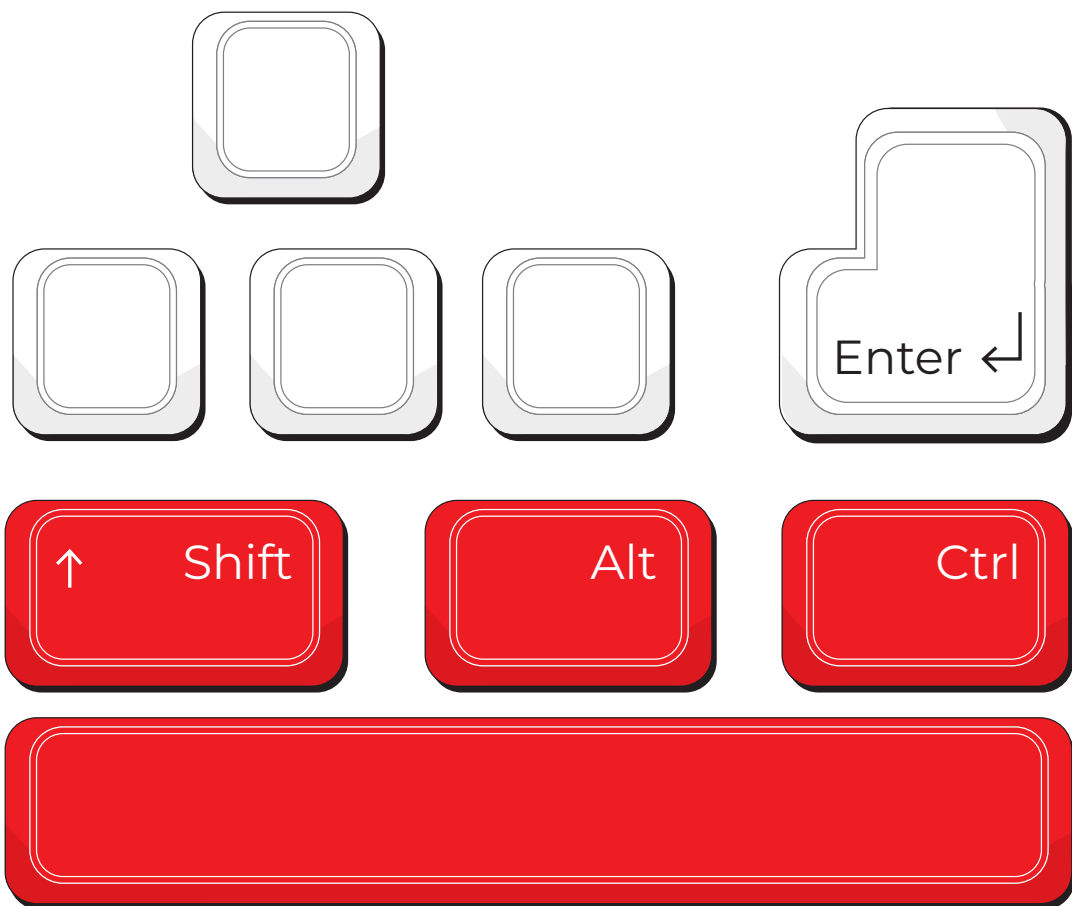
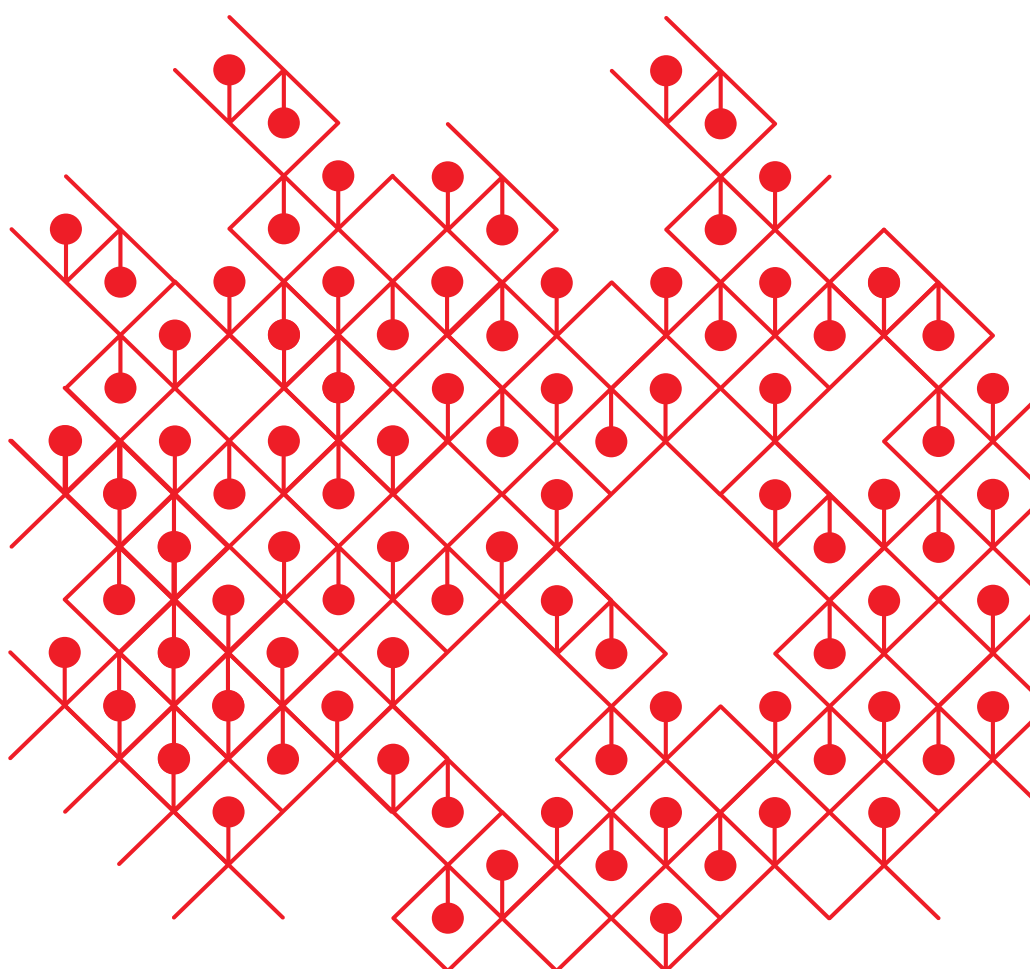


THE GAME INDUSTRY OF POLAND

REPORT 2020



The game industry of Poland – Report 2020



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Ministry of Economic
Development

Ministry of
Culture
and National
Heritage of
the Republic
of Poland.



Republic
of Poland



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Małgorzata Oleszczuk

President of the Polish Agency for Enterprise Development

Computer games, or more specifically, computer game development, often abbreviated to gamedev, is a relatively new and most dynamically developing creative industry.

Over the last decade, the game development industry has expanded on an unimaginable scale. Given the fact that people all the more often tend to look for entertainment in the virtual world, its further growth prospects seem to be just as optimistic. Even today there are more than two billion gamers worldwide, and over the next couple of years the global value of the computer game market should exceed USD 200 billion.

The revenue of the Polish game development industry exceeds EUR 500 million, with game export alone generating nearly 96% of that sum, which perfectly demonstrates its global potential. Along with the constantly expanding gamer community and dynamic growth of export, we can observe increasing interest in game programming education among young people. Polish universities currently offer 60 degree courses related to game development, and over half of them educate programmers.

The following publication is to outline the profile of the Polish game development industry, its history, potential, and strengths. Our ambition is to convince the public that the Polish game sector is not only about AAA productions, which have been highly successful on the global scene in recent years, but also about excellent simulators, games for change, as well as a huge sector offering external development, assets production, localisation, quality assurance, or video production.

In 2020, Polish Agency for Enterprise Development (PARP) was to prepare, in cooperation with the Ministry of Development, a national presentation of the game development industry for one of the largest trade events, Gamescom fair in Cologne. Unfortunately, the COVID-19 epidemic has thwarted our plans, but I am sure we will meet with you during the next edition, along with a large group of marvellous Polish game developers.

In the meantime, have a look at our publication and feel free to contact Polish companies representing this sector.

Kuba Wójcik**Executive Chairman of Indie Games Poland**

The Polish video game industry for years has been one of the most important sectors of Polish economy and culture. Players on desktop devices, mobile consoles, but also on the stock market hope for the success of domestic productions.

CD PROJEKT S.A. is currently the highest priced company at the Warsaw Stock Exchange, with numerous best-sellers included in its portfolio ('The Witcher' trilogy sold in over 50 million copies) and excellent prospects for the future. Analysts estimate that the forthcoming 'Cyberpunk 2077' should sell in as many as 38 million copies.

The Polish gaming sector, however, is not only about CD PROJEKT RED. Polish companies are successful in virtually every segment of this market. When talking about the premium game market, we should also mention the Techland, for years launching commercially successful projects. We also have strong players on the mobile game market, namely Huuuge Games — a company that has for years been creating 'social casino' games, as well as Ten Square Games — one of the leaders in the development and publication of games shared in the Free-to-play model.

Nevertheless, we have to bear in mind the fact that in Poland there are over 400 studios that pay taxes locally, have created several thousand jobs, and are gradually becoming one of the driving forces behind domestic economy.

It pays to support the Polish game development industry, especially given the fact that video games have become a vital element of the so-called cultural diplomacy. This is exactly why the Ministry of Culture and National Heritage has launched the Creative Industries Development programme, the National Research and Development Centre has kicked off the GameINN initiative, offering annual R&D subsidies, whereas PARP provides financial support for the promotion of product brands on foreign markets. Universities are also well aware of the Polish game development potential, now offering 60 degree courses related to this subject.

However, games are not only an element of big business, they are also — or perhaps foremost — an essential component of contemporary culture. Next year, 'This War of Mine' from 11 bit studios will be added to the school non-compulsory reading list, serving as an educational tool for teachers of sociology, ethics, and philosophy. It is worthy to note, that this title has won over 100 awards, while articles devoted to it have been published in such renowned magazines as TIME, EDGE, or Washington Post.

Each of these elements has positive impact on the perception of the Polish gaming sector, while its size and achievements position Poland among the EU leaders, confirming its importance on a global scale.

Overview of the gaming sector

The gaming sector can be described in many different ways, depending on what parts to count in. One can look at the consumer market, i.e. sales of games, usually along with e-sport. But it relies on import, as up to 97% games' spending in Poland are estimated to be on foreign titles. Alike, there are no Polish e-sport titles as yet. Therefore, the domestic game production is essential for this study, but also for the growth of the gaming sector in Poland.

Newzoo reports¹ are considered the key source of data on the Polish retail market. According to these estimates, there are 16 million players in Poland, generating a market worth USD 596 million, which places our country around the 20th position globally, depending on the year. Nevertheless, these estimates seem to rely far too much on such parameters as Internet users and mobile users, not taking the specific character of the Polish market into account.

Especially it misses the fact that **Poland is a particularly good market for PC premium gaming, which is confirmed by data from three key distribution platforms on PC.**

The Steamspy report² ranks Poland at seventh position in regard to the indie games revenues. Polish players are also the third largest group of GOG.COM customers, in terms of their share in sales, closely following Americans and Germans³. At the same time, according to the Epic Games Store statistics, Polish gamers are the seventh largest community on this platform⁴.

As the game production in Poland is booming the most of this paper is devoted to analyse it. Yet, in order to avoid common mistakes, it is necessary to stress that **96% of games produced in Poland are exported**, hence, game

¹ Newzoo, (2019), Global games market report

² Galyonkin S., (2018), Steam in 2017

³ CD PROJEKT, (2020), Sprawozdanie Zarządu z działalności Grupy Kapitałowej CD PROJEKT i CD PROJEKT S.A. za okres od 1 stycznia do 31 grudnia 2019 roku, s. 66

⁴ Epic Games Inc., (2020), Epic Games Store Weekly Free Games in 2020!

production figures should not be linked to the retail market in Poland. This is the nature of the gaming market and the game industry, probably most globalised of all contemporary industries.

In 2019, the revenue of the Polish game industry finally exceeded PLN 2 billion — a level which only 4 years ago seemed almost unimaginable. The sector has been registering constant growth, yet its stability is not that easy to observe

Game industry



440

development studios



9710

people working in
the game production



480

new releases annually



€479M

industry revenue

Source: Game Industry Conference

Consumer market



16M

number of gamers in Poland



\$596M

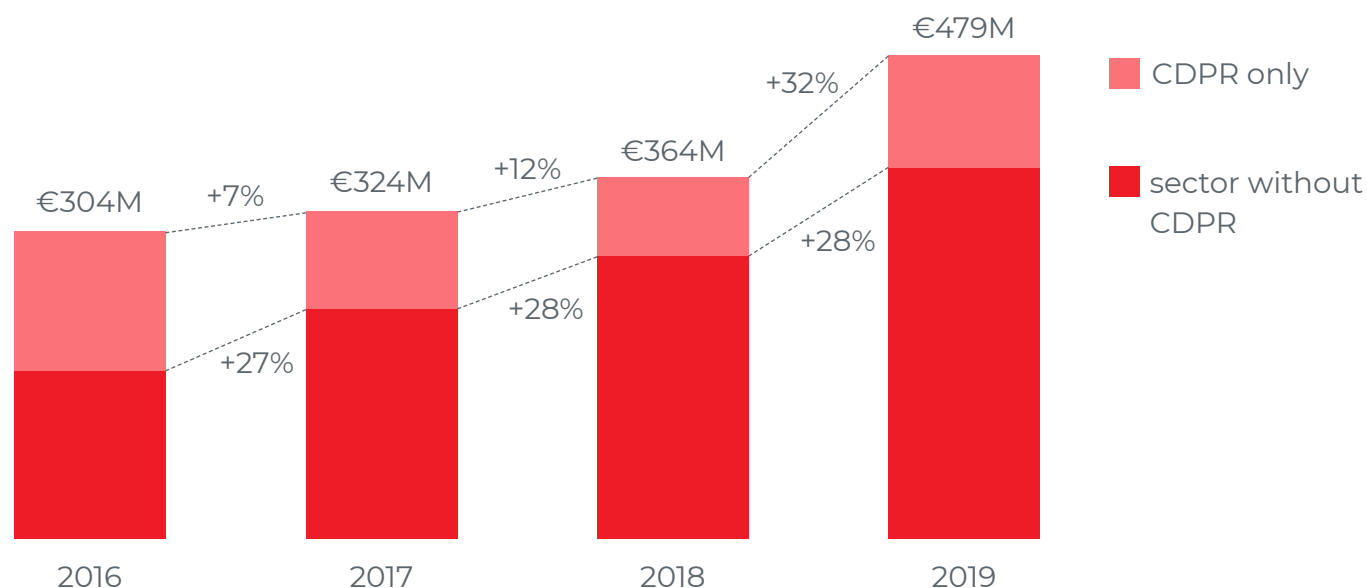
consumer market worth



\$11.5M

e-sport market worth

Source: Newzoo

Chart 1. Revenues of game developers in Poland

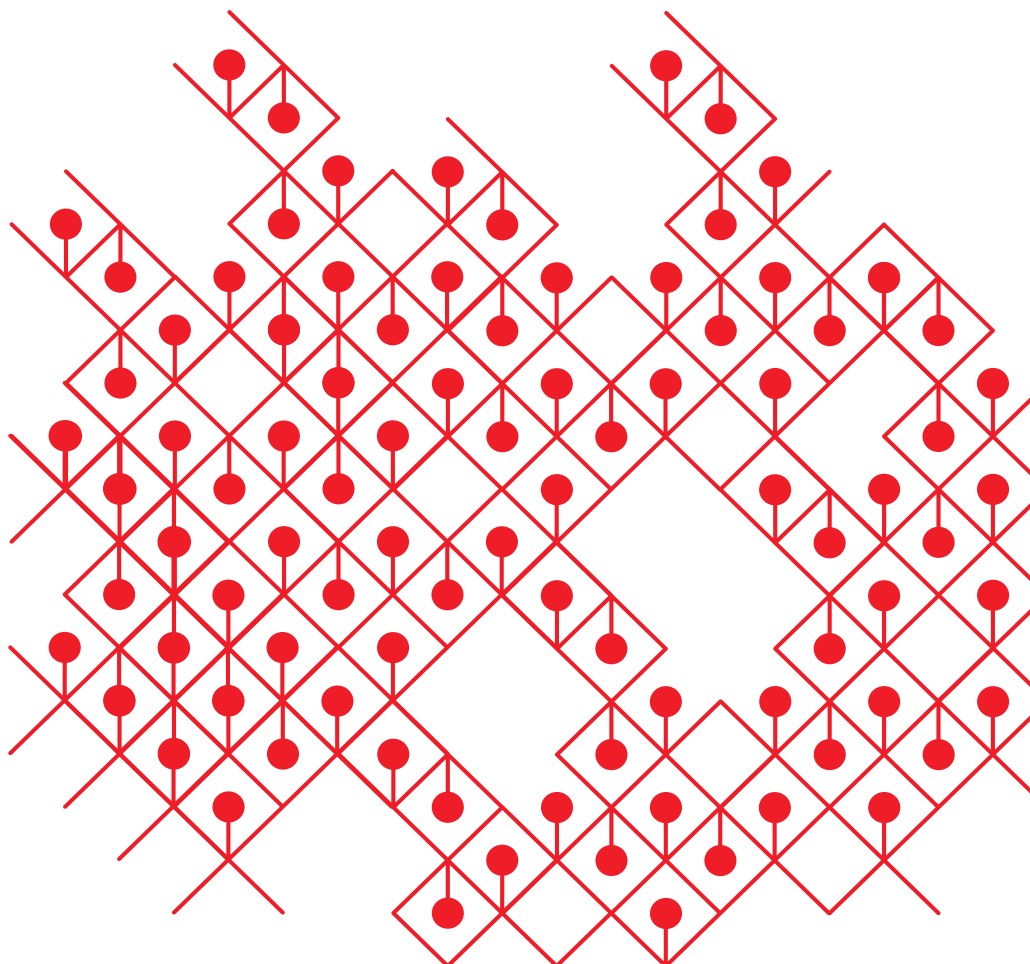
Source: Game Industry Conference⁵

because of CD PROJEKT RED revenue fluctuations related to their publishing cycle. This is why it was decided to present the revenue of the entire sector, with separate statistics for the makers of 'The Witcher'. From this perspective, it is plain to see that **the year-over-year growth of the game industry in Poland remains on a steady level of nearly 30%**.

The share of CDPR in the total sector revenue is also declining — in 2018 it dropped to a record low level of 22%, yet it might significantly change along with the upcoming 'Cyberpunk 2077' release. Noteworthy is that the revenue of other key players is less cyclic in its nature. Techland reports relatively stable revenue levels each year, whereas

Huuuge Games and Ten Square Games have in recent years been registering an increase considerably exceeding the mean for the sector in total. From now on, each of these top tier companies is likely to generate over 10% share of total sector revenue every year. Other companies that have in recent years been maintaining their revenue growth rate above the industry's mean include PlayWay, BoomBit, or even 11 bit studios. For the latter however, it is again related to the highly cyclic character of the studio's main title. Steady growth is easier to achieve for studios with production spread over a larger number of smaller projects.

⁵ Continuously updated data is available at: [Game Industry Conference, Polish game industry](#)



A game has to stir up emotions

Success story of 11 bit studios

'This War of Mine', developed by 11 bit studios from Warsaw, is the best example of the growing role of games not only in business, but also in education. This is the first video game added by the Polish Government to the official school reading list.

11 bit studios dates back to 2009, when the members of Metropolis studio, bought up by CD PROJEKT – Grzegorz Miechowski (the current CEO), Bartek Brzostek, Przemek Marszał, Michał Drozdowski, and Bartek Walecki, left the gaming tycoon and opened their own studio due to 'differences in artistic vision'.

They got down to work very quickly, already in 2011 publishing their first game called 'Anomaly Warzone Earth', representing the reverse tower defence genre (a strategic real-time game in which, instead of keeping enemies at bay by building towers, you play the role of an attacker). Its multiplatform engine was developed by one person only, namely Bartek Brzostek.

"It received excellent reviews and sold very well both for PCs and for mobile devices," says Paweł Miechowski, the partnerships manager at 11 bit studios. Other blockbusters soon followed, that is 'This War of Mine' and 'Frostpunk', still generating high sales. But the price of this success is hard and mundane work – production of a single game can take several years.

Paweł Miechowski believes that a game has to stir up emotions. "Easily said, extremely difficult to achieve," he stresses. It is about dosing such emotions as excitement, satisfaction, challenge, but even laughter or sadness. They are stirred up by the story, narrative, and entertainment. "A game can offer the same kind of experience as seeing a drama in the theatre and going through katharsis. It is interactive, thanks to which it engages players, giving them an opportunity to tell the story their own way," he explains.

The recipe for success, according to 11 bit studios, positioning its games in the medium hardcore/hardcore premium segment (games that are very time-consuming to complete, as opposed to casual ones), is the combination of high quality of production, interesting topic, and plot. For instance, in the aforesaid 'This War of Mine' players impersonate a civilian trying to survive during the war. Game mechanics and the gameplay portray war reality very well — its developers were inspired, among others, by the Balkan war, and the Siege of Sarajevo. The

game turned out to be a huge success, and the production paid for itself on the day of its launch.

“We knew that the game would pay for itself. But we did not expect it would be such a massive hit. Games are a part of show business and you never know how people will react to a given title. But we have to make sure that the production, financing, and marketing are at the highest level possible, with great emphasis on the quality and details,” he stresses.

‘This War of Mine’ won loads of trade awards, including Cultural Innovation at the South by Southwest (SXSW) Festival in Texas, which is one of the largest pop cultural events in the US. The game was also appreciated in Poland, winning Digital Dragons Award for the Polish game of the year. In Germany, at the same time, it was considered the best foreign game. In total it won over a hundred awards. ‘Frostpunk’ was just as successful, being nominated for BAFTA (British Academy of Film and Television Award).

11 bit studios does not make profits exclusively on creating and launching its own games. It also publishes titles from other developers. “Some have money to create a game, but they do not have the slightest idea how to plan marketing activities. Others, at the same time, have an excellent idea and a prototype, but do not have enough money for development. We ensure it all, depending on what expectations our clients have,” says Paweł Miechowski.

Hundreds of creators turn to the Warsaw studio, while its publishing activity already accounts for 40% of company revenue. It evaluates games from all over the world, subscribing to the ‘make your mark’ philosophy. The company would like to launch extraordinary games, which is why it is very picky as a publisher. So far it has launched ‘Tower 57’, ‘Spacecom’, ‘Beatcop’ (which sold very well), and genuine best-sellers, namely ‘Moonlighter’ from the Spanish Digital Sun studio, as well as ‘Children of Morta’ from the Texan Dead Mage team. There are more titles in development, but Paweł Miechowski cannot talk about them now. The studio’s ambition is to release one own title and three games from external developers per year.

11 bit studios is currently working on three new games, namely ‘Project 8’, ‘Project 9’ and ‘Project 10’, as well as an additional expansion pack for ‘Frostpunk’, considerably increasing its employment. The new office that the company moved to at the beginning of the year can house up to 300 employees, which indicates how ambitious expansion plans of the Warsaw studio are for the next couple of years.

Global game market growth estimates and drivers

According to estimates published by Newzoo¹ in 2020 the global value of the game market is likely to reach USD 159.3 billion, which is an increase of over 9% compared to the previous year, with USD 77.2 billion generated by mobile, USD 45.2 billion by console, and the remaining USD 36.9 billion by PC games.

According to Newzoo, the key driving forces behind this year's growth include the COVID-19 pandemic, with games offering entertainment during the lockdown, and the market launch of new generation consoles announced by leading manufacturers for the fourth quarter of this year. The pandemic itself has, on the one hand, increased interest in games, but on the other, it can slow down the development of titles currently at the production stage, or the release of new generation consoles. Nevertheless, initial concerns in this respect have so far not been confirmed.

Considering all three segments, nearly half of expenditures on games in 2020

Global gaming market value



Source: Newzoo

will come from China and the United States. The EU (counted as one country) is the third largest market globally, very closely following the leaders. Nevertheless, in years to come the role of players from developing countries, especially Latin American and Asia-Pacific, is likely to increase. Poland is currently one of the leading global

¹ Newzoo, (2020), Global Games Market Report

markets in the PC premium game subsegment.

Within the next couple of years, the gaming market should develop at a comparable rate, reaching USD 200 billion in 2023, at an average growth rate of 8.3% year-over-year. The growth of the console game market is likely to accelerate as a result of the launch of next generation consoles, but it is unlikely to reach a double-digit rate.

Second most preferred pastime

According to the PwC report², computer games are the second most preferred pastime activity. At a low price, they ensure entertainment for a relatively long time, offering an attractive alternative to cinema, theatre, or books. The number of gamers is increasing each year. Newzoo estimates that in 2020 there will be 2.6 billion gamers in the mobile segment alone, while the number of PC and console users will reach 1.3 billion and 729 million, respectively. In 2018, an average global player statistically spent USD 123 quarterly. According to Polish Gamers Research 2019³, at least half of gamers in Poland play no less than several times a week, regardless of the platform used. It is becoming a global consensus that games are nothing but a new medium

and as such should be considered a fully legitimate component of the cultural market. In Poland, games are considered one of most important cultural exports, which can be confirmed by their presence in nearly all activities targeted at creative sectors, e.g. those initiated by the Ministry of Culture and National Heritage.

The mobile segment is the fastest growing

The mobile segment is the fastest growing of all gaming segments.

According to Newzoo estimates, in 2020 the revenue generated by mobile games should reach USD 77.2 billion, which is

Number of gamers



2.6BN	1.3BN	729M
mobile	console	PC

Source: Newzoo

an increase of 13.3% compared to 2019. Why mobile? Firstly, mobile games have the lowest entry barrier because of low cost of the device and prevailing game consumption pattern, namely freemium (free games are selected by 62% of

² PwC, (2018), The 19th Annual Global Entertainment & Media Outlook 2018-2022 report

³ Polish Gamers Observatory, (2019), Polish Gamers Research 2019

gamers). Secondly, there are already ca. 3.5 billion smartphone users worldwide. For many of them, especially those living in developing countries, a smartphone is their first device with Internet access, and the only one which they can use for playing games. According to Mediakix data⁴, 56% of mobile gamers play at least 10 times a week, while the ARPU (the average revenue per user) is USD 35 per year, as reported by Statista⁵.

Women are becoming all the more eager to play games

In the United States women already account for 45% of players, compared to only 38% in 2007. In the mobile segment, American women account for 55% of all players. From the global perspective, women's dominance is even more evident. **According to Mediakix, in 2018 females accounted for 63% of all gamers.** Noteworthy is that 60% of them play every day. In Poland, as Polish Gamers Research 2019 reports, 47% of players are female, making up the majority of gamers on social media platforms and nearly half of mobile device gamers.

Female gamers



63%

of mobile gamers worldwide are women

60%

of them play games every day

47%

of all Polish gamers are female

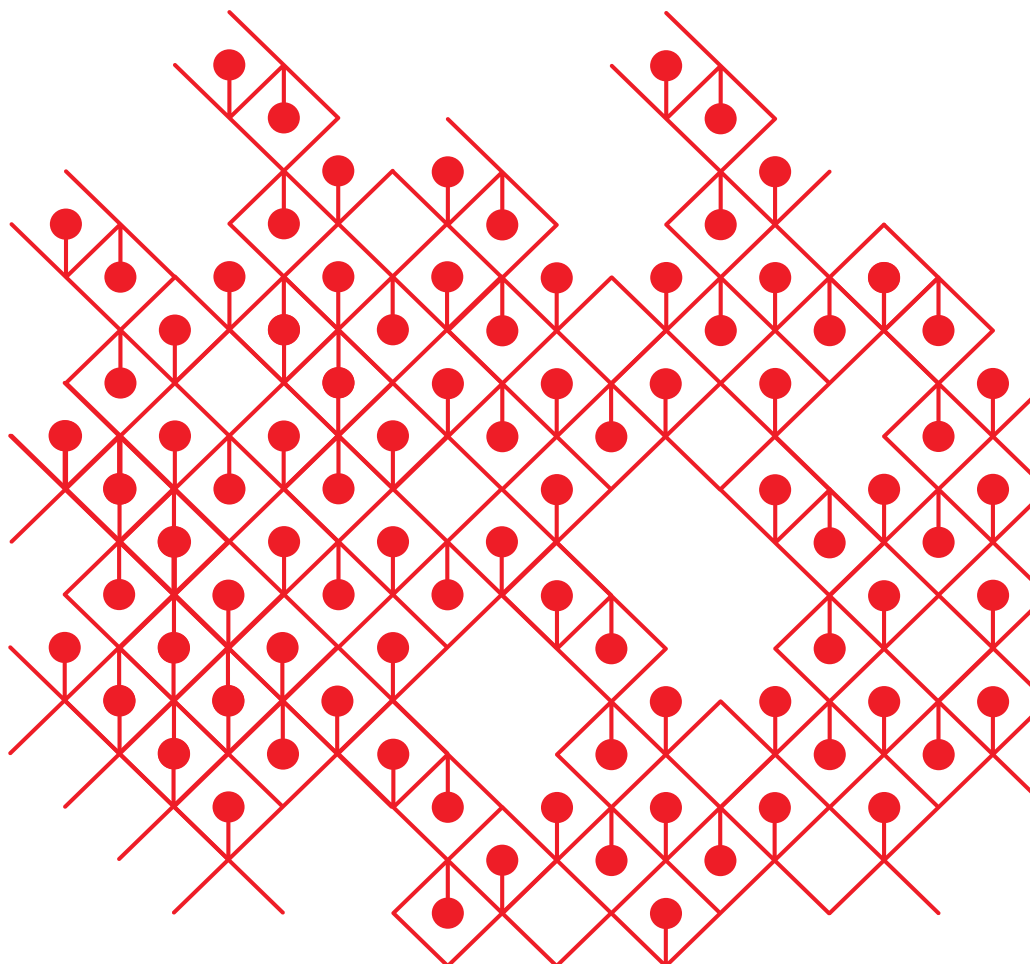
Source: Mediakix, Polish Gamers Research

E-sport

The total value of professional video game players taking part in competitions might not be impressive, as slightly over one billion USD is only a small fraction of the global gaming market. Nevertheless, e-sport generates specific figures that translate to building awareness and increasing interest in games as such. In 2020, the global e-sport audience is estimated by Newzoo at 495 million, including nearly 223 million of fervent fans. As many as 2 billion people are aware of the existence of e-sport and know what it is.

⁴ Mediakix (2018), 11 Female Gamer Statistics

⁵ Statista, Digital Market Outlook – Video Games Worldwide Highlights



To diversify the portfolio and not to limit yourself to specific genres

Success story of All in! Games

All in! Games is one of the youngest publishers and producers in the Polish game development sector. This Cracow-based company was established in 2018 and has already managed to launch several games. It combines two elements – investing and gaming. Two out of its 5 founders, namely Maciej Łaś and Łukasz Nowak, have established Allin Group specialising in financial consultancy, whereas Tomasz Majewski and Piotr Żygadło, the current CEO, are gaming experts. This combination of experience in the field of finance and gaming, as well as the fusion with Setanta, listed on the WSE's main trading floor, with January Ciszewski as the main shareholder is to help All in! Games become a recognisable game publisher and producer on the global market.

“In 2020 we plan to publish ca. 10 titles for PC, PS4, XBOX and Nintendo Switch platforms, virtually doubling the number of games we released in 2019. We try not to limit ourselves to specific genres by diversifying our portfolio, and having our products reach gamers representing different advancement levels, and fans preferring different types of games — from RPG, through adventure, action, simulator or shooting games, to family productions, or even ones inspired by classic arcade shooters,” explains Piotr Żygadło, the All in! Games CEO.

An example of such a family game is ‘Tools Up!’ published by All in! Games, and developed by the Knights of Unity studio from Wrocław, in which players are to supervise the work of a renovation team. The title was launched by the end of 2019 and over only two months sold 60 000 copies. “We expect this number to reach several hundred thousand. Such high sales are accompanied by good reviews, high scores, and a position on the Forbes list of best family games of 2019,” adds Piotr Żygadło.

But the All in! Games board pins its highest hopes on the launch of the ‘Ghostrunner’, developed in cooperation with One More Level studio. The game demo was released in May 2020 on the Steam platform and got very positive reviews from players. The title has already been mentioned in Polish CD Action, PPE, Polygamia magazines and in foreign trade periodicals, namely Destructoid, Games Radar, IGN, GameSpot. ‘Ghostrunner’ has also won the prestigious Indie Celebration award during Digital Dragons, one of the the leading gaming events in Europe. The global launch of the title will be supported by one of

the leading international producers, 505 Games, the No 1 publisher in the 2019 Metacritic ranking.

“‘Paradise Lost’ will also be an important launch for us (production: PolyAmorous), and so will be Metamorphosis (production: Ovid Works), and an RPG high fantasy set in the gloomy Medieval times entitled ‘Alaloth – Champions of The Four Kingdoms’ (production: Gamera Interactive),” stresses the All in! Games CEO.

One of the most recent titles published by the company is the tactical, turn-based ‘Fort Triumph’ (production: CookieByte Entertainment), which has been available on Steam since June, and has received over 80 % positive feedback. All in! Games is also planning to launch its console version soon.

As Piotr Żygadło emphasises, each game is developed by a team of specialists who do all they can to make sure it sells well and gets positive responses among players, reviewers, and the media. The process is supervised by experts specialising in testing, marketing, social media, public relations, copywriting, graphics and video production, closely cooperating with the game producer to achieve the best possible end result.

The Cracow-based company has also strongly engaged in e-sport. Since 2019, All in! Games has been the naming rights sponsor and strategic partner of the Wisła Cracow e-sport section, which opens an opportunity for the firm to reach most committed players and their fans. The team has already had its first achievements, as it has reached the CS:GO ESL Poland Championship semi-finals, and is highly likely to be far more successful in years to come. All in! Games does not intend to limit itself to supporting professional gamers only, as it plans to present its own new e-sport project soon.

In early 2020, All in! Games took a big strategic step and merged with Setanta joint stock company. “This merger helped us build a credible and recognisable entity publishing games produced by both Polish and international studios. We went public as a joint company. We believe that this merger will initiate an exceptionally successful chapter in our company’s history. We started with several people onboard, now we have nearly 60 employees, and we are hungry for more!” announces the All in! Games CEO.

Export

Export generates nearly 96% of the revenue of the Polish game industry¹. The United States is the key export destination, with perhaps up to half of Polish games being sold and monetised there. This tendency is further strengthened by efforts made by the largest and most salient producers to mark their presence on this pivotal market. But while looking at small and mid-sized developers, these proportions are different, and sales in the States only slightly exceed these in the second largest market, namely Europe, understood chiefly as the EU, and here primarily Germany, the UK, and France.

This order corresponds to the size of these markets, but it also seems to be reinforced by economic ties, which are relatively strongest in this region between Polish manufacturers and German distributors.

Export to all Asian markets accounts only for slightly over 10% of the whole, with China generating the highest share. At the same time, Japan and Korea, i.e. the third and fourth largest markets globally have relatively small shares. In the context of total sales on Asian markets, Polish developers do not seem to produce too many games suitable for these customers, moreover, their presence there is too weak to

Export share in revenue



96%

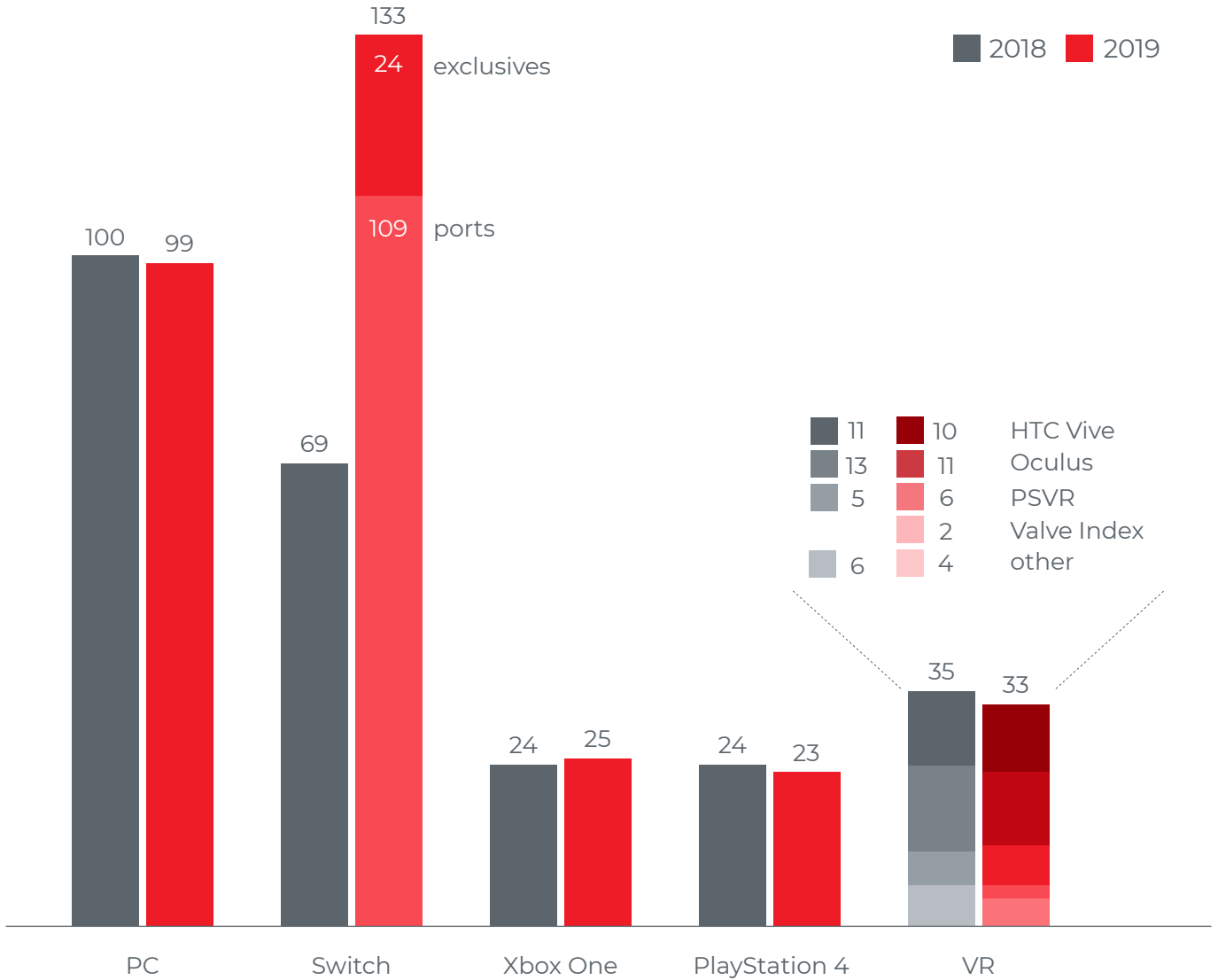
of the revenue of the Polish game industry comes from export

Source: Game Industry Conference

build strong ties, which is all closely interlinked. But in such a large industry there must be some exceptions to this rule, including companies specialising in marketing their production on specific Asian markets.

¹ Continuously updated data is available at: [Game Industry Conference, Polish game industry](#)

Chart 2. Releases of Polish games



Buyers of Polish games in the remaining markets, namely South America, Africa, and Australia, account for less than 10% in total, with most sales generated by Australia. The share of the Polish game exported to Australia seems to reflect the importance of this country to the global market relatively well.

Looking at the target markets of individual companies, for some export reaches even 100%, at least periodically. These can be both companies making games ordered by foreign partners, but also studios developing games with their own IP, e.g. mobile, but not promoting them on the Polish market, as it is not considered by them essential.

Export of services

The situation looks somewhat different when considering the sales of services, such as external development, porting, localisation, and quality assurance. Some companies sell most or even all services domestically. This phenomenon is particularly strong among companies that are part of large capital groups, as their productive capacity is fully satisfied by the needs of other group members. But at large companies looking for customers globally, the export share grows to up to 97%. In this specialisation, the main export destinations include the EU, the US, and Japan, accounting for ca. 90% buyers in total.

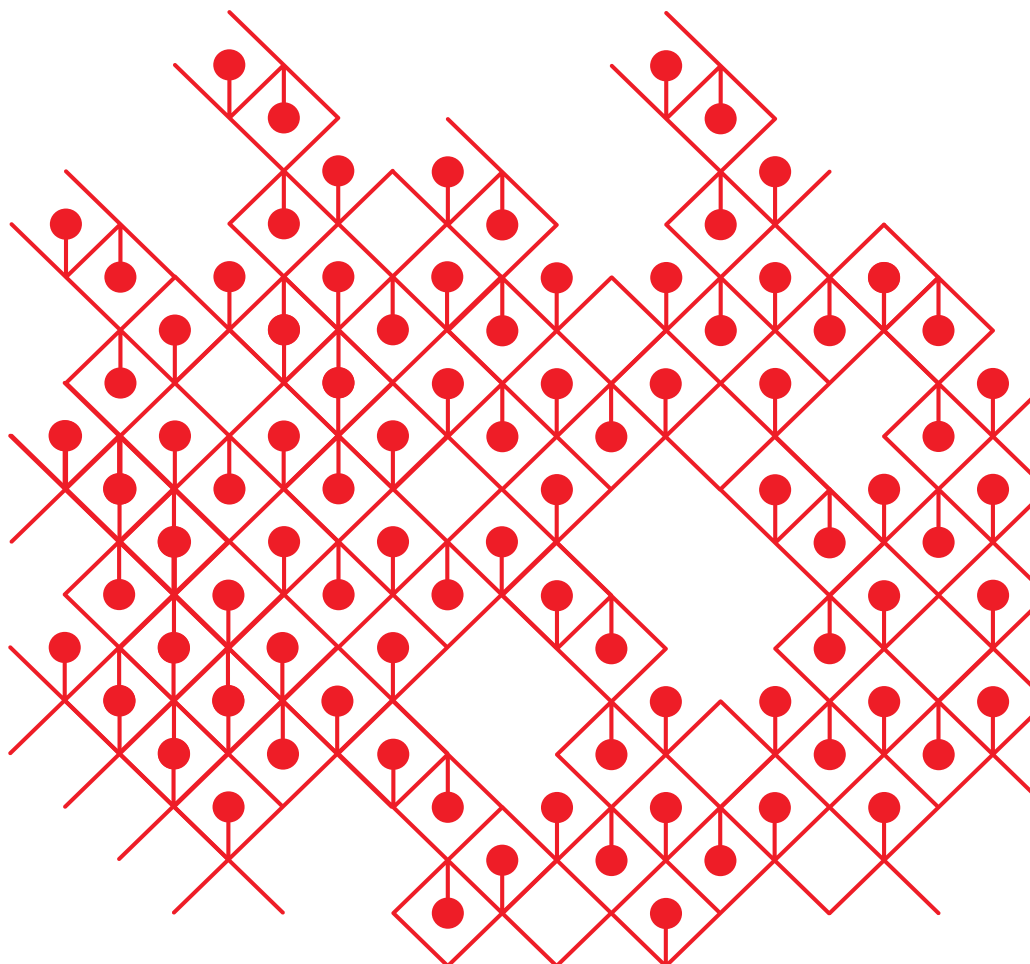
Game releases

According to data published by Michał Król, an analyst working for the PolskiGamedev.pl portal, **every year over 200 Polish games for PCs and consoles, and ca. 35 VR titles are released**. Król has also included in his statistics several dozen mobile game releases, separately for iOS and Android, with slight predominance of the latter. But since mobile premieres are exceptionally difficult to track, only titles from largest market players have been included.

Considering the above, **the number of mobile releases is estimated at 100 per year for each of the two mobile platforms**.

The only surprising element in this itemisation is the fact that in 2019 there were 133 new releases for Nintendo Switch, i.e. even more than for PCs. Only a more detailed analysis indicates that 109 of them were simply ports for games previously available on other platforms, mostly PC, but also mobile. It can actually be said that in Poland a separate subsector specialising in porting and publishing Nintendo Switch games has emerged.

Regrettably, no such data is available for earlier years. Thus at least for now, no elongated trends can be observed. However, this gives some insights, as well. A massive withdrawal of developers from the VR market was discussed in the Polish industry for at least most of the year 2019. The data does not support such withdrawal. There is a steady level of production. More so, few companies have found a sustainable niche in VR production. At least a few five-digit-sales successful VR titles come from Poland, led by Superhot VR, definitely in Top3 of titles sold on virtual reality.



More than ‘The Witcher’

Success story of CD PROJEKT RED

How and when did CD PROJEKT RED come to be? Who founded it? What were your beginnings like?

Everything really started with CD PROJEKT, which was founded by Marcin Iwiński and Michał Kiciński in 1994. The two friends’ venture was initially focused on CD-ROM software distribution. These were imported at first and distributed as they were available in the United States. However, as time passed, the company decided to start offering more — software accompanied by localized manuals at first, followed by fully localized software packaged with many physical bonuses. In 2002, driven by their passion for games and wanting to make one of their own, the founders of CD PROJEKT established a game development studio under the name CD PROJEKT RED. The studio’s first game was ‘The Witcher’, which was released for PC in 2007, followed by a sequel — ‘The Witcher 2: Assassins of Kings’ — which released for PC in 2011 and Xbox 360 in 2012. The trilogy concluded with ‘The Witcher 3: Wild Hunt’, which released in 2015 for PC, PlayStation 4 and Xbox One, with two expansions — ‘Hearts of Stone’ & ‘Blood and Wine’ — arriving in December 2015 and May 2016 respectively. In 2019, ‘The Witcher 3: Wild Hunt’ was also released for Nintendo Switch. In addition to ‘The Witcher’ series of games, CD PROJEKT RED also created ‘GWENT: The Witcher Card Game’, available for PC, iOS and Android, as well as ‘Thronebreaker: The Witcher Tales’ — a single player RPG for PC, PlayStation 4, Xbox One, Nintendo Switch and mobile combining narrative-driven exploration with unique puzzles and turn-based battles. The studio is currently working on its latest RPG, ‘Cyberpunk 2077’.

Why ‘The Witcher’? Why did you decide to adapt Sapkowski’s books to video game format?

When thinking about what game we wanted to make first, we quickly decided that it should be a medieval dark fantasy one. We had a fair share of experience and massive amounts of love for the genre as gamers, industry professionals, and somewhat as developers already, having worked on a PC conversion of ‘Baldur’s Gate: Dark Alliance’ before deciding to make a game of our own. During discussions it became obvious that we’re all great fans of ‘The Witcher’ series of books and thought that would be an amazing universe to set our game in.

How many people were working on ‘The Witcher’, the first one, and how many are you employing now? How does that change the studio’s structure?

‘The Witcher’ was made by a team of around 100 people. Nowadays, CD PROJEKT RED employs more than 900 professionals from across the world, spread across studios in Warsaw, Wrocław, and Cracow. We also have a presence in 8 countries around the world in the form of local subsidiaries of the CD PROJEKT Capital Group, branch offices, as well as media and community managers. Over the years, we’ve grown significantly. That said, the phrase “We are rebels!” continues to define us. We’re still rebels, passionate and ambitious about what we do, driven to create the best RPGs in the world, and doing so with love and respect for gamers and gaming. It’s something we don’t plan on changing, ever, no matter how big we get.

What are the biggest lessons you’ve learned along the way?

With each game we made, we learned something different. With ‘The Witcher’, we learned what it takes to make a game. With ‘The Witcher 2: Assassins of Kings’, we further mastered the art of crafting stories where your choices matter. And with ‘The Witcher 3: Wild Hunt’, we added a truly living and breathing open world to the mix, resulting in the biggest game in the franchise. ‘GWENT: The Witcher Card Game’, on the other hand, has been a massive lesson on how to create a competitive multiplayer title that continues to evolve and grow with time, while ‘Thronebreaker’ allowed us to explore ‘The Witcher’ world from a different perspective. But as developers, I think the biggest lesson is something we’ve always known and like to remind ourselves of with everything we do, and it’s that the smallest gestures often make the biggest difference. Quality, honesty, transparency, staying in constant contact with the community and respecting gamers’ time and hard earned money should always be the utmost priorities — that is our guiding principle and something we would like to see become more common across the industry.

You’re often emphasizing independence as an essential factor for you. Just how important is it for you and how does it benefit your games?

Our independence as a studio means we get to make games we want to make and gamers will love to play. We believe in doing business in a fair way, and our independence allows us to never stray off this path we chose many years ago. It’s very important to us and we will work very hard to make sure this is the way CD PROJEKT RED stays forever.

How many copies of games have you sold to this day?

To date, 'The Witcher' series of games has sold more than 50 million copies.

Could you tell us about things that you were unable to realize with the first Witcher, maybe even 'The Witcher 3: Wild Hunt', but you're now successfully achieving with Cyberpunk 2077?

With each game we made, we really learned a lot when it comes to non-linearity over the years. It's a concept we've already introduced in our past titles, with a non-linear approach to story and exploration. With 'Cyberpunk 2077', we're taking it to a whole new level by introducing gameplay non-linearity on top of this, letting gamers create their own character, build their own playstyle, and choose their own path through the Night City. Technology has also evolved in lots of brand new and exciting ways. Combined with the dystopian future setting, this allowed us to really take our engine places we never could before, delivering beautiful visuals beyond what was possible in a medieval setting and an open world that is not just huge horizontally, but also vertically, with massive megabuildings and skyscrapers towering over the streets below. With 'Cyberpunk 2077', we also chose to present the story from the first person perspective, putting gamers in the driver's seat and at the very center of the story. We think it adds an extra layer of immersion to the way we tell stories; in 'Cyberpunk 2077', players experience events through their eyes and can better identify with "their" V — the game's protagonist.

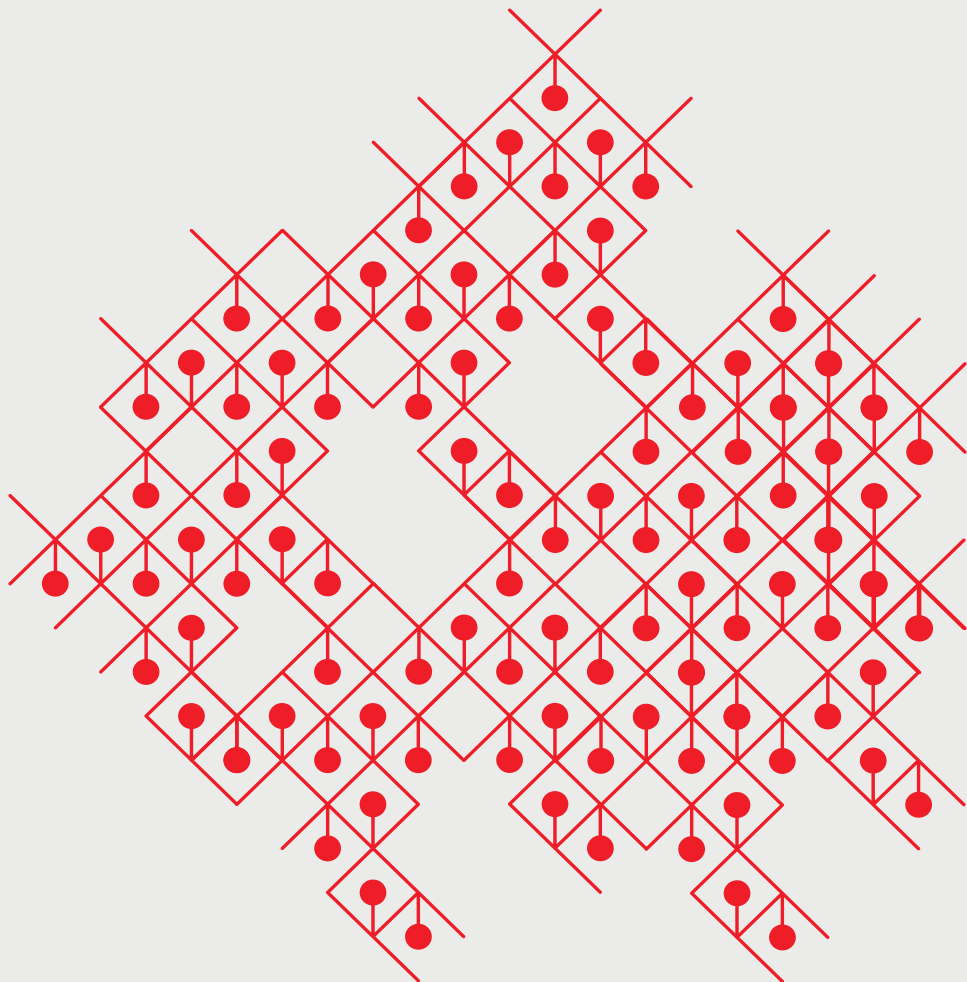
How do you get Keanu Reeves to work with you?

Mr. Reeves is a very talented actor who has a proven track record of playing strong characters who are not afraid to fight for what they believe in. He also has experience working within the cyberpunk and sci-fi genres, with starring roles in movies such as 'The Matrix' trilogy, as well as 'Johnny Mnemonic'. It probably won't come as a surprise when we say most of us, if not all, are huge fans. So when we thought about how to best portray the character of Johnny Silverhand — a cyberpunk rockerboy hellbent on taking down megacorporations of the dystopian future of 2077, whatever the cost — Mr. Reeves' past performances almost immediately came to mind. We decided to reach out to him to see if he would be interested. The rest is history and we can't wait for players to check out how everything turned out.

Can you say something about plans for transmedia initiatives of supporting Cyberpunk or plans of supporting the game post-launch?

First and foremost, with 'Cyberpunk 2077' our absolute priority is creating an amazing game and we're putting all our effort and focus right now on delivering a game that will stay with gamers long after the credits roll.

Regarding plans for the future, similarly to our previous games, we will be supporting 'Cyberpunk 2077' post-launch with free DLC, as well as bigger expansions, which gamers will be able to purchase. Not that long ago we also had some exciting news for gamers looking forward to the next-generation of consoles, the Xbox Series X and PlayStation 5. 'Cyberpunk 2077' will be playable on these systems via backwards compatibility once they're available. In the future, we additionally plan on releasing a free next-gen upgrade for everyone who purchased the Xbox One and PlayStation 4 versions of the game, which will allow the game to take advantage of the more powerful next-gen hardware. Quite recently, we also announced we're producing 'Cyberpunk: EDGERUNNERS' — an original series we're creating in cooperation with the renowned Japanese animation studio Trigger, as well as Netflix, which will tell a standalone story set in the world of 'Cyberpunk'.



Industry structure

In the Polish game industry there are over 440 studios¹ and companies developing games, across all business models, from first-party to coproduction or external development.

The data gathered by the Indie Games Poland indicates that **over 120 studios have closed down comparing 2020 to 2017. At the same time, over 160 new ones have been established.** It seems to be a normal trend in a sector characterised by such high variability as the game industry, observed also in other countries, with much longer history of this sector. Studios that failed to meet sales targets, or are incapable of completing a project, tend to shut down, but consolidations are also practised. At the same time, the number of new studios established ensures minor growth. Still, notable is that the period of rapid growth of the number of studios observed before 2017 seems to be over.

A sector of services not directly related to development has also been built around that large industry. The number of law offices specialising in legal services for the game industry alone has already exceeded a dozen. But this subsector has not been researched too deeply and is still waiting for a separate analysis.

Stock exchange



43

studios are listed
on Warsaw Stock
Exchange

71%

of the workplaces
are in remaining
397 companies

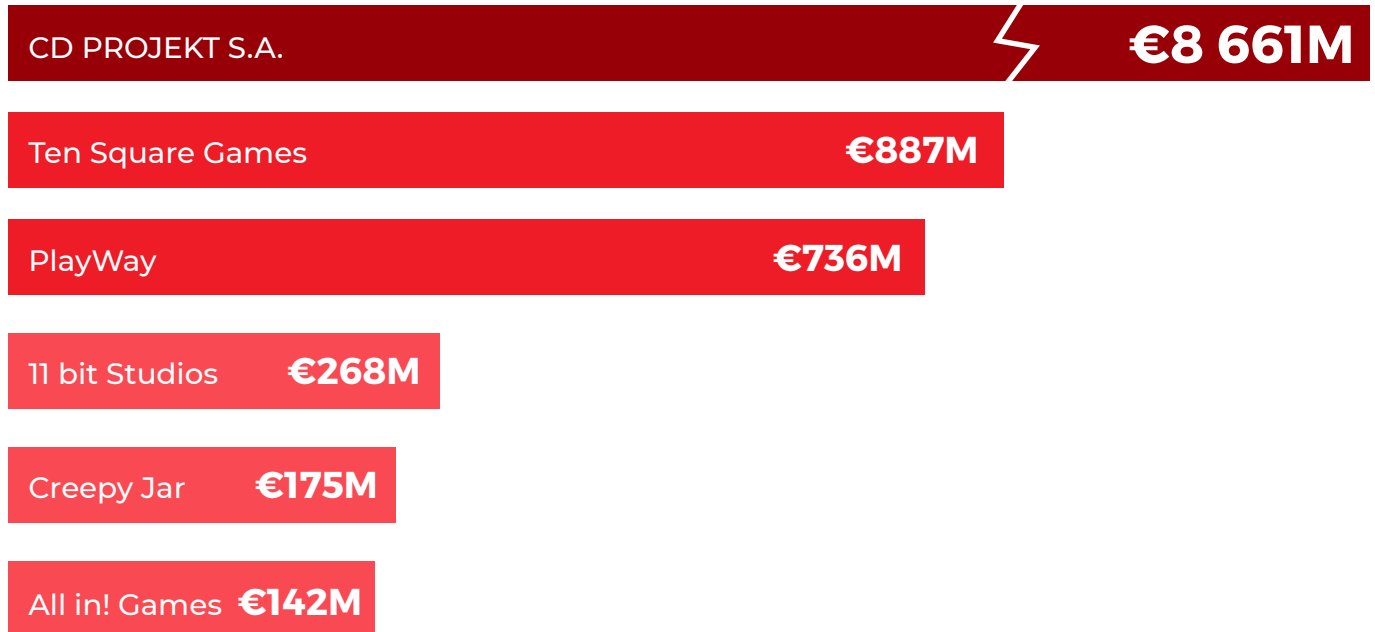
Source: Game Industry Conference

Listed and unlisted

As many as 43 companies representing the gaming sector are Warsaw Stock Exchange-listed, including 12 on the main trading floor, and 31 on the New Connect market. The number of listed companies representing gaming sector is higher only at the Tokyo Stock Exchange. The capitalisation of all these firms on July 1, 2020, exceeded EUR 11.7 billion, with CD Projekt S.A. alone worth EUR 8.7 billion, while the median valuation of the remaining companies is EUR 16 million.

¹ For more information visit regularly updated catalogue: [Indie Games Poland, http://gameindustry.pl](http://gameindustry.pl)

Chart 3. Highest priced companies at the Warsaw Stock Exchange - as of July 1, 2020 (EUR million)



However, it should be pointed out that **90% of entities in the Polish game industry function outside the Warsaw Stock Exchange**, including Huuuge Games and Techland, i.e. the second and third largest companies in the country, respectively. Unlisted companies generate over 45% of sector revenue, i.e. more than all those listed, except CD PROJEKT S.A., also creating the majority of workplaces in the industry.

Employment in game production

In 2020 the most significant research on the size of the industry so far was performed by Game Industry Conference, bringing the data that **there are 9710 full-time employees in game production in Poland²**.

With a new approach, this is now way tighter estimate than the historical ones, stating 6000 people in 2018 and 4000 in 2016, bringing the assumption that these were slightly underestimated. Still, the expansion of the industry is tremendous. It comes mostly from upscaling existing companies, while the rise of the number of new studios slowed down. The number of foreigners is also growing, exceeding several hundred currently.

As every industry assembles such numbers differently, it should be explained what it contains. Included were studios and companies doing game production and global publishing. The publishing part is challenging to separate. **Over 40 global publishers are currently coming from in Poland**, usually

² Continuously updated data is available at: [Game Industry Conference, Polish game industry](#)

Employment in the industry



39%

of studios count
5 or fewer people

10%

of studios have
a team of 40 or
more people

40%

of companies
employ 6 to 16
people

10

companies hire
more than 200
people

Source: Game Industry Conference

grown from domestic development studios. Still, publishers also happen to have in-house dev teams. Contrary, anything related to local market and distribution in Poland is entirely separate and was not counted. A comparable difficulty is with external development and similar services. Studios tend to have several teams, with such services granting budgets to produce their own IPs. What could be drawn separately is Q&A and localization services, with nearly 2000 employees in total in the group of the biggest providers. But this again stops being trackable going down to smaller teams and thus as a whole was taken to the estimate. However, no other service providers, not doing game production, were tracked. Sector producing games for global egambling

was not included, while it is roughly estimated to be several hundred people strong.

As expected, the distribution of company sizes follows the power law, with quite a few really big employee numbers and numbers of studios rapidly increasing when moving towards smaller teams. This could also be seen as 80/20 rule, where **20% of the biggest companies make up 80% of the total workforce.**

Looking at exact numbers, there are 7 companies with teams bigger than 300 people and another 8 that fit between 100 and 300. On the opposite side of the spectrum, there are at least two dozen of solo developers. Some of them are quite successful in how their games are received and with sales even in hundreds of thousands of copies within their niche.

Education and community

Universities in Poland offer 60 degree courses related to games, with 34 of them available at public and 26 at private institutions of higher education³. Nearly half of these courses, namely 26, are meant for programmers. This confirms a popular view that Poland is highly successful in educating such specialists. In each of these groups a whole spectrum of approaches to such education can be observed: starting from general programming courses with

³ For more information visit regularly updated directory: Indie Games Poland, PolskiGamedev.pl – Kształcenie dla branży gier

Universities in Poland



60

degree courses
are offered
countrywide



17

arts



26

programming



9

design

single subjects devoted to games, to highly specialised curricula moving on to gaming immediately after covering necessary foundations. Another 17 courses aim at educating artists. At public academies of fine arts these tend to be graduate labs, while at private facilities the number of highly specialised courses is growing. Nine courses focus chiefly on educating designers, some of which were built from scratch with that very purpose in mind. **Additional courses train musicians and sound engineers, narrative designers, or focus on game studies.**

Training by industry experts and exchange of experience are practised at a much wider scale. Each larger university at least once a year organises a series of lectures, while several student interest clubs hold regular seminars.

The key hubs, such as Wroclaw, Cracow, Warsaw, and Poznan have initiated regular lectures held by professionals representing the sector, usually by efforts of local organisers.

In Poland there are around 30 game jams organised annually, most of them attended by several dozen participants. Global Game Jam alone gathers over 600 participants in several locations each year. The educational offer is complemented with a growing number of private initiatives, courses, or training sessions. For at least two years some game development educational programmes have been present in selected secondary school curricula.

In Poland there are three major trade events of international scope. Digital Dragons is a respected conference with a business offer, considered among the leading meetings of this type in Europe. This is also where DD Awards – the most important Polish annual prizes in the gaming industry – are granted. Then, co-located Poznan Game Arena expo and Game Industry Conference, with a joint rich offer for business visitors, trade professionals, and gamers, form the third largest gaming event in Europe. Poznan is also the host city for the annual Central & Eastern European Game Awards – the most important award in the region, affiliating trade organisations from 16 countries.

How to succeed managing a group of 160 developer teams?

Success story of PlayWay

“At PlayWay we do not have a board, directors, secretaries, i.e. the typical corporate structure. Those developers who wish to cooperate with us, talk to me directly. Have a concept for a game? Write an e-mail or call. We will discuss it within two hours,” encourages Krzysztof Kostowski, the CEO and founder of PlayWay. And it is really true. He responded to a request for an interview within 15 minutes, giving his phone number with the ‘you can call’ note attached to it.

The PlayWay group currently integrates several dozen developers. This is the largest Polish group gathering game creators which also publishes its own games.

It is safe to say that Krzysztof Kostowski has created a unique business model in the Polish game development sector, characterised by relatively low risk and high rate of return. He has proven that money can be made also on low and medium-budget games. Examples? ‘House Flipper’ published by PlayWay cost ca. PLN 300 thousand. After about a year generating a revenue of PLN 30 million, which means that it paid back a hundredfold. “I wonder how many of those grand projects have such a rate of return?” the PlayWay CEO asks a rhetorical question.

Whereas others run 2-3 large projects simultaneously for several years, Krzysztof Kostowski coordinates the development of around a hundred smaller games, mainly simulators allowing for impersonating a car mechanic, a forensic specialist carrying out an autopsy, or even Jesus Christ himself.

Krzysztof Kostowski strongly denies the suggestion that developing many smaller projects is about taking an easy way out compared to getting engaged in one or two big ones. “It is just the opposite. From the CEO’s point of view it would be more convenient to develop one game over several years. I would gather teams, hire coordinators and go abroad for a long vacation, as I would not have much left to do, really. At PlayWay we have 58 subsidiaries and 160 teams. This surely is not the easy way out,” he explains.

In its approach to game development, PlayWay resembles a start-up that first explores and analyses the market to check if the product concept is likely to

succeed. The situation is similar for the PlayWay group. Game concepts are tested and only those that have been positively evaluated during market tests and are characterised by high sales potential are further developed.

“I did not want to share this know-how with the market, but I had to as a listed company. Just imagine that a team keeps on testing and testing, and testing some more, and finally they come across a best seller. They develop a game and just know it will sell. I thought that everyone would start copying us, but after four years virtually nobody else does this,” he wonders.

Krzysztof Kostowski has been this cautious in game development and in testing the potential of developer teams since the moment he entered the game development business, even before he established PlayWay and ran a software wholesale outlet. As he says, it is better to fail with several thousand in your pocket, than with millions.

Most PlayWay games are bought in the United States and Western Europe. But last year, the company managed to take the Chinese market by storm, and now the sales to this country generate nearly 20% of total revenue. “We started advertising more, a couple of our games succeeded on the Chinese Steam and opened the doors for other titles,” explains the PlayWay CEO.

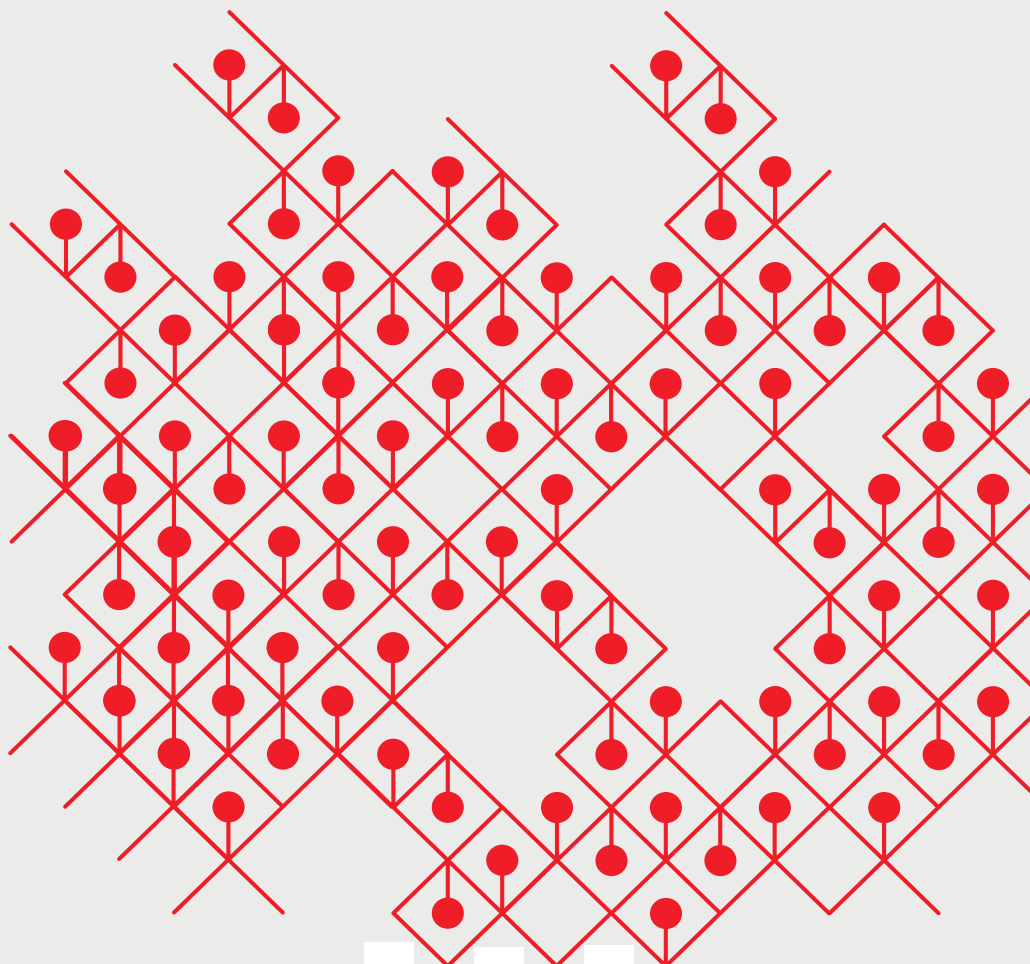
Marketing and game promotion are another distinctive attribute of this Warsaw-based firm. Apart from conventional commercials, the company relies on the cross-selling of an entire group of games. “We are now promoting ‘Barn Finders’ that is about to be released soon. Soon it will be displayed on our other 25 games as an upcoming title. We will also have a banner on Steam, taking players directly to the game. We are capable of doubling the number of players interested in this game within a week. Let’s say that a standard ad will over two years generate 50 thousand wish list entries on Steam. A cross-promotion allows for doubling this result in two weeks. This is where our power comes from. We have succeeded thanks to pre-productions. At no extra cost,” he stresses. Yet the PlayWay success did not come out of nowhere, but from years of experience. Just as many people his age in this sector, Krzysztof Kostowski started his business adventure with the world of games in the 90s, selling them at the famous Warsaw Grzybowska Street computer bazaar. In 2001 he opened a game wholesale outlet with his brother. “We suddenly became the largest software wholesaler in Poland. This is when we started developing our own games and distributing them via newsagents as CDs attached to periodicals for players,” recalls the founder and CEO of the PlayWay Group which now gathers

several dozen developer firms and publishes games created by them, at the same time.

This was a highly profitable business back then, and the number of copies exceeded 500 thousand per month. At that time, Kostowski already managed ten different developer teams, creating games for these periodicals. Between 2005 and 2010 he was the main client of independent developer studios in this country. He visited trade fairs and sold licences of games available in Poland to foreign publishers. He studied the sector and drew conclusions.

“The publisher as an external entity was a bottle neck and a barrier to making real profits for game developers. From foreign markets we received only a fraction of what we deserved. So, I decided to build a developer network that would not rely on publishers, but that would create and publish games on their own. This was the only way to become independent and get our market share,” he recalls.

This is when he felt that the local market was becoming too small for him and no longer offered any growth opportunities. He decided to take his 10-year experience to a higher level and established PlayWay in 2011. When he went public 5 years later, insiders insisted that it was impossible to combine the work of forty developer teams. “I now have 55 subsidiaries, incorporating 100 teams. We improve our financial performance virtually every quarter and are the only listed company in this business that cashes out the whole dividend” he emphasises.



Specialisations and strengths of Polish game production

The question about the roots of the success of the Polish game industry is one that surfaces quite often. Still, there is no single and straightforward answer to that. What will be discussed in this chapter might, however, show at least several factors that are building it.

AAA

There is no doubt that it has to start with this most prestigious specialisation, and its most awarded representative, namely 'The Witcher 3: Wild Hunt'. Other excellent AAA productions in recent years include 'Dead Island' and especially 'Dying Light' from Techland. However, in the near future gamers are waiting not only for 'Dying Light 2' and 'Cyberpunk 2077'. People Can Fly already have experience in this field, e.g. 'Gears of War: Judgment'. After parting with Epic Games following the launch of 'Fortnite', it will soon publish a title it has created on its own, called 'Outriders' and already announced another one.

11 bit studios comments and declarations suggest that their yet undisclosed

'Project 8' following 'FrostPunk', will also be an AAA production. Flying Wild Hog — a studio that gathered a lot of experience, and now has new funding, is rushing in that direction with Shadow Warrior 3 as well. Another case is CI Games that attacked the AAA sector, with titles like 'Sniper: Ghost Warrior 3' or 'Lords of the Fallen', but its current strategy is to focus on budget proposals. In the end **it is quite popular among Polish studios to do AA premium games, in effort to push the boundaries a little.**

PC and premium

As most Poles play games on their PCs, PC premium games are the basic area of development as well. Of course, these can be easily followed by Xbox

and PlayStation editions, sometimes even on day one, but the smaller the studio is, the more likely it is to develop a game for PCs first, and port it to consoles later only.

This trend has been apparent for years, with temporary fads and phenomena affecting it to a smaller or larger extent. Mass migration of small developers to F2P mobile and then an escape from this market observed in many neighbouring countries, has not affected Poland to such a great extent. On the other hand, the new deal that came along with Switch has fit relatively well into the Polish premium productions, as most of them are ported to this platform.

Simulators

Polish developers were probably encouraged to enter this genre by the 'Car Mechanic Simulator', as the number of its sold copies grew with each next edition, from 500 000 to over a million. Over time, it turned out that virtually everything can be simulated, as long as it is done properly, for instance, the 'House Flipper' a renovation crew simulation, '911 Operator' series, or the most recent best-seller 'Cooking Simulator'. Even smaller titles, which are to break even at tens of thousands of copies, are manufactured in large numbers by small studios, often financially affiliated to the PlayWay group that seems to have mastered the secrets of this genre at best. Separate

trend are games really high productions values like 'Green Hell', a survival simulator from Creepy Jar studio, that surpassed 1 million copies sold.

Such F2P simulators as 'Let's Fish' and 'Fishing Clash', are on the fringes of this trend, yet are played by millions and earn dozens of million for Ten Square Games.

Distribution

Poland also specialises in game distribution for PCs. GOG.COM was first known for its care for further life of classic titles, and next for its campaign against DRM. Then in 2019 it was clear that **GOG.COM is the vice-leader of PC game distribution**, being outpaced only by Steam. The appearance of a third large player, namely Epic Games Store, changed the ranking partially, since Epic surely has more registered users, if only of its Fortnite free hit. Meanwhile, in 2019, and during the first quarter of 2020, GOG.COM managed to maintain its previous growth of sales. At the time being, the platform offers nearly 4000 titles, adding several dozen new ones every month. In 2019 the GOG GALAXY 2.0 app entered the market, allowing players to merge all games owned in one library, as well as lists of friends from different platforms. Thanks to GOG GALAXY 2.0 players can also follow their friends' progress in different games, regardless of the platform. The app is currently in open beta.

External development and services

Even though it is less publicised, in Poland grew a large sector offering external development, assets production, porting, localisation, quality assurance, and video production services. **At least seven companies, namely Keywords, Lionbridge, QLOC, Roboto Global, Sperasoft, Testronic, and even Platige Image hire hundreds of people each** and offer top quality of services to clients from all over the world. Nevertheless, smaller companies offering such services tend to combine such activity with teams doing first-party development, and as a whole are often perceived as developers rather than service providers.

Ownership structure

The gaming sector in Poland is very... Polish. Nearly all companies have domestic owners or are listed on the Warsaw Stock Exchange. The takeover of such a large studio as Flying Wild Hog by Supernova Capital is a relatively new phenomenon. One could say that **every game developer in Poland is independent**. In fact, in numerous interviews, the most successful Polish game studios have independently stated that this autonomy serves them in achieving the best game quality.

It is difficult to clearly point to reasons for this state of affairs, since in the

subsector specialising in external development five out of seven largest firms have foreign owners. But no industry giant, like EA or Ubisoft, has dared to open their branch in Poland, even though they are present in neighbouring countries. Also studios looking for financing to support their growth not that often find it among foreign investors. However, now a reverse trend can be observed — **every year at least one company decides to come to Poland from abroad**, often together with their teams, and look for their business to grow here.

Horror games

Polish companies develop a wide selection of horror games, that can be categorized in many ways. Budget wise there will be solo-dev titles like 'Darkwood' or prestigious productions that are announced on the biggest Xbox shows like 'Medium'. The genre will differ from psychological horrors like 'Layers of Fear' series and 'Observer' or with tint of erotic like 'Lust for Darkness' and 'Agony', then walking sims like 'Kholat' and 'Husk' or classicising horrors like 'The Beast Inside', finally games referring in certain art styles like 'Inner Chains' or 'Apocalipsis'... More so, the most successful recent releases still will not fit to those categories, 'Carrion' is a reverse horror, while 'Wolrd of Horror' beses on Japanese culture and bicolor graphic from Paint.

Games for change

There is a group of designers in Poland creating games that do not only have an objective of entertaining, but also to affect reality, making the world a better place. Games such as 'Invisible Fist' or 'Solistice' raise important social problems, while 'Indygo' is supposed to help in understanding what depression is. An interesting group are also games placed in a difficult historical context, such as 'My Memory of Us' or 'We. The Revolution'. In June 2016 'This War of Mine', from 11 bit studios, which is probably the best known game representing this genre, describing the war drama from the point of view of a civilian, was added to the non-compulsory school reading list.

Photogrammetry

Several Polish studios have taken serious interest in photogrammetry and the idea of scanning buildings and landscapes. This technique has allowed a dozen strong studio The Astronauts to highly realistically reproduce surroundings and edifices in their best-selling 'The Vanishing of Ethan Carter'. The Farm 51 has not only employed photogrammetry techniques to develop 'Get Even' graphics, but has also done some research in this field, and offers its services to other firms.

...and there is more

Numerous other factors are discussed as leading to the successes of the Polish games. Poland is seen as having excellent programmers. Even the Polish developers that went abroad seem to be most often of this specialization. Unless the nation has an exceptional programming talent, this might be down to the quality of IT education. While gamedev courses at universities are flourishing currently, this would date even earlier — to hardcore programming studies.

English knowledge is widespread here. Poland scores top in international English proficiency tests, usually best of all Eastern European countries, and ahead of many in Western. This is especially true for youth in the education system. The entire game industry is also able to communicate in English. The main industry events in Poland are in English for years.

Finally, we might have an extraordinary hunger for success. Achieving the American dream was impossible for a long time here. First due to the communist era, then often to economic limitations. As the barriers are gone now, we want to reach high. This encourages us to make great games, even if it means choosing their meaningfulness over revenues.

An independent business

Success story of Techland

The beginning of Techland's operations dates back to the 90s when our company was dealing with the local distribution of games. "At that time still produced on floppy disks," says Paweł Marchewka, Techland CEO.

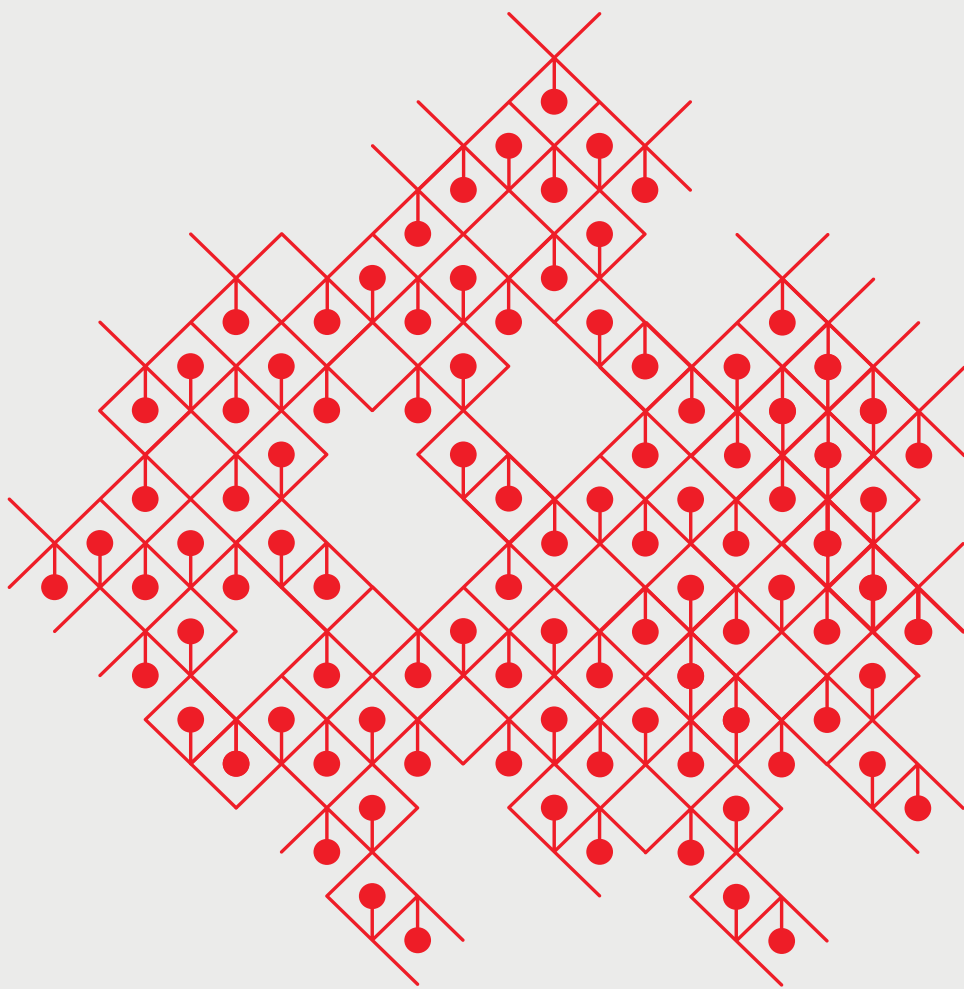
For the next, almost thirty years, the company was successively developing — expanding the aforementioned sales with productions imported from the West and localized to the Polish market, building own development department, conducting international publishing activities and, of course, creating global sales hits — top tier AAA games.

"Certainly, our first, big, international success was 'Call of Juarez', released in 2006 — a first-person shooter game in which the player controls two different protagonists in a Wild West setting," says Techland CEO. The game did quite well on the European market. "Another breakthrough was the creation of the 'Dead Island' series that sold over a dozen million copies. Whereas the next title — Techlands flagship survival horror game, 'Dying Light', became loved by tens of millions of players around the world. Next iteration of the hit, which is currently in production, 'Dying Light 2', has for months been the second most anticipated game in the world according to the Steam ranking," adds Paweł Marchewka.

Techland currently employs around four hundred people in three offices located in Wrocław, Warsaw, and Ostrów Wielkopolski. Apart from the mentioned 'Dying Light 2', Techland was also simultaneously developing one more AAA class product — a yet unannounced game set in a fantasy world, which will contain RPG elements. The company also has a team responsible for the development of 'Dying Light' expansions – although it's been five years since the release of that game, it is still being supported and developed. The newest one, 'Dying Light – Hellraid', was released in August 2020.

"It's a huge team developing a few games and expansions at the same time, which, same as our products, we have developed for years. While working on 'Call of Juarez', we barely had a few dozen people on board. Which makes us several times larger today," indicates Paweł Marchewka.

“Techland is an independent company and we plan to remain such,” says Paweł Marchewka. “Independence is, above all, the freedom to make decisions — in terms of finance, processes or people. Of course, like everything else, it has its bright and less bright sides. Independence also requires a lot of courage, good planning, proper business security in terms of financial liquidity, and, which is probably most important — self-discipline. Today we feel good working in this model and we are not planning to go public. However, we also see great potential in this business model,” adds Techland CEO.



In the quest for the first Polish computer game

Polish gaming is not only about commercially successful productions launched recently, but first and foremost about over 40 years of history. Nevertheless, it is not easy to establish which game can be considered the first Polish production in chronological terms. First, one would have to decide whether we are talking here about the first project that was entirely Polish in terms of both the concept and the execution, or about a more or less faithful adaptation of a Western title? Should it be a product that was launched onto the market, or a work of a teen gaming pioneer that never even left his room? Depending which of the above criteria we decide to consider, different conclusions can be drawn.

As early as in the nineteen sixties a puzzle game called 'Marienbad' was developed on the Polish Odra 1003 computer, inspired by the Chinese 'Nim' mathematical game, which in turn was featured in a French movie entitled 'Last Year at Marienbad'. The rules of the game were as follows: the computer simulated four rows with one, three, five, and seven safety matches per each. The player alternately with the computer removed any number of safety matches from one row, and the loser was the one who was left with the last match to

remove. Status updates were printed by wire. But the problem with considering 'Marienbad' the first Polish game historically is that it never left the place in which it had been developed and was never officially distributed.

Crazy 80s

The search for the first fully Polish production should be resumed no sooner than in the nineteen eighties. Earlier development of Polish gaming was considerably hindered by the political

situation and a ban on official import of Western computer equipment related to it. In the mid nineteen eighties computer 'markets' started being organised in the largest Polish cities, allowing young entrepreneurs to sell both hardware and software, including games. Such markets, resembling open-air bazaars, enjoyed enormous popularity, since they offered nearly everything that enthusiasts of electronic entertainment needed back in those days, at lower prices compared to official retail outlets (as computers finally started being legally imported to Poland).

Around that time, after the abolition of the aforementioned import restrictions, 8-bit Atari computers were introduced to stores, soon followed by ZX Spectrum, Amstrad, Commodore 64, and Amiga. The crazy era of making up for computer backwardness began. According to official data, by 1988, Poles bought 180 000 Atari computers alone.

The nineteen eighties witnessed at least several attempts to develop the first Polish game that would be approved by the emerging Polish gaming community, but since these were often one-off projects based on Western titles, and failed to win wider acclaim, none of them deserve to be called the 'first'. Such titles as 'Web Master' (a 'Pacman' equivalent), 'Gąsienica' (a 'Snake' equivalent), 'OiX' (a classic tic-tac-toe), or the digital version of 'Battleship' are worth mentioning in this context.

The first truly domestic title, namely a product that was Polish from beginning to end, the first one to be described and reviewed in a nationwide trade magazine, and is even said to have generated profits for the author, was a game called 'Puszka Pandory' ('Pandora's Box') developed for ZX Spectrum computers in 1986. It was a text game with some graphic elements. The player impersonated a special agent who was to destroy a hostile rocket system on an unspecified island. The character was moved by means of a set of commands. The game did not take the market by storm right away, as back then the emergence of gaming in Poland was accompanied by a huge problem related to illegal game copying, resulting from the fact that the Copyright Act introduced in 1952 did not regulate the protection of computer game developers' property.

One way or another, text adventure games featuring graphic elements became the number one genre used for the production of new titles, such as 'Mózgoprocessor', launched at the turn of the nineteen eighties and nineteen nineties for ZX Spectrum and Atari computers.

The first step is always the hardest

The end of the 80s and the beginning of the 90s witnessed an avalanche of titles, initially for Atari, later for Amiga

computers. Polish developers made 100% use of the hardware potential of these platforms, until the moment when PCs entered the scene. Hence, it is really not easy to point to a title that could be considered a pioneer.

'Robbo' can probably be deemed the first platform game with arcade elements. It was developed by Laboratorium Komputerowe Avalon (LK Avalon) for Atari computers in 1989.

Even though it did refer to such foreign best-sellers as 'Sokoban' and 'Boulder Dash', it enjoyed such popularity that in 1992 it was developed for PCs as well. In 1992 XLand decides to pave the way for PC games not being created after hours. A professional team created by them produces 'Electro Body', later by Epic published and promoted globally as 'Electroman'. 'Operation Blood', i.e. one of the first Polish shooter games created by Mirage studio, was launched in the same year. A year later, 'Tajemnica Statuetki' ('The Secret of the Figurine') created by Adrian Chmielarz, was published by Metropolis Software. It was a classic adventure game, but what made it unique was the fact that it was not animated and all visual elements on the screen were made of photos taken by the author during his Côte d'Azur holidays.

In 1995, the first Polish sports manager game called 'Liga Polska Manager 95' (Polish Football League Manager 95),

created by Rafał Cymerman, and one of the first FPS (First Person Shooter) games entitled 'Project Battlefield' published by TSA were introduced to the market. **In the following year, the first significant RTS (Real Time Strategy) game called 'Polanie' ('The Polans') was published by USER studio.** Its plot was loosely inspired by early Medieval history of Poland. In 1996, Gobi Software released 'Legion', which was a combination of strategy and RPG (Role Playing Game) genres.

The above titles can serve as perfect examples of the Polish game development professionalisation process. At the time, 'made in Poland' games were developed and published by several entities, including the aforementioned LK Avalon, the creator of such titles as the platform game 'Robbo' (1989), adventure game 'A.D. 2044' (1991), or yet another platform game called 'Hans Kloss' (1992), as well as Mirage, USER, TSA, or Techland. The latter is currently known all over the world, and began with publishing 'Prawo Krwi' (1995), a Polish answer to... 'Mortal Kombat'.

21st century

With the advent of the 21st century, the game development sector in Poland was becoming more professional. The era of individual programmers developing games for Atari or Amiga was over. Game development was gradually

taken over by larger studios, but now and then one could (and actually still can) find such 'gems' as 'Soldat' (2002), a platform 2D shooting game inspired by such best-sellers of those times as 'Worms', or 'Quake', and developed for PCs in only six months by Michał Marcinkowski, a secondary school pupil. Even though in terms of its graphics the title was no match for other games listed here, its playability was so good that until recently there was a quite large community gathered around it, running websites and bulletin boards, organising tournaments and leagues.

The new era in the Polish game development universe came with titles that became known to the global gamer community, e.g. 'Another War' (2002) from the aforesaid Mirage studio, or 'Painkiller' (2004) created by People Can Fly. But a genuine breakthrough

was yet to come. Techland became globally known in 2006 after the release of the first instalment of the 'Call of Juarez' series. After their attempt to 'colonize' the Wild West, the company gained international acclaim thanks to its survival horror titles, including 'Dead Island' (2011) and 'DyingLight' (2015). Around that time, CD PROJEKT RED launched subsequent instalments of its 'The Witcher' (2007) trilogy, and even though the first two did not enjoy that much publicity, later 'The Witcher 3: Wild Hunt' (2015) won global recognition for the company.

But one should by no means forget about other developers. In 2010, the 'Sniper' series from CI Games was released, followed by 'Lords of the Fallen' (2014). 'This War of Mine' from 11 bit studios and 'The Vanishing of Ethan Carter' from The Astronauts both premiered in 2014. **Some studios specialise in developing specific genres, e.g. Bloobler Team, with its psychological horrors, such as 'Layers of Fear', 'Observer', and 'Blair Witch', or Ten Square Games, with its sport simulations in the free-to-play model, including 'Let's Fish' (2012) and 'Fishing Clash' (2017).** The success of the latter can be illustrated by the fact that in 2011 the company was established by three individuals, and now it employs 280 specialists ensuring entertainment for over 3 million active players worldwide.

Nowadays, the evaluation of the Polish game development sector is constantly improving. Millions of users play these games, while Polish developers successfully leverage their experience gathered over the years in virtually every existing gaming genre.

From 10 square metres to 280 employees

Success story of Ten Square Games

Ten square meters. This was the size of the first office of the Wrocław Ten Square Games (TSG) studio, established in 2011 by Maciej Popowicz and Arkadiusz Pernal. Today TSG employs 280 people and is one of the highest priced gaming companies on the Warsaw Stock Exchange - with stock market value exceeding USD 1 billion.

TSG specialises in mobile games – the fastest growing gaming segment, accounting for nearly half of the global market. The company focused on it when it decided to stop producing browser games in 2014. Its products are distributed in the free-to-play (F2P) model, and most turnover (over 96%) is generated by the so-called micropayments in games.

After nearly a decade of its market presence, TSG has published over 200 games, including both small-scale productions that are fast to prepare, and several huge international bestsellers. The first of them was an angling game called 'Let's Fish', launched in 2012 for PCs, and two years later for mobile devices. It was followed by 'Fishing Clash' and 'Wild Hunt' introduced in 2017.

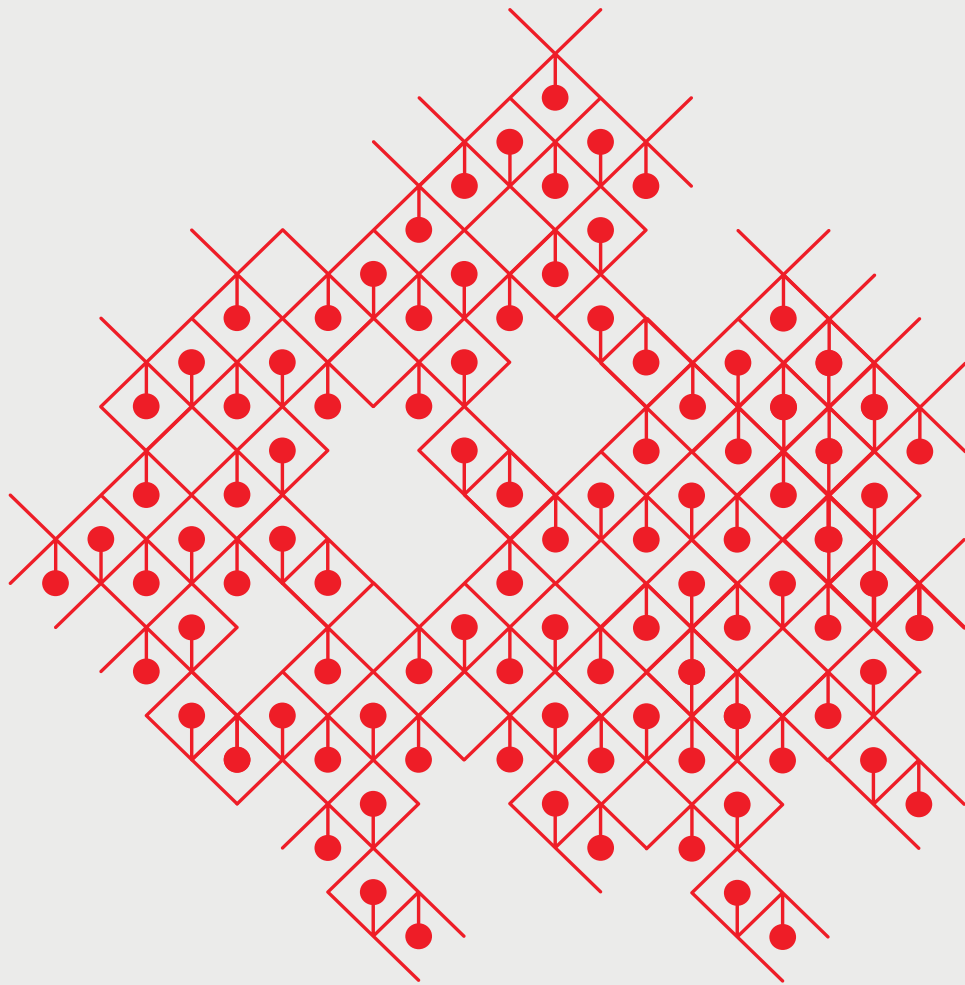
TSG owes its success to talent, passion for new technologies, and the dedication of people building this company every single day. The energy and hard work of the entire team have allowed for building unique knowhow in the F2P segment over a short period of time, giving the firm and its shareholders the potential for long-term growth.

Between 2017 and 2019, the company turnover and profits grew nearly tenfold, with almost 80% of revenue generated by the American and European market, in nearly equal proportions, whereas Asian and other markets account for almost 20%. Globally, TSG productions have over 21 million active users.

In June 2020, the position of the Ten Square Games CEO was taken up by Maciej Zużalek, who has for years been associated with the firm and has long-standing experience on the M&A market. Maciej Popowicz and Arkadiusz Pernal continue to be team members, focusing on developing TSG in key product and operational areas.

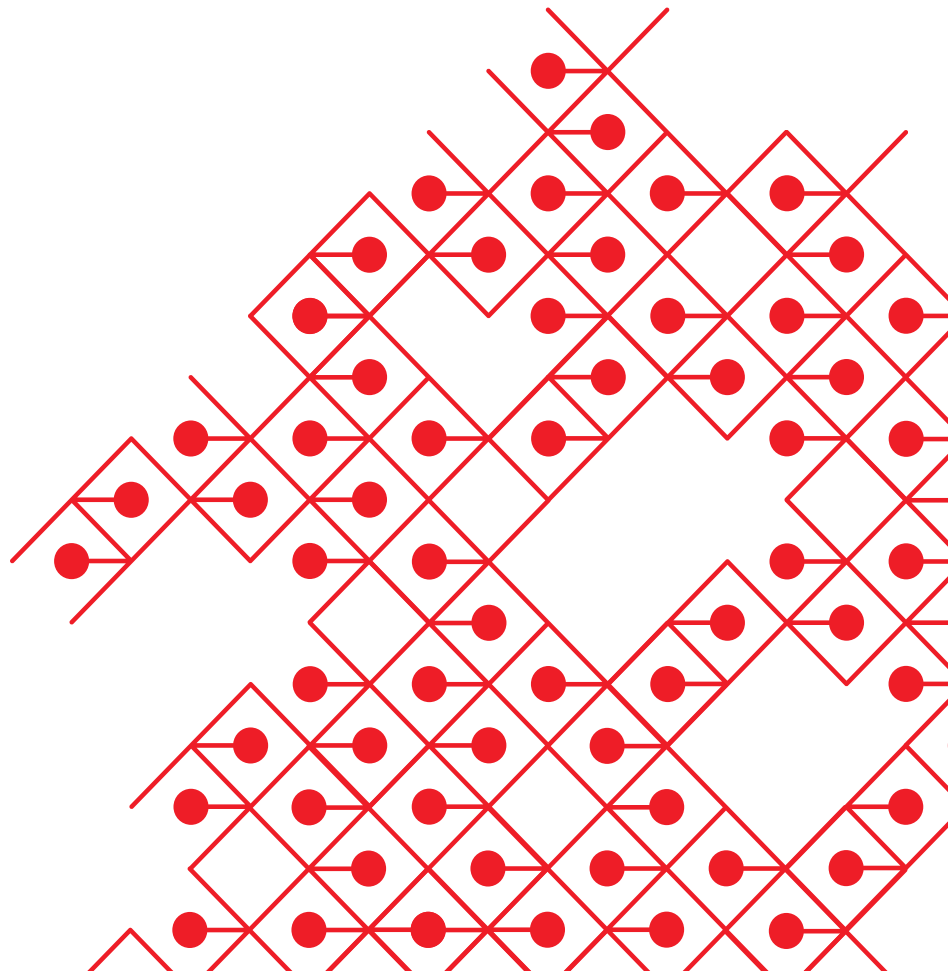
The company sees further business growth in relying on three key pillars: a consistently expanding competence centre with the main hub in Wrocław, opening new game developer studios in other locations (beginning with Warsaw), and potential M&A transactions.

The company's ambition is to create an F2P gaming production centre. Thanks to its constantly enhanced infrastructure and competencies, TSG is likely to become a cooperation and knowledge-sharing platform for both young and ambitious teams, and more experienced creators from all over the world. "Our goal is clear: to attract biggest talents, to produce the best games, and to further increase the value of our company," Maciej Zużalek declares.



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

Companies catalogue



11 bit studios

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



Platforms and business models:

PC, PS, Xbox, Switch, Mobile, Premium

Best known for:

The Developer of 'This War of Mine' and 'Frostpunk' and the publisher of 'Moonlighter' and 'Children of Morta'.

The next big thing:

3 internal and 4 external projects in the development – to be released in 2021-2023

Operating since: 2009

Team size: 140

We are a collective of talented developers and skilful publishers reaching millions of hardcore gamers, all driven by the creation of meaningful entertainment. We seek experienced developer teams to form publishing partnerships based on sharing artistic sensibility and a smart business approach. We are a BAFTA nominee, an IGF award winner, and a winner of hundreds more prizes.

2B Games

www.2b-games.com



Platforms and business models:

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

Best known for:

A Game Development Team of people with 10+ years of experience in production.

The next big thing:

Two unrevealed projects, one in cooperation with an acclaimed game developer and publisher.

Operating since: 2010

Team size: 6

Our team comprises of highly skilled and specialised professionals, ranging from programmers, graphic artists to designers, capable of cooperating with each other and providing solid, thorough content upon which quality games are created.

4EVOLVE Games

www.4evolve-games.com, contact@4evolve-games.com



Platforms and business models:

PC

Best known for:

Making PVE space games with co-operation & co-existence approach.

The next big thing:

'DeepStars Project' – space sim exploring game.

Operating since: 2015

We are a team of independent software professionals. A few years ago, we decided to combine our knowledge and experience to develop best possible software products.

7Levels

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



Platforms and business models:

PC, Xbox, Switch

Best known for:

'Castle of Heart' – Switch exclusive – over 200 000 copies sold.

The next big thing:

Working on 3rd big Switch project

Operating since: 2014

We are a team that made our passion a way of life. We focus on developing and publishing Switch games. At the moment, we are also expanding our activities to other platforms (PC, Xbox). Our team is a group of professionals with over 10 years of industry experience.

A2 Softworks

contact@a2softworks.com



Platforms and business models:

PC, PS, Xbox, Switch, Mobile, Premium, Mac

Best known for:

'Gatewalkers' (alpha) – its alpha version reached 45 000 unique players during tests in July 2020.

The next big thing:

'Gatewalkers' – a unique mixture of coop, survival, and action RPG game.

Operating since: 2017

We are a game development studio made of young and ambitious people for whom game creation is not only a job but first of all a fun and joyful way to express ourselves. We are players, too, so we usually develop games we cannot find in the market.

Aequinox Games

www.aeqnx.com, aeqnx@aeqnx.com



Platforms and business models:

PC, PS, Xbox, Switch, Mobile, F2P, Premium

Best known for:

Portfolio of over 20 premium casual games.

The next big thing:

'RIN' – metroidvania with unique magic system – release in Q4 2021 (PC and consoles).

Operating since: 2008

Team size: 14

Over the years we have been working with several leading premium casual game publishers, such as iWin, GameHouse, Big Fish Games, or Artifex Mundi. We are constantly looking for new partners and opportunities to expand, most recently in the mid-core market, as we are developing an exciting new metroidvania project. Previously known as World-Loom Games.

Afterburn

www.afterburn.games, hello@afterburn.games

Platforms and business models:

PC, Switch, Mobile, Premium

Best known for:

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

The next big thing:

An Unrevealed tactical RPG – release in late 2020

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

We are a tiny game development studio. We have recently released inbento – a food-themed puzzle game with a light story, out now on iOS and Android.

AFTERBURN

All in! Games

www.allingames.com, contact@allingames.com

Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Ghostrunner' (demo), 'Tools Up!', 'Fort Triumph', 'Daymare:1998'

The next big thing:

'Ghostrunner' – release in 2020, 'Paradise Lost' – release in 2020,
'Metamorphosis' – release in 2020, 'Alaloth: Champions of the Four Kingdoms'
– release in 2021

Operating since: 2018 **Team size:** 70+

We are a publishing house based in Krakow that promotes and supports unique games for PC and consoles, working on both Polish and international projects. Some of our titles include Ghostrunner, Tools Up!, Fort Triumph, and Paradise Lost: The Last Story on Earth. Our main goal is to discover and publish exceptional games and to create a whole new level of gaming experience.

ALL iN!
GAMES

Anshar Studios S.A.

www.ansharstudios.com, office@ansharstudios.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

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

The next big thing:

'Gamedec' – isometric, narrative, cyberpunk, RPG – release in 2020.

Operating since: 2012 **Team size:** 90

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

appcadabra

www.facebook.com/appcadabra, support@appcadabra.pl



Platforms and business models:

PC, Mobile, Browser, F2P, Premium

Best known for:

We are known for the 'speedwaymanager.pl' Internet browser manager game.

The next big thing:

We are working on such Internet browser games as e-sportmanager, speedwaymanager, and volleyballmanager.

Operating since: 2020

We are an experienced group working on unique products. We want to develop browser community games, especially sport managers. Our main goal is to create unique real-time gaming experience.

ARP Games / Another Road Publishing

www.anotherroad.games

Platforms and business models:

PC, Premium

Best known for:

Incubation and publishing process of 'Weakless'.

The next big thing:

Publishing process of 'Lumberhill' – a hectic co-op for up to 4 players about a bunch of lumberjacks.

Operating since: 2020

We are a newly created game publishing brand stemming from ARP Games – a video games incubator associated with the Polish Industrial Development Agency. With an impressive ensemble of game marketing specialists and people experienced in supporting sprouting talent, we aim to aid most fun and daring projects to successfully thrive in the challenging game market.

Artifex Mundi S.A.

www.artifexmundi.com, contact@artifexmundi.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, F2P, Premium

Best known for:

Producer and global publisher of games, with a 14-year history of operation.

The next big thing:

Potential to become one of the best F2P companies in the world.

Operating since: 2006 **Team size:** 90

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

Our team combines family atmosphere and common values.

Artificer

www.artificer.com, contact@artificer.com

Platforms and business models:

PC, PS, Xbox, Premium

Best known for:

Tactical games across all settings and genres.

The next big thing:

An unannounced innovative tactical game expanding the genre – Q1 2021

Operating since: 2019

We are a born experienced studio: a close-knit and motivated team of over 30 developers that started working on our first game on day one. Consisting of key talent behind games like 'Hard West' and 'Phantom Doctrine', Artificer has expansive know-how of the tactical genre. With serious backing and ready to punch above its weight, the studio empowers developers and values timeless craftsmanship.

The Astronauts

www.theastronauts.com

Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'The Vanishing of Ethan Carter' – many awards, including BAFTA, and over one million copies sold.

The next big thing:

'Witchfire' – a dark fantasy first-person shooter – release in 2021.

Operating since: 2012

An independent game developer, founded by former owners of People Can Fly (Painkiller, Bulletstorm, Gears of War: Judgement).



Atomic Jelly

www.atomic-jelly.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'303 Squadron' and 'Project Remedium'.

The next big thing:

'Truck Mechanic: Dangerous Paths' and 'Space Mechanic Simulator' – two complex simulator games.

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

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

Awesome Games Studio

www.awesomegamesstudio.com,

contact@awesomegamesstudio.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Yet Another Zombie Defense' franchise – over one million units on PC and consoles sold.

The next big thing:

'Fury Unleashed' – a roguelite platformer shooter where you play through the pages of a comic book.

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

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

Baby Bison Games

www.babybisongames.com, contact@babybisongames.com



Platforms and business models:

PC, Switch

Best known for:

'Survive the Blackout'.

The next big thing:

An adventure survival game for PC and consoles – release in 2022.

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

We are a small indie company specialised in survival games, in love with minimal pixel art and good stories.

Beautiful Bee

www.beautifulbeeteam.com, info@beautifulbeeteam.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

The next big thing:

'Strings Theory' – a freaky, tricky logic game, with abstract concept and touching heroes.

Operating since: 2015

We are BeautifulBee – a couple of friends working together in one team. We use our skills to create better and better games.

BeeFlame Studio

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



Platforms and business models:

PC, PS, Xbox

Best known for:

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

The next big thing:

The newest build of our 'Grey Skies' game which will feature combat and story elements.

Operating since: 2016

We are industry professionals and people with experience in their respective fields, along with university graduates, all focused on telling our story.

BestToiletGames

www.besttoiletgames.com



Platforms and business models:

Mobile, Browser

Best known for:

'Towerman' – played over 100 million times on various platforms.

The next big thing:

We are currently working on several HTML5 arcade games.

Operating since: 2013 Team size: 2

We create small arcade games for mobile devices and browsers. We focus mainly on the HTML5 technology.

Our games are available for licensing and other publishing forms on platforms supporting HTML5.

Blindflug Studios

www.blindflugstudios.com,
poland@blindflugstudios.com



BLINDFLUG STUDIOS

Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, Apple TV, Mac

Best known for:

'First Strike' – nuclear war simulation with seven million players, annihilating the Earth over 20 million times.

The next big thing:

We create one unique, new game almost every year. Stay tuned, a new release could happen any moment.

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

Ever wanted to fly your own airplane through colourful dieselpunk skies but mercilessly hunt down the last flying fish? Or blow up the Earth to bits spectacularly and feel a little sad afterwards? Since 2014, we have been pushing to prove that not only mixing entertainment and serious games, but also Polish creative engineering and Swiss precision make for one amazing and unique combination!

Black Eye Games

www.blackeyegames.com, info@gloriavictisgame.com



Platforms and business models:

PC

Best known for:

'Gloria Victis: MMORPG' – a unique medieval open world experience which sold more than 300 000 copies.

The next big thing:

'Gloria Victis: Siege' – lead a group of civilians to survive a medieval siege – release in late 2020.

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

We are independent game developers. Our team consists of developers who gained experience either in multiple commercial projects or in the modding scene. We are united by a common passion: gaming!

BlackMoon Design

www.blackmoondevgames.com



Platforms and business models:

Browser

Best known for:

Over 80 hyper casual mobile HTML5 browser games, played by millions of players.

The next big thing:

We hope to get to 100 published games by the end of 2020.

Operating since: 2005 **Team size:** 5

We have created nearly a 100 HTML5 web games. We make games that are funny, colourful, and easy to catch up. We are interested in new channels of distributing our HTML5 games to players worldwide.

Black Torch Games

contact@skullstonegame.com



Platforms and business models:

PC

The next big thing:

'Skullstone' – our first and only project, unfinished

Operating since: 2015

Not a company, just a group of skilled people who want to do something interesting in their free time.



Bloober Team S.A.

www.blooberteam.com, biuro@blooberteam.com

Platforms and business models:

PC, PS, Xbox, Switch, VR/AR

Best known for:

'Observer', 'Layers of Fear' games and the 'Blair Witch'.

The next big thing:

'The Medium' and the 'Observer: System Redux' – release in late 2020.

Operating since: 2008 **Team size:** 100

We are an independent development studio dedicated to creating truly psychological horror games, focused on engaging storytelling, mystery, and disturbing yet important themes.

Blue Sunset Games

www.bluesunsetgames.com, info@bluesunsetgames.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

High community impact on the 'Go All Out' game featuring legends like Zorro, Breakbone, Teslakid and more.

The next big thing:

'Madness Beverage' – a FPS that brings together shooting, guns blazing and super-power drinks mayhem.

Operating since: 2017

It has always been our team's ambition to create games for community and our own satisfaction. With passion, knowledge, and constant community feedback there is a whole new world of game development that made us want more.

Bold Pixel

www.boldpixel.com



Platforms and business models:

PC, Xbox, Mobile, Switch

Best known for:

'Back to 1998' – pixelart point&click adventure game.

The next big thing:

'Back to 1998 side B' – Q4 2020

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

We have a fresh, creative, and unusual approach to creating electronic entertainment. We are a family business run by Inez Górska-Brzezińska, responsible for the creative part, and Kamil Brzeziński, responsible for production and IT part. Our studio has released several titles for the Gamebuino platform and 'Back to 1998' on Steam (soon on Xbox).

Bones Studio

www.bones.studio, contact@bones.studio



Platforms and business models:

complete virtual production and motion capture animation services. As an all-in-one studio, we capture complete character performance: body, face, and fingers

Best known for:

Remote motion capture. A complete solution covering the entire workflow of character's animation production from casting, props creation, through performance session to full post-production.

The next big thing:

In-house developed, remote tool allowing developers all over the world for online directing.

Operating since: 2013

Motion capture. Complete solutions. Fully remote.



Bulbware

www.bulbware.com, contact@bulbware.com

Platforms and business models:

PC, PS, Xbox, Mobile, Switch, F2P, Premium

Best known for:

'PewDiePie's Poopdie' – a game played by a million people, 'Bulb Boy' – over quarter of million copies sold.

The next big thing:

An unrevealed horror adventure featuring unspeakable abominations – release in late 2021

Operating since: 2015

We are a first Polish company publishing games on Switch. Art-guy and code-guy, who are not afraid to bring their twisted visions to life. We won multiple awards (Google Indie Masterpiece, Intel Best Character Design, Apple Apps We Love) and got spotlight from media outlets like Polygon, Kotaku, RPS, IGN, GameSpot.

Can Explode

www.canexplode.com, canexplode@canexplode.com



Platforms and business models:

PC, Mobile, Browser, F2P, Premium, Tools for game developers

Best known for:

Constantly looking for effective ways to create and market quality gaming experience.

The next big thing:

How can loads of data gathered by game developers help improve retention and sales of their games?

Operating since: 2015

We provide game developers with tools to combine behavioural and transactional data with game assets and content to easily build and validate digital marketing campaigns across various player segments and channels.

Players love distinct experience, so finding and exploiting a way to differentiate a game is critical to increase its probability of success. Making the process faster and cheaper has been our obsession since we entered the game industry and learned the hard way that creating a product is only half of the game.

Carbon Studio S.A.

contact@carbonstudio.pl



Platforms and business models:

VR/AR

Best known for:

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

The next big thing:

An unrevealed action-adventure VR game set in the Warhammer universe.

Operating since: 2015

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

ChaosForge

www.chaosforge.org, www.jupiterhell.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Jupiter Hell', 'Early Access', 8 years in the making, 3D custom engine, turn-based roguelike.

The next big thing:

'Jupiter Hell' updates, exiting Early Access and console ports.

Operating since: 2012

Founded by a veteran of the old school of traditional roguelike development, ChaosForge is dedicated to bringing back a genre that for a decade has been misnamed, misunderstood and badly represented. We work in a very small team of close-knit friends in a small office in Wrocław – utilising our completely ground up built 3D engine technology, competing against others (so far successfully) with easily available and approachable game engines.

Cherrypick Games S.A.



CHERRY PICK GAMES

www.cherrypickgames.com, hello@cherrypickgames.com

Platforms and business models:

Mobile, F2P, Premium

Best known for:

'Touchdown Hero' – more than five million downloads, 'My Hospital' – more than two million downloads.

The next big thing:

'Solitaire: Adventure Journey' – a free-to-play mobile game.

Operating since: 2014 **Team size:** 20

We are a team of industry veterans, all with deep experience in creating and marketing games for all leading gaming platforms.

We share a passion for games and a unified vision to create top-quality products with approachable gameplay design, complemented by superb visuals and experience-enhancing sound.

Cocomo

www.cocomo.pl



Platforms and business models:

PC, Mobile, VR/AR, Tablet

Best known for:

Over 20 years of work from photography, web, advertising, game development as an outsourcer for many companies with various projects in various styles and forms of gameplay.

The next big thing:

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

Operating since: 2008 **Team size:** depending on the project

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

Code Horizon S.A.

www.codehorizon.pl, kontakt@codehorizon.pl



CODE HORIZON

Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Gold Rush: The Game'

The next big thing:

'Gold Rush: The Game' – porting the game to consoles (Xbox One and PS4)

Operating since: 2014

We are a team of young and passionate developers who dedicate their lives to creating some of the best and most innovative games out there. There are not many of us, but we makeup for our lack of numbers with sheer discipline and work ethics. We have experience in both PC and console gaming, although our most well-known game by far is a PC title – 'Gold Rush: The Game'.

Console Labs S.A.

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



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Thief Simulator' – Xbox One, 'Ultimate Fishing Simulator' – Xbox One

The next big thing:

'Tank Mechanic Simulator' – for Xbox One and PS4

Operating since: 2018

Our company specialises in porting games from PC to other platforms like Xbox One, PS 4, and Switch. Our ports range from customising the game for the platform through optimisation to certification and post-premiere support.

Creepy Jar

www.creepyjar.com



Platforms and business models:

PC

Best known for:

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

The next big thing:

We are working on releasing 'Green Hell' on consoles in late 2020.

Operating since: 2015

We are an independent survival simulator game developer. The core team is made up of former Techland employees, all of whom held supervisory positions in game production. In 2015, the team decided to found their own design studio. Back then, the team was joined by other industry veterans, including former Techland and Flying Wild Hog employees.

Critical Hit Games

www.criticalhitgames.pl, grzegorz.golen@criticalhitgames.pl



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

We are currently working on the first project

The next big thing:

An unrevealed, top-notch quality, story-driven game, set in the vision of an alternative future world

Operating since: 2020

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.

Crunching Koalas

www.crunchingkoalas.com, info@crunchingkoalas.com

Platforms and business models:

PC, PS, Xbox, Mobile, Switch

Best known for:

Bringing 'Darkwood' to PS 4, Switch and Xbox One – both the game and its console adaptation were critically acclaimed and maintain a large and active fanbase.

The next big thing:

'Bonkies' – a couch co-op construction builder in space featuring lovable monkeys with jetpacks and bionic arms, release in Q4 2020 (PC and consoles).

Operating since: 2012 **Team size:** ~20

We are a studio focused on bringing exceptional indie titles to wider audiences by providing development, porting, and publishing support to developers.



Digital Melody Games

www.digitalmelody.eu, hello@digitalmelody.eu

Platforms and business models:

PC, PS, Xbox, Mobile, Switch

Best known for:

'Timberman', 'Stencil Art', 'Pack Master'

The next big thing:

Two new titles from the 'Timberman' universe (2021) and several other multiplatform games.

Operating since: 2014

We are a small company founded by a group of friends to develop most playable games in the world. Focusing on the mobile market, we brought to life such titles as the 'Timberman' series – perhaps the most well-known lumberjack in the world and many other hyper-casual hits. Simple, innovative gameplay and unlimited fun is our motto.



Donkey Crew

www.donkey.team



Platforms and business models:

PC, PS, Xbox

Best known for:

'Last Oasis' – nomadic survival MMO

The next big thing:

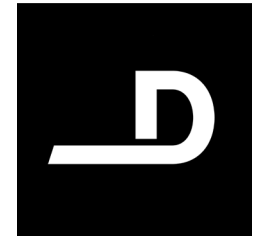
Unrevealed new content update for 'Last Oasis'.

Operating since: 2018 **Team size:** 50

We are a newly established game studio. The first donkeys came from small beginnings, originating as a team of diehard modders from the Mount and Blade community. We came from all over the world to make original games that they want to play.

Draw Distance S.A.

www.drawdistance.dev, contact@drawdistance.dev



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Serial Cleaner': more than one million owners; 'VtM – Coteries of New York': 1st fully licensed World of Darkness game.

The next big thing:

'Serial Cleaners' – a single-player stealth action crime story, a sequel to the 'Serial Cleaner' indie hit.

Operating since: 2009 **Team size:** 20+

Draw Distance is a new name of iFun4all – a 10-year experienced Polish indie game development studio and publisher, standing behind 'Serial Cleaner', 'Halls of Horror', 'Ritual: Crown of Horns', 'Vampire: The Masquerade – Coteries of New York' etc.

Dreamgrit

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



Platforms and business models:

PC, Mobile, Switch, Premium

Best known for:

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

The next big thing:

'The Saragossa Manuscript' – an improvised tales of romance, duels, and curses – narrative roguelike – release in 2021

Operating since: 2011

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

DOJI S.A.

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



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch

Best known for:

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

The next big thing:

A self-published 'Coffee Noir – Business Detective Game' serious game – Q4 2020 (PC and consoles).

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

Our team merges video games and education tools to create entertaining, absorbing, and thought-provoking applications, both for business and casual needs. We hope to change the image of educational games to be as appealing, immersive, and memorable as good video games can be, yet useful and effective so that every hour with our games will be more than just pure entertainment. We develop tailor-made edtech projects and e-learning games for corporate clients.

ECC Games S.A.

info@eccgames.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, F2P

Best known for:

'Car Mechanic Simulator 18' for iOS and Android – more than two million game downloads.

The next big thing:

Development of 'DRIFT21' in early access, R&D on GearShift – a tool to create motorsport games.

Operating since: 2010 **Team size:** 20

Our team gathers automotive enthusiasts, who pursue their passion for cars and motorsport by creating games about cars.

Enclave Games

www.enclavegames.com, contact@enclavegames.com



ENCLAVE
GAMES

Platforms and business models:

Mobile, Browser, Web/HTML5

Best known for:

More than a decade of experimenting, building, and teaching about HTML5 game development.

The next big thing:

Catalogue of hyper-casual games implementing web monetisation.

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

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

Enerio

www.enerio.eu, biuro@enerio.eu

Platforms and business models:

PC, PS, Xbox, Mobile, Browser, F2P, Premium

Best known for:

Special gaming clothing for gamers.

The next big thing:

We are working on more comfortable (personal) clothing for streamers and e-sport teams.

Operating since: 2019

The brand was created one year ago by the Fabryka Reklamy Ladora Dorota Machaty Advertising Agency.



Eremite Games

eremitegames@gmail.com

Platforms and business models:

PC, Mobile

Best known for:

'Shattered Plane'- a turn-based strategy game (mobile), one of the top paid strategy apps in Poland.

The next big thing:

'Against the Storm' (PC) – a roguelike city builder set in a world tormented by the everlasting rain.

Operating since: 2017

Team size: 6

We are a group of six video game developers willing to sacrifice a lot for the sake of our passion. We combine our previous experience in game development with the thrive to experiment and acquire new skills. We love strategy and RPG games.



EXOR Studios

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



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'D.I.P.R.I.P.', 'Zombie Driver', 'X-Morph Defense'

The next big thing:

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

Operating since: 2007 **Team size:** 14

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

Evil Indie Games

Evil Indie Games

www.evilindiegames.com, games@evilindiegames.com

Platforms and business models:

PC, Mobile, Browser, Switch, F2P, Premium

Best known for:

'NO THING', 'Extra Color'

The next big thing:

'Sad RPG' – a social anxiety RPG – release in Q4 2020.

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

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

Failcore

www.failcore.games

F A\LCORE

Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Invisible Fist' – late capitalism deck-builder, where players fight the invisible hand of the free market as a multibillionaire, a middle-class student, or a factory worker.

The next big thing:

'Ridiculous Catapult Simulator' – wacky physics deck-builder. Shoot everyday objects to defend your castle from enemy waves. Discover powerful combos or create pure chaos – the choice is yours!

Operating since: 2018

Team size: 7

We are a growing game development studio with fully remote employees working worldwide. Our first game started as a joke over lunch. Our second game brought together an experienced international team and a publisher to create an eye-candy multiplatform deck-builder sandbox.

False Prophet & The Blood Moons

www.falseprophetandthebloodmoons.com,

thebeast@falseprophetandthebloodmoons.com



Platforms and business models:

PC, PS, Xbox

The next big thing:

'The Beast' – a unique tactical role-playing game in a grimdark medieval world.

Operating since: 2019

Team size: 12

We are a team of over 12 well experienced professionals with a proven AAA/AA track-record, who decided to push the boundaries of human limitations and start to work their way to create unique games in a dark and grim fantasy universe.

Fantasyexpo

www.fantasyexpo.pl, office@fantasyexpo.pl



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, F2P, Premium

Best known for:

PolishEsportsLeague – best teams, most popular games, stars, casters, online&offline production.

The next big thing:

Polish Mobile League, the only professional mobile devices league in Poland.

Operating since: 2013

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

Far From Home

www.farfromhomegames.com, info@farfromhome.games

Platforms and business models:

PC, PS, Xbox, Premium

The next big thing:

'Project Oxygen' – FPP, survival-based game on the ruined Earth after an ecological disaster.

Operating since: 2020

Team size: 12

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



The Farm 51

www.thefarm51.com


 The logo for Chernobylite, featuring the word "CHERNOBYLITE" in a stylized, white, monospace font with a horizontal line underneath, set against a black rectangular background.

Platforms and business models:

PC, PS, Xbox, Mobile, VR/AR

Best known for:

'World War 3' – realistic modern FPS, 'Reality 51' – our own technology which allows to create photorealistic graphics.

The next big thing:

'Chernobylite' – sci-fi survival horror game based on the 3D-scanned Chernobyl Exclusion Zone.

Operating since: 2005

Our company was established by three game development veterans: Kamil Bilczyński, Robert Siejka and Wojtek Pazdur. Since then, we have expanded significantly and today we hire over 100 employees. Since 2012, the company has been listed on the NewConnect Stock Exchange.

Filip Loster

www.filiploster.com

Platforms and business models:

Mobile

Best known for:

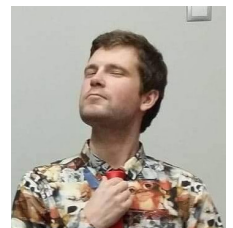
'GYRO' – more than two million downloads. 'Unhatched' – with an honourable mention from IGF, a Google Play IGF Finalist.

The next big thing:

An unannounced mobile f2p game – release in 2021

Operating since: 2011

I am an indie game developer from Krakow, making indie games since 2011.



Fireart Games

www.fireart.games



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Spirit Roots'

The next big thing:

'TOHU'

Operating since: 2017

We are a small independent game studio, focused on producing beautiful, handcrafted games with a great gaming experience.

Forestlight Games

www.forestlightgames.com, office@forestlightgames.com



Platforms and business models:

PC, PS, Xbox, Mobile

Best known for:

Making 2.0 simulators which are a mix of traditional simulator games with story-driven productions.

The next big thing:

'The Pope: Power & Sin' – a sim/strategic game inspired by the life of Rodrigo de Borja – release in 2021.

Operating since: 2019 **Team size:** 15

We certainly have our favourite games that we like to play and make, but we love creating games in general. Whether it is our own idea or one of our clients', we believe in making the best games we can. Join us, as a digital nomad you can work from anywhere either remotely or as a freelancer.

Forever Entertainment S.A.

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



Forever Entertainment SA

Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR, Premium

Best known for:

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

The next big thing:

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

Operating since: 2010

We are one of the biggest Switch publishers in the world – with over 80 titles released. We work mainly with indie developers, helping them port and market their games on almost every platform available.

Frozen District

marketing@frozendistrict.com

Platforms and business models:

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

Best known for:

'House Flipper' and its DLCs – more than two million copies sold.

The next big thing:

'The Tenants' – landlord simulator where you deal with annoying and problematic tenants – release in 2020 (early access).

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



We create unique and exciting experience for PC and console players by developing innovative and high-quality games.

We offer technical and conceptual consultations, provided by our internal development team – Jutsu Games.



Fuero Games

www.fuerogames.com, office@fuerogames.com

Platforms and business models:

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

Best known for:

Our games are played by hundreds of thousands of people every day all around the world.

The next big thing:

'Bushy Tail' – a story-driven adventure game about a three-legged fox with amazing audio-visuals.

Operating since: 2012 **Team size:** 50

We are an independent game development studio. Our team consists of more than 50 professionals who worked on AAA titles on all imaginable platforms which have earned the recognition of the players and critics all over the world.

Galaktus

www.galaktus.pl, biuro@galaktus.pl



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, F2P, Premium

Best known for:

A PR agency with EU&US reach, worked for Green Hell, People Can Fly, War Thunder, Crossout and more

The next big thing:

Working now on comms and strategy for a few unrevealed A+, AA and indie titles in global scale

Operating since: 2011 **Team size:** 24

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

Game Factory

www.fabrykagier.pl, mail@fabrykagier.pl



Platforms and business models:

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

Best known for:

'Brain Buddies', 'Monster World', 'Diamond Dash' (Facebook), 'Cookie Jam' and 'Panda Pop' (mobile)

The next big thing:

A venture into self-publishing with two small internally developed PC/console titles in early 2021.

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

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

GameDesire

www.gamedesire.com, office@gamedesire.com



Platforms and business models:

Mobile, Browser

Best known for:

'Pool Live Pro', 'Poker Texas Hold'em', 'Mahjong' and 'Bingo'

The next big thing:

New version of 'Yatzy' – release in Q4 2020

Operating since: 2004

Our company has been among the leading European free-to-play social games developers for years. Our titles are available on iOS, Android and desktop. Our users are our source of constant inspiration and development, and we take great pride in daily bringing joy to millions of players around the world!

Gamedust

www.gamedust.co, office@gamedust.co



Platforms and business models:

PC, PS, Xbox, Switch, VR/AR

Best known for:

'Overflight' – an arcade flight simulator that exceeds the capabilities of VR in every aspect.

The next big thing:

'Yupitergrad' – retro futuristic VR platformer with fluid and free acrobatics movement – release in Q3 2020.

Operating since: 2017

We are an independent video game studio and publisher derived from the VR R&D division in a software house – Setapp. We are enthusiasts who turn their unconventional ideas into games adapted to target platforms both VR and non-VR. Our imagination, vast knowledge about the Unity engine, porting and certification processes allow us to be a fully independent studio.

Gameset

www.gameset.co, contact@gameset.co



Platforms and business models:

marketing services

Best known for:

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

The next big thing:

Expansion in Poland and further in CEE with influencers and services tailored to gaming market.

Operating since: 2017

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

GD Events

www.gdevents.pl, kontakt@gdevents.pl

Platforms and business models:

Mobile, Browser, e-board

Best known for:

Over 250 B2B hybrid games licensed and created for various NGOs, the public and business sector.

The next big thing:

New educational games for museums – Q3 2020.

Operating since: 2010 **Team size:** 10

We believe that games can and should be used as a bridge between what is new and old. This philosophy helped us to create educational games that are interdisciplinary and engaging. From basic gamification processes to advanced experimental forms, we are searching for the best way to utilise popular game mechanics from different types of media to create something new and useful.



GeoGames

www.geogames.pl, kontakt@geogames.pl

Platforms and business models:

Mobile, Browser, VR/AR, F2P

Best known for:

Geolocation and AR games. A tool like WordPress but for games and Apps like Pokemon Go or smaller projects. Simple games and apps can be already done without any coding skills. API and easy Unity integration. The platform is still in development but available for closed alfa tests.

The next big thing:

Open beta of our platform and geolocation sports game built with it.

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

We are a company and content managing system for spatial data and augmented reality apps/games and gamifications (like Pokemon GO). With our tools we can develop that kind of products for a fraction of their market price and in a significantly shorter time.



Green Planet Games

www.greenplanetgames.com,
contact@greenplanetgames.com



Platforms and business models:

PC, Mobile, Browser, VR/AR

The next big thing:

An unrevealed VR title – release in 2021.

Operating since: 2020 **Team size:** 4

We are a team of Unity developers ready to help anyone complete their game. We are also producing VR titles that will be revealed in 2021.

Holy Pangolin

www.holypangolin.com, holypangolin@gmail.com

Platforms and business models:

PC, Mobile, Browser

Best known for:

'Karambola' – nominations, selections – A MAZE Awards 2017, NowPlayThis, Digital Cultures (Best of Poland)

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

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



Hyperstrange

www.Hyperstrange.com, community@hyperstrange.com



Platforms and business models:

PC, PS, Xbox, Switch, Oculus Quest

Best known for:

'ELDERBORN', a metal action fantasy slasher with brutal FPP melee combat and souls-like progression.

The next big thing:

A hard-core spatial puzzle game set in a vibrant cyberscape full of danger.

Operating since:

 The day of Solar Eclipse, 2015

We are a game development and publishing studio driven by Metal Action Fantasy.

Hypnotic Ants

hello@hypnoticants.com



Platforms and business models:

PC, PS, Xbox, VR/AR

Best known for:

'Dreamo' – PC and VR version

The next big thing:

'Medic: Pacific Corpsman' – become a medic, the true hero of war. Survive the horrors of the battlefield, dodge the bullets, and bring salvation to the wounded.

Operating since:

 2018-06-12

Team size: 8

We are 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, extraordinary, and fresh.

Ice Code Games

www.icecodegames.com, info@icecodegames.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

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

The next big thing:

An unrevealed game based on a successful brand

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

We are a fast-growing studio that worked on games in several genres and distributed them on all leading platforms. Our main focus is on premium PC and console strategy titles.

Igrek Games

www.igrekgames.net, contact@igrekgames.net

Platforms and business models:

PC, Mobile, Switch

Best known for:

'Blosics' – two million downloads

The next big thing:

'Destropolis' – a shooter with lasers, nuclear explosions, and synth-wave music.

Operating since: 2010 **Team size:** 1



I am an indie game developer.

IMGN.PRO

jakub.rylko@imgn.pro



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Kholat', 'Seven: Enhanced Edition'

Operating since: 2010

A premium game developer and publisher.

Indago

www.indagovr.com

Platforms and business models:

PC, Mobile, VR/AR

Best known for:

Cooperation with Unity on AirSim – a VR simulator project that allows for testing autonomous vehicles.

The next big thing:

Condensation – a VR game where the player controls the mech in the post-apocalyptic world of steampunk – release in Q4 2021

Operating since: 2014



We have many years of experience in the industry and specialise in assets, game design, 3D graphics, and the VR/AR technology. Passion for virtual reality reflects our high quality of work and attention to every little detail. Our achievements include the Cicero VR-Public Speaking Training Tool for the Kozminski University, VR games and the Best Artistic Content prize in 2019 Unity Awards.

Indeep Studios

www.indeep.io

Platforms and business models:

Mobile, Switch, F2P, Premium

Best known for:

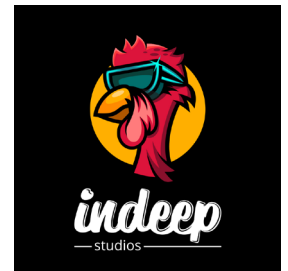
‘Sole Light’ – an isometric puzzle game for iOS and Android. Discover the dystopian world by pushing rocks and controlling clones to solve puzzles – Pixel Heaven 2019 Best Mobile Nominee, Digital Dragons Students Talent Show Finalist.

The next big thing:

An unrevealed Hyper Casual mobile game – first half of 2021.

Operating since: 2019 **Team size:** 4

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



Jet Toast

www.jettoast.com, studio@jettoast.com



Platforms and business models:

Mobile, F2P

Best known for:

‘Blocky Farm’ – mobile farm manager with tractor, pets, and a lot of love – over three million downloads.

The next big thing:

‘Aero’ – a mobile tycoon game about managing an airport where passengers matter – release in late 2020.

Operating since: 2015

We are passionate game developers who love toasts and jet engines.

Juggler Games

mp@jugglergames.com

Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'My Memory of Us' – a game that allowed us to express our game creation talents with hand-painted & animated graphics, original score, and captivating emotional story.

Operating since: 2016

Team size: 12

We are a family of seasoned game creators who strive to deliver unique and quality gaming experience of immersive stories, signature art style, and engaging mechanics. We have faced many challenges, but we will always find a way 'juggle out of it'.



Jujubee S.A.

www.jujubee.pl/en.home.html, contact@jujubee.pl

Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR

Best known for:

'Realpolitiks' and 'KURSK'

The next big thing:

Strategy games – 'Realpolitiks 2' and 'Dark Moon'

Operating since: 2012

Our goal is to create inspiring and unconventional games for all significant platforms. We are a publicly-traded company on NewConnect (JJB). Our projects include: 'Realpolitiks', 'KURSK', 'Deep Diving Simulator', 'Take-Off: The Flight Simulator', 'Supect In Sight', 'COVID: The Outbreak'.



Kids With Sticks

www.kidswithsticks.com

Platforms and business models:

PC, PS, Xbox, Switch, Premium

Operating since: 2019

Team size: 5



We are Kids With Sticks, a small Indie game developer. We like bold and imaginative ideas; we value passion and creative freedom.

Kivano

www.kivano.games, contact@kivano.games

Platforms and business models:

PC, Mobile, Switch

Best known for:

We are associated with Godot Engine – we have been supporting its development for years.

The next big thing:

‘TailQuest’ – a unique mix of tower defence and 3D puzzle platformer with local co-op.

Operating since: 2008

We have been creating games for one simple reason – we know that we can create something unique, full of passion and love for details. Over the years of our activity, we have gained the trust and love of our fans who know that our games always have something more, a second layer to discover.

We create games to change the world for the better, give pure joy and a moment of reflection. We hope to continue our mission in the coming years.



KLABATER S.A.

www.klabater.com, lukasz.mach@klabater.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

Crossroads In – first and beloved tavern sim game!

The next big thing:

'This is the Zodiac Speaking' publishing, 'Heliborne: Enhanced Edition'
– development

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

We are a global developer and publisher of ambitious games. As benevolent spirits, we believe that it is important to be creative, be bold, be dedicated and to believe in your work! We will not let your game be swept by the tide of indie games. We will set out together – for gold and glory!

The Knights of Unity – Professional Unity Development



THE KNIGHTS OF UNITY
Professional Unity Development

www.theknightsofunity.com, contact@theknightsofunity.com

Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, F2P, Premium

Best known for:

'Scythe: Digital Edition', 'Tools Up', 'Disco Elysium', 'Gwent', 'PC Building Simulator', 'Edna & Harvey'

The next big thing:

An unannounced roguelike card racing game – release in Q1 2021

Operating since: 2015 **Team size:** 80

Since the very beginning, we have been developing Unity projects for companies around the globe. After 5 years, we have completed 90 projects, and with 35 experienced Unity developers on board, we have become one of the top Unity development companies in the world.

Kobyłańska Lewoszewski Mednis Law Firm

LEGALPLAY

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

The next big thing:

A website dedicated to legal regulations for the gaming sector.

Operating since: 2018

We are a team of lawyers dedicated to video game developers and publishers (both AAA and indies), as well as investors. We offer expert legal advice and business support regarding game development activities in Poland to make sure their next exciting project is a big success.

Kool2Play

contact@kool2play.com

Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Uragun' – a top-down shooter that rewards your instinct and exploration of combat synergies – release in Early Access on Steam in 2020

We are a developer and publisher of a multitude of games that share one idea – human nature and its relationship with the world of technology.

We create games that explore the human psyche — emotions and instincts — and how it is affected in a world shaped by our inventions. We want players to experience the consequences of ongoing technological advancements in scenarios based on the dangers that our addiction to technology might bring.



Kurki Collective

www.kurki.games, kurki.games@gmail.com



Platforms and business models:

PC, Mobile, Switch

Best known for:

'ElectroRide' – a racing game created for years with passion but without a budget.

The next big thing:

'Zniw Adventure' – a traditionally animated point and click adventure game with educational content.

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

Our collective was founded on the strong foundations of many years of friendship and the desire to share our experience.

We believe that by participating in the collective, we have an advantage over small independent game developers – we are never alone, we can count on thorough testing of our games, good advice and a helping hand when one of us gets stuck in the process of creating a game.

Last Qubit

contact@lastqubit.com, m.stankiewicz@lastqubit.com

Platforms and business models:

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

Best known for:

Advent Games Festival – with its enthusiastic and cheerful community, it is growing year by year.

The next big thing:

'Idle Mine Breakout' – currently at the softlaunch phase, will have its full release in late 2020.

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

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

L.inc

www.linc.games



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

Playable Graphic Novel – the future of digital comics. By combining authentic graphic novel simulation with the interactivity of video games, game developers and comic industry veterans can come together to create the ‘next generation’ of digital comics.

The next big thing:

‘Liberated’ – just released on PC with new stories and full voice-overs. Our first Playable Graphic Novel and a captivating original IP showcases the incredible potential of the PGN format.

Operating since: 2017

L.inc’s mission is to craft new gaming experience inspired by everything we love about comic books: the visual language, flexibility, and the joy of compiling your personal collection.

Lionbridge Gaming

www.lionbridge.com



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, F2P, Premium

Best known for:

Exclusive LOC, QA and certification services provider or some of the world’s biggest games.

The next big thing:

Providing end-to-end services from secure network of labs and studios across 20 countries worldwide.

Operating since: 2013

Team size: 1400

We are a division of Lionbridge, a market leading provider of localisation, testing, machine learning, and content development services. We work with game studios, engine creators, platform holders and hardware manufacturers across every gaming genre. We provide world-class localisation, QA, audio production, community management, and marketing services.

Low Poly Dreams



www.lowpolydreams.com, contact@lowpolydreams.com

Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, Premium, 3D Business Apps

Best known for:

We are best known for our work quality done as third-party contractors.

The next big thing:

‘Cursed Abyss of Space’ – a blend of fast-paced real-time tactics and roguelite exploration in Lovecraftian space.

Operating since: 2011

We are a close-knit team of professionals who share their work-time between working on games and 3D business apps as a outsourcer and implementing our own game ideas. We work with the Unity engine.

LWiki

www.LWiki.pl, d.lesniak@LWiki.pl



Platforms and business models:

PC, Other

Best known for:

An adjustable gaming desk you can connect with your computer.

Operating since: 2016 Team size: 1

We manufacture furniture for corporate and individual customers. Digital processing and automated production allow us to meet all quality and quantity expectations of our customers. Our experience has helped us create an adjustable desk that can be adapted to the height of users of all ages. This is a new patented product on the market.

Madmind Studio

www.madmind-studio.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Agony' – a survival horror set in hell.

The next big thing:

'Succubus'- an action horror/slasher, 'Paranoid' – a survival horror.

Operating since: 2016 **Team size:** 19

We are a game development studio created by Tomasz Dutkiewicz. We are a team of game developers who have been working for more than ten years in the video gaming industry. Our studio comprises of veteran game developers, who have worked on numerous AAA titles.

Manufractal Studio

parp@manufractal.com

MANUFRACTAL

Platforms and business models:

PC, Mobile, VR/AR, F2P, Premium

Best known for:

Worked on 'Real Boxing 2' (also Rocky/Creed versions) and 'Mayhem Combat' – both for Vivid Games.

The next big thing:

An unrevealed puzzle-skill game – release in Q2 2021, and a tech strategy-sim game – release in Q1 2022.

Operating since: 2015

We provide services in the creation and co-production of games and technology R&D. We specialise in Unreal Engine 4 for mobile platforms and PCs. Currently we are in the process of creating more games (including our own ones) and additional technologies (plugins) for Unreal Engine 4.

Marcin Makaj

www.themoonwalls.com, martin@themoonwalls.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Bohemian Killing' – one of the most awarded solo-developed games, showcased all around the world.

The next big thing:

'Commander 85' – a nostalgic sci-fi thriller and hacker simulator set in the 80s, with numerous awards.

Operating since: 2011

Team size: 1

I am a real-life lawyer and economist, engaged in creating games in my own one-man studio, where I works as a designer, graphic artist, and programmer. I am also an academic lecturer and a doctoral student at the Academy of Arts in Szczecin. Furthermore, I was a speaker at the Game Developers Conference in San Francisco, and taught children at a private art school in South Korea.

Mass Creation

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

Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Zombie Endless Runner – Corridor Z'

The next big thing:

'Shing! – Beat'em'up' 2.0 with unique control scheme.

Operating since: 2010



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

MATABOO

www.mataboo.com, contact@mataboo.com

Platforms and business models:

PC, PS, Xbox, Switch, Google Stadia

Best known for:

We are proud of our experienced and highly motivated team.

The next big thing:

We plan to release our own game in the next two years.

Operating since: May 2019

We help game creators at each stage of development: from design through content creation, gameplay programming, features implementation to bug fixing, porting, and optimisation.



MATABOO

Mechanistry

www.mechanistry.com, hello@mechanistry.com

Platforms and business models:

PC, Premium

The next big thing:

'Timberborn' – a beaver-city builder with stacking structures and water control mechanics – release in 2021.

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

We foster healthy work habits while creating a game where beavers either work or die.



Timberborn

MediaCraft

www.mediacraft.pl, dmdarma@gmail.com



Platforms and business models:

VR/AR

Best known for:

Public Gaming Installations – interactive systems for projection mapping.

The next big thing:

AR Public Game

Operating since: 2010

We are a company producing AR Games, audio-visual VR shows and game projection mappings. We work in the European Union, Japan, Hong Kong, and China. We are the industry leading and award-winning company that produced the biggest projection mapping in the world – screened on 40 skyscrapers simultaneously in Shenzhen, China in 2019.

MGP Studios

www.mgp-studios.com, developer@mgp-studios.com



Platforms and business models:

PC, Xbox, Switch

Best known for:

'Sinless' and 'Sand is the Soul' – unique and immersive audio-visual compositions with one of a kind gameplay style. 'Project Downfall' – first place in the Big Indie Pitch in Amsterdam 2020.

Operating since: 2013

Team size: 1

Looking for a unique take on a specific genre? You have come to the right place!

Mindjar Design

www.mindjardesign.com, jmajewski@mindjardesign.com



Platforms and business models:

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

Best known for:

'Ultimate Action Hero' – won the 2nd award at the official Unity 2D Challenge.

The next big thing:

Ultimate Action Hero – a 2D side-scroller action game set in the blockbuster movie industry.

Operating since: 2014 **Team size:** 2

Doing fun and gorgeous 2D projects in Unity, pushing the 2D visuals forward with the latest technology. Also making our first steps in VR.

MoaCube

www.moacube.com, tom@moacube.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Cinders' – a modernised re-telling of Cinderella that challenged the tired fairy-tale tropes, giving more focus to side characters and player agency.

The next big thing:

'Bonfire' – delightfully gloomy tactical RPG about journey and failure, currently in Steam Early Access. We are also bringing 'Cinders' and 'Solstice' to home consoles and are working on a yet unannounced project.

Operating since: April 2011 **Team size:** 5

We are a small collective of indie game developers, started by two industry vets: designer Tom Grochowiak and artist Gracjana Zielinska. We make highly polished games that tell diverse, personal stories and are mostly known for our 'Cinders' and 'Solstice' narrative titles.



Monologic Games

www.monologic.games, contact@monologic.games

Platforms and business models:

PC, PS, VR/AR

Best known for:

'Ven VR Adventure' – a single-player VR platform game. Meet Ven on his unknown planet, invaded by Bruce Nelson who wants to destroy the magical world.

The next big thing:

Releasing 'Ven VR Adventure' on three big platforms, namely Steam, Oculus and PS VR – late 2020.

Operating since: March 2019

Team size: 11

We are a small independent studio, established out of shared passions of developing games that can serve as an impact on the innovations in the field of virtual reality game development.

Monster Couch

www.monstercouch.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Die for Valhalla'

The next big thing:

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

Operating since: 2015

Team size: 8

We create games that you can play with friends. Modern gaming started on the couch many years ago and we want to reignite this fire with our games. Why? Because couch co-op is the best multiplayer experience ever created. Our secondary goal is to help other indie developers get their games on consoles. We specialize in game porting.

Moonlit S.A.

www.moonlit.games, contact@moonlit.games



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, Premium

Best known for:

'Deadliest Catch: The Game'

The next big thing:

'Model Builder' – first scale model building simulator for PC and consoles 'Dog Trainer' – a unique dog owner & trainer simulator.

Operating since: 2014

Moonmana

www.moonmana.com



Platforms and business models:

PC, Xbox, Mobile, Browser, F2P, Premium

Best known for:

'Pirates of Everseas' – an online strategy game with over two million players.

The next big thing:

'Ultimate Pirates' – MMO strategy game with real-time PvP battles and RPG elements. 'Ultimate Pirates' is a game where you use strategy and tactics to fight naval battles, intercept other pirate ships, and plunder gold from the vanquished! – release in 2020.

Operating since: 2008 **Team size:** 50

What makes us unique is an incredibly skilful and experienced team of engineers. Our team has 8+ years of experience in the development and support of 4X strategy's, online cross-platform games, F2P, midcore games, high-load server operations, and live-ops. We develop games with own IPs and provide outsourcing services: Full cycle game production; Prototyping; Porting. Our expertise: UE, Unity, 4X games, RPG, Card games, Simulators, multiplayer, cross-play, F2P, Mobile, PC.

Movie Games

www.moviegames.pl



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Drug Dealer Simulator' – No 1 Steam top seller status on the launch day, 'The Beast Inside' – Webby Award

The next big thing:

'Lust from Beyond', 'Alaskan Truck Simulator', 'MythBusters: The Game'.

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

We are a game developer and publisher, listed on the Warsaw Stock Exchange alternative investment market – NewConnect. The company was founded by game enthusiasts with experience in the financial, gaming and media sectors. The Movie Games portfolio includes horror games and simulators presenting different aspects of various occupations.

MSM Studio

www.msmstudio.eu, msmstudio@msmstudio.eu



Platforms and business models:

PC, Mobile, Browser, VR/AR, Other

Best known for:

Our game-based course of Gaelic called 'Bua na Cainte' is used in most primary schools in Ireland.

The next big thing:

'Business Update' – an innovative language course based on AI (late 2020).

Operating since: 2008 **Team size:** 10

We are specialised in producing digital contents and game-based software for primary, secondary, and vocational education. Our products have been used by individual students, schools, universities, educational publishers, and government organisations worldwide. We are the creator and publisher of 'Balloon' — a series of SCORM-compliant language courses (English, German, and more).

MuHa Games

www.muhagames.com, contact@muhagames.com



Platforms and business models:

PC

Best known for:

'Thea: The Awakening' and 'Thea 2: The Shattering' – innovative mechanics for the 4X genre, hybrid games, combining card game with RPG and turn-based strategy. Inspired by Slavic mythology.

The next big thing:

An unnamed project that we cannot yet announce, due to IP rights and marketing needs.

Operating since: 2010

Team size: 6

We are all about making our own, home-baked games. We are open to explore many different game styles, but we are best-known for combining the strategy/4X genre with a mix of unusual mechanics.

MythicOwl

m.kaminski@mythicowl.com



Platforms and business models:

PC, Xbox, Mobile, Browser, F2P, Premium

Best known for:

'Hexologic' – a multiplatform, award-winning puzzle game that sold over 100 000 copies within a premium model.

The next big thing:

'One Line Coloring' – a puzzle game and working on a yet to be announced game – our biggest project so far, which we are seeking a funding/publishing partner for.

Operating since: 2014

Team size: 12

We are dedicated to creating quality games and applications that inspire players to learn new skills. We love video games and value your time spent in front of the screen. We want to encourage everyone to get the best out of their gaming experience, giving our products a creative and educational twist.

Give your mind a peaceful break or boost your brain to the limits, it is up to you to decide!

Nano Games

www.nano-games.com, info@nano-games.com



NANO GAMES

Platforms and business models:

PC, Xbox

Best known for:

HDC Licensed Content provided by Europa Truck Trial championship organised since 1989.

The next big thing:

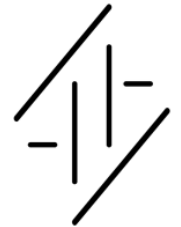
'Heavy Duty Challenge' – a motorsport simulation game about tough, all-terrain truck trial championships.

Operating since: 2009

We are an independent game development studio creating unique and exciting entertainment experience for PC and consoles. We specialise in simulation games. So far, we have developed: 'Reef Shot', 'Cityconomy', 'ZAMB! Redux', and 'ZAMB! Endless Extermination'.

NeatWare Grzegorz Kiernozek

www.neatware.pl, gkiernozek@gmail.com



Platforms and business models:

Mobile, VR/AR, F2P

Best known for:

Multiple hyper-casual mobile titles developed during partnership with one of major publishers.

The next big thing:

More hyper-casual titles coming up later this year.

Operating since: 2016 Team size: 4

We are an indie game development studio.

Neemlee

www.neemlee.com, hello@neemlee.com



Platforms and business models:

Mobile, Premium

The next big thing:

We cannot reveal it, it is a secret.

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

We are a boutique agency that brings together online advertising experts. We combine competence in the field of user acquisition, in-app and attribution analytics, app store optimisation, strategy, and creation in the mobile game sector. We provide our clients with comprehensive support from game development through launch to the monetization period.

Noble Fox Games

www.noblefoxgames.com, contact@noblefoxgames.com



Platforms and business models:

PC

Best known for:

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

The next big thing:

An unrevealed strategy game for PC set during the Cold War – release in late 2022

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

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

OneMoreGame.STUDIO

www.onemoregame.studio,
contact@onemoregame.studio



Platforms and business models:

Mobile

Best known for:

Gemstone Legends and Animatch Friends

The next big thing:

We will be working on a new project, but now we cannot reveal any details.

Operating since: 2018

Our team comprises of people who love games and thanks to that the world of games has no secrets for them. If you play our game once, you will surely come back to it. We provide plenty of hours of fun for everyone.

OnionMilk

www.onionmilk.org, contact@onionmilk.org



ONIONMILK.ORG

Platforms and business models:

PC, Switch

Best known for:

'Pigeon Fight' – a party game where you play a pigeon fighting for bread

The next big thing:

'Dunrog' – a first-person dungeon crawler – release in Q3 2020

Operating since: 2016 **Team size:** 6

We are a small team, focused on humorous indie games full of unconventional solutions. For us, artistic expression is an adventure that can be fulfilled by game development. During every event we take part in, our team is hidden behind animal masks, wearing full white outfit, which makes us easy to spot in crowded halls full of game enthusiasts.

PIX

www.p1x.in, kj@p1x.in



Platforms and business models:

PC, Mobile

Best known for:

'Tanks of Freedom' – more than 33 000 downloads on itch.io, available on most Linux distributions and F-Droid

The next big thing:

'Tanks of Freedom 3D' – a sequel to our strategy game now in a 3D engine – to be released when it is completed.

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

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

Perimeter Games

www.perimetergames.eu, contact@perimetergames.eu



Platforms and business models:

PC, PS, Xbox, Switch, Premium

The next big thing:

'HeatWave' – a strategy game – release in 2022. An unannounced simulation game – release in 2022.

Operating since: 2020

As developers with over 14 years of experience, we love to create games and we do it the right way!

Phobia Game Studio

contact@phobia.games



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'CARRION' – a reverse horror game where you assume the role of an amorphous creature – sold 200 000 copies in the first week.

The next big thing:

'CARRION' – porting to PS4.

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

We are not normal. Do not even think about working with us unless you want to develop bipolar disorder.

Pineapple Works

www.pineapple.works, contact@pineapple.works



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, custom hardware platforms

Best known for:

Godot Engine – providing console ports to all platforms. 'Legends of Amberland' – a custom engine NS port.

The next big thing:

'Death and Taxes' – a narrative game with the grim reaper doing an office job (for Switch).

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

Pineapple Power! Video game polishing, porting, and publishing – it is what we do, and it is our promise to our partners. Desktop, Mobile, consoles? Unity, Unreal, Godot, custom engine? Tell us your tech – we will work it out! Extremely indie-friendly and challenge-loving team of passionate engineers. We aim to provide excellent, fair, and inclusive service to game developers and publishers worldwide.

Pixel Edge Games

www.PixelEdgeGames.com, sboczek@PixelEdgeGames.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR, Premium

Best known for:

'Racket Fury: Table Tennis VR' – launch title for Oculus Quest

The next big thing:

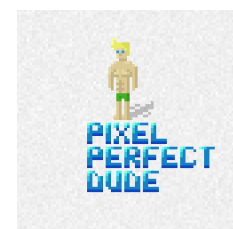
An unrevealed First-person Shooter (FPS) combined with the tower defence genre, with full VR Support (Rift, Quest, Vive, PSVR) – release in 2021

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

We are a game development studio specialising in Virtual Reality games. Our close cooperation with Oculus resulted in releasing one of our games as the Launch Title for Oculus Quest (2019). We have published our titles on all major VR platforms (Oculus Rift, Oculus Quest, HTC Vive, PS VR, Viveport). Since 2019, we have been working on desktop and console games, and projects with full VR support.

Pixel Perfect Dude

contact@pixelperfectdude.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR, F2P, Premium

Best known for:

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

The next big thing:

An unrevealed driving game – early 2022.

Operating since: 2011

We are a small independent team building simple mobile games but aiming big in the long run.

Played With Fire

www.playedwithfire.com, contact@playedwithfire.com



PLAYED WITH FIRE

Platforms and business models:

VR/AR, Premium

Best known for:

'Stagaze' – VR game experience mixing parascience and fairy tale, inspired by 'The Little Prince'.

The next big thing:

An unrevealed stylised fantasy action adventure game – release in 2022

Operating since: 2019

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

PlayWay S.A.

www.playway.com, contact@playway.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR, F2P, Premium

Best known for:

'Car Mechanic Simulator 2018' – over one million copies sold, 'House Flipper' – over one million copies sold.

The next big thing:

'Builders of Egypt', 'Bum Simulator', 'I Am Jesus Christ', 'Junkyard Simulator', 'Contraband Police'

Operating since: 2011

We are the second biggest producer and publisher of games in Poland and one of the top ones in Europe. Our company was created to build quality games for PC, Mobile and Consoles. We have produced and released over 100 games sold or downloaded worldwide.

Polished Games

www.realmsofmagic.net, contact@polishedgames.com



Platforms and business models:

PC

Best known for:

'Realms of Magic' – a 2D Sandbox RPG set in the Western fantasy universe – sold over 10 000 copies.

The next big thing:

A full version of 'Realms of Magic' by the end of 2020.

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

Passion and common interests brings people together. Our company connected a group of talented enthusiasts to create something truly great.

PolyAmorous

greg@polyamorousgames.com



Platforms and business models:

PC, PS, Xbox

Best known for:

'Paradise Lost' – release in Q3 2020.

The next big thing:

'Rush' – an exploration-driven adventure game about gold rush in the 19th century America.

Operating since: 2017

We are all about emotions. They drive our lives, they drive our conversations, and they drive our games. Games made with love. We care about details; we are open, tolerant, and accepting. Stories for games, not games for stories. We know how games work and we do our best to squeeze as much as possible from the medium.

Punk Notion

www.punknotion.com, contact@punknotion.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Weakless' – a beautiful, puzzle-adventure game with stunning organic environments, filled with curious life forms and a bioluminescent glow.

The next big thing:

'The Last Show of Mr. Chardish' – previously known as 'Ars Fabulae'. Decades have passed and an actress called Ella returns to the abandoned theatre to uncover a preserved collection of extraordinary performances.

Operating since: 2018-02-15

Our company was born from passion for games, animation, and engaging storytelling. We focus on developing narrative-driven games, in the meantime supporting others with animations.

Pyramid Games

contact@pyramid.games



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, VR/AR, F2P, Premium

Best known for:

'Occupy Mars: The Game' – added to the Steam Wishlist over 120 000 times

The next big thing:

An unannounced project

Operating since: 2012

All of us are gamers, and we love making new games! Our goal is to deliver the best possible quality in our games. We are also very passionate about science and science-fiction. Our games will take gamers to Mars and back, teach them how to become NASA engineers or show the exciting work of palaeontologists.

QubicGames S.A.



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

Your go-to Switch publisher. Four million unique users. 40 games. 'Dex', 'Blazing Beaks', 'Mana Spark'.

The next big thing:

Launching the Untold Tales & Forest Spirits publishing brands.

Operating since: 2014 **Team size:** 25

Reality Games Polska

www.reality.co

Platforms and business models:

Mobile, VR/AR

Best known for:

'Landlord GO' – over twenty million users.

The next big thing:

An AR Property Trading Game with the AAA license.

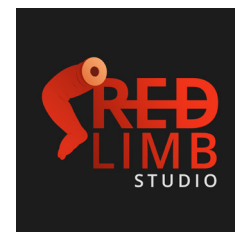
Operating since: 2016 **Team size:** 55

We create games based on real life stories and events.



Red Limb Studio

www.redlimbstudio.com, redlimbstudio@gmail.com



Platforms and business models:

PC, PS, Xbox, Switch, VR/AR

Best known for:

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

The next big thing:

'Beat me!' – couch party and online, physic-based action brawler, cross platform.

Operating since: 2016 **Team size:** 5

We are a group of guys who like to create things and one skater. The entertainment and fun that we create, and which players can get from our products are our main goal of existence in the game development industry.

Red Zero Games

www.redzerogames.com, contact@redzerogames.com



Platforms and business models:

PC, PS, Mobile, Switch, Premium

Best known for:

'Here Be Dragons'

The next big thing:

An unrevealed hard sci-fi strategy for the premium market – Q 2021.

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

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

Reikon Games

www.ruinergame.com, hello@reikongames.com



REIKON

Platforms and business models:

PC, PS, Xbox

Best known for:

'RUINER' – a top-down action shooter created in the spirit of cult cyberpunk anime – sold over a million copies.

The next big thing:

An unannounced SCI-FI FPS game.

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

Our goal is to learn and evolve, make awesome games, and have fun doing it.

Robot Gentleman

www.robotgentleman.com, hello@robotgentleman.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'60 Seconds!' – over two million copies sold, released on every major platform.

Operating since: 2012 **Team size:** 17

We are an independent game developer easily recognisable by our signature headgear. If you have ever seen a robot in a top hat, that is probably one of us! The studio is known for its warmly received '60 Seconds!' dark comedy atomic adventure and its spiritual successor – '60 Parsecs!'

Rock Square Thunder

www.facebook.com/rocksquarethunder,

janusz@rocksquarethunder.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

Quality of our work

The next big thing:

An action-adventure game in the spirit of 'Zelda' series, current gen & PC, coming out in Q1 2021.

Operating since: 2020 **Team size:** 4

Made up purely of industry veterans, with experience working on AA, AAA and indie titles on all major consoles in last 2 generations. In Unity, Unreal Engine 4, and in-house engines. We can help out other studios at any stage of development, and we have got several prototypes ready to pitch for the next year.

Runvido

www.runvido.com, office@runvido.com

www.ultronAR.com

Platforms and business models:

Mobile, VR/AR, F2P

Best known for:

UltronAR – a platform for creating field games based on AR game engine able to recognise 3D objects

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

We have been operating since 2017, when we released Runvido, our first mobile app allowing for recognising static objects and reviving them with many additional features. After the success of the project, our team applied to NCBR's GameInn, winning the preselection, obtaining a EUR 1.7 million grant, and immediately starting work on the UltronAR project platform with field games based on AR, AI, and ML.

scriptwelder studio

www.scriptwelder.com



Platforms and business models:

PC, Browser

Best known for:

'Don't Escape: 4 Days to Survive', 'Deep Sleep Trilogy', 'Waterworks!'

The next big thing:

A point and click game with a twist! – to be revealed in late 2020.

Operating since: 2012 **Team size:** 1

I want to reinvent the old ideas, add something new to each title, come up with a twist that will combine the known and the unknown, turn everything upside-down and make you ask: why didn't anyone think about that before!

Serious Sim

www.serioussim.net, pr@serioussim.net



Platforms and business models:

PC, Mobile, VR/AR, Premium

Best known for:

'Radio Commander' – an innovative strategy game with more than 80% positive reviews on Steam.

The next big thing:

An unrevealed cross-genre racing experience based on road movie themes – release in 2021/2022.

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

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

Sigur Studio

www.sigurstudio.com, info@sigurstudio.com

Platforms and business models:

PC, PS, Mobile, Switch, VR/AR

Best known for:

'Dawid Podsiadło GRA' – a mobile game developed for RED BULL Music.

'REPRESSD' – an adventure puzzle game for Steam and Switch.

The next big thing:

'COLD RED' – a dystopian detective game with a non-linear story. coldred.

sigurstudio.com

Operating since: 22.03.2018

We are an advergaming game developer. We specialise in games and mobile applications for marketing and educational purposes.



Silesia Games

www.silesiagames.com, info@silesiagames.com

Platforms and business models:

Switch

Best known for:

'Galaxy Champions TV', 'Ultra Foodmess', 'Fin and the Ancient Mystery'.

The next big thing:

'Hero-U' – a humorous RPG game by creators of the 'Quest for Glory' series.

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

We specialise in game development and porting games to Switch using the Unity Engine and GameMaker Studio 2.



Silver Lemur Games

www.SilverLemurGames.com, silverlemurgames@gmail.com



Platforms and business models:

PC, Switch, Premium

Best known for:

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

The next big thing:

'Stellar Monarch 2' & sequels to 'Legends of Amberland' series

Operating since: 2005 **Team size:** 1 + several long-term contractors

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

SimFabric S.A.

www.simfabric.com, contact@simfabric.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR, F2P, Premium

Best known for:

'Farm Expert' – over 2.5 million copies sold.

The next big thing:

'Farm&Fix 2020' and 'ElectriX' – release in late 2020.

Operating since: 2016 **Team size:** 60

Our company was created in 2016 after winning the main ESA (European Space Agency) award in the competition for the best space application.

We create simulators and games for PCs and mobile devices. Since 2018, we have been a certified producer and publisher for Switch, PS4, and Xbox One consoles. We are listed on Warsaw Stock Exchange with capitalisation of over USD 100 million.

Slavic Monsters

www.slavicmonsters.pl, kontakt@slavicmonsters.pl



Platforms and business models:

PC, Mobile, F2P

Best known for:

'Slavic Monsters' (Beta) – a mobile geolocation game with AR, containing a universe of over 100 monsters based mainly on the Slavic Mythology. The first geolocation AR game with the RPG quest generated using real-world data.

The next big thing:

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

Operating since: 2016 **Team size:** 5

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

Sos

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

Platforms and business models:

PC, Mobile, Browser, VR/AR, Premium, Retro hardware

Best known for:

'McPixel', 'Super Pig X', 'Mosh Pit Simulator', 'Thelemite'

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

Mad scientist of video games. Creator of Thelemite, McPixel and many other games you have never heard about. Enthusiast of retro hardware, still creating games for old computers (Flappy Bird 64, P). Organiser of Oh Game Jam, co-organiser of 7DFPS. Co-creator of Doom Piano. Formerly a schoolteacher. Currently on a quest to create the worst video game ever. Hopelessly addicted to game jams.



Space Boat Studios

www.spaceboatstudios.com, press@spaceboatstudios.com



Platforms and business models:

PC

Best known for:

'Out of Reach' – more than 150 000 copies sold on Steam.

The next big thing:

'Out of Reach: Treasure Royale' – a pirate battle royale – release in Q3 2020.

'Holy Cow' – a 2D parody – release in Q4 2020.

Operating since: 2014

We create games that we would like to play ourselves and we are eager to take up new challenges. At 'Out of Reach', we started with an open-world MMO. When creating 'Treasure Royale', we focus on the greatest dynamics of the game. 'Treasure Royale' will be the first pirate battle royale on Steam!

Star Drifters

www.stardrifters.com, business@stardrifters.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Driftland: The Magic Revival' – more than 250 000 gamers.

The next big thing:

'Danger Scavenger' – an unrevealed story-driven adventure game for Switch, next-gen, and PC.

Operating since: 2014 **Team size:** 8

We are experienced and passionate developers focused on one goal – to create engaging games that will remain in the players' memory for a long time.

Storm Trident S. A.

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



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Ultimate Fishing Simulator' for Switch (coming soon)

The next big thing:

An unrevealed game ported from PC to Xbox One and PS4 – 2020.

Operating since: 2020

We are growing fast as a new game development point from the Pomerania region. Our main aim is to port games from PC to consoles such as Xbox One, PS4, Switch, and next-gen.

Superbright

www.superbright.org, info@superbright.org



Platforms and business models:

VR/AR

Best known for:

'In Death: Unchained' – one of the highest rated games on Oculus Quest and one of its top sellers

Operating since: 2016 Team size: 10

We are a collective of former AAA gaming and Silicon Valley developers who are obsessed with the future of technology.

SUPERHOT

thebusiness@superhotgame.com

Platforms and business models:

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

Best known for:

The entire 'SUPERHOT' franchise, with 'SUPERHOT' VR as one of the VR system sellers since 2016, and all titles in the franchise selling over five million copies in total.

Operating since: 2015

Team size: 40

Building SUPERHOT and helping indies in SUPERHOT PRESENTS.

SUPERHOT

Swimming Scorpions

www.swimmingscorpions.com,

contact@swimmingscorpions.com

Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Startide' – a nimble mecha against gargantuan bosses in the vast sea of bullets.

The next big thing:

'Petrol Blood' – a stealth/chase driving game set in the Cold War era – release in 2021.

Operating since: 2015

Team size: 10

Our goal is to deliver games that are intensive, garish, and loud. Games that should be played at maximum volume.



SWIMMING
SCORPIONS

Sylen Studio S.A.

contact@sylenstudio.pl



Platforms and business models:

PC, PS, Xbox

Best known for:

The Facebook page of the game is followed by 214 000 fans six months before its release.

The next big thing:

'Dream of Gods'

Operating since: 2020

We are an independent game development studio.

Tate Multimedia

www.tatemultimedia.com, contact@tatemultimedia.com



Platforms and business models:

PC, PS, Xbox, Switch, Premium

Best known for:

'Kao the Kangaroo' series – over two million copies sold; 'Urban Trial' series – over 1.5 million copies sold

The next big thing:

'Kao the Kangaroo' – the legendary character is back in the most adventurous 3D platformer ever!

Operating since: 2000

Team size: 40

We are an independent developer and game publisher. Our studio develops exclusive titles based on their own IPs and publishes them on all major consoles and PC. We are the creators of the legendary 'Kao the Kangaroo' series, the well-known 'Urban Trial' series and 'Steel Rats'.

T-Bull S.A.

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



Platforms and business models:

PC, Mobile, Switch, F2P

Best known for:

'Top Speed' and 'Moto Rider GO' – one hundred fifty million total downloads.

The next big thing:

Two simulators on PC, including space survival, and a mobile MMOS game.

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

We are the one of the largest Polish mobile game developers, which has been operating on the market for over 10 years. Our applications have been downloaded almost half a billion times in total. The company's greatest achievements include 'Moto Rider GO' with over 100 million, and 'Top Speed' with over fifty million downloads. The studio is currently expanding its portfolio with simulators, Switch games, and new mobile productions.

Ten Square Games S.A.

www.tensquaregames.com,
bartlomiej.piekarski@tensquaregames.com



ten square games

Platforms and business models:

Mobile, Browser, F2P

Best known for:

'Fishing Clash' – a free simulation game for fishing enthusiasts, a top 50 grossing title on Google Play.

The next big thing:

'SoliTales' – a classic solitaire with gardening for amateur gardeners

Operating since: 2011

We produce and publish free-to-play hobby simulation games for all (e.g. fishing, hunting, gardening), with revenues derived from micropayments and ads. Our games are available on iOS and Android, as well as on all major social networks. Our flagship games – 'Let's Fish' and 'Fishing Clash' – have over three million active players. Since 2018 we have been listed on the Warsaw Stock Exchange.

Thing Trunk

info@thingtrunk.com

Platforms and business models:

PC, Premium

Best known for:

'Book of Demons' – sold half a million copies on PC.

The next big thing:

'Hellcard' – a roguelike deck-builder and next game in the 'Book of Aliens' series.

Operating since: 2014

Team size: 10

We are a small but agile game development studio and a creative team behind 'Return 2 Games' – a series of original mid-core games inspired by the golden days of PC gaming. Founded by three industry veterans, we are now growing and working on two projects simultaneously, closely cooperating with its lively community nie wiem do czego odnosi się its



Transhuman Design

www.thd.vg



**TRANSHUMAN
DESIGN**

Platforms and business models:

PC

Best known for:

'Soldat' and 'King Arthur's Gold'

The next big thing:

'Soldat 2'

Operating since: 2002

Team size: 4

Our team is led by Michal 'MM' Marcinkowski, the creator of the legendary 'Soldat'. This indie classic dominated the 2D multiplayer world that took the Internet and LAN parties by storm in the early 2000. Since then, MM has surrounded himself with a handful of like-minded people to make the most entertaining multiplayer games of all time!

Trigger Labs

dev@triggerlabs.pl



Platforms and business models:

PC

The next big thing:

'Flight Catastrophe' – save the lives of the crew and the passengers during unforeseen, life-threatening situations – release in Q3 2 2021

Operating since: 2020 **Team size:** 11

We are a team of passionate professionals with both experiences in game development and knowledge about the industry. We value teamwork, creativity, and continuous skill improvement. But, above all, we value the fun that people draw from our games. That, along with our determination and familiarity with the publishing process, proves that we are ready to deliver the best experience possible!

TwoMammoths

www.twomammoths.com, info@twomammoths.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Archaica: The Path of Light' – based on our own engine and sweat. We self-published it. We learned a lot. And we are very proud of it.

The next big thing:

A unique mix of Tetris and strategy game with elements of deck-building.

Operating since: 2017 **Team size:** 2

An indie studio from Poland fun by two brothers.

Ultimate Games S.A.

rafal@ultimate-games.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, VR/AR

Best known for:

'Ultimate Fishing Simulator', 'Ultimate Fishing Simulator VR' – more than 120 000 copies sold.

The next big thing:

'Ultimate Fishing Simulator 2' – a next generation fishing simulator – early access in 2021.

Operating since: 2015

From the very beginning of our activity we have been producing PC games devoted to fishing, hunting and hobbies.

VARSAV Game Studios

www.varsav.com, varsav@varsav.com



Platforms and business models:

PC, PS, Xbox, Switch

Best known for:

'Bee Simulator' – released on PC, Xbox One, PS4, Switch. Won 4 awards till now.

The next big thing:

'Giants Uprising' – a fantasy hack'n'slash full of giants and unlimited destruction.

Operating since: 2017

Team size: 40

We are a game development studio specialised in games showing the player a unique perspective of the main character, previously unknown in other games. We develop and publish video games for PC and consoles.

Viabo

www.viabogames.com, office@viabogames.com



Platforms and business models:

PC, Mobile

The next big thing:

A puzzle-skill game in space – release in Q2 2021, and a tech strategy-sim game – release in Q1 2022.

Operating since: 2019

We have been operating in the computer game industry since 2019. We cooperate with Manufractal Studio, with 5 years of experience in this sector, and we have assembled a team of specialists working together on the release of 2 abovementioned games. We are based in Bydgoszcz.

Vile Monarch

www.vilemonarch.com, scribe@vilemonarch.com



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

'Oh...Sir!' series and 'Weedcraft Inc.' – a tycoon simulator.

The next big thing:

An unrevealed survival city-builder game for next-gen & PC – 2022.

Operating since: 2015 Team size: 40

We are a hard rock game studio. We specialise in unique games that tell engaging stories through game mechanics.

Vivid Games S.A.

www.vividgames.com, info@vividgames.com



Platforms and business models:

Mobile, F2P

Best known for:

'Real Boxing' – more than eighty million downloads.

The next big thing:

'Knight Fight 2' – medieval fighting game.

Operating since: 2006

We are a leading mobile game development studio in Poland. With our global reach & world's best mobile boxing franchise under our belt ('Real Boxing'), we are here to produce top-notch mobile entertainment.

Vixa Games

www.vixagames.com, contact@vixagames.com



Platforms and business models:

PC, Switch, Premium

Best known for:

The 'Jumping Joe!' franchise – over 300 000 copies sold on Switch.

The next big thing:

'The Crackpet Show' – a postapocalyptic brutal roguelike cartoon show featuring mutated animals.

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

We are a team of extravagant developers who happened to cross their paths on a quest to make the best game in the world.

Proudly sticking to our objective to release premium quality titles, explore genres, and break down stuff.

Vogelfänger

www.facebook.com/vogelfanger88,
vogelfangergames@gmail.com



Platforms and business models:

PC, Premium

The next big thing:

An untitled action-puzzle-platformer – release in 2021 (PC demo)

Operating since: 2015 **Team size:** 2

We would like to say how glad we are that after five years of fails, sleepless nights and painful breakups, we are able to use our experience to make our dream-project come true in a way that makes us happy. That it has sensible scope, realistic expectations and, most importantly, that people seem to like it! Have a great day, dear whoever is reading this, and remember to stay hydrated!

VR TierOne

www.vrtierone.com



Platforms and business models:

VR/AR

Best known for:

'VR TierOne' – the very first VR game supporting depression treatment and rehabilitation.

The next big thing:

Introducing in-home therapy.

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

'VR TierOne' is an innovative medical device that uses Virtual Reality to effectively support the process of treating depression and rehabilitation of people after strokes, oncological treatment, cardiological problems and more. 'VR TierOne' helps patients make effective use of the time spent in the rehabilitation ward and maximise the benefits of physiotherapy.

Vulpesoft

www.vulpesoft.pl



Platforms and business models:

PC, Switch

Best known for:

Building a team of a dozen or so for a non-profit project and transforming it into a commercial game.

The next big thing:

'Dr Livingstone, I Presume?' – feel the African heat in this riddle-filled 3D adventure.

Operating since: 2016

We are a start-up company building its way in the game industry with its first title for PCs. Strongly believing that 'nothing great comes easy', we work hard on delivering you the best video game experience you can possibly dream of.

Walkabout Games

www.walkabout.games, hello@walkaboout.games



Platforms and business models:

PC, PS, Xbox, Mobile, Switch, Premium

Best known for:

Wanderlust: 'Travel Stories' – one of the best travel games, 'Liberated' – the first playable graphic novel

The next big thing:

'Werewolf: the Apocalypse – Heart of the Forest' – a new and fresh take on the cult RPG game

Operating since: 2017 **Team size:** 5 in publishing, 5 in Different Tales Team, 30 in PolyAmorous team

We are an independent game studios collective from Central and Eastern Europe. We provide support and guidance while ensuring your creative freedom. Our goal is to help produce and publish fantastic gaming experience. We focus on ambitious, mostly story-driven projects.

Wastelands Interactive

www.wastelands-interactive.com,
contact@wastelands-interactive.com



Platforms and business models:

PC, PS, Xbox, Mobile, Browser, Switch, Outsourcing

Best known for:

Amazing, professional Art Team that keeps getting bigger and better.

The next big thing:

'War Room' – a realistic strategy, taking you straight into the heat of the war in Afghanistan.

Operating since: 2009 **Team size:** 25

We are a dedicated team of artists, storytellers, programmers, designers, and true gamers working together for several years. We are currently focusing on building a strong Art Team.

Wayward Preacher

www.waywardpreacher.com,
waywardpreachergames@gmail.com



Platforms and business models:

PC, PS, Xbox, Premium

Best known for:

'God's Trigger' – with One More Level development team, 'Dread X Collection' – a global indie horror project.

The next big thing:

'Dread X Collection 2' – release in Q3 2020, an undisclosed music-based narrative game – release in late 2021.

Operating since: 2015

A one-man army with a bunch of talented friends helping with his flaws. Focused on solving other people's problems, aiding them mostly in the programming and optimisation area, no matter the engine or platform. Aside from the work-for-hire mode, developing his own project as well.

Wenkly Studio

www.wenklystudio.com, business@wenklystudio.com



Platforms and business models:

Mobile, Switch, VR/AR, F2P

Best known for:

'Elven Assassin' VR game – played over 1 000 000 minutes each month by players worldwide

The next big thing:

'Horror Forest 3' - open-world MMORPG zombie shooter (for Android)

Operating since: 2015 **Team size:** 35+

As an experienced game producer and publisher, we specialise in the development of highly interactive, engaging, fully customised, and multi-sensory virtual environments. Our aspiration is to create immersive experiences that entertain people from all around the world. To achieve that, we cooperate closely with VR parks and businesses from more than 120 countries.

Woodland Games

www.woodland.games, contact@woodland.games



Platforms and business models:

PC

The next big thing:

Taxi Simulator – 2021, Hell Architect – 2020, Autopsy Simulator – 2021, Urban Explorer – 2021.

Operating since: 2016 **Team size:** 15

We know one thing for sure – we want to give you the best games we can possibly make, and games that we ourselves would like to play. We believe that true passion and putting heart into our work can, and will, result in great products. All of us are gamers, and we love making new games! Our goal is to deliver the best possible quality in our games. We are also very passionate about science and science-fiction. Our games will take gamers to Mars and back, teach them how to become NASA engineers or show the exciting work of palaeontologists.

Infographic Game industry

Source: Newzoo

//Data from the infographic are presented in the table.//

development studios	440
new releases annually	480
people working in the sector	9710
industry revenue	EURO 479 million

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Infographic Consumer market

Source: Newzoo

//Data from the infographic are presented in the table.//

number of gamers in Poland	16 million
consumer market worth	USD596 million
e-sport market worth	USD11.5 million

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Chart 1. Revenues of game developers in Poland

Source: Game Industry Conference

	2016	2017	2018	2019
Others	173	220	282	362
CDPR	131	104	82	117
YOY growth except for CDPR		0.27	0.28	0.28
YOY growth including CDPR		0.07	0.12	0.32
Revenue (million EURO)	304	324	364	479

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Infographic Global gaming market value

Source: Newzoo

//Data from the infographic are presented in the table.//

2020	USD159.3 billion
consumer market worth	USD200 billion

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Infographic Number of gamers

Source: Newzoo

//Data from the infographic are presented in the table.//

mobile	2.6 billion
console	1.3 billion
PC	729 million

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Infographic Female gamers

Source: Mediakix

//Data from the infographic are presented in the table.//

47%	of Polish gamers are female
63%	of mobile gamers worldwide are women
60%	of them play games every day

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Chart 2. Releases of Polish games

//Data from the infographic are presented in the table.//

2018				2019			
PC	100	VR total	35	PC	99	VR total	33
Switch	69	VR/HTC Vive	11	Switch	133	VR/HTC Vive	10
Xbox One	24	VR/Oculus	13	Xbox One	25	VR/Oculus	11
PlayStation 4	24	VR/PSVR	5	PlayStation	23	VR/PSVR	6
		VR/other	6			VR/Valve Index	2
						VR/other	4

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Chart 3. Highest priced companies at the Warsaw Stock Exchange - as of July 1, 2020

//Data from the chart are presented in the table.//

CD PROJEKT S.A.	EURO 8661 million
Ten Square Games	EURO 887 million
PlayWay	EURO 736 million
11 bit Studios	EURO 268 million
Creepy Jar	EURO 175 million
All in! Games	EURO 142 million

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Infographic Employment in the industry

//Data from the infographic are presented in the table.//

39%	of studios count 5 or fewer people
40%	of companies employ 6 to 16 people
10%	of studios have a team of 40 or more people
10	companies hire more than 200 people

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Infographic Universities in Poland

//Data from the infographic are presented in the table.//

60	degree courses are offered countrywide
26	programming
17	arts
9	design

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**Republic
of Poland**



European Union
European Regional
Development Fund

