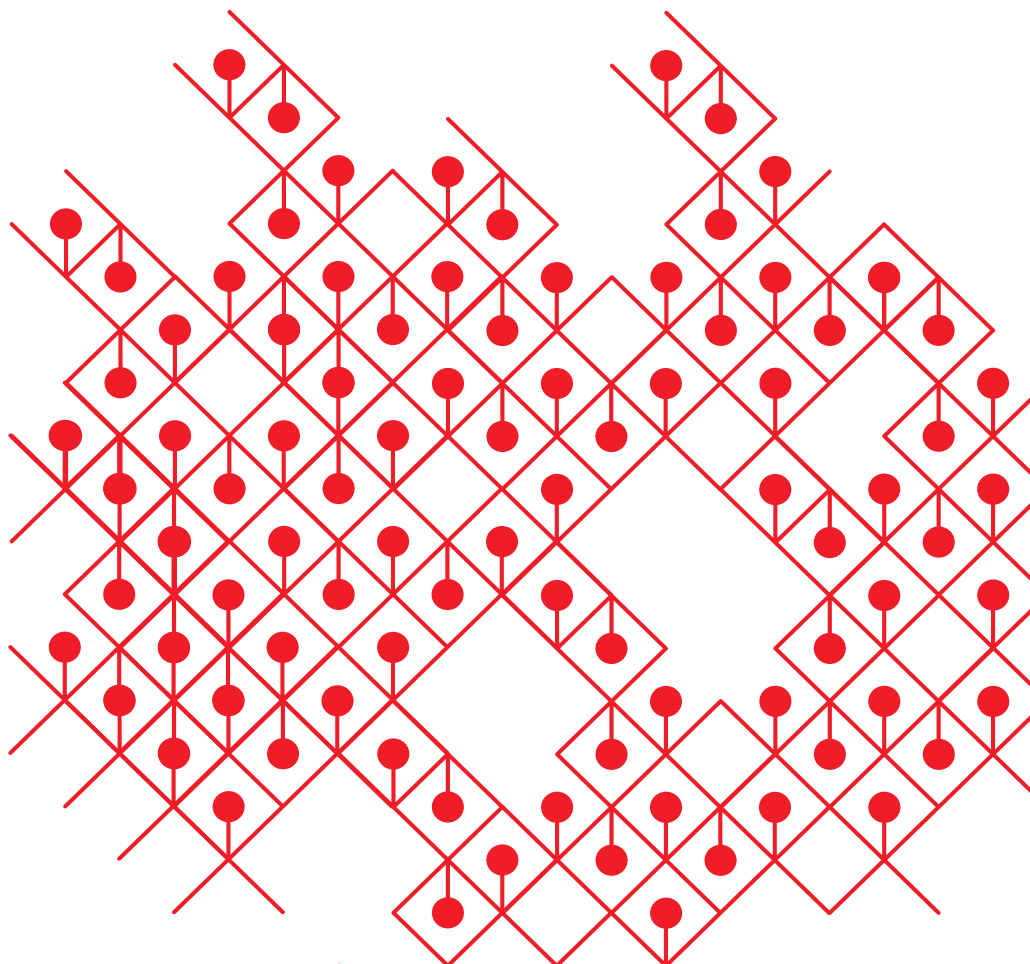
While this specialization is still mostly in production, it helps to understand the limitations of the Polish game industry and the goals it aims to achieve. The remake of the *Witcher I* was an announcement applauded by many RPG fans. Furthermore, Bloober Team

and CI Games are rebooting their two big IPs, namely Layers of Fear and Lords of The Fallen. But the Polish game industry which is much younger than its American or Japanese partners, is also reaching for their valued IPs to provide their remakes for new platforms and new times. Forever Entertainment is known as the developer of the Panzer Dragoon remake, while Bloober Team electrifies everyone waiting for their remake of Silent Hill 2 considered one of the best videogames of all time. But trust us, there is more to come.

5.10. Virtual Reality

The VR game market has finally become a decent niche allowing some medium-sized studios to thrive on it. Most of them will not reach the sales of Superhot VR, a Polish production being among few ones that make 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 non-VR studios would consider tempting. For example, Carbon Studios added Warhammer Age of Sigmar: Tempestfall to their The Wizards series, while Gamedust added Yupitergrad to Neverout. The latest hits from Poland include Car Mechanic VR, enthusiastically received Green Hell VR and Cooking Simulator VR awarded the Steam's VR Game Of The Year. Notably, all three titles are VR adaptations of hit Polish simulators mentioned a few sections earlier. This new trend sparked the organization and good attendance at a new VR Summit accompanying the Game Industry Conference in Poznań.



6. Small, successful, and independent

The success story of Afterburn

Although the game industry is dominated by male CEOs, this is not the case with Afterburn, a small studio from the city of Łódź, which found a niche in creating boutique premium mobile games. The endeavor led by Kamila Spierewka is an example of how smart management and creative ideas successfully pave the way to sustain a small business in gamedev – all Afterburn’s games covered the production costs in just a month after the release! Take a look at how they do it.

‘Our recipe for success is handling our games with love, taking care of our workers (hard no-crunch policy!) and ourselves and treating players with the respect they deserve. Nothing can give you such freedom as running your own company.’ says Kamila Spierewka, the CEO of Afterburn, who got her first PC when she was 10 and had been playing games ever since.

But it was not until 2016 when she seriously engaged in the game industry and co-founded Afterburn with the then boyfriend and now husband Łukasz. They started to make their own games as soon as they managed to save some money and had enough funds to do it. While Łukasz already had some experience in game development working previously for such acts as Wastelands Interactive, CD Projekt Red, and SUPERHOT, Kamila tried her luck in other walks of life – studied film & new media theory, medicine, worked as cashier, and even as a volunteer during movie festivals. Since she did not know how to write codes or draw pictures, she decided to focus on other ways of contributing to development – management, production support, and design level work.

‘We talked a lot about the things we did not like in our previous workplaces. Eventually, we started our own team to make games the way we wanted and to have control over the entire development process and marketing activities.’ she recalls her first steps preceding the foundation of very own business.

Completely different approach

Afterburn releases games on big platforms: PCs, consoles, and mobiles. But their area of expertise lies in premium mobile games launched on the

AppStore and Google Play. As Kamila says, it is a tricky market because developers and platforms usually focus on free-to-play games. This is not the case with Afterburn which took a completely different approach – they offer complete, polished, relatively short games for money up-front, with a refund option in case you do not like it.

‘It is a fair transaction for both sides and our fans really appreciate it. The major downside is that we must largely rely on Apple and Google editorial teams, since people do not discover our games via advertisements, but through featured visibility on stores, which means that our visuals, designs, and ideas behind the games must be outstanding.’ the CEO stresses.

As of now, Afterburn successfully launched three titles, namely: inbento, Golf Peaks, and Railbound. All of them reached or surpassed the targets expected by Kamila’s team. Actually, all of them covered the entire production costs in a month after the release and received warm reviews both from players and critics. For example, Railbound, which is their biggest commercial success, amassed over 800 positive reviews in just six months after the release on Steam with the majority of them being ‘overwhelmingly positive’. 50 thousand copies sold on Steam alone almost doubled the break-even point, which for this title was around 30 thousand copies.

Poems instead of never-ending sagas

‘We make small, polished, and complete experiences of high quality that do not use predatory mechanics to get you thrilled. I prefer finite movies to long-running series and poems to never-ending sagas, so I want to make games that reflect that. Our titles are designed for people that are ready to pay for them, finish them, and take something valuable from them, whether it’s a story itself, a great soundtrack, a difficult puzzle, or eye-pleasing visuals. We do not want to ruin those experiences by interrupting them with microtransactions or advertisements’, the Afterburn’s CEO says.

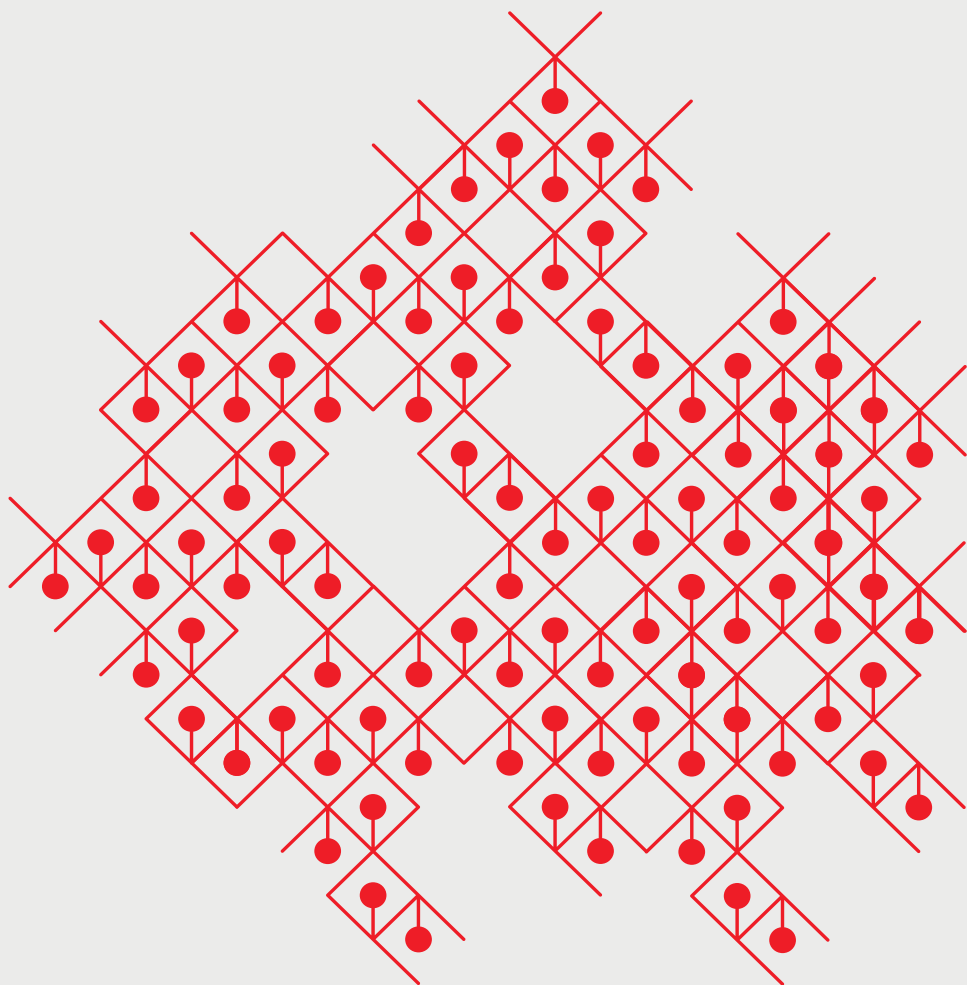
Kamila’s team operates in relatively short production cycles ranging from 6 to 12 months and starts with small prototypes usually made during game jams or just after the release of the most recent title. Then they test

the idea for up to seven days to figure out whether it fits the Afterburn DNA. It may take up to a year to make a completed, polished product. Relatively short cycles require relatively low production budgets and if the game pans out, it can return the costs really quickly.

‘Nonetheless, we plan our next moves in advance, being fully aware that any of our games can fail even if we do everything correctly, which is why we secure the budget for the next two games at all times. If you are a big studio or have an infinite supply of money, it does not matter if your game is bad or good, because you can always put a lot of cash and effort into marketing or acquisitions, while we need to take everything into consideration: the game’s title, the genre, the release date, which platforms should be our main focus, when to start marketing the game, whether the theme matches our mechanics, and whether the difficulty level fits our target audience.’ she adds.

Limited resources are the biggest challenge in having a small studio – almost every team member has to act in different roles. In Kamila’s case it is design level work, HR management, doing press and marketing. If anyone gets sick, it may derail the entire plan. But luckily, they manage to stay in the business and maintain creative independence with all the rights to their titles belonging exclusively to them. And because of that, they do not want to grow big as a company.

‘That does not mean we do not dream big. We are planning to produce two games at a time while supporting the older titles. And, last but not least, I would like to start a hub for game developers in Łódź together with an incubator for young developers who could co-exist with different companies similar to ours and do that within the next 10 years.’ Kamila talks about her future plans.



7. Polish local game market

The Polish game market is a local market where games are distributed to Polish gamers. It is noteworthy that it is being increasingly detached from the Polish companies discussed in the previous chapters. The traditional method of physical distribution is declining rapidly, and local distributors are almost extinct. The vast majority of digital distribution within this market is sourced entirely from foreign entities. Polish developers sell a mere 1-4% of their produced games within the local Polish market.

The year-over-year growth rate of 15% has slightly declined by 2 percentage points, still exceeding most Western markets. This fact reaffirms Poland's position as one of the most rapidly developing countries in this regard. The overall value of the Polish consumer market is projected to reach USD 1 575 million by 2026.

Estimates from various sources suggest that the number of gamers in Poland ranges from 17 million to 20 million. However, as every single numerical statistic, this one also fails to provide a comprehensive understanding of this phenomenon. These millions range from most hardcore to quite casual gamers, encompassing those who engage in gaming daily, occasionally or solely in social interactions. For a more focused perspective, we estimate active Steam gamers in Poland at 3 to 4 million.

Polish game market

19th

market globally



\$1225M

consumer market value in 2022

\$68

average revenue per user (ARPU)

+15% YOY

Market growth

\$12.6M

eSports market value in 2022

\$2.5

average revenue per user (ARPU)

+11% YOY

Esports growth

Physical games distribution is down to

14%

Sources: GIC Team elaboration based on data from Euromonitor International, Statista and public data

Polish market in global rankings

13th

biggest globally Xbox

13th

biggest globally PlayStation

9th

biggest globally PC Steam

7th

biggest globally PC Epic Games

4th

biggest globally PC GOG.COM

Sources: GIC Team elaboration based on data from GamingAnalytics.info, gamediscover.co Euromonitor International and public data

Additionally, there is a separate group of more occasional Steam, console, and handheld gamers, both regular and occasional, a segment of VR gamers, and, naturally, the broadest category of mobile gamers. Interestingly, both younger gamers and elder game leisure users tend to gravitate towards mobile gaming.

The peculiarity of the Polish game market is its substantial share of PC gaming, which has remained consistent over the years and continues to do so. Poland is

probably the second strongest market regarding PC gaming numbers per capita, closely following Canada. This is the reason causing Polish market to rank higher for PC platforms, particularly on Steam. The market share of the Epic Games Store in Poland is significantly higher than in many Western European countries, often exceeding it two to three times. This unique aspect of the Polish PC market is further exemplified by Valve's suggested pricing on Steam. The recommended prices for games in Poland are generally equal to those in the European Union or only slightly reduced. In contrast, in markets shown as larger gamer populations and higher sales volumes, such as Turkey, Brazil, and even Russia, game prices tend to be 40% to 80% lower than in Poland.

Sony PlayStation has emerged as the dominant player in the static console market in Poland, surpassing Microsoft Xbox and potentially capturing up to two-thirds of the market share, according to the Euromonitor data. However, there is insufficient data available to accurately estimate the market shares of handheld consoles, such as Nintendo Switch, or the rapidly rising popularity of the Steam Deck.

Polish is one of the leading languages within the global gaming landscape. A Steam survey shows Polish as the ninth most popular language among platform users¹. Remarkably, among the strongly

¹ Steam, (2023), Steam Hardware & Software Survey: May 2023, <https://store.steampowered.com/hwsurvey/Steam-Hardware-Software-Survey-Welcome-to-Steam>

Gamers in Poland



even **20M** gamers

over **80%**

gamers
are adults

47%

are female

Sources: Newzoo, Polish Gamers Research

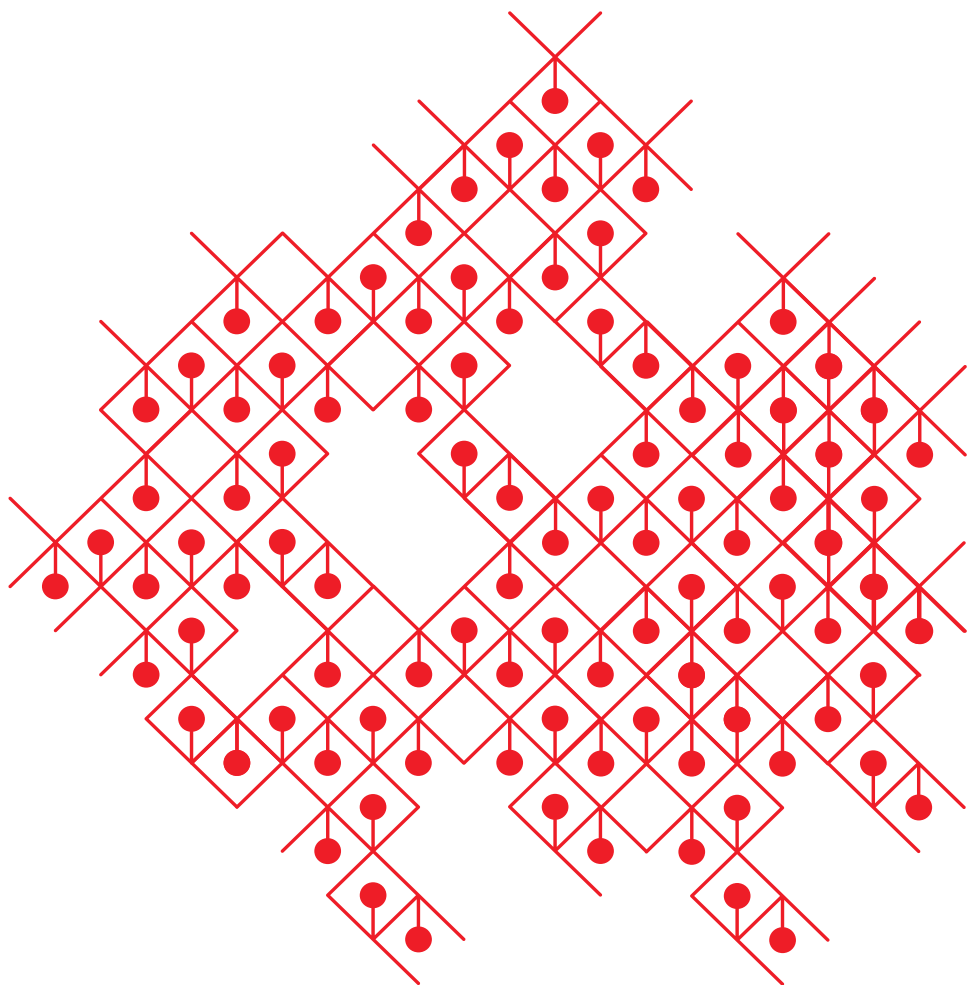
growing Steam language groups, only Japanese has managed to surpass Polish over the course of many years.

In recent game localization surveys, Polish consistently ranks between the 9th and 12th, which is a significant advancement compared to its previous position outside the top 15 just a few years ago. Our analyses keep confirming that Polish is the 9th most frequently utilized localization language, particularly on the Steam platform. Additionally, it is worth noting that English is widely adopted as a popular gaming language in Poland, given the nation's commendable proficiency in English².

The Polish local game market looks very alike all Western globalized markets. Polish gamers engage with the same popular global titles and original indie

games as their counterparts in America and Europe. Foreign corporations play the key role on this market, particularly the holders of distribution platforms such as Valve (Steam), Google, Apple, Sony, Microsoft, and Nintendo, as well as major global developers like Electronic Arts and Ubisoft. The highest-ranking Polish company in the industry is CD Projekt SA, primarily due to the success of 'The Witcher' series and 'Cyberpunk 2077' and the digital distribution achievements of the GOG.COM platform. However, it is noteworthy that for more than a decade, there have been no game producers in Poland capable of making profits through the local market only. The industry must rely on the global reach and international sales for sustained profitability and success.

² In numerous tallies of English knowledge or teaching, Poland usually ranks right behind top scoring Nordic countries, the Netherlands and Germany.



8. Harnessing the mobile gaming boom

The success story of BoomBit

When Marcin Olejarz, the CEO of BoomBit, together with his wife Karolina Szablewska-Olejarz, the current Chairman of Supervisory Board of BoomBit, started building the Aidem Media, their first development and publishing business back in 1997 no one suspected that this was going to be a trailblazing venture in many ways, both in Poland and abroad. It grew from a local producer of educational games to an international capital group with an extensive service portfolio and diversified sources of income.

In the early 2000s, Aidem Media (which is a palindrome) was one of the first Polish development studios to sell their own educational games on CDs. They were also among the first to obtain the rights to adapt popular children's Polish cartoon characters (including Reksio, Bolek and Lolek or Koziołek Matołek) which they brought to PCs in the form of interactive games. Back then, Reksio adventure game was probably one of the most significant successes of the company. The license was sold to Slovakia, Hungary, Romania, and Czechia. TV production was also no stranger to Aidem. Around 2008, the company started the cooperation with Hannibal Soares (the CEO of BoomBit Games Ltd), the current deputy CEO of BoomBit. Still, the truly transforming decisions were yet to come in this story.

'Certainly, the first breakthrough moment for the company was the entry to the mobile games market around 2010,' says the CEO. Although Snake, preloaded on Nokia phones in 1997, is considered the precursor of modern mobile games, the real 'boom' for this type of games took place with the development of the first smartphones and rising popularity of social networks which occurred around 2010. Again, Aidem Media was paving the way for mobile gaming in a relatively new segment of virtual entertainment. This was also the moment when the company acquired its first strategic investor (ATM Grupa). The next milestones came with the start of cooperation with Cheetah Mobile, one of the world's leading mobile game publishers in 2017, followed by the acquisition of 100% shares in BoomBit Games Ltd and the launch of the BoomBit capital group, followed by the debut on the Warsaw Stock Exchange in 2019. That still is not their final word, as Boombit are setting their sights on another ambitious project, 'Our next business goal is to develop projects based on the blockchain technology,' admits the CEO.

Three pillars of growth

From the beginning of its presence in the mobile games segment, the company has released hundreds of titles, which by 2023 had over 1.3 billion downloads! Currently, BoomBit remains one of the most important game developers and publishers on the mobile market with a track record of hit titles like Dancing Line (co-production with Cheetah Mobile, over 150 million downloads), Build a Bridge! (Google Play Most Innovative Game of 2017), Tanks a Lot! and recently Hunt Royale, Darts Club as well as a wide portfolio of hyper-casual games, including a series of Ramp Jump games, Slingshot Stunt Driver, and Shoe Race, to name just a few. The games are available primarily on the AppStore and Google Play, but selected titles can also be found on Steam and Nintendo Switch.

Despite the impressive portfolio of games, BoomBit likes to point out that they are not just another gamedev studio. The company business model is more complex and diverse than that, as it rests on three fundamental pillars.

First – development and self-publishing. There belong the biggest and most popular BoomBit productions. Today, BoomBit focuses mainly on hypercasual and mid-core/casual games but is open to other projects, too.

Second – Publishing. Through BoomHits, a business belonging to the BoomBit capital group, the company provides its publishing services to third-party developers, yet not in the form of financial support for the production, but as a set of advanced consulting, marketing, and design solutions. ‘We have innovative tools for data analysis and User Acquisition support, which, to put it modestly, are world-class.’ admits Marcin and adds, ‘For many years BoomBit has been developing its own games in-house. We are constantly looking for new projects and partners. As a company coming from the mobile market, we are pioneering the production of games based on data analysis and optimization of marketing campaigns.’

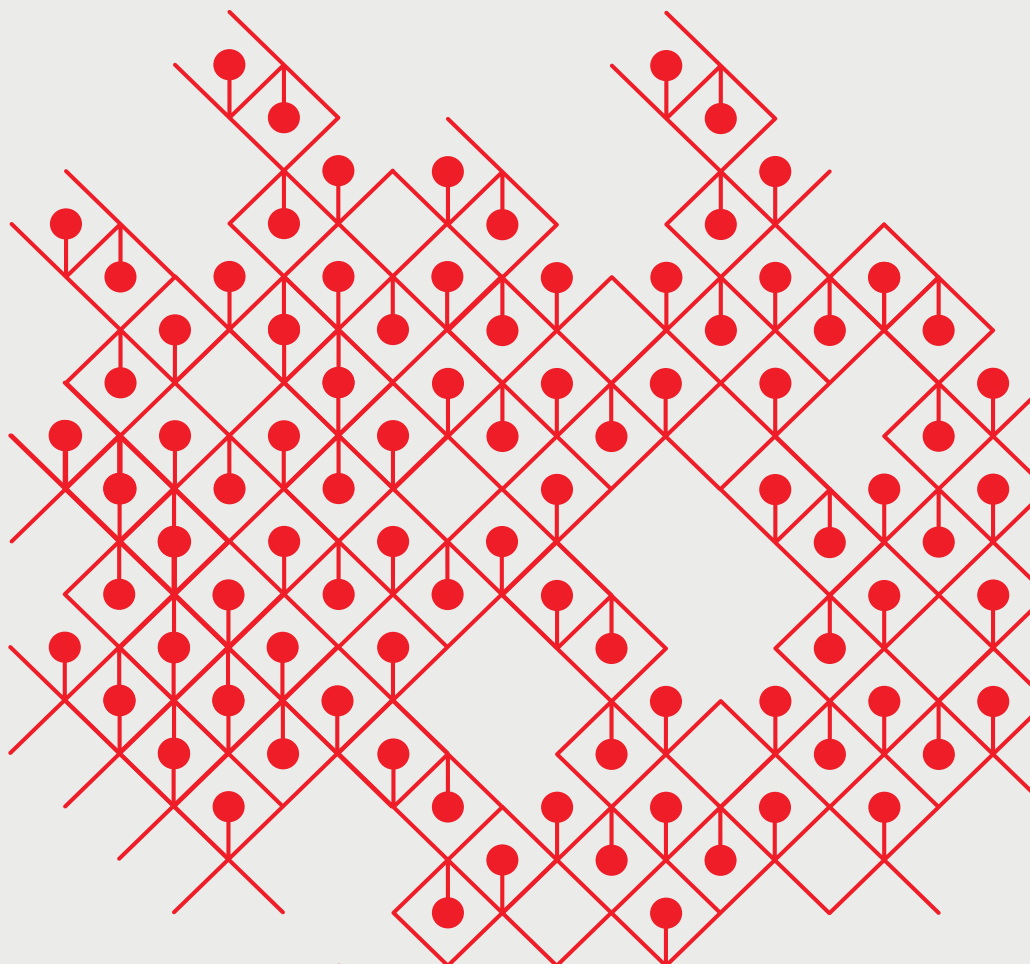
Finally, the third pillar is the engagement in joint ventures with the most promising studios selected after the testing stage.

Numbers speak for themselves

Even though today BoomBit employs over 300 specialists around the world, its CEO emphasizes that despite the constant growth and increasingly

complex development and operational processes, the company maintains a non-corporate approach to employees, 'We have a lot of examples of people who, after a period of work outside of BoomBit, are happy to come back to us due to this.' adds Marcin.

Financial results from the last 4 years are a testament to the scale of BoomBit's success. From 2019 to 2022, the group recorded an almost six-fold increase in consolidated revenues and an almost ten-fold increase in cash. In 2022, the Group's revenues amounted to PLN 294 million and were over 22% higher than in 2021. 'Our highest-earning title is Hunt Royale, generating in 2022 almost PLN 81 million, which accounted for 28% of all revenues. This makes us stand out in the market and shows that we are not dependent on one or two successful premieres.' says the CEO. 'The top five grossing games accounted for nearly half of gaming revenue last year, and TOP 10 for 64%, which confirms that our portfolio is well diversified.' When inquired about future plans, Marcin replies, 'Certainly, there are still many challenges ahead of us and opportunities to try something new and exciting. For sure, thanks to a fantastic team, we are ready for it. In our history, we have often shown how dynamically and agilely we can react to changing market conditions. As for the details, I will keep them to myself. The competition is watching!'



9. Data Sources and Methodology

9.1. Data sources

Game Industry Conference

The GIC (Game Industry Conference) has undertaken extensive research on the Poland's game industry over an extended period. The primary objective was to address crucial knowledge gaps in this area. To accomplish this, we maintain multiple databases that are continuously updated. These databases are populated through a diligent data collection effort, encompassing our day-to-day activities, special projects, and comprehensive sourcing techniques. The data is derived from a variety of public sources, including financial reports of listed companies, as well as selectively obtained through surveys, private inquiries, and our extensive connections within the Polish game sector.

Gaminganalytics.info

Gaminganalytics.info, a market intelligence data and statistics provider for video games, has been a valuable source for this report. It obtains comprehensive and up-to-date information on bestselling and highly anticipated games through automated data mining and manual curation. The data encompasses a wide range of platforms, especially Steam. We have used both

publicly available information and custom queries developed in collaboration with the report authors.

Indie Games Poland

IGP is a game industry organization in Poland, running support and knowledge sharing programs for developers, among others. Data gathering has recently concentrated around the polskigamedev.pl portal, its databases of game releases and teaching programs, and in-depth game journalism covering the industry, studios, games, successes, and more. A particular part of this are databases compiled by Michał Król, especially on releases of Polish games. All this data is manually gathered, and all tallies are carefully tailored to the needs of appropriate projects. The IGP biannually publishes a PolskiGamedev.pl Magazine, with an invaluable professional journalism and report section. This publication can be recommended as an extended discussion of many factors presented herein.

9.2. Methodology

With the growing interest in the game industry, numerous emerging reports and analyses, a careful selection of adequate

research methodology is of crucial importance. We have put an extra effort in ensuring best possible accuracy of data presented in this report.

In Poland, there is no publicly available data from any registers that can be utilized to explore the game industry, unlike in certain more traditional sectors. Due to unique characteristics of the sector, including digitalization and internationalization, it is necessary to undertake own data gathering to conduct the research effectively. The process of data collection for this report was conducted incrementally, avoiding relying on a single Internet survey, wherever it was possible. The only exceptions are Chart 2, Chart 11, and Chart 13 based strictly on studios' declarations. We paid special attention to obtaining a data sample encompassing a comprehensive representation of the industry, striving for completeness in the areas that are most relevant to the study's outcomes. Considering the limited accessibility of certain data, a thoughtful approach was employed to estimate missing information and fill gaps through interpolation when necessary. New data emerging allowed for improving estimations on past numbers, hence, wherever figures in the report differ from the past ones, it is result of such a revision. Some further approaches and decisions made there should be discussed as follows

The first research challenge was to accurately determine the number of active

studios, and some comparisons with other countries made it evident that different approaches was adopted in some other reports. For this research, a comprehensive database comprising over 1250 records was established and maintained. This involved addressing over 270 errors present in other databases, such as instances of mixed country of origin or misclassified industry types (often including software houses unrelated to game development or companies producing e-gambling games). Additionally, over 400 studios recorded as inactive were purged. Defining boundaries of what a gamedev studio is, can be a complex undertaking, as it involves distinguishing between student organizations and teams, game jam developers, and other entities that may not represent actual game production intended for market release. However, determining qualification criteria remains a challenge, as studios frequently emerge from informal teams with partially developed games. The qualification was much easier for the 3rd party publisher tally, as only actual publishing of external developers' titles was counted, ignoring any declarations made by companies. In general, all similar numbers in this report should be seen as quite conservatively calculated.

The ongoing debate about reporting the game industry statistics is further complicated by blurred boundaries between first-party development, third-party development, outsourcing, and related services. In this report, any actual

game production, regardless of where it is performed, has been included, as external development is often strongly linked to first-party development in the same company. This is the only feasible approach based on the available data. The reported statistics could be significantly higher if a broader set of external services was included. This business surrounding game production has yet to be researched. Similarly, the estimated number of foreigners in the industry does not encompass certain roles, such as player support specialists employed by larger companies that offer this exclusively as an external service. If such positions were included, the reported number of foreigners could potentially be twice as high.

The ranking of games with one million copies sold includes only the most basic sales figures, generally excluding bundles, free key giveaways, free downloads, or heavily discounted sales (e.g., one euro and below). A more challenging issue is how to account for subscription services, especially Microsoft Game Pass, in such rankings. For the time being, it has been decided not to include them at all.

European reports on the game industry employ varying approaches to listing educational programs incorporating digital art and new media courses. This report includes only those courses that have dedicated classes specifically focused on game development. Consequently, courses such as digital art, 3D art, or computer

animation degrees that lack explicit gamedev classes have not been included in the tally, despite having been encompassed in other reports. Employing such a more inclusive approach could potentially increase the reported number of art courses by as much as two dozen. However, such reporting raises valid concerns as to why not all programming courses are included in the count.

No single source exists completely and accurately portraying the Polish game market, and probably not any other one. Data from official trade statistics miss what is not reported there, primarily Steam. Survey approaches introduce sampling and response biases and overrepresent some sectors, usually free-to-play. Finally, data mining is limited to web portals that can be effectively scrapped, usually to a single platform. To report on the Polish game market, we employed several years of experience with all these methods to navigate between their shortfalls to achieve the most accurate image possible.

We express our sincere appreciation to the European Games Developer Federation for their dedicated efforts in publishing cross-European reports and organizing workgroups to discuss methodologies. Each of these reporting processes and connected debates provides valuable insights and enables us to foster new ideas and learnings from this collaborative group.

Connect with Poland!

Quality international events happening in Poland are the best means to reach out the companies in the Polish game industry

collocated and happening every October
Poznań International Fair, Głogowska 14, **Poznań**



exhibiting options:

B2B exhibition zone
Geek Careers recruitment zone



B2C exhibition including: Polish Dev Zone,
Indie Dev Zone, Web3 Gaming Expo,
Escape Room Games Event

networking means:

MeetToMatch and/or GRIP networking system with dedicated meeting tables
three evenings of networking parties
several dedicated pitching events

GameDev Investment Forum, GIC Legal Summit, VR Summit

Women in Games breakfast + roundtable, a dozen of other industry roundtables
side events: further specialized summits, gamejams, Epic Game Music concert, and more

awards:

Central & Eastern European Game Awards – a regional cooperation of 16 countries
Best Speaker Awards

Best Game and Best Booth Awards

gic.gd

www.gamearena.pl/en

happening every May

ICE Kraków Congress Centre, Marii Konopnickiej 17, **Kraków**



exhibiting options:

B2B exhibition zone, Indie Showcase

awards:

Digital Dragons Awards
Indie Showcase Awards

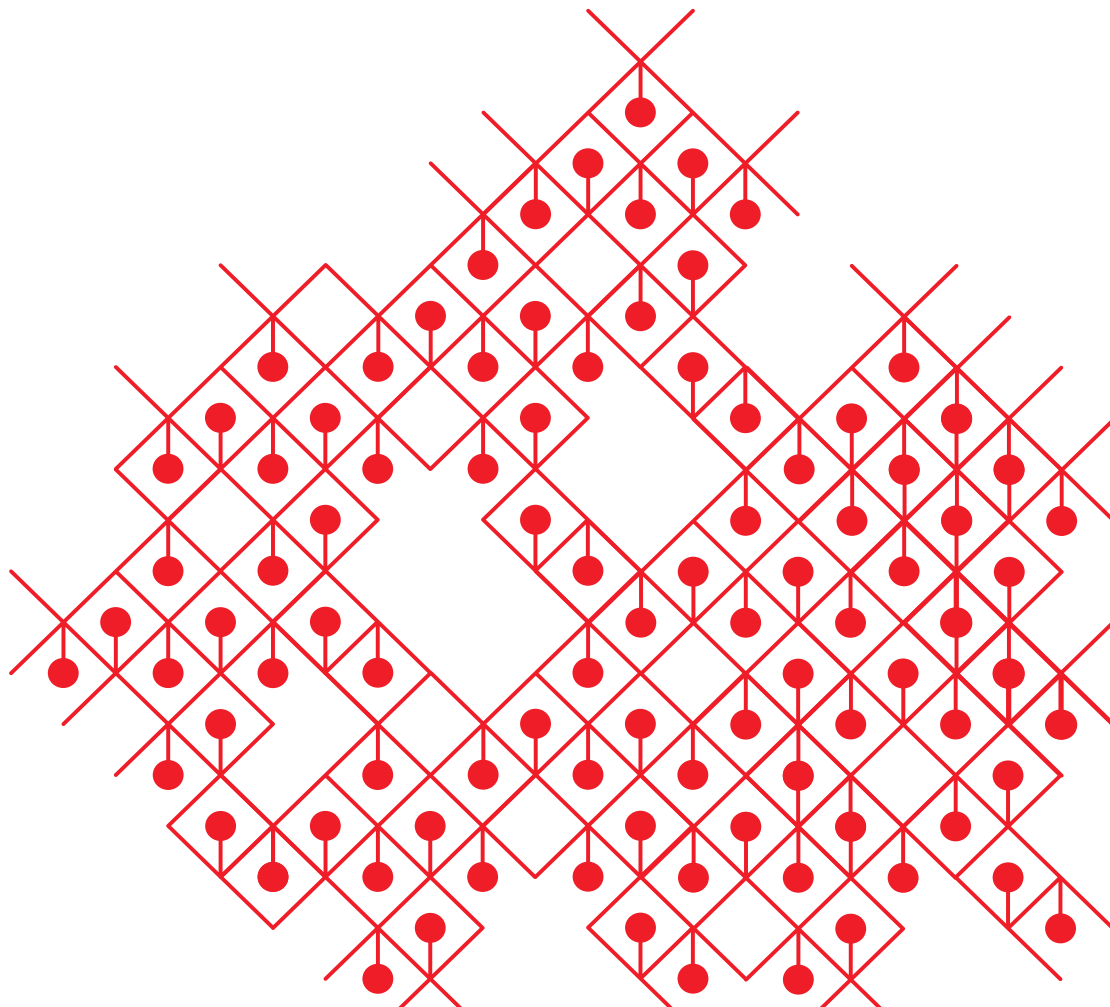
networking means:

Application with dedicated meeting tables
two evenings of networking parties
Arena - pitching session
Women's networking breakfast

www.digitaldragons.pl

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.



11 bit studios

www.11bitstudios.com, info@11bitstudios.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

Premium

Best known for:

This War of Mine +7M copies sold, included in the Polish national education system curriculum.

Next big thing:

Frostpunk 2 is the sequel to the highly acclaimed, BAFTA-nominated society survival game.

Description:

A collective of talented developers and skillful publishers reaching millions of gamers all driven by the creation of meaningful entertainment. Seeking experienced dev teams to form publishing partnerships with – teams which we share an artistic sensibility with, and the desire to create thought-provoking games while maintaining a smart business approach to the process.

Operating since: 2010 **Team size:** > 250

2B Games

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



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Tempest Rising - Modern RTS inspired by RTS greats of the 1990s and 2000s.

Next big thing:

Warpaws - a real-time strategy game where dogs and cats duke it out in a lighthearted alternate world.

Description:

2B Games is 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.

Our team comprises highly skilled and specialized professionals, capable of cooperating with each other and providing solid, thought-out content upon which quality games are created.

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

2Dynamic Games

www.2dynamic.games, contact@2dynamic.games



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

F2P, Premium

Best known for:

Lumencraft - a top-down, rogue-like shooter and base building with tower defense elements.

Next big thing:

We work on 2 new titles which will utilize our 2Dynamic Engine allowing for advanced terrain sim.

Description:

An independent development studio that specializes in 2D games with advanced terrain and lighting simulation, utilizing the 2Dynamic Engine.

Operating since: 2000

3R Games

www.3r.games, office@3r.games



Platforms:

VR/AR, Meta Quest 2

Models:

Premium

Best known for:

Bestselling and top rated Thief Simulator VR: Greenview Street for Meta Quest 2.

Next big thing:

Parts 2 & 3 of Thief Simulator VR - Richie Rich St. & Industrial St. DLCs.

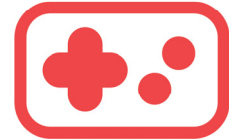
Description:

Meta Quest 2 top seller in a debut? That's us! 3R Games S.A. is the team behind the successful Thief Simulator VR: Greenview Street, a title listed among 50 global Meta bestsellers since its release in July 2022. We are pioneers of the VR/AV market in Europe, with 10 years of experience. Since January 2021 3R Games S.A. has been listed on the GPW Main Market (Warsaw Stock Exchange).

Operating since: 2021 **Team size:** 11

8Bit

www.8bitplay.com, contact@8bitplay.com



8BIT

Best known for:

Proudly, 90%+ clients are referrals, showcasing our commitment to quality service for top studios.

Next big thing:

Recruiting all roles for global studios (AAA, mobile, console, indie) - we lift their game!

Description:

8Bit, a global recruitment agency, links top talent with diverse game studios. Our vibrant team of gaming enthusiasts connects candidates to opportunities in mobile, PC/console, VR, start-ups, and all gamedev types. Covering every development aspect, studios trust 8Bit to find the perfect fit. Experience the 8Bit difference, turning talent into gaming magic, one connection at a time!

Operating since: 2015

A2 Softworks

www.a2softworks.com, contact@a2softworks.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

F2P, Premium, Web3, External development/Outsourcing/Services

Best known for:

Gatewalkers is a unique mixture of co-op game, survival and RPG released in 2023.

Description:

A2 Softworks is an indie gamedev studio seated in Poznań, Poland. We are players, so we develop games that we wish to play! We specialize in online, cross-platform games.

Operating since: 2017

AB

www.oobe3d.pl, contact@oobe3d.pl



Platforms:

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

Models:

F2P, Premium, Web3, External development/Outsourcing/Services

Best known for:

We have 3 types of proprietary scanning technologies. Our scanners use up to 200 photogrammetry cameras.

Next big thing:

We are currently working on automating the process of creating animations and scanning with the use of drones.

Description:

Our company specializes in photogrammetric scanning of any objects, regardless of their size and weight, for game and film productions. We create one of the most accurate 3D scans in the world based on our proprietary technology. We scan human figures, faces, animals or elements of city infrastructure, architecture, and even works of art.

Operating since: 2017

Afterburn

www.afterburn.games, hello@afterburn.games

AFTERBURN

Platforms:

PC, Xbox, Nintendo Switch, Mobile

Models:

Premium

Best known for:

Railbound - Overwhelmingly Positive on Steam (96%).

Next big thing:

An unrevealed puzzle game.

Description:

Afterburn is a small game development studio based in Łódź, Poland, focused on crafting comfy puzzle experiences. Our newest title is called Railbound - a track-bending brainteaser! Our previous titles include Golf Peaks and inbento, both out now on computers, mobile, and consoles!

Operating since: 2018 **Team size:** 6

Always Too Late

www.alwaystoolate.com, business@alwaystoolate.com



Platforms:

PC

Models:

Premium

Next big thing:

We are currently working on our debut title - Holy Stick! - a 2D party shooter, releasing this Summer.

Description:

A small, fully independent gamedev studio, founded by two young enthusiasts.

Operating since: 2022

Amber Nutrition Bartosz Bertrandt

www.ambernutrition.eu, bartek@ambernutrition.eu



Best known for:

Participation in the IEM Katowice 2023 and very positive feedback on my food products.

Next big thing:

Start an Online Store.

Description:

Amber Nutrition creates and develops food products, personalized to specific customer requirements, with particular emphasis on nutritional needs of e-athletes. Amber Nutrition is open to cooperate in in the field of research, development of technologies or improving the quality of food products.

Operating since: 2022

Ancient Forge

www.ancientforigestudio.com, contact@ancientforigestudio.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

The Tenants - went even 15 hours after the launch, sitting at over 5k very positive reviews now.

Description:

Ancient Forge is a video game development and publishing studio from Poland, founded in 2018 by Max Strzelecki and Dushan Chaciej. Led by experienced game developers with a strong passion for mechanics-heavy games, the studio specializes in premium PC games. The studio's core principle is to build games that the team themselves want to play, as showcased by the recent full release of The Tenants.

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

Anshar Publishing

www.ansharpublishing.com, office@ansharpublishing.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Gamedec: Definitive Edition - Award-winning Isometric Cyberpunk RPG based on a Polish book series.

Next big thing:

An upcoming release of a turn-based RPG Game - Zoria: Age of Shattering.

Description:

Honest and comprehensive marketing and publishing services. Created in 2021, the team consists of Anshar Studios veterans and experienced specialists who gained their understanding of the industry at key Polish game studios. No bull policy and a revolutionary system of inverse recoup make us a perfect fit for integrity, transparency, and straight-to-business partnership.

Operating since: 2021 **Team size:** 8

Anshar Studios

www.ansharstudios.com. office@ansharstudios.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Gamedec: Definitive Edition – isometric
cyberpunk RPG – full SKU development,
released on 16.09.2021.

Next big thing:

Layers of Fear (coproduction) - next
instalment of a horror saga; next-gen & PC -
01.06.2023.

Description:

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

Operating since: 2012 **Team size:** 150

Appcadabra

www.sportsmanagerpro.com,

support@appcadabra.pl



Platforms:

Mobile, Browser

Models:

F2P, Premium

Best known for:

Speedway Manager - the biggest
speedway manager in the world.

Next big thing:

Sports Manager PRO - the first multisport
manager in the world.

Description:

We create magical apps...

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

Arclight Creations

www.arclightcreations.pl, contact@arclightcreations.pl



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Help Will Come Tomorrow – a survival strategy game set in the Siberian wilderness.

Next big thing:

An unrevealed 2D adventure game with farm/life sim mechanics inspired by the work of Albert Uderzo.

Description:

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

Operating since: 2019

ARP Games

www.arpgames.pl, office@arpgames.pl



Platforms:

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

Models:

Premium, External development/
Outsourcing/Services

Description:

We are a stimulator of various projects in the gaming sector. The company is owned by ARP, a governmental agency supporting the development of Polish industry. We support promising Polish gaming ventures. Over 30 teams have already benefited from our support.

Operating since: 2016

Artifex Mundi S.A.

www.artifexmundi.com, contact@artifexmundi.com



ARTIFEX MUNDI

Platforms:

PC, PlayStation, Xbox, Nintendo Switch,
Mobile

Models:

F2P, Premium

Best known for:

Over 85 hidden object games exceeding
10 million copies sold across all platforms.

Next big thing:

Unsolved - an F2P hidden object game and
a yet-to-be-announced F2P RPG title.

Description:

Artifex Mundi is a game developer and
publisher based in Katowice, Poland. To
date, we have sold over 10 million copies
of hidden object games. Right now, we
are focusing on developing F2P mobile
HO games and RPGs. We have been
listed on the Warsaw Stock Exchange
since 2016.

Operating since: 2006 **Team size:** 100

Artificer

www.artificer.com, contact@artificer.com



Platforms:

PC

Models:

External development/Outsourcing/
Services

Best known for:

Showgunners: Turn-based strategy on
dystopian reality TV. Hard West. Phantom
Doctrine.

Next big thing:

Expertise in turn-based games is
inherent in our DNA. We're also currently
expanding to new genres.

Description:

Artificer, a Warsaw-based studio founded
by the team behind Showgunners, Hard
West, and Phantom Doctrine. With over
40 experienced developers, including
award-winning veterans from titles like
Call of Juarez, Outriders, The Witcher,
and more. Led by the “measure twice,
cut once” philosophy, we are devoted
to hand-crafted work and turn-based
expertise.

Operating since: 2019 **Team size:** 45

Astrolabe Stories

www.astrolabestories.com, info@astrolabestories.com



Platforms:

PC, Nintendo Switch, Mobile

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Last Threshold and Ballads & Romances.

Next big thing:

A puzzle-solving visual horror novel - 2023
or 2024. Standalone comic series from the
Threshold universe.

Description:

An indie studio from Wrocław focused
on designing horror games with a
Lovecraftian vibe.

Operating since: 2021

Atomic Jelly

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



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Release of several cool games and stable
operations for many years with a good
team.

Next big thing:

Truck Mechanic: Dangerous Paths, Space
Mechanic Simulator, Train Mechanic
Simulator and more.

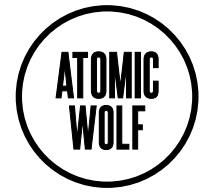
Description:

We value ideas and innovations, so we
try to make every game we create truly
unique. Our goal? Creating interesting
games based on ambitious and
sometimes also crazy ideas.

Operating since: 2016 **Team size:** 11

Atomic Wolf

www.atomicwolf.net, info@atomicwolf.net



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.

Next big thing:

Yet Another Fantasy Title (YAFT), an open-world fantasy RPG, filled with absurd humor and bard music.

Description:

Atomic Wolf is a globally recognized video game development company. Our studio has a strong focus on storytelling, immersive worlds and unforgettable gameplay experiences that resonate with players worldwide. Our portfolio consists of highly acclaimed titles, including award-winning Liberated, which is a combination of a comic book and a video game. Our team of talented developers and visionaries works tirelessly to deliver our next launch - Yet Another Fantasy Title.

Operating since: 2017

Awesome Games Studio

www.awesomegamesstudio.com,
marcin@awesomegamesstudio.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

Premium

Best known for:

Fury Unleashed - a roguelike action platformer, 200k copies sold and a 75+ Metacritic score.

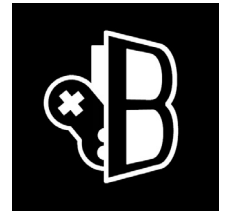
Next big thing:

Yet Another Zombie Survivors - a reverse bullet hell where you command a group of survivors.

Description:

Awesome Games Studio was founded in 2009 and is based in Kraków. 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.

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



Backroom Boys

www.backroomboys.games, hello@backroomboys.games

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

External development/Outsourcing/
Services

Best known for:

Over 8 years of experience with
PlayStation, Xbox, and Nintendo porting.

Next big thing:

Currently porting two AA+ titles for the latest
generation of PlayStation and Xbox.

Description:

A small team of console fanatics with over
8 years of experience with PlayStation,
Xbox, and Nintendo porting. Our mission
is to work on amazing projects, build
meaningful relationships, and leave our
footprint on the world, while having a
great time.

Operating since: 2022

Baltoro Games

www.baltorogames.com, contact@baltorogames.com



Platforms:

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

Models:

F2P, Premium

Best known for:

Moto Rush GT - million copies sold.

Next big thing:

Pixel Cafe - a unique blend of bartending
simulation, a visual novel, and arcade time
management.

Description:

We focus on attracting creators with
passion who harmoniously combine their
love for games with their work.

Operating since: 2008 **Team size:** 20

Better Gaming Agency

www.bettergaming.pro, contact@bettergaming.pro



Best known for:

Providing top-notch PR & marketing services to a variety of developers and publishers.

Next big thing:

GIC becoming globally recognized as the biggest conference for game professionals in Europe.

Description:

We are an international gaming agency that works with companies and brands from the video games industry – be it veterans or those just making their first steps. We help build product awareness and reach a suitable audience. We specialize not only in video games (PC, console, mobile), but also in hardware and events, both online and offline. To make sure everything is better.

Operating since: 2017

Big Cheese Studio

www.bigcheesestudio.com, contact@bigcheesestudio.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, PCVR, META, PICO

Models:

Premium

Best known for:

The Cooking Simulator game and DLCs – several million copies sold on multiple platforms.

Next big thing:

Right now, our biggest focus is on Cooking Simulator 2, Pizza Empire and an unrevealed project called Cheddar.

Description:

Big Cheese Studio is a team of talented professionals developing realistic simulation games that focus on creativity, competition, and fun. Our passion and experience translated into a great success of the Cooking Simulator game. We are constantly working to add new quality projects to our portfolio. Since 2021 we have been listed on the Warsaw Stock Exchange.

Operating since: 2018

Bit Golem

www.bitgolemgames.com,

contact@bitgolemgames.com



Platforms:

PC, VR/AR

Models:

Premium

Best known for:

Dagon: by H. P. Lovecraft - one of the best rated Lovecraftian games on Steam, over one million units.

Next big thing:

Dr. Emmerson's Nocturnes our original approach to bringing literature into the interactive medium.

Description:

We are a small 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 – focus on the story.

Operating since: 2013 **Team size:** 2

Black Drakkar Games

www.blackdrakkar.games, contact@blackdrakkar.games



Platforms:

PC

Models:

External development/Outsourcing/Services

Best known for:

Co-development of Fort Solis - a third person thriller set over one long night on Mars.

Next big thing:

Co-development of an unannounced AA+ Sci-Fi action game with a world known IP and unrevealed projects.

Description:

Black Drakkar Games is a Polish studio founded by industry veterans and powered by very experienced and harmonized individuals. Our team co-develops various game projects. One of them is Fort Solis - a single-player third-person thriller set over one long night on Mars. The second project is an unannounced AA+ game in the Sci-Fi action/thriller genre with a world known IP.

Operating since: 2021 **Team size:** 50

Black Eye Games

www.gloriavictisgame.com, press@gloriavictisgame.com



Platforms:

PC, Nintendo Switch

Models:

Premium

Best known for:

Gloria Victis: Medieval MMORPG.

Next big thing:

Big expansion pack for Gloria Victis MMORPG with guild islands, free-building, and guild castle sieges.

Description:

Black Eye Games is a self-funded indie developer from Lublin focusing on premium PC games. Its flag title is Gloria Victis: a Medieval MMORPG which sold in more than 500 000 units and had its 1.0 launch on Feb 7, 2023.

Operating since: 2012

Black Torch Games

www.skullstonegame.com, contact@skullstonegame.com



Platforms:

PC

Best known for:

Skullstone

Description:

We are not a company but just a group of skilled individuals who joined their forces to make a game.

Operating since: 2016 **Team size:** 8

Blindflug Studios

www.blindflugstudios.com,

distribution@blindflugstudios.com



BLINDFLUG STUDIOS

Platforms:

PC, Mobile

Models:

Premium, External development/
Outsourcing/Services

Best known for:

First Strike, a nuclear war RTS game, played by more than eleven million players so far.

Next big thing:

We are an indie game studio founded in 2014 by Jeremy Spillmann and Moritz

Zumbühl, based in Switzerland, Poland, Ukraine, and Slovakia. Our mission is simple: we want to create beautiful, imaginative, and incredibly fun games that center around real-world dilemmas. We believe that games are a great medium allowing players to experience the most complex of problems while being entertaining, too!

Operating since: 2014

Bloober Team

www.blooberteam.com, biuro@blooberteam.com



Platforms:

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

Models:

Premium

Best known for:

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

Next big thing:

Our 2 upcoming games include Layers of Fear and a remake of SILENT HILL 2 in cooperation with KONAMI.

Description:

Bloober Team is a seasoned game development studio with over 230 people strong. We are revered for creating horror games with mature storylines and atmospheric set-pieces, resulting in a chilling and memorable experience. We are proud of our mastery and passionate approach to creating outstanding horror games.

Operating since: 2008 **Team size:** 230

Blu Game Show

www.esport.blustreamtv.pl, p.katewicz@e-pulpit24.pl

Best known for:

We are the proudest of setting up the biggest game event in northern Poland.

Next big thing:

We are currently working on 3rd edition of the Blu Game Show.

Description:

We started with only one e-sports game - CS:GO. During the 3rd edition of Blu Game Show, two e-sports tournaments will be organized - FIFA2023 and Counter Strike: Global Offensive. We encourage e-sports organizations to submit their teams.

Operating since: 2021

Bones Studio

www.bones.studio, contact@bones.studio



Models:

External development/Outsourcing/ Services

Best known for:

Motion capture services.

Next big thing:

An unrevealed big project - summer 2023.

Description:

Bones studio – Character Animation Experts.

We are a 3D production studio specialized in full-performance motion capture and character animations for games, movies, and advertising.

Under one roof, we combine a mocap studio with a team of experienced 3D animators which allows us to ensure an unbeatable price-quality ratio.

Operating since: 2013 **Team size:** 30

Born Lucky Games

www.bornluckygames.com, mantis@bornluckygames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

F2P, Premium

Best known for:

Roarr! The Adventures of Rampage Rex, the biggest seller.

Next big thing:

An unrevealed 3D beat'em'up game.

Description:

A small indie company focusing on casual and kids' games.

Operating since: 2011

Brave Lamb Studio

www.bravelambstudio.com,
m.dziwniel@bravelambstudio.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

War Hospital, a society survival game in the top 500 most wishlisted games on Steam.

Next big thing:

Enemy of the State is a top-down shooter set in a stylized noir world of the 1920s.

Description:

Brave Lamb Studio is a company producing premium indie computer games.

We are composed of specialists with many years of experience in the industry. The extensive experience of key people in the company is transformed into the ability to produce high-quality projects dedicated to gamers. Our latest project, War Hospital, is a unique combination of games in the real-time strategy genre.

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

Byte Barrel

www.bytebarrel.com, contact@bytebarrel.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Forgive Me Father - Our first big success.

Next big thing:

Forgive Me Father 2 - even more
Lovecraftian madness in this action-packed
FPS sequel.

Description:

We are a small indie developer from Poland. Byte Barrel was founded in 2017 by Ernest Krystian and Kamil Przeździecki. Our mission is to develop engaging, creative, and player-focused games. We aim to create the best possible experience for everyone, because making games is not only our work but also our passion. We are not afraid to face new challenges and explore different genres.

Operating since: 2017 **Team size:** 18

ChaosForge

www.chaosforge.org, epyon@chaosforge.org



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Jupiter Hell - 8 years in the making on a 3D custom engine, turn and grid-based roguelike.

Next big thing:

Jupiter Hell console ports, and two unannounced roguelikes built on the same engine.

Description:

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 misrepresented. We are a small team utilizing our completely ground up built 3D engine tech to develop lovingly hand-crafted games.

Operating since: 2012

Cleversan Games

www.cleversan.com, office@cleversan.com



Platforms:

PC

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Renowned for the Farm Manager series, a successful city-building franchise adored globally.

Next big thing:

Farm Manager sequel and an unannounced fantasy city-builder offering innovative experiences.

Description:

A game development studio specializing in city-building games for PC. Our talented team creates innovative experiences with titles like Farm Manager. Passionate about city-building and economic management games, we strive to deliver engaging, strategic, and rich experiences to players, emphasizing depth and replayability in our game design.

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

CodeJungle

www.codejungle.pl, hello@codejungle.pl



Platforms:

Mobile

Models:

F2P

Best known for:

Simplest RPG online because we repeated the success of the previous title and got over 500 000 users.

Next big thing:

Developing a new mobile idle game with puzzle elements.

Description:

We create Android and iOS mobile games that captivate players. Our skilled developers, designers, and testers work together to deliver high-quality and innovative games. We use the latest technology to stand out in the crowded mobile gaming market.

Operating since: 2018

Cosmic Dreams

www.cosmicdreams.com, contact@cosmicdreams.com

COSMIC
DREAMS

Platforms:

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

Models:

F2P, Premium

Best known for:

FurryFury: Smash & Roll got to more than 800k users and was a Game of the Day in App Store last year.

Next big thing:

Codename: Project Astromatic: an open-world crafting game for PC. A Steam page in May this year.

Description:

Cosmic Dreams is an independent developer of entertainment software. Our overall aim is to create high-quality outstanding games that beyond being fun, enrich the culture with amazing worlds and stories.

Operating since: 2020

Covenant.dev

www.covenant.dev, contact@covenant.dev



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

The only gamedev studio to ever win the award for the Best Place to Work in Poland.

Next big thing:

Gord: Dark fantasy strategy game: build to survive, conquer darkness, complete quests & manage populace.

Description:

Covenant is an indie creative house offering well-executed, fresh gameplay experiences. The company works only on original, proprietary IPs and greatly relies on employee empowerment to develop them into globally recognizable franchises.

Operating since: 2020 **Team size:** 26

CrazyGoatGames

www.crazygoat.games, contact@crazygoat.games



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Best known for:

We are proud of every product we have released, such as The Dragoness: Command of the Flame.

Next big thing:

Wolfkins - with the power of mystical wolves you are destined to save the vast and unexplored lands.

Description:

Crazy Goat Games is an indie game studio based in Poland, dedicated to creating fun and unique takes on video games. With over 10 years of experience in making products for our clients, we have recently started developing games of our own, and we are here to stay.

Operating since: 2012

Creepy Jar

www.creepyjar.com, office@creepyjar.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Green Hell, a critically acclaimed survival game with over 4 million copies sold.

Next big thing:

A coop base-building simulator with survival elements set in a sci-fi setting, made with UE5

Description:

Creepy Jar is the publisher and developer of a critically acclaimed survival game called Green Hell (over 4 million copies sold). Established in 2017, it is a collection of experienced creators passionate about bringing best premium indie games to global audiences. The studio is currently working on Chimera, a new project which is an advanced base-building simulator with survival elements made with UE5.

Operating since: 2017 **Team size:** 52

Critical Hit Games

www.criticalhit.games, hello@criticalhitgames.pl



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Next big thing:

A top-notch quality, story-driven FPP game set in an alternative vision of the future world.

Description:

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.

Operating since: 2020 **Team size:** 25

Desand Game Studios

www.desand.eu, contact@desand.eu



Platforms:

PC, PlayStation, Xbox, VR/AR

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Nomed and Symmetry in cooperation with RGCrew.

Next big thing:

Dreamhouse: the Game – a multiplayer sandbox + 3 unannounced multiplayer games (2x sandbox, 1x story).

Description:

Desand is a Polish indie studio that specializes in multiplayer games with rich content and unique gameplay. Our diverse team of passionate gamers and storytellers strives to deliver innovative and immersive experiences. We also develop and implement new technologies that make our games stand out in their genres. Our goal is to create games that offer endless possibilities for players by players.

Operating since: 2021 **Team size:** 30

Digital Dragons

www.digitaldragons.pl, hub@digitaldragons.pl



Best known for:

Conference, Accelerator, Awards, Academy, Arena, Research, Incubator, Indie Showcase, KrakJam, internationalization.

Next big thing:

DD Workshops – training for gamedev professionals; DD Inn – community for the game industry.

Description:

Digital Dragons is a comprehensive ecosystem of support for the video game industry in Poland, Europe, and the world, run by the Kraków Technology Park. Our offer is addressed to developers and companies at every level of gamedev advancement.

We cooperate with all interested actors of the game industry stage.

Operating since: 2011 **Team size:** 12

Digital Melody

www.digitalmelody.eu, hello@digitalmelody.eu



Platforms:

Nintendo Switch, Mobile

Models:

F2P, Premium, External development/ Outsourcing/Services

Best known for:

Timberman series - tens of millions sold and downloaded for mobile, PC and console platforms.

Next big thing:

An unreleased Timberman 2 spinoff with online multiplayer, matchups, and leagues. Debuts Q3-Q4 2023.

Description:

Digital Melody S.A. is a small but mighty Polish game studio. Founded by a group of friends over a decade ago, they have now grown to a team of over 20 specialists. With over 50 games under their belts, they are best known for the Timberman series - featuring possibly the most famous lumberjack in the world available on a range of platforms.

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

DRAGO entertainment

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



Platforms:

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

Models:

Premium

Best known for:

Gas Station Simulator - over 1 million
 copies sold. Loved by players & streamers.

Next big thing:

Winter Survival - PC & next-gen survival
 game created with the most cutting-edge
 technology.

Description:

Founded in 1998, DRAGO entertainment
 is not only one of the oldest Polish game
 development companies, but with over
 1 million copies of Gas Station Simulator
 sold, it is also one of the most successful
 ones. Following their "In games we trust"
 motto and keeping the indie vibe of a
 fairly small team, DRAGO continue to
 deliver games acclaimed by both players
 and creators.

Operating since: 1998 **Team size:** 50

Draw Distance

www.drawdistance.dev, contact@drawdistance.dev

DRAW_DISTANCE

Platforms:

PC, PlayStation, Xbox, Nintendo Switch,
 Mobile

Models:

Premium

Best known for:

Serial Cleaner games reached more than
 1,5 million users.

Next big thing:

Draw Distance works now with Bloober
 Team at Projekt M and Paradox
 Interactive at Project Cardinal.

Description:

The company was founded in 2009 in
 Kraków. The studio's flagship, multi-
 platform titles are the Vampire: The
 Masquerade - Coteries of New York and
 Vampire: The Masquerade - Shadows
 of New York visual novels. Do not forget
 Serial Cleaners, with a sequel, which has
 reached almost one and a half million
 users worldwide. Draw Distance S.A. has
 been listed on the NewConnect since
 2016.

Operating since: 2009 **Team size:** 43

Dreamgrit

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



Platforms:

PC, Nintendo Switch, Mobile

Models:

Premium

Best known for:

Snakes of Avalon – an award-winning, niche adventure game praised for its psychedelic and tragic story.

Next big thing:

The Saragossa Manuscript – a narrative roguelite full of romance, honor duels, and grisly curses.

Description:

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

Operating since: 2011

Duality Games

www.dualitygames.eu, office@dualitygames.eu



Platforms:

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

Models:

Premium

Best known for:

Barn Finders - our simulator game with a redneck and alien twist, over 200 000 copies sold.

Next big thing:

Upcoming adventure horror game called Unholy.

Description:

Founded in 2018 by Tomasz Strzałkowski, Duality Games is a game developer studio and a publisher from Poland, designing and producing games from two ends of the gaming spectrum: simulation games - mainstream products designed with care and always a touch of individual input and twist; horrors/thrillers - mature games for mature audience. Often led by the Tomasz Strzałkowski's artistic vision.

Operating since: 2018

The Dust

www.thedust.pl, office@thedust.pl



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Next big thing:

The studio is working on a dark-fantasy game called The Inquisitor for PC and next-gen consoles.

Description:

We were established in 2014 in Wrocław. Our team is ambitious and is not afraid of challenges. We have gained experience in various technological and marketing projects, ranging from mobile games and VR to AAA games. The mix of experience in the team builds relationships that allow us to reach for the most significant challenges. We are characterized by openness and awareness of what we strive for.

Operating since: 2014 **Team size:** 42

Eleven Puzzles

www.elevenpuzzles.com, contact@elevenpuzzles.com



Platforms:

PC, Mobile, Browser

Models:

Premium

Best known for:

Unsolved Case - a two-player co-op puzzle game that combines an escape room with a mystery thriller.

Next big thing:

Unboxing the Cryptic Killer: continuation of the Unsolved Case story, about detectives trapped in a cat and mouse game.

Description:

We create story-rich, comic book-style two-player puzzle adventures, inspired by escape rooms and detective stories. Our players, separated in different environments, work together to overcome challenges, and solve mysteries. We are passionate about pushing the envelope in the two-player puzzle design, seamlessly blending thrilling narratives with innovative challenges.

Operating since: 2020 **Team size:** 5

Elmak

www.savio.net.pl, biuro@savio.net.pl



Best known for:

We draw satisfaction from the fact that every product undergoes a series of thorough tests.

Next big thing:

Expanding the product offer in line with the idea of high quality for everyone.

Description:

Savio was established to provide high-end multimedia and gaming products. We believe that quality can be accessible to everyone. As Savio, we have been operating since 2012, in 2019 we decided to introduce a gaming product line – Savio Gaming.

We thoroughly test our products before they go on sale. Savio Gaming has a growing group of fans, not only in Poland.

Operating since: 1990

Enclave Games

www.enclavegames.com, contact@enclavegames.com



ENCLAVE
GAMES

Platforms:

Mobile, Browser

Models:

F2P, Premium, Web3, External development/Outsourcing/Services

Best known for:

Fostering web gamedev community with the js13kGames competition and the Gamedev.js Jam.

Next big thing:

No big hits, just constantly evolving and steadily growing over the years.

Description:

Enclave Games is an indie game development studio building hyper casual mobile HTML5 games, and fostering web gamedev communities around the js13kGames competition and the Gamedev.js Jam.

Operating since: 2012

Eremite Games

www.eremitegames.com, contact@eremitegames.com



Platforms:

PC, Mobile

Models:

Premium

Best known for:

Against the Storm - a critically acclaimed roguelite city builder that sold more than 500 000 copies.

Next big thing:

We prepare for the 1.0 Launch of Against the Storm while continuing to deliver bi-weekly updates.

Description:

Eremite Games is a Polish studio formed by six friends who cut their teeth working on AAA, indie, and mobile games in Poland's thriving development scene, before striking out to forge strategy games set in uncharted worlds. They are united in their passion for memorable, genre-defining strategy games and RPGs.

Operating since: 2017 **Team size:** 6

Evil Indie Games

www.evilindiegames.com, office@evilindiegames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, Browser

Models:

F2P, Premium

Best known for:

NO THING, SAD RPG, CARS AND GUNS.

Next big thing:

An unrevealed game based on own IP for PC, Nintendo Switch, and mobile - late 2023.

Description:

Evil Indie Games is an independent Polish game development studio founded in 2010 by two brothers - Michal Stalewski and Piotr Stalewski. Currently, Michal and his wife Natalia are the heart of Evil Indie Games. The studio's latest project is called SAD RPG, which is a social anxiety role playing game presenting the life of a person struggling with the social anxiety disorder (SAD).

Operating since: 2010

Exit Plan Games

www.exitplangames.com, jose@exitplangames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

We are one of the first game dev studios in Poland to adopt a 4-day workweek, and unlimited holidays.

Next big thing:

Bang-On Balls: Chronicles - a fun action 3D platformer inspired by old school games.

Description:

Exit Plan Games is a small team of very experienced game developers on a mission to keep work healthy and uncomplicated, and to have an absolute blast making games with fresh and fun concepts, all while maintaining an excellent balance between work and personal life.

Operating since: 2019 **Team size:** 16

EXOR Studios

www.exorstudios.com, pawel.lekki@exorstudios.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

The Riftbreaker - more than 1 million players. Zombie Driver - more than 1 million players.

Next big thing:

The Riftbreaker - online coop mode.

Description:

EXOR Studios is an independent, veteran game studio located in Szczecin, Poland, founded in 2007. Our enthusiastic team focuses on delivering high-quality titles to the core gaming platforms - PCs and consoles. Our first break out hit, Zombie Driver, has sold well over one million copies. Our latest game, The Riftbreaker, has already passed the one-million player threshold and is going strong.

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

Fabryka Gier

www.fabrykagier.pl, mail@fabrykagier.pl



Platforms:

PC, Nintendo Switch, Mobile, Browser

Models:

F2P, Premium, Web3, External development/Outsourcing/Services

Best known for:

Panda Pop, insanely popular game, visual side of which have been working on since 2013.

Next big thing:

Together, a cooperative puzzle platformer based on an internally developed IP.

Description:

Game Factory is a game development studio based in Szczecin, Poland. Our team has created over 200 game products in various genres. We specialize in Unity3D and HTML5 technologies. We are licensed developers for Xbox, PlayStation and Nintendo systems. Our team is 40 people strong, covering all aspects of game development, from design, through visual design, and programming to quality assurance.

Operating since: 2005 **Team size:** 45

False Prophet

www.falseprophet.dev, contact@falseprophet.dev



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

We are a new AA/AA+, UE 5 game development studio located in Warsaw: an Epic Mega Grant winner.

Next big thing:

Turn-based, tactical RPG. False Prophet's mission is to create dark, mature, and demanding games.

Description:

False Prophet is an AA/AA+, UE5 game development studio founded in 2019. We are a limited company working on our first game, called BEAST: an AA+, UE5 grimdark, turn-based, tactical RPG, coming to PC, PS5, and XBX/S.

Operating since: 2019

Fantasyexpo

www.fantasyexpo.pl/pl/first-choice-in-gaming,
kontakt@fantasyexpo.pl



Description:

Fantasyexpo team consist of people who are passionate about gaming and e-sport who enjoy ambitious projects. We seek new trends, and we know what players' needs.

In our campaigns, we focus on effectiveness and innovation. Check us in action especially in gaming marketing and influencer marketing.

Operating since: 2014

Far From Home

www.farfromhomegames.com, info@farfromhome.games



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Around 300k Forever Skies wishlists and 140k players who added the demo to their Steam library.

Next big thing:

Forever Skies - a survival, sci-fi FPP with base building - early access release in 2Q2023 on Steam.

Description:

We are an independent AA+ studio founded in 2020 by devs and passionate gamers who share 3 goals: 1. To create a great work environment which will allow people to grow, be ambitious and have a real impact on projects; 2. To serve players, to listen, watch and bring the best possible experience for them; 3. To start - through games - a discussion about the future of the Earth and humankind.

Operating since: 2020 **Team size:** 28

The Farm 51 Group

www.thefarm51.com, info@thefarm51.com



Platforms:

PC, PlayStation, Xbox, VR/AR

Models:

F2P, Premium

Best known for:

Get Even, Chernobyl VR Project, Chernobylite, World War 3

Next big thing:

We are persistently working on some exciting new things yet to be announced, so stay tuned!

Description:

The Farm 51 Group SA is an independent game development studio specialized in creating innovative video games. Our projects combine game development experience, advanced photogrammetry, and 3D scanning solutions, as well as passion for telling captivating, imaginative stories. The company has also a proved record of various VR projects, where we have deployed our proprietary Reality 51 technology.

Operating since: 2005

Fimpossible Games

www.fimpossiblegames.com, fimpossiblegames@gmail.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

High-quality technology for the game industry on the Asset Store.

Next big thing:

Paragrowth: Survival RPG for PC - Early Access Late 2023
SPECTEARED: Horror FPS for PC - 2024

Description:

Fimpossible Games (aka. Fimpossible Creations) has been operating since 2018. Until 2022, we focused solely on developing technology for the Unity Engine and distributing it on the Unity Asset Store. Currently, we are also working on game projects and developing even more advanced technologies. You will have a chance to experience the results for yourself very soon!

Operating since: 2018

FinGames

www.fingames.co, kris@fingames.co



Best known for:

We are a proud financial partner of Sonka, Varsav Game Studios, Vile Monarch, IRON VR, and Simteract.

Next big thing:

Ongoing fundraising for EUR 10m in the coming months to support the best game creators!

Description:

We democratize access to capital for game creators by offering five alternative lending products which in comparison to classic forms of gaming financing do not take away most of the revenue/profit from game's success. This helps our clients make the journey from a small studio to an AAA player!

Operating since: 2022 **Team size:** 3

Fireline Games

www.firelinegames.com, contact@firelinegames.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Fueled Up - a chaotic couch co-op spaceship recovery full of explosions and space squids.

Description:

A small independent game studio comprised of passionate developers focused on delivering the most fun and engaging gameplay. We believe in creating smaller but fully polished games that stand out from the crowd. Our goal is to create games that are loved by players, because seeing people enjoy our games is the best reward for our work.

Operating since: 2016

Fixer Group

www.fixer.group, contact@fixer.group



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

F2P, Premium

Best known for:

Martial Law - an adventure game set in the times of martial law in Poland

Next big thing:

A sequel to Martial Law and a new series of adventure games set in the 1980s in the USA.

Description:

Specialists in the 1980s nostalgia. Creators of "a Polish game, in English, about a guy who fell asleep in a snowdrift" that is Martial Law. We specialize in creating and publishing games for PC and consoles.

Operating since: 2023 **Team size:** 4

Flying Wild Hog

www.flyingwildhog.com, andre.golebski@flhyingwildhog.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

The release of games in 2022: Shadow Warrior 3, Trek to Yomi, Evil West and also Space Punk.

Description:

Founded in 2009 in Warsaw, Poland, the Flying Wild Hog's name evokes the same core feeling as its acclaimed catalogue of titles – action-packed, fast-paced, and wholeheartedly unique. From Hard Reset and Trek, through Yomi, Evil West, to the Shadow Warrior trilogy, Flying Wild Hog's titles have established a reputation for quality with spurring and continued growth across three Polish studios.

Operating since: 2009 **Team size:** 330

Fool's Theory

www.foolstheory.com, biz@foolstheory.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Seven: The Days Long Gone, cooperation
with CD Projekt RED on The Witcher:
Enhanced Edition.

Next big thing:

The Thaumaturge - an RPG with morally
ambiguous choices, taking place in the
early 20th century Warsaw.

Description:

Fool's Theory is a collective of experienced
and creative developers, who share a
simple philosophy - we believe that
unbridled passion and flexible processes
are what makes a perfect combo for
crafting great games.

Operating since: 2018

Forever Entertainment

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



Forever Entertainment SA

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

FRONT MISSION 2: Remake - the classic
Japanese tRPG finally available worldwide
- coming June 2023.

Next big thing:

Remakes of the classic and recognizable lps.

Description:

Forever Entertainment S.A. was
established in 2010. From that point
on, it has been dynamically developing,
basing its growth on a diversified video
game portfolio, and acquiring ever more
interesting indie and remake IPs every
year. Forever Entertainment is among the
top three of the largest publishers in the
world in terms of the number of games
released for the Nintendo Switch console.

Operating since: 2010

Frozen District

www.frozendistrict.com, contact@frozendistrict.com



Platforms:

PC, PlayStation, Xbox, VR/AR

Best known for:

Proud of House Flipper- a 2018 sim game blending renovation & design, delighting fans worldwide.

Next big thing:

Frozen District developing House Flipper 2, the awaited sim game sequel.

Description:

Frozen District is an independent game development studio filled with gaming enthusiasts who are led by the need to create gaming titles with passion and respect for gamers.

Thanks to the company's unique atmosphere and non-conventional workflow, they can maintain a fresh look at the gaming industry and use this experience in their projects.

Operating since: 2010

Frozengem Studio

www.frozengem-studio.com, biuro@frozengem-studio.com

Platforms:

PC, PlayStation, Xbox

Models:

External development/Outsourcing/
Services

Best known for:

We produce vertical slices and advertising materials in the Unreal Engine 5.

Next big thing:

We are developing a grid-based dungeon crawler cRPG game based on Kashubian beliefs and bestiary.

Description:

We are a group of enthusiasts, passionate about games and new technologies.

We do pre-production and create game prototypes, aimed at market research.

We create advertising graphics and animations to support promotion. We are in the process of producing the Dungeons of the Amber Griffin game.

Operating since: 2004

Futuresalt Entertainment

www.futuresaltentertainment.com, stanley@futuresaltentertainment.com



Platforms:

PC, Xbox, Mobile, iiRcade

Models:

Premium, External development/
Outsourcing/Services

Description:

We create story-driven action games with great adventures and soft puzzles that go straight to the minds and hearts of players.

Operating since: 2019

Galaktus

www.galaktus.pl, biuro@galaktus.pl



Best known for:

Delivered agency services to Creepy Jar, EA, People Can Fly and over a hundred other brands.

Description:

Galaktus is an agency with over ten years of experience in gaming and technology. We come from Poland, yet we operate internationally. We deliver a wide range of services: PR, marketing, social media, community, events, influencers, Steam card ops, TikTok, trailer production and quality assurance. We work as an external-internal marketing team that is dedicated to our clients.

Operating since: 2011 **Team size:** 32

Game Formatic

www.gameformatic.com, hello@gameformatic.com



Platforms:

PC, PlayStation, VR/AR, Oculus

Models:

retail sale

Best known for:

Car Mechanic Simulator VR is our most recognizable title all around the world.

Next big thing:

Train Yard Builder is our upcoming PC title. A simulator where you can build a virtual model railway.

Description:

We specialize in virtual reality technology. The company's strategy is to port popular simulator titles to VR and to produce original PC games. We distribute and sell games in most markets around the world through global online sales platforms such as Steam.

Operating since: 2020

Game Industry Conference

www.gic.gd, biuro@frozengem-studio.com



Best known for:

Quality of everything we do, would it be an event or this report.

Next big thing:

GIC becoming globally recognized as the biggest conference for game professionals in Europe.

Description:

What started as a conference quickly became so much more. GIC now serves also as an industry hub, facilitator, a think tank... We are running numerous programs to support game developers in Poland and the CEE region in cooperation with dozens of partners public and private, Polish and international.

Operating since: 2012

Game Island

www.gameisland.pl, office@gameisland.pl



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Next big thing:

Game Island is working on a survival game called Serum.

Description:

We design games for PC platforms and consoles. We love telling original stories and sharing them with our players.

Thanks to our passion and work put into projects, we can stimulate imagination and provide entertainment at the highest level.

Operating since: 2020 **Team size:** 21

Gamedust

www.gamedust.co, office@gamedust.co



Platforms:

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

Models:

Premium

Best known for:

Yupitergrad and Yupitergrad 2: The Lost Station. We are also the publisher of Rooms of Realities.

Next big thing:

We are further developing our publishing activity and are preparing a new own VR title.

Description:

Gamedust has experience which enables us to deliver projects on time in healthy work environment, to port and publish games on our own and to help other companies with their Unity Engine VR and non-VR projects.

Operating since: 2017

Games Incubator

www.games-i.com, hello@games-i.com



Platforms:

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

Best known for:

A producer and publisher of Animal Shelter Simulator, Ship Graveyard Simulator, Car Detailing Simulator.

Next big thing:

A couple of games under development: My Horse: Bonded Spirits, ZOO Simulator, Animal Shelter2 and more.

Description:

A Polish gaming studio founded in 2019 by Marek Parzyński together with Playway S.A. Developer and a publisher of several games, including Animal Shelter Simulator, Ship Graveyard Simulator, Car Detailing Simulator, specializing in the production of PC games, and porting them to other platforms (consoles, etc.). The company also offers game marketing services and runs a programming school.

Operating since: 2019 **Team size:** 70

Games Operators

www.gameops.pl, contact@gameops.pl



Platforms:

PC

Models:

Premium

Best known for:

911 Operator - more than one million copies sold.

Next big thing:

Infection Free Zone - the #2 most-wishlisted game of Steam Next Fest 2023. Based on real-world maps.

Description:

Games Operators is a publishing company that invests, releases, and promotes video games. We help with the development of innovative and unique games. We are involved in projects on various levels of progress – from concepts to almost finished productions.

We offer technical consultations, provided by our internal development team called Jutsu Games, responsible for the success of the 911 Operator title.

Operating since: 2017 **Team size:** 26

Gameset

www.gameset.co, contact@gameset.co



Best known for:

Our campaign won Gold in the MIXX Awards Europe in 2022 and the Gold Effie Poland in 2022, among others.

Description:

We design and implement effective and engaging communication aimed at modern consumers who are difficult to reach through standard promotional channels. We comprehensively introduce brands to gaming and virtual worlds on the Polish market and throughout Europe.

Operating since: 2017

Giant Lazer

www.giantlazer.com, zap@giantlazer.com



Platforms:

PC, Mobile, VR/AR

Models:

Premium, Training apps

Best known for:

1. Trash Rage. The first ecologically themed VR game 2. Company (Un) Hacked. A cybersecurity VR Training.

Next big thing:

Heat Bash is a VR game related to global warming and building awareness of climate change.

Description:

A VR/AR application developer specializing in immersive solutions to transform education, industry, and business workflows. Giant Lazer manages everything from designing, 3D modeling, and programming to improving how we learn, work, and develop our skills. It pushes the limits of VR, from educating users on cybersecurity in the workplace to increasing awareness of climate change.

Operating since: 2015

Goat Gamez

www.goat-gamez.com, contact@goat-gamez.com



Platforms:

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

Models:

Premium

Next big thing:

Sports: Renovations - a narrative-driven simulation/renovation game rooted in the history of sports.

Description:

Goat Gamez is a video game developer and producer created by the famous soccer player Robert Lewandowski and the established game development powerhouse Movie Games. Goat Gamez develops games focused on the enduring feelings and lasting memories sports generate among fans around the world. Its projects focus on sports emotions presented from unusual perspectives, including behind the scenes.

Operating since: 2021 **Team size:** 15

Gruby Entertainment

www.grubyentertainment.com,
contact@grubyentertainment.com



Platforms:

PC

Models:

Premium

Best known for:

Deadlink - our first roguelite FPS with a 93% positive Steam review ratio.

Next big thing:

Deadlink full release in Q3 2023.
An unannounced multiplayer action title, currently in pre-production.

Description:

Our goal is to manufacture solid, high-calorie gameplay for mid-to-hardcore players, granting them action-packed hours accompanied by crucial and meaningful decisions.

Operating since: 2020 **Team size:** 21

Holy Pangolin

www.holypangolin.com, holypangolin@gmail.com



Platforms:

PC, Mobile, Browser

Best known for:

Karambola - nominated/selected for A MAZE Awards, NowPlayThis, Digital Cultures (Best of Poland).

Description:

We make unconventional games that tell humorous stories inspired by nature, mixed with uneasy emotions. Using hand-drawn graphics and experimental techniques such as the stop-motion animation, Agata Nawrot and Sebastian Krzyszkowiak transfer surreal worlds full of music and absurd from their imagination onto computer screens.

Operating since: 2016 **Team size:** 2

Hyperstrange

www.hyperstrange.com, hello@hyperstrange.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Developer of POSTAL: Brain Damaged and Blood West, publisher of Frozenheim, Jupiter Hell & many more.

Next big thing:

Blood West, an immersive stealth shooter based in wild west horror setting, full launch in fall 2023.

Description:

Hyperstrange is an independent games development and publishing studio operating from Warsaw, Poland. Founded on the day of the 2015 solar eclipse, we continue to bring metal, fantasy, action and hyper-strangeness to gamers worldwide. From brutal boomer shooters, through serene strategy sagas, to peculiar puzzles - we are hyper, we are strange, and so are our games.

Operating since: 2015 **Team size:** 75

Hypnotic Ants Studio

www.hypnoticants.com, office@hypnoticants.com



Platforms:

PC

Models:

Premium

Best known for:

Medic: Pacific War – at a late stage of development, planned release in 2023.

Next big thing:

An unrevealed survival/post apo/strategy game for PC - planned to be announced in 2023.

Description:

A small independent team of experienced game developers who create passionately twisted games, located in Radom, Poland. We want our games to make an impact by being relevant, meaningful, unusual, and fresh.

Operating since: 2018

Ice Code Games

www.icecodegames.com, bizdev@icecodegames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Hard West 2, critically acclaimed and loved by fans: a tactical adventure in the American West.

Next big thing:

Working on the studio's next projects: codename Odyssey and more.

Description:

An independent studio specializing in tactical and strategy genres, with two games, Re-Legion and Hard West II, released on multiple platforms. While working on their next project, codename Odyssey, the studio is also looking for more opportunities to innovate. Listed on the NewConnect market of the Warsaw Stock Exchange since 2022.

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



Illusion Ray

www.illusionray.com, pr@illusionray.com

Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

The Beast Inside, a well-received horror game with more than 700k copies sold.

Next big thing:

Action-Adventure game Wardogz for PC and next gen consoles.

Description:

A small indie developer with a passion for creating new worlds.

Operating since: 2019

Image Games

www.image.games, hello@image.games



Platforms:

PC

Models:

External development/Outsourcing/
Services

Best known for:

The company focuses on the development of indie premium (AA) RPG games.

Next big thing:

The company is currently working on an undisclosed project, with Anshar Studios as the production partner.

Description:

Image Games is a company founded by Movie Games and Platige Image, a studio for the production and post-production of game cinematics. Image Games combines Movie Games know-how in the field of game development and Platige Image experience in creating visual storytelling.

Operating since: 2021

Indeep Studios

www.indeep.io, contact@indeep.io



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Sole Light - an isometric puzzle game (iOS, Android). Pocket Pool - It is time for the crazy Pool (Switch).

Next big thing:

A tactical roguelite deck-builder that turns you into a deathless commander within a hatepunk world.

Description:

We always tirelessly put players first and work for them in an atmosphere of pure partnership and unrestricted creativity. We make sure we develop games of the 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 that address complex issues and inspire reflection in a fun and accessible way.

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

Indie Games Poland

www.igp.org.pl, info@igp.org.pl



Description:

Indie Games Poland Foundation was created to support the video game industry, particularly independent creators, and promote video games in the cultural market. We have organized many

events, such as industry conferences and trade fair booths worldwide, training sessions, and more. We are also the voice of the industry to governmental and international bodies.

Operating since: 2015

Inky Dreams

www.inkydreams.com, info@inkydreams.com

Platforms:

PC, Nintendo Switch

Models:

Premium

Next big thing:

A mixture of hand-crafted action visual novel with a story driven arcade shoot 'em up gameplay.

Description:

A new studio founded in Poland by developers with various backgrounds who had their own idea for a visual novel genre. We want to bring stories to life and combine thrilling novels with satisfying gameplay in an aesthetic, anime artstyle.

Operating since: 2023

Intermarum

www.intermarum.com, office@intermarum.com



INTERMARUM
DARE TO DREAM

Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, Browser

Models:

F2P, Premium, External development/ Outsourcing/Services

Description:

Intermarum was founded in 2010 in the cozy and beautiful city of Opole, located in the south of Poland. Since then, we have been creating games taking the best from many genres, but at the same time, making them unique with fresh ideas – our ambition is to make our dreams a reality. Our hardened developers work each day to deliver the best gaming experience possible.

Operating since: 2010

Iron VR

www.ironvr.pl, contact@ironvr.pl



Platforms:

VR/AR

Models:

Premium

Next big thing:

Hunt Together, horror PVP for Oculus Quest.

Description:

Iron VR is a flexible team creating simple, playable VR titles. Our goal is to create smaller games based on a clever gameplay concept and to bring the games of other developers to virtual reality. We also create our own tools and solutions to work with virtual reality technology and optimize the production process. We cooperate with the leading manufacturers of VR goggles on the global market.

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

Jet Toast

www.jettoast.com, studio@jettoast.com



Platforms:

Mobile

Models:

F2P

Best known for:

Blocky Farm - over 5 million downloads worldwide.

Airport Inc. - over 2 million downloads worldwide.

Next big thing:

Kukulu - Pocket Empire.

An economy tycoon game about leading your tribe through eras.

Description:

CREATING GAMES BEYOND PLAYERS EXPECTATIONS

Located in Warsaw, Poland, we are small mobile gaming studio with a passion and mission to provide top quality entertainment to our players! Creators of two mobile hits: Blocky Farm and Airport Inc. Currently working on a pocket tribe simulator - lead your folks through eras from Stone Age straight to the future!

Operating since: 2017

Jujubee

www.jujubee.pl, contact@jujubee.pl



Platforms:

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

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Realpolitiks, Punk Wars, Kursk, Deep Diving Adventures, Flashout.

Next big thing:

Dark Moon.

Description:

Jujubee S.A. is the game development studio behind such titles as the Flashout series, Kursk, the real-time strategy game Realpolitiks, Deep Diving Adventures, "Covid: The Outbreak" and the publisher for Punk Wars. Currently, the company is working on the Dark Moon anticipated strategy game and on Realpolitiks 3: Earth and Beyond. Jujubee is a publicly traded company on the NewConnect (JJB).

Operating since: 2012

kastom szop multimedia

www.kastomszop.pl, szop@kastomszop.pl



Platforms:

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

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Outsource developer work and promo commission projects.

Next big thing:

Incident, an action/stealth game with a twist. Coming to PC and Xbox late 2024.

Description:

kastom szop specializes in providing customized solutions in the gamedev industry. Established in 2016, it branched out from IT consulting to gamedev and now aims at releasing its own products.

Operating since: 2016

Keywords Studios

www.keywordsstudios.com,

katowice.office@keywordsstudios.com



Platforms:

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

Models:

External development/Outsourcing/ Services

Best known for:

Providing our world-class flexible, efficient, and scalable solutions to 24 of the top 25 companies.

Next big thing:

On a mission to Imagine More, we aim to expand the scale and range of services offered to clients.

Description:

Now in our 5th year in Poland, at Keywords Studios we support both AAA and indie game developers with Functionality QA, Player Support, Localization QA and other services from our largest studio in Europe. Within the Create, Globalize and Engage divisions, we harness our passion for gaming, technology, and media to create a global service platform for video games and beyond for 25 years worldwide.

Operating since: 2018 **Team size:** 1300

Klabater

www.klabater.com, contact@klabater.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Proud of Crossroads Inn & Heliborne (100k+ sold, each) for innovative & immersive gameplay.

Next big thing:

Working on Crossroads Inn 2: a captivating sequel with a deeper strategy..

Description:

We are a gaming company specializing in developing, porting, and publishing, committed to delivering innovative games to gamers worldwide. Our team creates strategic simulation games with narrative and RPG elements, while expertly porting titles to consoles. Through collaboration and embracing the latest trends, we provide standout gaming experiences in a competitive global market.

Operating since: 2018

The Knights of Unity

www.theknightsofunity.com,

contact@theknightsofunity.com

Platforms:

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

Models:

External development/Outsourcing/ Services

Best known for:

Cooperation on award-winning games like Disco Elysium, The Battle of Polytopia, or Cult of the Lamb.

Next big thing:

A new, unannounced entry to a popular tabletop RPG game



THE KNIGHTS OF UNITY

Description:

The Knights of Unity is a professional Unity and Unreal Engine development studio. Since the very beginning, we have been developing projects for companies around the globe. After 8 years, over 100 completed projects and with 70 developers on board, we have become one of the top work-for-hire companies in the world.

Operating since: 2015 **Team size:** 140

Last Qubit

www.lastqubit.com, contact@lastqubit.com

Platforms:

PC, Nintendo Switch, Mobile, Browser, VR/AR

Models:

F2P, Premium, External development/ Outsourcing/Services

Best known for:

Having combined exp from mobile to AAA games, we are open to a wide range of projects and tech.

Next big thing:

A top-down survival game set on a stranded island, with Lovecraftian themes, and art inspired by comic books..



Description:

Our ambition is to expand our outsourcing/co-development capabilities and grow our Unity-focused team. With high interest in new Unity solutions and newest tech, we are always open to new, interesting projects - even with uncommon, niche devices. We also develop our small multi-platform games, with main focus on improvement of our development, testing, and porting pipeline.

Operating since: 2018 **Team size:** 5

Leśniewski Borkiewicz Kostka & Partners

www.lbplegal.com, office@lbplegal.com



Description:

We specialize in providing legal services for the new technology industry, focusing on personal data protection, e-commerce, game development, and intellectual property. Our clients include mainly IT, TMT and, e-commerce companies

– international corporations, domestic software houses, independent studios, and biggest players developing AAA games.

Operating since: 2017 **Team size:** 18

Lublin GameDev Foundation

www.lublin-gamedev.pl, kontakt@lublin-gamedev.pl



Best known for:

Organized and co-organized: Trigamic Tournament, Cyberiada, GameJam+ Poland and its European Finals.

Next big thing:

LubGame Conference - game dev conference focused on people that want to start their gamedev journey.

Description:

The Lublin GameDev Foundation was founded to bring together the Lublin community of game developers. People who enjoy and are not afraid to share their knowledge of game development. From the very beginning, the foundation has been hosting many local and less local events for people passionate about games to make new friends and exchange mutual experience.

Operating since: 2013

Madcore Games

www.madcore.games, contact@madcore.games

MADCORE
GAMES

Platforms:

Mobile

Models:

F2P

Next big thing:

An upcoming co-op multiplayer aRPG called Loot Heroes - coming mid 2023.

Description:

We are a team of veterans on a mission to build the world's first mid-core action RPG co-op experience.

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

Madmind Studio

www.madmind-studio.com, info@madmind-studio.com



Platforms:

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

Models:

Premium

Description:

A studio specializing in the production of horror games, with particular focus on the most hardcore varieties of this genre. Madmind Studio was founded in 2016 and is growing rapidly. The most famous titles of the studio include Agony and Succubus.

Operating since: 2016 **Team size:** 40

Madnetic Games

www.madnetic-games.com,
office@madnetic-games.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

87% positive reviews with 40k sold copies of the first studio's game called WW2 Rebuilder in the first 3 months.

Next big thing:

Photography Simulator - immersive photography simulator for PC & next-gen consoles planned for 2024.

Description:

Madnetic Games is a young and aspiring video game development studio based in Wrocław, Poland. Our team is made of talented and passionate developers striving to create best possible gaming experience.

Operating since: 2020

madtoro.studio

www.madtoro.studio, contact@madtoro.studio



Platforms:

PlayStation, Xbox, VR/AR

Models:

F2P

Description:

Madtoro.studio is a young independent team located in Szczecin, Poland, specializing in creating immersive games for consoles and VR. Our team is made of game development enthusiasts who aim to deliver unique and unforgettable experiences. Our passion and commitment allow us to create games that will deliver excitement and enjoyment to gamers.

Operating since: 2019

Mass Creation

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



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

F2P, Premium

Best known for:

Shing!, Hamster Playground

Next big thing:

Hamster Playground.

Prepare for cuteness, relentless training, and fierce rivalry in challenges.

Description:

Mass Creation team are passionate industry professionals, making action packed games with passion and expertise, focusing on delivering games providing unique gameplay experience and top quality. They create new versions of arcade genres, which they grew up on – games they would like to play as players.

Operating since: 2009 **Team size:** 10

Mataboo

www.mataboo.com, contact@mataboo.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

External development/Outsourcing/
Services

Best known for:

Porting, co-developing, and optimizing games for PC and consoles.

Next big thing:

Co-development of Suicide Squad for Rocksteady and more unrevealed projects for other studios.

Description:

MATABOO helps game creators at every stage of development from design through content creation, gameplay, programming, bug fixing, to implementation, porting, and optimization. We work closely with studios such as WB Games, Rocksteady, Bloober, Creepy Jar, Frogwares and The Farm 51, supporting titles like Suicide Squad, Gotham Knights, Chernobylite, Green Hell, The Medium, and Sherlock Holmes games.

Operating since: 2019 **Team size:** 79

MediaCraft.studio

www.mediacraft.studio,

makaruk@mediacraft.video



Platforms:

PC, Mobile, VR/AR, Live Event Interactive Game Installations

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Interactive VR Animitto 2.0 - multiplayer VR game in public space.

Description:

MediaCraft.studio is a company specializing in the production of animated 3D content, such as character animation, environment design, VR development. We employ concept artists, cartoon animators, writers, software developers, and 3D animators to create high-quality, visually appealing animated content for a variety of different purposes, including entertainment, education, gaming, and VR.

Operating since: 2010 **Team size:** 8

Mooneaters

www.mooneaters.com, kontak@mooneaters.com



Platforms:

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

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Everdream Valley - won the Game of the Year award at the Nordic Game Discovery in 2022.

Next big thing:

Our next game will be even better looking and cozier than Everdream Valley.

Description:

At Mooneaters, we specialize in adventure games featuring simulation and RPG elements, with beautifully stylized graphics. Our aim is to create titles that become a place of fun and cozy adventures that evoke the magic hiding in childhood memories and everyday things.

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

Moonmana

www.moonmana.com, bizdev@moonmana.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, Browser

Models:

F2P, Premium, External development/ Outsourcing/Services

Best known for:

Pirates of Everseas- a top 5 strategy game on App Store with 2M downloads & players in 135 countries.

Next big thing:

Haddie's Pizzeria- a simulator/adventure game with cooking mechanics for PC&console to be released in late 2023.

Description:

Moonmana is a reputable European Game Development and Art Production Studio creating top-notch games for global clients. We have 15+ years of experience in game development, producing both our own IPs and external games. Key partners: Warner Bros., Glu Mobile, Azerion, Saber Interactive, Gameforge. Genres: Strategy, Simulator, RPG, Shooter, Battler, Adventure.

Operating since: 2008 **Team size:** 70

Movie Games Mobile

www.moviegamesmobile.com,

mjaniszewski.mobile@moviegames.com



Platforms:

Mobile

Models:

F2P

Next big thing:

Mr. Prepper is a simulation game distinguished by its cartoonish design and humor. To be released in 2023.

Description:

Movie Games Mobile aims to create differentiated titles tailored to global markets. A member of the rapidly growing MOVIE GAMES family, listed on the NewConnect market. Access to numerous projects, including titles from the Movie Games Group released on PC and consoles, enjoying global success. Fast production process and low expenses thanks to access to multiple distributed teams.

Operating since: 2017

Movie Games

www.mov.gs, ir@moviegames.pl



Platforms:

PC

Models:

Premium

Best known for:

Steam indie bestsellers: Drug Dealer Simulator and Gas Station Simulator.

Next big thing:

We are working on Drug Dealer Simulator 2, a prequel to DDS1 featuring coop - late 2023.

Description:

Movie Games is a Polish game developer and publisher, listed on the Warsaw Stock Exchange. The company was founded by game enthusiasts, combining new talents with industry veterans, including Maciej Miąsik, the key developer behind The Witcher, David Jaffe, the creator of God of War, and Tobiasz Piątkowski, one of Poland's most acclaimed art directors and comic book writers.

Operating since: 2016

Mroya Studio

www.mroya.studio, hello@mroya.studio



Platforms:

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

Models:

External development/Outsourcing/Services

Description:

We are a Warsaw-based team of award-winning professionals, former Wargaming employees, buddies, and dreamers, specializing in creating trailers, cinematics, animation, and high-end computer graphics.

Operating since: 2022

MuHa Games

www.muhagames.com, contact@muhagames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Thea: The Awakening, Thea 2: The Shattering, Master of Magic - all three titles are awesome games.

Next big thing:

We are currently continuing our work on Master of Magic.

Description:

MuHa Games is all about making our own, homebaked games. We are dedicated to making fun, interesting, and innovative stuff and exploring all types of game genres, often within the same game. We tend to favor survival/4x/rpg style games thus far, but who knows what the future may bring. Our Titles include Thea: The Awakening, Thea 2: The Shattering and Master of Magic.

Operating since: 2013 **Team size:** 7

MythicOwl

www.mythicowl.com, contact@mythicowl.com



Platforms:

PC, Xbox, Nintendo Switch, Mobile

Models:

Premium

Best known for:

Hexologic is our award-winning multiplatform game that already exceeded 150k copies sold worldwide.

Next big thing:

Planetiles, a serene roguelike city-build puzzler about creating natural habitats on remote planets in space..

Description:

MythicOwl is a friendly indie puzzle game developer and publisher from Warsaw, Poland. As a team behind award-winning games like Hexologic and Harmony's Odyssey, we specialize in relaxing and creative games that value players time and offer soothing gameplay.

Operating since: 2015

Nature Manufacture

www.naturemanufacture.com, naturemanufacture@gmail.com



Platforms:

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

Models:

Assets developer

Best known for:

Our assets can be found in numerous games and apps from indie to AAA.

Description:

NatureManufacture is a studio founded in 2014, created by experienced developers. We develop high quality nature assets and deep, advanced systems for the Unity Engine, as well as other unique products for the Unreal Engine. All our virtual works will help you develop your own game!

Operating since: 2014

Nawia Games

www.nawiagames.com, hq@nawiagames.com



Platforms:

PC, Nintendo Switch, Mobile

Models:

F2P, Premium, External development/ Outsourcing/Services

Best known for:

Flick Champions series.

Next big thing:

Save The Ocean!

Description:

An Independent Studio that specializes in high quality, mid-size games for various platforms.

Operating since: 2008

Neurodio

www.neurodio.com, contact@neurodio.com



Platforms:

Nintendo Switch, Mobile, VR/AR

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Numbala is more than a game. It is a cognitive training designed to teach kids mathematics.

Next big thing:

The next big thing will be Seedy The Seed – a creative platformer and builder. Stay tuned late 2024!

Description:

We combine game design and neuroscience to help people with cognitive deficits or learning difficulties. Our mission: no more boring cognitive training.

Operating since: 2016

NiVision

www.nivision.net, nivisionag@gmail.com

Platforms:

VR/AR

Models:

Premium

Best known for:

X-Fitness - 4,8 rating on AppLab Oculus Store.

Description:

We decided in 2016 to change things a bit and start our adventure with Virtual Reality. This branch of the computer games industry absorbed us completely. The feeling that you can finally be in the game, not play the game.... awesome. We create for different platforms and headsets: Oculus (Quest, Go, Rift), Pico (Neo 4, Neo 3, Neo 2), SteamVR, YVR, iQIYI.

Operating since: 2016

No Gravity Development

www.nogravitydevelopment.com,

contact@nogravitydevelopment.com



Platforms:

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

Models:

External development/Outsourcing/ Services

Best known for:

Support for bigger indie companies to deliver high-quality console game ports onto the market.

Next big thing:

An unrevealed 2D side-scrolling beat'em up for PC & consoles - late 2024.

Description:

We are a team of specialists, offering high quality services of game porting for Switch/Xbox/PlayStation console platforms. In addition, we provide game development and quality assurance services. We are perfectly acquainted with Unity, Game Maker Studio, Unreal Engine, GODOT, but we are not afraid of custom engines, too. If you are looking for high-quality porting services for your projects, contact us!

Operating since: 2018

No Gravity Games

www.nogravitygames.com, contact@nogravitygames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Many great console ports such as Alder's Blood, Will You Snail, Sorcery!, Creepy Tale/Creepy Tale 2.

Next big thing:

An Alder's Blood sequel (in the production) for next-gen & PC - Late 2023.

Description:

No Gravity Games is an indie boutique publisher specialized in console publishing and building up game value. We are flexible, and we know that cooperation is the key to success. We have a long list of partners who can help us solve almost every issue. We can publish, build, and port games, but also provide QA, right contacts, Asian markets, dev kits... You name it.

Operating since: 2008

Odd Qubit

www.oddqubit.com, stanski@oddqubit.com



Platforms:

PC

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Organizing Gamedevove Pogaduchy!

Next big thing:

Cowboy Life Simulator, remade in UE5, life simulator inspired by Stardew Valley!

Description:

We are an ambitious studio, aiming for high quality AA games with solid design and unique looks. We are community leaders and educators. We want to be the change we wish to see in the world.

Operating since: 2021 **Team size:** 7

One More Level

www.omlgames.com, info@omlgames.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Ghostrunner – a hardcore FPP slasher packed with fast action, set in a cyberpunk megastructure.

Next big thing:

Ghostrunner 2 – a sequel created in cooperation with the 505 Games, which is a world-wide publisher.

Description:

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

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

OnionMilk

www.onionmilk.org, contact@onionmilk.org



ONIONMILK.ORG

Platforms:

PC, Mobile, PlayDate

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Pigeon Fight - first game and self-published title.

Next big thing:

Undressed: a noir story presented by means of stop-motion animation, placed in the 20th century around the textile industry.

Description:

OnionMilk is a small team of indie developers with weird ideas and love for coding even weirder tools. Our birthplace is Łódź and we focus on developing the gamedev community in our beloved city. We love to support newcomers in our industry and guide them through the gaming adventure.

Operating since: 2015

Orbital Knight

www.orbitalknight.com,
contact@orbitalknight.com



Platforms:

Mobile

Models:

F2P, Premium

Description:

Orbital Knight is a mobile game developer in business for more than a decade. Our portfolio includes games such as Force Master, Crazy Kick, Kickerinho. Our games have garnered more than 120 million downloads on Android and iOS devices. We work with publishers including Voodoo and Apple Arcade. In the past 2 years, we have released Spire Blast and Custle Crumble on Apple Arcade.

Operating since: 2012

Ovid Works

www.ovidworks.com, contact@ovidworks.com



Platforms:

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

Models:

Premium, External development/ Outsourcing/Services

Best known for:

Metamorphosis – a game based on Kafka's stories.

Interkosmos – the first space adventure for VR.

Next big thing:

An unrevealed narrative adventure game for next-gen and PC – 2024.

Description:

Ovid Works is a company run by professionals from both the creative and technology domain. Along with producing premium games for PC, consoles, and VR, it has been involved in R&D activities on the interactive narration in video games. Ovid Works' mission is to create captivating, immersive video games with rich and meaningful stories.

Operating since: 2016

Paradark Studio

www.paradarkstudio.com, hello@paradarkstudio.com



Platforms:

PC

Models:

Premium

Best known for:

ExeKiller

Description:

An independent Polish game development studio based in Kraków and led by Kasia Widmańska and Amadeusz Wróbel. ExeKiller is Paradark Studio's debut game, scheduled for release on PC and next-gen consoles.

Operating since: 2021 **Team size:** 15

Paranoid Interactive Konrad Sumało



www.paranoidinteractive.net, konrad.sumalo@gmail.com

Platforms:

PC

Models:

Premium

Best known for:

Frozenheim - over 250 000 copies sold.

Next big thing:

Unrevealed steampunk action-adventure for console and PC – 2024.

Description:

Our mission is to bring to you beautifully crafted universes that will make a lasting (and good!) impression.

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

The Parasight

www.theparasight.com, info@theparasight.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

BLACKTAIL, a FPP surreal action-adventure game, where the story of Baba Yaga comes to life.

Next big thing:

An unannounced action-adventure game powered by the Unreal Engine 5.

Description:

THE PARASIGHT reimagines timeless stories and excels at creating unforgettable experiences rooted in legends and fairy tales.

Operating since: 2019

Payskin

www.payskin.gg, mikolaj@payskin.gg



Platforms:

Browser

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Founders of eMinePro - gaming marketing agency and ProPlayers - esports management agency.

Next big thing:

Create a payment method for players to be able to pay for products with digital goods from games.

Description:

Payskin is a modern payment method created for players who want to gain more from the skins they have accumulated over the years. Dusty skins from the abyss of CS:GO inventory have just gained new value in the real world. With Payskin, you can pay for the purchase of real-world items and digital goods. For businesses, on the other hand, this is an opportunity to reach a whole new target audience.

Operating since: 2021

Petard Games

www.petardgames.com,
business@petardgames.com



Platforms:

PC, Mobile, VR/AR

Models:

retail sale

Best known for:

DLCs for the Car Mechanic Simulator 2018 that are highly sought-after among the gamer community.

Next big thing:

Hairdresser Simulator – a realistic hairstylist salon simulator. Relaxing for everyone.

Description:

We create "explosive" video games and DLCs for PCs and smartphones. We want players to feel the hats-flying-off rush of a fresh explosion every time they launch our games. We intend to tear the virtual gaming world apart from the inside out before anyone realizes that nothing and no one can stop us from detonating the fun!

Operating since: 2021

Pixel Edge Games

www.PixelEdgeGames.com, sboczek@PixelEdgeGames.com



Platforms:

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

Models:

Premium

Best known for:

Racket Fury: Table Tennis VR - Meta Quest Launch Title.

Next big thing:

The Karters 2: Turbo Charged - Cartoon Kart Racing game coming to PC, PS5, Xbox Series X | S, Switch.

Description:

Pixel Edge Games crafts immersive experiences that transport players to new worlds. Specializing in VR, we released Racket Fury: Table Tennis VR on Meta Quest as a launch title. But we are not limited to VR - our kart racing game, The Karters 2: Turbo Charged, is coming to PC and major consoles soon. With a passion for innovation and excellence, we are pushing the boundaries of what is possible in gaming.

Operating since: 2015

Pixel Storm

www.pixelstorm.pl, info@pixelstorm.pl



Platforms:

PC, Mobile, Browser

Models:

F2P, Web3, External development/ Outsourcing/Services

Best known for:

Ballies.gg - a new web 3 uncharted model with a complete new audience.

Next big thing:

<http://piratessaga.pl>

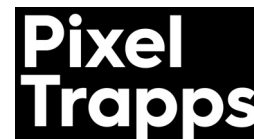
Description:

We will make a game for you! PixelStorm is a company that can deliver any game. We are not afraid of even the most sophisticated concepts. We specialize in F2P data-driven games both in Web2 and Web3 space. We produce video games for PC, mobile, and web platforms. If you need a team that can deliver a product at a fair price, get in touch with us.

Operating since: 2020 **Team size:** 40

Pixel Trapps

www.pixeltrapps.games, pixeltrapps@gmail.com



Platforms:

PC, Mobile, VR/AR

Models:

Premium, Web3, External development/
Outsourcing/Services

Best known for:

The company is just working on its great successes.

Next big thing:

Web3: Shelter of Exiles and OlympX, VR
Animal Jigsaw VR, PC: Dead Metro.

Description:

Pixel Trapps is a gaming studio that is dedicated to providing high-quality products and creating memorable games for their audience. They have ambitious plans for the future of gaming, particularly with regards to the blockchain technology.

Operating since: 2021

PixelAnt Games

www.pixelantgames.com, play@pixelantgames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Next big thing:

An unannounced title for PC & next-gen.

Description:

Founded in 2020 by Paweł Rohleder and Adam Lasoń, PixelAnt Games is one of the Sumo Digital studios. Based in Wrocław, the studio works on the co-development of AAA/AA+ games across current and nextgen platforms, while working on own IP. PAG operates according to its Gamedev 2.0 concept, which allows for a kinder, smarter way of making games. In 2022, PAG opened a new studio in the Czech Republic.

Operating since: 2020 **Team size:** 82

Plarium

www.company.plarium.com, talents@plarium.com



Platforms:

PC, Mobile

Models:

F2P

Best known for:

RAID: Shadow Legends, Mech Arena – our flagship games. We have 450 M players across all our games.

Next big thing:

Multi-platform third-person shooter, with innovative gameplay in a realistic setting.

Description:

RAID: Shadow Legends, Mech Arena, and 18 other hit games have made Plarium one of the most successful game companies in the world. We create free-to-play mobile and computer games that are regularly featured on the App Store and Google Play. We employ more than 1400 specialists, and our teams collaborate with Hollywood stars, famous streamers, competitive players, and casual gamers.

Operating since: 2009 **Team size:** 1400

Played With Fire

www.playedwithfire.com, contact@playedwithfire.com



PLAYED WITH FIRE

Platforms:

VR/AR

Models:

Premium

Best known for:

Mixture - VR self co-op action-adventure, where you play as 2 unlikely allies - Knight and Alchemist.

Next big thing:

A VR game of science and horror - our biggest production yet!

Description:

Played With Fire creates rich, immersive and original VR content, specializing in action & adventure games with focus on scientific twists - be it a weird take on astronomy, alchemy or physics-altering gadgets.

Operating since: 2019



Polished Games

www.realmsofmagic.net, contact@polishedgames.com

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Realms of Magic – a Pixel art 2D action RPG in a fantasy setting with over 50k copies sold on Steam.

Next big thing:

An unrevealed pixel art RPG for next-gen & PC - late 2024.

Description:

Polished Games goal is to bring joy and entertainment. As passionate gamers who want to add our touch to the industry, we prioritize the fun factor over sales. Our stress-free work environment drives us to fulfillment and efficiency. We are a group of friends, who also operate as a professional gaming studio from Wrocław. We take pride in our attention to detail and the way we polish our games.

Operating since: 2014

Purple Ray Studio

www.purpleray.studio, contact@purpleray.studio



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Boti: Byteland Overclocked - Stylized 3D cooperation platformer with eye-catching visuals.

Next big thing:

Release of Boti: Byteland Overclocked in the summer of 2023.

Description:

Purple Ray Studio is an independent game developer that specializes in delivery of quality stylized games.

Operating since: 2021

Pyramid Games

www.pyramid.games, contact@pyramid.games



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, Browser

Models:

F2P, Premium, External development/Outsourcing/Services

Best known for:

Occupy Mars: The Game - EA release, over 300K people added the game to the wish list before the launch.

Next big thing:

Further development of Occupy Mars: The Game to full release, including online co-op mode and campaign.

Description:

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 and strive for immersive gameplay. We are very passionate about science and science fiction.

Operating since: 2012 **Team size:** 40

QED Games

www.qedgames.pl, games@qed.pl



Platforms:

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

Models:

External development/Outsourcing/Services

Best known for:

Grail - an AI engine for games. High quality AI for NPCs and stand-in bots.

Next big thing:

Implementing the Grail engine in new games, including well-known franchises.

Description:

AI experts creating a high-quality decision-making engine for game developers. No matter what technology you use for your games, we can give you tools that will make your AI creation cycle shorter and cheaper, but also easy to debug and maintain. Creating engaging and trustworthy agent behaviors has never been easier!

Operating since: 2018

QLOC

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

Platforms:

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

Models:

External development/Outsourcing/ Services

Best known for:

Co-dev (Cyberpunk 2077, Gotham Knights), ports (Hellblade: Senua's Sacrifice), remasters (Dark Souls).

Next big thing:

Multiple other games in the pipeline – remastering and porting and a full-scale AAA development.



Description:

Our company is a first-class service provider for publishers and developers. We provide functional and linguistic testing, co-development, porting, and remastering services, we translate and localize games into 35 languages, deliver 3D graphics, character, and concept art. We work with EA, Capcom, Warner Bros, CD PROJEKT RED, Activision, BANDAI NAMCO, and others.

Operating since: 2009 **Team size:** 800

Rage Quit Games

www.ragequitgames.com, hello@ragequitgames.com



Platforms:

Mobile

Models:

F2P

Best known for:

Our most popular game, The Wolf, has been downloaded more than 80 million times.

Next big thing:

Tomorrow, our most technologically advanced game, is scheduled for full release later this year.

Description:

Rage Quit Games is a game development studio based in Kraków, Poland, specializing in high-end mobile multiplayer 3D games. In all, their releases have been downloaded over 180 million times, with the most successful title, namely The Wolf alone having over 80 million downloads.

Operating since: 2013 **Team size:** 152

ReadyCode.io

www.readycode.io, contact@readycode.io

{ readyCode }

Platforms:

PC, PlayStation, Xbox

Models:

External development/Outsourcing/
Services

Best known for:

In-game modding tool for Unity/UE
games.

Next big thing:

First 100 games with our tech embedded!

Description:

ReadyCode is an innovative startup specializing in providing modding as a service for modern games on the Unreal and Unity engines. Our platform empowers game developers to integrate modding tools and features, fostering a thriving community of creators and players. We aim to revolutionize the gaming landscape by unlocking full potential of games through the power of the user-generated content.

Operating since: 2022 **Team size:** 10

Reality Games

www.reality.co, pr@reality.co

Platforms:

Mobile

Models:

F2P

Best known for:

Landlord Tycoon and Landlord Go -
games using real-world data, with over 21
M downloads.

Next big thing:

A new title based on a very famous board
game.

Description:

Reality Games is a gaming studio, with 60 employees and business representatives in Kraków, London, and also China. Our first game, Landlord Real Estate Tycoon, launched in early 2015 and garnered millions of players globally. We specialize in geolocation games that use real-world data to deliver life-related experience to the players.

Operating since: 2014 **Team size:** 60

Reality Unit

www.realityunit.one, contact@realityunit.one



Platforms:

Mobile, Browser

Best known for:

We are the studio that has created the first-ever non-gambling roulette.

Next big thing:

We are working on games that will use hexagon in the narration.

Description:

Reality Unit is a skill-based game aggregator. We are a part of the move changing the way people play. Our (hyper) casual games provide users with a lot of fun, and let them win real-life prizes.

Operating since: 2020

RedDeer.Games

www.reddeergames.com,
reddeergames2019@gmail.com



Platforms:

PC, Xbox, Nintendo Switch, Mobile

Models:

Premium

Next big thing:

The Evil One - AA isometric, action - adventure game made on UE5 together with Destructive Creations.

Description:

RedDeer.Games is an independent video game developer and publisher, awarded in the "Fastest Growing Gamedev Company in Central Europe" category. In recent years we have released many titles such as PID, She Wants Me Dead, Cyber Protocol, Reky, Space Tail: Every Journey Leads Home, Pro Gymnast Simulator, or UnderDungeon. Our goal is to provide a unique experience to Nintendo Switch players.

Operating since: 2018 **Team size:** 54

Reikon Games

www.reikongames.com,
hello@reikongames.com

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

RUINER. A brutal action shooter in the cult cyberpunk anime spirit. Over 4 million copies sold globally.

Next big thing:

A fast-paced FPS love letter to sci-fi anime cult classics. Doom meets the Gunnm style.



Description:

An independent creative team, a development and production company creating high-end computer and video games. Our specialty are artistic action adventures set in haunting science-fiction realities, embracing the cybernetic dimension of life.

Operating since: 2014 **Team size:** 105

Render Cube

www.rendercube.pl, contact@rendercube.pl

Platforms:

PC, PlayStation, Xbox

Models:

F2P

Best known for:

Medieval Dynasty, over 1.2 million copies sold.



Description:

Render Cube is a team of 29 people who love games on every level - from gaming through designing, to coding, even though this love is not always easy. What really sets our team apart? Passion. We see it every day, and it certainly goes from a "craftsman" to an "artist". Come to our office. We hope you notice it just as quickly.

Operating since: 2012 **Team size:** 29

Retrovibe

www.retrovibegames.com, contact@retrovibegames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Devs that have launched their games with us choose Retrovibe to publish their next one either.

Next big thing:

new retro titles, with SacriFire - a pixel art jrpg as the most prominent one.

Description:

Retrovibe is an indie publisher of new retro titles across a variety of genres. Currently helping developers working on 13 titles - some of which have already been released (B.I.O.T.A., Impaler, Janosik, Project Warlock, Project Warlock II, Shardpunk: Verminfall), some are upcoming, and a number have not been announced yet.

Operating since: 2021

Ringlab

www.stardrifters.com/scorchlands, ringlan@gmail.com



Platforms:

PC

Models:

Premium

Best known for:

Scorchlands - entered early access this February to a very positive reception from players.

Next big thing:

Expanding Scorchlands during early access.

Description:

Ringlab is a tiny team making games for folks that enjoy some thinking while playing. Our main belief is that games can influence people in a positive way. We have been in the industry for 5 years now, working both for ourselves and for other studios, including SUPERHOT.

Operating since: 2020



Road Studio

www.ir.roadstudio.pl, ir@roadstudio.pl

Platforms:

PC, PlayStation, Xbox

Models:

Premium

Next big thing:

Alaskan Truck Simulator – be a trucker, not a truck! Step into the boots of Alaskan truck drivers.

Description:

We are a developer of automotive and survival-themed simulation video games that are also travel-themed. We allow players to become drivers of various vehicles and visit many corners of this world, all thanks to modern development tools, digital distribution, experienced members of our production team, as well as unique business relationships.

Operating since: 2020

Robot Gentleman

www.robotgentleman.com, hello@robotgentleman.com



ROBOT
GENTLEMAN

Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Best known for:

60 Seconds!, 60 Seconds! Reatomized, and '60 Parsecs! - with over 5 million copies sold.

Description:

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.

Operating since: 2012 **Team size:** 27

Second Chamber

www.secondchamber.dev, greg@secondchamber.dev



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Coining the term for the wanderer adventure game genre.

Next big thing:

An unrevealed wanderer adventure game, set up to define the features and modules of the genre.

Description:

We deliver true wanderer experience, made by gamers for gamers.

Operating since: 2023

Sim Farm

www.sim-farm.com, hello@sim-farm.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Publishing Farm Manager 2021, a hit with over 120k copies sold.

Next big thing:

Publishing Farm Manager World, Feudal Baron: King's Land, and an unannounced immersive simulator.

Description:

Sim Farm is a game development and publishing studio with a passion for creating immersive and engaging experiences. Our proven track record, exemplified by the success of Farm Manager 2021, showcases our dedication to excellence.

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

Simteract

www.simteract.com, contact@simteract.com



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

Train Life: A Railway Simulator – manage your railway company and drive across Europe.

Next big thing:

Taxi Life: A City Driving Simulator – become a taxi driver completing tasks in 1:1 Barcelona.

Description:

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

Operating since: 2014 **Team size:** 60

Sleepwalking Potatoes

www.sleepwalkingpotatoes.com,
sleepwalkingpotatoes@gmail.com



Platforms:

PC, Xbox, Nintendo Switch, Mobile

Models:

F2P, Premium

Next big thing:

NecroGolf: The world has gone; now it is only you, your golf clubs and all darn uppity undead Yankees.

Description:

An indie game development commando squad.

Operating since: 2022 **Team size:** 4

Smile Studios

www.smile-studios.com, hi@smile-studios.com



Platforms:

PC, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Best known for:

TSIOQUE - Best Indie Game @ Digital
Dragons 2019, Best Indie Game @
GameBCN 2018.

Next big thing:

Secret and exciting things..

Description:

An independent animation and videogame studio from Warsaw, Poland, and also from the world. Founded by Alek Wasilewski, an award-winning director-producer, SMILE makes animations, games, and stories worth telling. We offer services as creators of trailers, cinematics and animated game content while developing projects of our own.

Operating since: 2018

Something Random

www.somethingrandom.com, contact@somethingrandom.com



Platforms:

VR/AR

Models:

Premium

Best known for:

SUPERHOT- our team is composed of
former SUPERHOT developers.

Next big thing:

A train-themed playful strategy game -
late 2023 and Improvisation-focused sci-fi
FPS- 2024.

Description:

VR Studio from Łódź is composed of experienced and passionate former SUPERHOT devs. Our goal is to create something we call "true VR games". With high-quality graphics, story, and gameplay at their core. We question industry standards and dig deep in search of mechanics and solutions never seen before. Our name comes from our unconventional solutions, weird approaches, and reinventing the wheel.

Operating since: 2022 **Team size:** 25

Sos

www.sos.gd, just.sos.it@gmail.com



Platforms:

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

Models:

Premium

Best known for:

McPixel 3

Next big thing:

The worst game ever.

Description:

I make bad games.

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

Sperasoft, a Keywords studio

www.sperasoft.com, marketing@sperasoft.com

S P E R  S O F T
A KEYWORDS STUDIO

Platforms:

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

Models:

Premium, External development/
Outsourcing/Services

Best known for:

A contribution to Halo Infinite, Assassin's
Creed, FIFA, RainbowSix, Saints Row,
Mortal Kombat etc.

Next big thing:

We have already contributed to over 30
AAA franchises and have about 2 original
IPs in our pipeline.

Description:

Sperasoft, a Keywords studio is a leading
game development company. We
offer fully international development
capabilities with comprehensive
professional teams constructed with the
best producers, engineers, designers,
and artists in the gaming industry. Our
partners and clients include Ubisoft,
Microsoft, Warner Brothers, 343 Industries,
Riot Games, Electronic Arts, Sony,
BioWare, Blizzard etc.

Operating since: 2004 **Team size:** 200

Star Drifters

www.stardrifters.com, business@stardrifters.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Driftland: The Magic Revival - our first critically acclaimed best-selling RTS title on PC.

Next big thing:

First Dwarf is an immersive action RPG with base building elements in a fantasy open-world.

Description:

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.

Operating since: 2014

Starward Industries

www.starwardindustries.com, info@starward.co



**STARWARD
INDUSTRIES**

Platforms:

PC, PlayStation, Xbox

Models:

Premium

Next big thing:

An upcoming retro sci-fi thriller The Invincible - based on a novel by Stanisław Lem by the same title.

Description:

Starward Industries is a game development studio that creates narrative-driven experiences. With a focus on meaningful stories and immersive gameplay, Starward Industries aims to captivate players and take them on unforgettable journeys. The team is composed of industry veterans with a passion for innovation, and their commitment to quality shines through in every aspect of their work.

Operating since: 2018 **Team size:** 35

Storm Trident

www.storm-trident.com, office@storm-trident.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Front Mission 2: Remake, Magical Drop VI - world's leading IPs developed in our company.

Next big thing:

Front Mission 2: Remake - a big IP from Square Enix.

Description:

A development studio based in Gdańsk, with a knack for making remakes and new installments of known IPs. Working together with leading companies of the game industry across the globe.

Operating since: 2020

Sundog

www.sundog.games, supdog@sundog.games



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Next big thing:

Ibru - an FPP detective RPG set in a science fantasy world.

Description:

Sundog is a game development studio led by industry veterans in cooperation with a Nobel Prize-winning author.

Operating since: 2022

Symbiotic Labs

www.symbioticlabs.xyz, bartosz.ostrowski@symbioticlabs.xyz

**SYMBIOTIC
LABS**®

Platforms:

PC, Browser

Models:

Web3

Best known for:

Creating an amazing, cross-disciplinary team very experienced in gamedev.

Next big thing:

A game in which together with other players you can shape a complex and long-term story in web3.

Description:

A game development studio with a vision to create groundbreaking games that inspire players like never before. By placing our players at the heart of our creations, we empower them to influence the stories they participate in, forging a deep connection with the games we develop.

Operating since: 2022 **Team size:** 25

Take IT Studio!

www.takeitstudio.com, office@takeitstudio.com



Platforms:

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

Models:

Premium

Best known for:

Electrician Simulator - more than 70k copies sold in 6 months.

Next big thing:

Electrician Simulator coming to consoles; working on some PSVR 2 games and a next big PC game.

Description:

Video games are our job, but also our greatest passion. We create titles for PCs, consoles, and mobile devices. We also use virtual (VR) and augmented (AR) reality. As Take IT Studio! we make every effort to ensure that our products are modern and of good quality. Do you want to be part of this movement?

Operating since: 2020

Tate Multimedia SA

www.tatemultimedia.com, contact@tatemultimedia.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

We are the creators of the legendary Kao the Kangaroo.

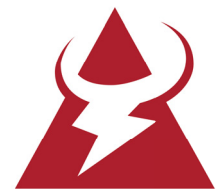
Description:

For over 20 years, Tate Multimedia has been an independent game developer and publisher specialized in delivering successful IPs to players all over the world. Our team is made of passionate and highly dedicated folks with years of industry experience. We are creators of the legendary Kao the Kangaroo, well-known Urban Trial series, and the award-winning Steel Rats.

Operating since: 2000

T-Bull

www.t-bull.com, contact@t-bull.com



Platforms:

PC, Nintendo Switch, Mobile

Models:

F2P

Best known for:

Moto Rider GO - over 150 million downloads and Top Speed - over 50 million downloads.

Next big thing:

More mobile mid-core games and updating of key games from our portfolio.

Description:

A Polish mobile game developer with a diverse portfolio and over 650 million downloads worldwide. Our 12+ years of industry experience have allowed us to create popular titles such as Moto Rider GO, Top Speed, Dice & Spells, and Bike Clash, captivating players across multiple platforms.

Operating since: 2010 **Team size:** 50

Techland

www.techland.net, www.techland.net/press-center



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

The Dying Light franchise (premiere in 2015 & Dying Light 2 Stay Human premiere in 2022) sold more than 30 million copies worldwide.

Next big thing:

We are committed to delivering best-in-class AAA games. Our newest game is set to be a narrative-driven fantasy epic with an exotic open world ready to be explored.

Description:

Techland S.A. stands as one of the largest and most prominent game producers in Poland. For over 30 years, it has managed to maintain its status on the global stage as the industry leader in its commitment to providing players with unforgettable experiences.

Operating since: 1991 **Team size:** > 400

Ten Square Games

www.tensquaregames.com, contact@tensquaregames.com



Platforms:

Mobile

Models:

F2P

Best known for:

Fishing Clash – a top 50 game in the Google Play Store. Played by 80 million in 171 countries.

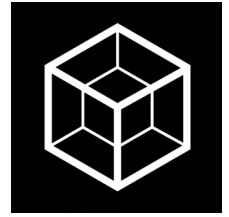
Description:

Can work be fun? Can passion become a job? Ten Square Games knows how to make this happen. We are an international team of 350 experts ranked among the Top 50 Mobile Game Makers in the World according to Pocket Gamer. Creating world-class hits like Fishing Clash, Hunting Clash, and Wings of Heroes is possible because we dare to explore, trust each other, and change fast, embracing challenges.

Operating since: 2011 **Team size:** 350

Tesseract Games

www.tesseractgames.pl, contact@tesseractgames.pl



Platforms:

PC, Mobile, Browser

Models:

Premium, External development/
Outsourcing/Services

Best known for:

We are the creators of the legendary Kao the Kangaroo.

Next big thing:

Project Aurora - a narrative game about exploring the ruins of an extraterrestrial civilization.

Description:

An independent game development studio that supports other companies and produces its own games. Tesseract Games has supported many independent productions in various areas - from graphics, through game and narrative design, to programming. Currently, the company focuses mainly on creating its own story-driven computer games.

Operating since: 2020

Teyon

www.teyon.com, office@teyon.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Terminator: Resistance - our most successful game named by fans a love letter to the original movies.

Next big thing:

RoboCop: Rogue City - play as a crime-fighting cyborg RoboCop in FPS action RPG game for PC & consoles.

Description:

Teyon is a developer and publisher of video games on all major platforms. The company was founded in 2006 in Kraków, Poland, and has since expanded to include locations in Łódź, Poland, and Tokyo, Japan, with a total of 100 employees. The company is currently focused on developing high-quality action RPG and racing games, and we are also known for our Japanese retail and digital publishing branch.

Operating since: 2006 **Team size:** 100

Transhuman Design

www.thd.vg, michal.marcinkowski@gmail.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

F2P, Premium

Best known for:

Creators of Soldat and other multiplayer classics like King Arthur's Gold.

Next big thing:

Maniac - a car-chase roguelite.

Description:

An independent studio led by Michal Marcinkowski, the creator of Soldat, an indie classic that dominated the 2D multiplayer world and directly inspired games like N, Take Arms and Worms Rumble. Soldat was followed by King Arthur's Gold and Butcher.

Operating since: 2002

Travel Games

www.ringroutes.com, ringroutes@gmail.com



Platforms:

Mobile, Board Game

Models:

External development/Outsourcing/ Services, Board Game Direct Sale

Best known for:

Publishing board games supported by a mobile app which work as travel guidebooks and tour planners.

Next big thing:

Ring Routes Icelandic Summer is the first guidebook in the form of a board game which you can play.

Description:

Travel Games works on an innovative board game supported with a mobile app. It is the first guidebook and a trip planner which you can play. We plan to develop this project and create a computer game and an interactive multimedia platform which will help tourists to book hotels, travel services, rate local tourist companies and their offer and promote a sustainable way of travelling.

Operating since: 2022

True Games Syndicate

www.truegamesyndicate.pl, kontakt@truegames.pl

Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

We are still waiting for our first game to come.

Next big thing:

DDS: Narcos.

Description:

True Games Syndicate is a company that develops and publishes video games. TGS games shows real life without a filter. Dangerous situations, moral dilemmas, difficult choices, and shady deals. The reality of the street is not easy, but it will give you the excitement that you have been waiting for!

Operating since: 2020

Try Evidence

www.tryevidence.com, michal@tryevidence.com

try_evidence

Platforms:

PC, PlayStation, Xbox

Models:

External development/Outsourcing/
Services

Best known for:

We have worked with 30+ publishers, devs, and investors, and have completed 100+ successful projects to 2023.

Description:

We check how players, and the media react to games at every stage of production: from the idea to post-release. We anticipate gaming market behavior and Metascores using qualitative and quantitative methods as well as advanced desk research. All of this is to make decision-making processes easier and to minimize business risks.

Operating since: 2019

Two Horizons

www.twohorizons.pl, office@twohorizons.pl



Platforms:

PC, PlayStation, Xbox

Models:

Premium

Best known for:

The studio is best known for its 2023 release of a simulation game called Hotel Renovator.

Next big thing:

The studio is working on the next instalment in the Renovator series – the Airport Renovator.

Description:

We create games believing that players' ingenuity and creativity can build the most exciting titles. We believe that each of the recipients of our games has their horizon, action strategy, and way to achieve the goal. We focus in each production mainly on fun, building the games mainly upon arcade mechanics and creating solutions that will generate the expected level of satisfaction among our recipients.

Operating since: 2020 **Team size:** 23

UmiArt

www.umiart.pl, info@umiart.pl



Platforms:

PC, Nintendo Switch, Mobile, VR/AR

Models:

F2P, Premium, External development/ Outsourcing/Services

Best known for:

Dogemon App' - creature collecting game. Largest project yet for me, had over 150k players.

Next big thing:

An unrevealed card game, where you play against a grim reaper. The stake is your soul. PC platform.

Description:

The company is a one-man army for now. I have a huge passion for games and art, and have created code, designs, and graphics almost all by myself for all my games.

Mostly focused on mobile games in the past. Currently moving into the PC and console platform.

Operating since: 2018 **Team size:** 1



UNNAMABLE
ARTS

Unnamable Arts

www.unnamable-arts.com, hello@unnamable-arts.com

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium, External development/
Outsourcing/Services

Next big thing:

Selenwald' - an action roguelike RPG
where dark fantasy meets 18th century
history.

Description:

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 and beyond. The
studio's mission is to deliver gameplay
focused, mechanically and intellectually
challenging games set in rich, dark, and
unique worlds that tell deep and intricate
stories aimed for a mature, mid- to
hardcore audience.

Operating since: 2020

Unstoppable Project Management

www.48group.pl, pm@unstoppm.com

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Medieval Dynasty, Ghostrunner and a few
more.

Next big thing:

Ghostrunner 2

Description:

We are an agency which helps to find the
right publishing partner or investor.

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

Untold Tales

www.untoldtales.games, contact@untoldtales.games



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, Browser

Models:

Premium, External development/ Outsourcing/Services, Publishing 4 Hire

Best known for:

One million copies of great indies such as Arise a Simple Story, The Hong Kong Massacre, Golf Club, etc.

Next big thing:

Bang on Balls: Chronicles & Everdream Valley.

Description:

Untold Tales is an indie publishing label with a focus on games that have an interesting story to tell. We help dev teams successfully deliver their digital masterpieces to a wider audience across multiple platforms. While we do not focus on any specific genre, our most trusted guiding light is games that offer remarkable joy and narrative.

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

UrbanNinja.Studio

www.urbanninja.studio, hello@urbanninja.studio



Platforms:

Mobile, VR/AR

Models:

F2P, Premium

Best known for:

Miracle 1920: Tower Defense - 60k organic installs on Google Play.

Next big thing:

VR slingshot and skateboarding game for Oculus Quest 2.

Description:

A team of specialists based in Warsaw, working across different industries of different sizes. We do not settle, we are intentional about building with surgical precision and creating extraordinary experiences. We go the extra mile, and then walk a couple more, just for fun.

Operating since: 2015 **Team size:** 2

Varsav Game Studios

www.varsav.com, lukasz.rosinski@varsav.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

Best known for: the first game - Bee Simulator, with four rewards and around 200 000 copies sold.

Next big thing:

Our current biggest thing is Project CHASE with a quadruped animal as the main protagonist.

Description:

VARSAV Game Studios specialized in developing games with unique main protagonists and exceptional mechanics. The studio's first game, Bee Simulator, was released in 2019, simultaneously for PC, PS4, Xbox One and Nintendo Switch. Our second, self-published game is called Giants Uprising, currently in early access on Steam. VGS is also an investor in Ovid Works, Mooneaters and 3 other studios.

Operating since: 2016 **Team size:** 35

Viabo Games

www.viabogames.com, office@viabogames.com



Platforms:

PC, Nintendo Switch, Mobile

Models:

Premium

Best known for:

Setting up our own studio and seamlessly releasing our first title, Blaze in Space: Beat a-Maze.

Next big thing:

A procedurally generated RPG with proprietary technology for automatic world and story generation.

Description:

Viabo means "path", and our path was clear right from the beginning - to create new worlds and unforgettable experiences. After starting out as ambitious gamers, we persevered through the dream phase and set achievable goals for ourselves. Now, with a cohesive team that has released their first game together, we are taking on more challenging projects.

Operating since: 2021 **Team size:** 13

Vile Monarch

www.vilemonarch.com, scribe@vilemonarch.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile

Models:

Premium, External development/Outsourcing/Services

Best known for:

Oh...Sir! TIS - the biggest reach; Growing Up - the best reception; Floodland - the most ambitious.

Next big thing:

The Last Alchemist - a wholesome game about exploration, invention, and alchemy puzzles - Summer 2023.

Description:

A hard rock game studio. We specialize in crafting compelling fantasies through expertly designed game systems - in different genres and on various platforms.

Operating since: 2015 **Team size:** 70

Vivid Games

www.vividgames.com, office@vividgames.com



Platforms:

PC, Nintendo Switch, Mobile

Models:

F2P, Premium

Best known for:

Real Boxing series [120 million downloads], Knights Fight 2: New Blood, Eroblast, Lovenest.

Next big thing:

Real Boxing 3 enriched with a multiplayer and a storyline. Developing games from the blast segment.

Description:

One of the Poland's leading mobile game developers. For more than 15 years, it has been creating amazing titles, such as those of the Real Boxing series - the most recognized brand among boxing games in the world. For its achievements, the company has received many awards including "Best Independent Producer", "Best Polish Game of the Year", Apple award "Editors' Choice". Listed on Stock Exchange.

Operating since: 2006 **Team size:** 70

Vixa Games

www.vixagames.com, robert@vixagames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

Premium

Best known for:

The Crackpet Show - over 25k viewers watching live on Twitch in peak.

Next big thing:

Edge of Sanity - a Lovecraftian survival horror game with 2D art, a disturbing story, and base management.

Description:

Founded in 2016 by a group of passionate indie developers in Gdańsk, Poland.

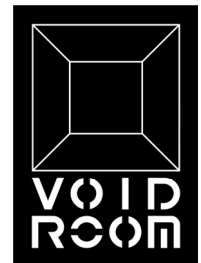
The team strives for a unique and eye-catching art style, an uncommon mix of genres and themes, as a result of which our games are usually a bit twisted per the nature of the crew. Despite an element of silliness, quality and the studio's motto that reads "Life is too short to play boring games" are strongly reflected in all the Vixa Games' products.

Operating since: 2016 **Team size:** 15

void room

www.voidroom.com,

contact@voidroom.com



Platforms:

PC, VR/AR

Models:

Premium

Best known for:

Tea For God, often mentioned as the most immersive and innovative VR title.

Next big thing:

Tea For God, still in the development. To be released in 2023 on PCVR and mobile headsets.

Description:

A solo indie developer. Exploring how new technologies could be used to create different kinds of games/experiences.

Currently, how impossible spaces in VR could be used to increase the immersion and how a development pipeline heavily based on procedural generation could address the issue of targeting multiple platforms with a single project/source.

Operating since: 2016 **Team size:** 1



Wayward Preacher

www.waywardpreacher.com, watroba.grzegorz@gmail.com

Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Best known for:

Cooperation with One More Level on God's Trigger and with Polygon Treehouse on ROKI Switch port.

Next big thing:

Dark, gritty music-based game in the Slavic world, with robust narrative and original gameplay. Release: 2024.

Description:

One-man army with help of a few friends focused on porting, optimization, technical systems design, and production.

Operating since: 2015

We Dig Games

www.wediggames.com, pr@wediggames.com



Platforms:

PC, PlayStation, Xbox, Nintendo Switch

Models:

F2P, Premium

Best known for:

Hamster Playground.

Next big thing:

Publishing of: Harmony's Oddysey;
Hexologic: TBA; Unannounced project by Mass Creation.

Description:

We are a passionate team of developers who have over 10 years of experience in the industry and always decided to take the high road of self-publishing, earning us a great deal of insight into both the perspective of a creator and publisher.

Operating since: 2021

Weird Johnny Studio

www.weirdjohnnystudio.com,

contact@weirdjohnnystudio.com

WEIRD JOHNNY
STUDIO

Platforms:

Mobile

Models:

F2P

Best known for:

Hero Tale Idle RPG - almost 1.5 million downloads while in early access.

Description:

At Weird Johnny Studio, we want to make games by our very own rules. There is a sea of mobile games trying to squeeze players out of their last penny to be higher in some PvP ranking. Our goal is to make something valuable and fun! Games we make are single player with no pay-to-win mechanics as we believe player's decisions and strategy should affect game progress, and not the amount of money spent.

Operating since: 2016

Wenkly Studio

www.wenklystudio.com, contact@wenklystudio.com



Platforms:

PC, Nintendo Switch, Mobile, VR/AR

Models:

Premium, External development/
Outsourcing/Services

Best known for:

Elven Assassin VR with more than 800,000 active users worldwide, Private Property, Survival Nation.

Next big thing:

We are currently working on the two big VR titles.

Description:

We transform ideas into thrilling virtual reality experiences. Our team of talented developers and visual artists is passionate about creating immersive games that entertain people worldwide. We are proud to have produced numerous successful games. Using the Unity 3D Engine, we are experts in gamification and can also provide VR/AR solutions tailored to meet the needs of enterprises.

Operating since: 2015

Yaza Games

www.yazagames.com, kontakt@yazagames.com



Platforms:

PC, Xbox, Nintendo Switch

Models:

PC, Premium

Best known for:

Inkulinati - an ink-based strategy game straight from medieval manuscripts (early access release).

Next big thing:

Inkulinati - an ink-based strategy game straight from medieval manuscripts (full release).

Description:

We are a small studio from Poland. We want to surprise you with our hand-crafted worlds that may contain a bit of absurd humor. We are currently working on our debut title - Inkulinati - available now in early access.

Operating since: 2019

Yellow Dot Games

www.yellowdotgames.com, contact@yellow-dot.eu



Platforms:

PC, PlayStation, Xbox, Nintendo Switch, Mobile, AirConsole

Models:

Premium

Best known for:

More than one milion copies sold with Them Bombs!

Next big thing:

We are working on Let's Cook Together 2, which is a plot-driven co-op game.

Description:

Yellow Dot is a small independent development studio based in Gdańsk, Poland. We specialize in local cooperative games that can be enjoyed by virtually anyone, from seasoned players to complete newcomers. The main theme of our games is communication; the dynamics of our games change depending on who you play the game with – friends, spouses, or whole families.

Operating since: 2023 **Team size:** 4

Infographic The Polish game industry

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

494	game producers & publishers
15 290	people hired
EUR 1286M	industry revenue in 2022
530+	new releases annually, platform-wise

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Table 1. The biggest European game industries, workforce wise

Source: GIC, EGDF European Video Games Industry Insights Reports, national reports

//Data from the infographic are presented in the table.//

		Workforce size		trends YoY in last years
1	UK	20 975	(2021)	+1%
2-3	France	15 000 - 19 000	(2021)	n/d
	Poland	15 290		+24% - +16%
4	Germany	11 242	(2022)	-13% - +8%
5	Spain	8000 - 9500	(2020-21)	n/d
6	Sweden	7944	(2021)	+11% - +20%
7	Romania	6700	(2021)	+3%
8	Finland	4100	(2022)	+6%

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Chart 1. Revenues of game developers and publishers from Poland (bln PLN)

Source: Game Industry Conference

//Data from the chart are presented in the table.//

year	Total	Total without CD Projekt SA	YOY growth - total	YOY growth - total without CD Projekt SA
2018	2.38	2.02	+27%	+42%
2019	2.73	2.23	+14%	+10%
2020	5.93	3.79	+118%	+72%
2021	5.44	4.55	-8%	+20%
2022	6.03	5.08	+11%	+12%

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Chart 2. Yearly releases vs production cycle of Polish studios

Source: Game Industry Conference

//Data from the chart are presented in the table.//

23.5%	1 release
16.2%	2+ releases
60.3%	no release this year

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Infographic Employment in the Polish game industry

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

15 290	people working in the game production sector
24%	are female
over 16%	growth YOY
over 2200	foreigners (more than 14.5% of total employment)

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Infographic Company size in the industry

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

of 494 studios	
16	companies hire 200+ people
56	studios have a 50+ team
106	studios have a 25+ team
78%	of teams are smaller than 25 people
34%	are with teams of 6-15 people
32%	of studios hire up to 5 people

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Chart 3. Companies with a team of 100+

Source: Game Industry Conference

//Data from the chart are presented in the table.//

2020	14
2021	19
2023	25

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Chart 4. Average team size

Sources: GIC, EGDF European Video Games Industry Insights Report, national reports

//Data from the chart are presented in the table.//

Poland	
2020	22.1
2021	25.8
2022	29.0
2023	31.3
Other countries	
Germany (2021)	15.7
UK (2021)	13.7
Sweden (2021)	11.9
Romania (2021)	29.4
Finland (2022)	20.5

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Chart 5. Years of studios' market presence

Source: Game Industry Conference

//Data from the chart are presented in the table.//

1991	1
1992	0
1993	0
1994	1
1995	0
1996	0
1997	0
1998	1
1999	0
2000	3
2001	1
2002	4
2003	0
2004	7
2005	7
2006	4
2007	3
2008	8
2009	10
2010	13
2011	18
2012	20

2013	24
2014	37
2015	34
2016	38
2017	30
2018	45
2019	47
2020	62
2021	45
2022	30

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Chart 6. Number of localizations, Polish vs foreign games

Source: Game Industry Conference

//Data from the chart are presented in the table.//

Numbers of translations	World	Poland
1	56,58%	26,18%
2	14,35%	8,36%
3	5,04%	4,73%
4	3,18%	2,37%
5	1,87%	2,37%
6	1,94%	2,84%
7	2,09%	4,26%
8	1,86%	6,94%
9	2,46%	6,31%
10	2,78%	7,41%
11	2,28%	8,52%
12	1,43%	6,94%
13	0,94%	6,78%
14	0,64%	2,21%

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Chart 7. Localization languages, Polish vs foreign games

Source: GamingAnalytics.info

//Data from the chart are presented in the table.//

	Foreign	Polish
English	99,92%	100,00%
German	71,37%	89,88%
Polish	23,26%	89,40%
French	68,55%	85,30%
Spanish	70,28%	82,65%
Russian	59,27%	77,11%
Chinese	66,99%	71,57%
Italian	47,73%	63,86%
Portuguese	46,07%	56,39%
Japanese	53,70%	49,16%
Korean	37,61%	35,90%
Turkish	17,88%	26,51%
Hungarian	10,88%	10,36%
Czech	10,10%	9,88%
Dutch	15,12%	8,67%
Ukrainian	7,97%	5,30%
Thai	8,50%	3,13%
Swedish	7,55%	3,13%
Romanian	6,48%	3,13%
Greek	9,41%	2,41%
Norwegian	7,71%	2,41%
Finnish	7,86%	2,17%
Vietnamese	5,59%	1,69%

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Chart 8. Polish game releases structure in 2022

Source: Game Industry Conference

//Data from the chart are presented in the table.//

PC	162
Switch	92
PS4	42
PS5	28
XO	52
XSX	19
VR	25
Mobile	90
Browser	10
Other	10

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Chart 9. Polish titles that sold over a million copies globally

Source: Indie Games Poland

//Data from the chart are presented in the table.//

2014	4
2015	5
2016	4
2017	6
2018	6
2019	4
2020	4
2021	4

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Chart 10. Growth of the 3rd party publishing sector in Poland

Source: Game Industry Conference

//Data from the chart are presented in the table.//

Year	2016	2017	2018	2019	2020	2021	2022
Number	13	17	25	37	45	46	48
Growth YOY		+30%	+47%	+48%	+22%	+2%	+4%
New		+5	+9	+12	+12	+6	+8
Stopped		-1	-1	0	-4	-5	-6
Stopped %		-8%	-7%	0%	-11%	-11%	-13%

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Infographic Formal education targeted at game industry

Source: Game Industry Conference

//Data from the infographic are presented in the table.//

65	degree courses are offered countywide
Course profiles:	
26	programming with game related classes or game programming
23	art with game related classes or game art
10	game design
4	game studies (ludology)
52	number of universities
of which:	
23	are state universities (32 courses)
29	are private universities (33 courses)

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Table 2. Formal education for gamedev in Europe

Source: Sources: Game Industry Conference

//Data from the table are presented in the table.//

		Universities offering such	per 1M of citizens
1	France	150	2.2
2	Germany	109	1.3
3	UK	135	2.0
4	Spain	67	1.4
5	Poland	52	1.4
6	Finland	37	6.7
15	Serbia	10	1.4

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Chart 11. Leading platforms as declared by studios

Source: Game Industry Conference

//Data from the chart are presented in the table.//

PC	68.4%
Mobile	12.8%
VR/AR	7%
Nintendo Switch	6.4%
Playstation	3.2%
Browser	2.1%

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Chart 12. Polish releases on Steam

Source: GamingAnalytics.info

//Data from the chart are presented in the table.//

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Game self-publishing	2	3	9	49	36	55	74	93	75	81	101	76
Games polish publisher		1	3	9	22	43	50	49	46	63	59	59
Games foreign publisher	3	4	11	13	19	19	21	7	13	19	23	27
DLC self-publishing			1	12	7	10	24	17	31	20	56	20
DLC polish publisher	1	2	3		6	9	25	28	19	22	21	33
DLC foreign publisher	1	1	9	3	6	17	25	21	12	10	22	23

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Table 3. Origin countries of games in Top200 Steam wishlists

Source: GamingAnalytics.info

//Data from the table are presented in the table.//

Contry of origin	Share	Games count	Change
USA	16.75%	33.5	-1.5
Poland	15.25%	30.5	-7.5
Great Britain	8.00%	16	+1
Japan	6.75%	13.5	+7.5
Canada	6.75%	13.5	-2.5
France	5.50%	11	-1
Sweden	5.00%	10	
Germany	5.25%	10.5	+7.5
Russia	3.00%	6	-2
Spain	2.25%	4.5	+1.5
China	2.50%	5	-3
Netherlands	2.50%	5	-2
Other	20.50%		

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Chart 13. Leading business models as declared by studios

Source: Game Industry Conference

//Data from the chart are presented in the table.//

Premium	69%
F2P	12%
External	18%
Retails sale	1%

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Infographic Polish game market

Sources: GIC Team elaboration based on data from Euromonitor International, Statista and public data

//Data from the infographic are presented in the table.//

USD 1225M	consumer market value in 2022
USD 12.6M	eSports market value in 2022
USD 68	consumer average revenue per user (ARPU)
USD 2.5	eSports average revenue per user (ARPU)
19th	market globally
+15% YOY	market growth
+11% YOY	eSports growth
down to 14%	physical games distribution

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Infographic Polish market in global rankings

Sources: Sources: GIC Team elaboration based on data from GamingAnalytics.info, gamediscover.co Euromonitor International and public data

//Data from the infographic are presented in the table.//

13th	biggest globally Xbox
13th	biggest globally PlayStation
9th	biggest globally PC Steam
7th	biggest globally PC Epic Games
4th	biggest globally PC GOG.COM

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Infographic Gamers in Poland

Source: Newzoo, Polish Gamers Research

//Data from the infographic are presented in the table.//

Even 20M gamers	
over 80% gamers are adults	47% are female

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European Union
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