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Creative
Industries
Institute



Shaping Polish Design

The current state of the sector in Poland

MAY 2025

Report partners

Creative Industries Institute

The Creative Industries Institute is a state cultural institution established in 2022. Its mission is to support and promote the Polish creative industries, such as design, fashion, video games, music and arts and crafts. Creative Industries Institute implements a grant programme for the creative industries, as well as educational and talent development activities. It is currently developing a strategy of support for the creative industries, of which this report is a part.



Organised regularly since 2007, the **Łódź Design Festival** is one of the most important design events in Central Europe. It is aimed at designers, entrepreneurs, theoreticians and design enthusiasts. Distinguished by its interdisciplinary approach, it combines industrial design, graphic design, architecture and innovative technologies with social reflection. In 2024, Łódź Design Festival attracted over 15,000 visitors.



DAT:AWESOME is a data-driven communication brand owned by Linkleaders, one of Poland's largest 360 communication agencies. It specialises in communication strategies related to research and industry insights, and its projects reach over 100 million recipients in the Polish media every year. The company has been repeatedly awarded the Golden Paperclip award for its projects aimed at the real estate, IT and design industries, as well as those in the area of modern communication for the digital economy.

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PLN 4.3–6.5 billion

— value of the sector



7.7 years

— average work experience
of industry employees
surveyed



68%

of employees feel
that the sector shapes
consumer attitudes



69%

of employees have
a positive view of the quality
of the sector's solutions
and products



22%

of employees have
a positive view of support
for the sector from public
institutions



54%

of employees perceive a significant slowdown in the industry



67%

of design sector employees believe there is no strategy for its development in Poland



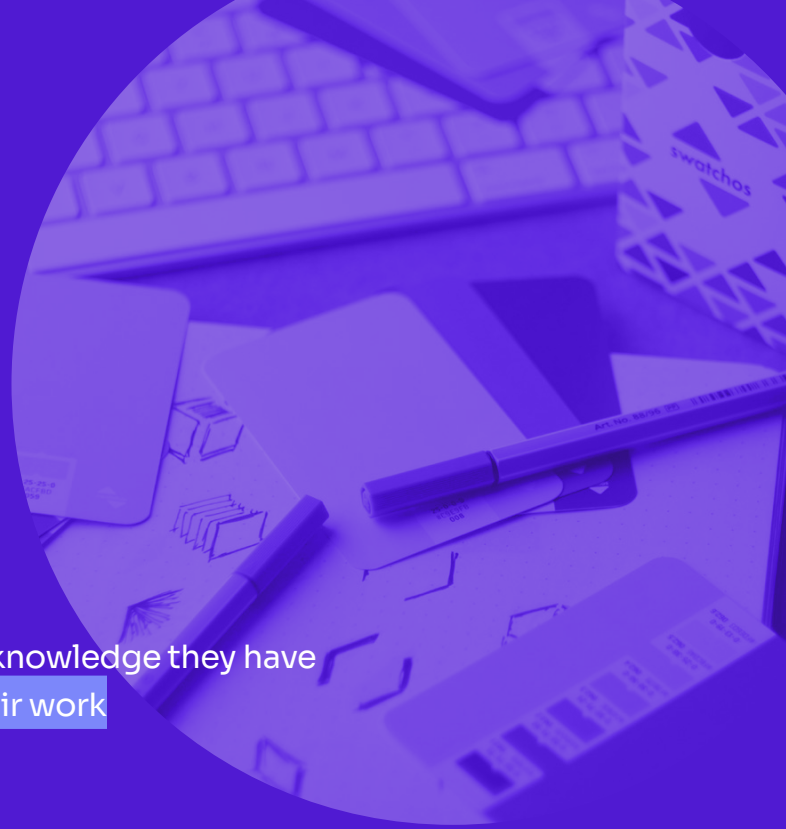
56%

of them point to insufficient cooperation between the industry and the sector



42%

of them consider a flood of foreign products as a key threat



45%



of industry employees use the knowledge they have gained from their studies in their work



AI training

ranks first among the desired training courses



5/10

companies opt for the personalisation of products and services



4/10

companies use green solutions and AI



60%

of employees consider sustainable design as an important direction for the industr



Aleksandra Szymańska

Director, Creative Industries Institute

The omnipresence of design — in the products we use every day, in services, and in the spaces that surround us — does not mean that discussion of the role that design plays in economic, social and cultural processes is equally widespread. This is all the more relevant in a world where technologies influence the design sector with unprecedented dynamism.

The report, “Shaping Polish Design”, was created to examine the design community — their work, needs and expectations — as well as the barriers that limit development. It is also a resource for institutions such as the Creative Industries Institute and public policymakers, and provides a basis for building development strategies. The report will also support programmes that will become part of a system of professionalisation as well as promotion, and act as a response to the needs of the sector.

We perceive immense potential in Polish design as a fully fledged participant in the global market, whether in product design, design services or in the circulation of art. The design sector is not only a rapidly growing branch of the economy, but also a narrative of culture and identity, craft traditions and trends. The creative industries have a significant impact on shaping a country’s image, as they themselves become brands. In the case of design, one can point to examples such as Denmark, Sweden, Italy and Japan. The essential condition is a solid support system, treating design as part of Polish culture, while at the same time strengthening mechanisms for entrepreneurship, promotion and export.

The publication of this report is also an opportunity to express gratitude to the team of the Creative Industries Institute for their work as well as dedication, and in particular to Iga Harasimowicz and Monika Głowacka, dat:awesome by Linkleaders — for their great professionalism, to Michał Piernikowski for his heart, knowledge and involvement at every stage of its development, and to Joanna Jurga for supporting us at the foundational stage of this report. We present it with the hope that it will be read and applied, and that it will assist us in formulating recommendations and then putting them into practice. For a report is not only knowledge, but also a commitment.



Time for verification and new paths.

Report introduction

Time for verification and new paths.

Report introduction

Poland lacks a social figure of the designer — this was one of the first sentences the researchers heard from design professionals. This sentence contains surprisingly many layers of meaning: from a lack of awareness of the role that design plays in the creation of products and services, through ignorance of the industry's latent potential and emerging trends, to the relatively low maturity of cooperation between large businesses and designers, craftspeople and innovators. The report by the Creative Industries Institute aims to give them a voice and present the environment in which they operate on a daily basis.

AMONG MISCONCEPTIONS

The economy needs design. Both in the textbook sense, where a sketch becomes a product, and in the broader sense, where design helps companies to look more widely, plan more wisely and communicate more clearly. Design is not merely an aesthetic addition — it is the language of the contemporary world, a tool of strategy, value and competitiveness.

The Polish design is in a difficult position because despite undeniable access to talent and numerous successes on the international stage, it still harbours immense potential that is difficult to unleash. The reasons lie in the challenges of global markets and, as the survey shows, the lack of systemic action and the difficulty of uniting a fragmented sector under a single Polish banner. At stake are international contracts and commissions, as well as prestige — opportunities that are within reach of the domestic sector, yet remain so distant.

Polish design requires reshaping.

Although recent years have seen many positive developments in design — companies that have gained markets thanks to it, Polish products winning awards in international competitions, brands leveraging aesthetics and functionality — too many of these stories remain exceptions rather than rules. Design is all too often mistaken for “embellishment”, and the role of designers is reduced to choosing colours, typefaces or creating decorative details for interiors commissioned by the more affluent clients.

IN SEARCH OF A TRUE PICTURE OF THE SECTOR

The report “Shaping Polish Design” was written to change this. To show what the design sector really is: what its contribution to the Polish economy looks like, how many people it employs, where exports are growing, how designers are educated and what challenges they face. But also — what it still lacks. And what it lacks are essential elements: data, understanding, as well as connections between design and industry, and between education and the labour market.

This is the first such comprehensive survey on design in Poland in several years. It was created out of the need to redefine the significance of design, both as a creative sector and as a real participant in economic and social life. Based on public data and the findings of a dedicated survey conducted among industry professionals, we present a picture of the sector in numbers and in stories — both systemic and personal.



DESIGN IN THE ECONOMY

The report begins with an economic analysis of the role of the design sector in Poland — we indicate how many businesses operate in this sector, how many people they employ, what added value they generate, and how the employment structure in design differs from that in other sectors.

We show that design has a notable impact on the economy — more than 16,000 companies operate in this field, and employment is characterised by a higher proportion of women and self-employed individuals. At the same time, the design sector, despite its creative strength, remains fragmented and often underfunded.

In a separate section, we analyse the export of design services — its value is growing, but it is still lower than in Western European countries. Polish design companies rarely specialise in the export of services as their main business model. This indicates that while the quality of their projects is recognised, there is a lack of support mechanisms that would help turn potential into a tangible share of the global market.

INDUSTRY EDUCATION — BETWEEN ART AND CRAFT

The next section has a closer look at higher education, examining how future designers are trained, which courses and universities are most popular, and what the situation of graduates looks like once they leave university.

Although the number of design students is growing and the standard of artistic education in Poland is high, experts are divided on whether study programmes are sufficiently adapted to contemporary market realities. Many respondents take a critical view of universities — pointing to insufficient transfer of practical knowledge, lack of preparation for cooperation with companies in the sector, and too little focus on business-related topics. Others, however, emphasise the strong creativity of recent graduates, their sound vision and eagerness to develop.

As noted by **Katarzyna Bryze of VOX Group**, “Only practice creates space for developing specific skills — not just those related to aesthetics, but also to technology and production”.

The report also contains data on the labour market and employment — we show the forms of work adopted by professionals in this sector, how they assess their working conditions, what motivates them and what discourages them. The sector is dominated by self-employment and freelancing, with all their advantages and drawbacks.

INSTITUTIONS, SUPPORT, ENVIRONMENT

In a separate section, we examine public and institutional support for the design sector, asking whether designers have access to grants, infrastructure and networks. We also check whether education, law, industry institutions and the state together create an environment conducive to the development of design.



There is little room for optimism in this respect — only 22% of respondents view the support of public institutions positively. Many people do not know where to look for funding, and existing programmes are often ill-suited to the specific needs of the creative sector. One positive signal comes from local initiatives — city scholarships and open tenders with quality criteria — but this is still far too little to speak of comprehensive, systemic support. And yet, such support can serve as “an impulse to take building your business seriously and to take some risks”, as noted by Wiktoria Podolec of Tartaruga Studio when describing the assistance her company received after winning a competition.

VOICES FROM THE SECTOR

An important complement to the report is the voices of designers who build the value of design in Poland every day. Their statements are not only commentaries on the data — they are also a record of what the industry sees up close, what it lacks, what it expects, and what it can offer in return.

Recurring themes include not only the need to reform education and improve the conditions of cooperation with clients, but also an increasingly strong awareness of the social responsibility of design. Designers point to the importance of considering user well-being, audience diversity and sustainable development.

Criticism also emerges in relation to companies’ superficial approaches to sustainable design, with accusations of greenwashing and marketing activities that have no real impact on the environment.

Increasingly, the subject of artificial intelligence also appears, though AI is not viewed as a threat but as a new tool in the hands of a conscious designer. The prevailing view among the respondents is that AI will not replace creativity and contextual thinking, but it can support work, streamline prototyping and generate variations. At the same time, questions arise about intellectual property, ethical boundaries and the transparency of the tools used.

DESIGN IS A BRIDGE — NOT JUST A PLEASANT DETAIL

This report intends to build bridges — between statistics and practice, between design and industry, as well as between expectations and reality. We show that design does not begin and end with the visual layer. It is a field that connects different competencies and languages: of art and engineering, business and education, trends and social needs.

Design can — and should — serve as a link between what is complex and what is understandable. Between a company's values and its product. Between technology and people. Between what exists today and what is possible tomorrow.

This report is an invitation to look closely at the design sector in Poland — not only to understand it better, but also to appreciate its potential as a real agent of change. We invite you to read, and to continue the discussion on the role that design can — and should — play in a country's development.





Design, or what exactly?

Terminology and social image

Design, or what exactly?

Terminology and social image

Industrial design, over the years, has been the dominant term when describing the industry to which this report is devoted. However, as the survey results indicate, the sector's **dynamic development has also influenced the terminology preferred by its professionals.** Today, naming extends beyond mere academic discourse. It directly shapes the perception of the sector, its position in the economy, and awareness of the expanding scope of activities, which can be classified as design, as technology advances.

TERMINOLOGY: THE ROOTS OF THE TERM

The word “design” has its roots in Latin, derived from the verb “designare”, which means “to denote, designate, draw, plan”. It is derived from a combination of the prefix “de-” meaning “from” or “out of” and “signare”, meaning “to mark”. From the same root came the Latin noun “designatio”, referring to a designation, plan or project. In later centuries, the term passed into Old French as “dessein”, meaning “plan” or “intention”. In Middle English, around the 14th–15th centuries, the form “design” began to be used in the context of concepts and planning. By the 17th century, the term was applied to art, architecture and craft, emphasising both the aesthetic and functional aspects of objects. In the 19th and 20th centuries, its meaning expanded to areas such as graphics, engineering, fashion and applied design. Today, “design” refers both to the process of designing and to its final result, combining visual aspects with functionality.

The history of design in Poland dates back to the early 20th century, when the importance of design in industry began to be recognised. The key period of its development came after World War II, with the growth of state design institutions, and later during the political transition, when new market opportunities and international competition began to emerge.

TERMINOLOGY: THE CONTEMPORARY CHALLENGES

In today's world, design plays not only an aesthetic role but above all a functional and social factor. It is a key element of innovation, influencing economic competitiveness and shaping user experiences in almost every field of life — from architecture and industry to digital technologies. In the European context, the terminology adopted by institutions such as Eurostat is significant, as it defines design as part of the creative and innovative sectors, emphasising its role in a knowledge-based economy. In Poland, this concept continues to evolve although the lack of clear definitions does often lead to inconsistencies in the statistical and legal classification of design.

The legal framework of design includes both regulations concerning intellectual property protection and those relating to technical standards and product safety. In the European Union, design is protected under industrial property law and regulations on industrial designs, which is also reflected in the Polish legal system. Nevertheless, there are notable gaps in legislative terminology, particularly with regard to clearly defining copyright for design projects and the classification of activities in tax and economic systems.

The absence of precise regulations concerning the protection of unique projects — especially in the context of digital design and UX — means that designers often have to rely on general legal norms that do not account for the specific nature of their work. This creates a need for further harmonisation of regulations and adaptation of terminology to the changes in the design sector.

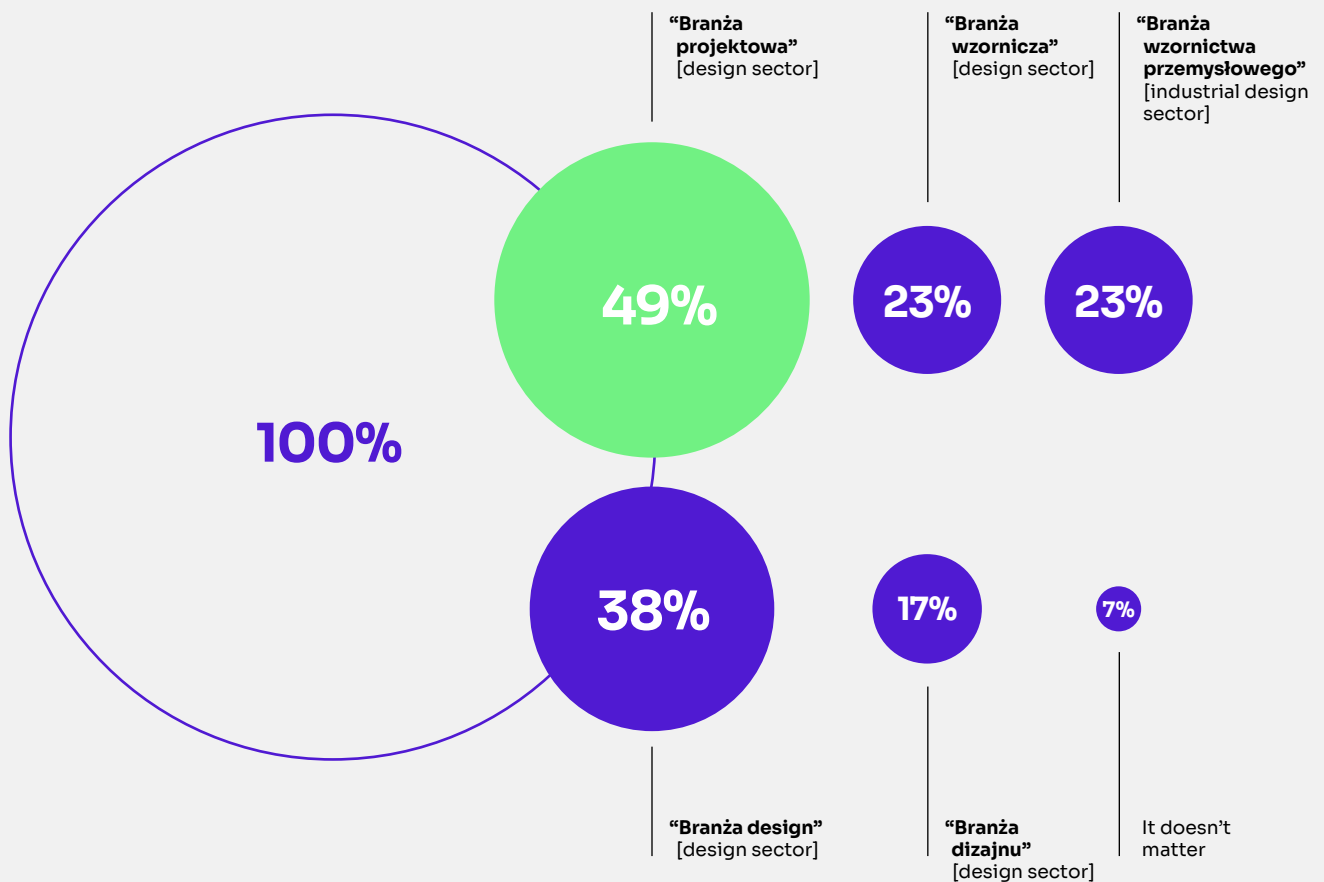
TERMINOLOGY: THE PREFERENCES OF INDUSTRY PROFESSIONALS

In light of these issues, it is understandable that terminology is not a neutral matter for the industry's professionals — only seven percent declared that they did not care about the term used to describe their field. When asked what terminology they preferred, employees surveyed by the Creative Industries Institute most often pointed to **“branża projektowa”** [design sector] (49%) — this was by far the most popular choice.

This preference reflects the selection of a term with the broadest application and scope — perhaps less precise than those previously in use, but also more inclusive in relation to the increasingly fluid boundaries of the sector. It also appears better suited to the more industrial character of the work of many designers who are responsible for purely functional aspects, and less often associated with aesthetics and the lifestyle sphere.



What would industry professionals like to call it?



The English-derived term **“branża design”** (38%) proved to be so widely accepted in the sector that it took second place on the list of preferences. Its strongest advantage is the broad recognisability of the term among people outside the sector, which makes it easier to identify a company with the nature of its activity. At the same time, this very aspect can be a drawback — because of the widespread use of the word “design” in the context of aesthetics and lifestyle, design activity may often not be associated by outsiders with processes such as visual identity, UX design or the design of public spaces. Notably, respondents were far less inclined to use the term – **“branża dizajn”** (18%), which includes a Polish phonetic spelling of the English word.

It is particularly noteworthy that the two terms that have long been used to describe the sector were further down the list — both **“branża wzornicza”** and **“branża wzornictwa przemysłowego”** were indicated by less than one in four respondents (23% each). These responses may suggest that, for many professionals, such terms are seen as less relevant to the contemporary, and ever-evolving profile of the sector.

It is worth noting that the share of respondents preferring the term “branża wzornicza” is higher among older professionals, meaning that it is most frequently utilised by those who are more experienced and have been active in the sector for a longer period of time. In contrast, “branża design” is preferred by younger people and, notably, more often by women (43%) than men (29%).

Although some terms were selected more often than others, the purpose of the report is not to choose one of them, but rather to highlight the need to systemise the terminology, taking into account the voices in the industry. Accordingly, the terms cited above will be used interchangeably throughout the report.

DEFINITION



The design sector encompasses a broad spectrum of activities related to the design of products, services and systems in terms of such things as aesthetics, functionality and innovation. Examples include industrial design, graphic design, architecture and interior design, arts and crafts, UX/UI design, household appliance/consumer electronics design, service design — designing and planning services in terms of potential client needs and mapping them.

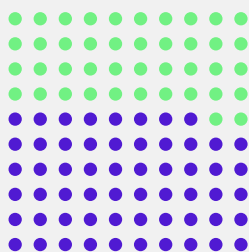
THE SOCIAL ROLE OF THE SECTOR THROUGH THE EYES OF ITS PROFESSIONALS

The design sector in Poland plays an increasingly important role in shaping consumer preferences and improving the quality of life in society, yet it still struggles with a lack of broad awareness of its significance. The survey shows that as many as 69% of respondents perceive design as having a significant impact on consumer choices, while 65% believe that working in this sector gives them a sense of purpose and a tangible influence on their surroundings. These results point to the growing self-awareness of designers, who perceive their activity not merely as an aesthetic service but also as a factor influencing market decisions, as well as the functionality and ergonomics of everyday solutions.



“ It is surprising how many consumers do not realise that someone has designed virtually every item around them.

ANONYMOUS SURVEY PARTICIPANT



58%

employees of the design sector believe that it plays an important role in improving the quality of life of Poles.

Despite these positive assessments, designers identify existing barriers in the social perception of design. One of the key problems is the lack of widespread education in this area. As noted by one survey participant:

There is still no figure of the designer in Poland's social, collective awareness. The concept of design is absent in education, and its real impact on reality is not being demonstrated — starting from the most basic level of schooling.

The lack of knowledge in this regard results in such things as the underappreciation of Polish design by consumers, who often base their choices on price, opting for foreign products or cheaper, mass-produced substitutes. Many of the specialists surveyed pointed to the problem of competition from cheap, copycat designs: *Poles as a nation do not appreciate design, beauty and style. They are uneducated in this aspect, so unfortunately they prefer to buy a shoddy product, as long as it is cheap.*



69%

The industry plays an important role in shaping consumer preferences.



68%

The needs of the industry are poorly understood by those outside it.

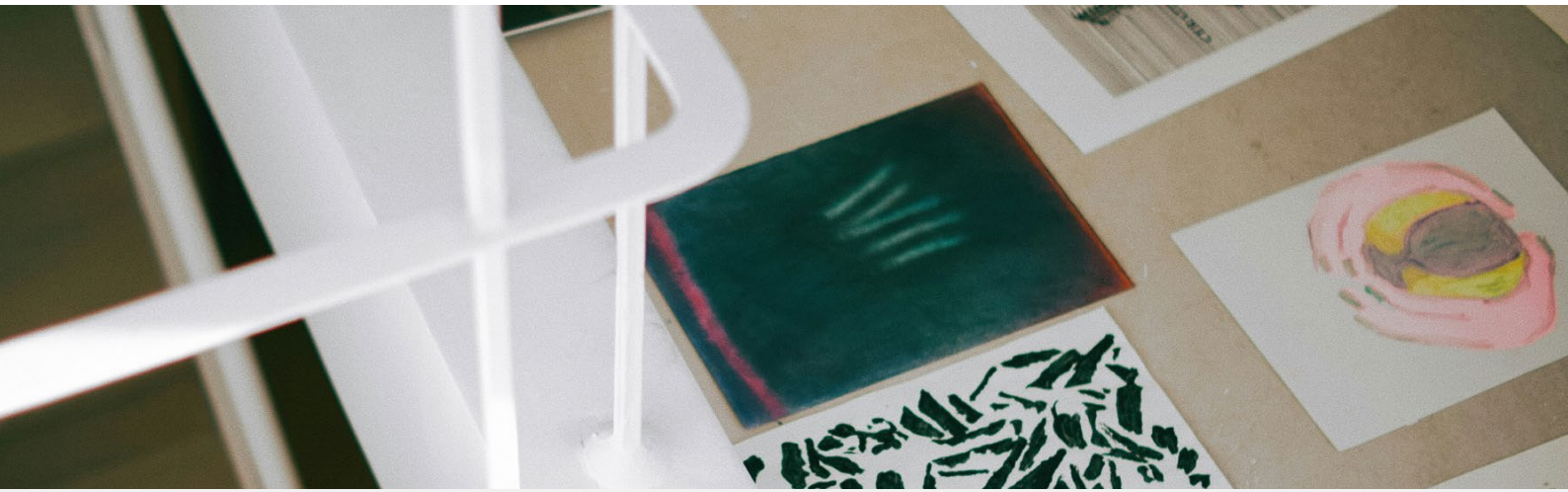


65%

Working in the industry provides a sense of meaning and impact.

At the same time, the design sector in Poland finds it challenging to promote its own achievements. Respondents stressed that in mainstream media, design is discussed in a way that is insufficient and inadequate to its actual role in the economy and society. A clear communication gap can be seen here between the design community and its audiences, which means that the significance of design is not sufficiently recognised.

Another major challenge remains changing the mindset of producers, who do not always recognise the strategic value of design in building competitiveness on the market. Designers emphasise that many companies still view design solely as an aesthetic element, ignoring its role in creating product functionality and innovation.



Industry representatives on social awareness of design



The challenge lies in the low awareness among consumers and their failure to appreciate the work of teams of specialists — global brands offer competitive prices, but their products are simple, copycat and identical everywhere — they are soulless.



Human work time is costly, as opposed to AI, not to mention quality materials, which are also expensive. People do not realise how much time must be devoted to designing and then producing an item. They want a quality product, but at Chinese prices, which is impossible.



Promoting Polish design as an important branch of industry should go hand in hand with raising public awareness that choosing domestic products is not only a matter of aesthetics but also an act of supporting the national economy. Educating consumers about the value of local design could contribute to protecting the market and strengthening the position of Polish brands, thereby fostering the development of the entire sector.



Designers are not stars — of course, it's great if they help promote the brand and collection, but that is not their primary role. Their task is to create a product that will last for years, be functional, fulfil its role and stand the test of time in terms of both quality and visual aesthetics.

→ **ANNA CHWALIŃSKA**
Elle Deco



Business turbulence.

Scale and condition of the industry

Business turbulence.

Scale and condition of the industry.

Estimating the scale of the design sector in Poland is a task already complicated due to the level of its definition and scope, which vary depending on the source consulted. The assumptions adopted in this report, however, demonstrate that the sector **plays a vital role in the economy**, often extending beyond turnover or employment indicators. Nonetheless, **it struggles with business turbulence**, often facing misunderstanding from business partners and a sense of insufficient support from public institutions.

THE SCALE OF THE DESIGN SECTOR

While design/industrial design is not listed as “wzornictwo przemysłowe”, “design” or “branża projektowa” in official Statistics Poland or Eurostat classifications, it is partially reflected in such classifications as PKD, i.e. the Polish Classification of Activities (74.10.Z — “działalność w zakresie specjalistycznego projektowania” [specialised design activities]), and in the broadly understood creative and cultural sector. Its scale must therefore be estimated at the intersection of various industries which are measured by statisticians. For this reason, the analysis has applied a top-down method, based on macroeconomic data with a gradually narrowing down to the relevant market segment. The definition applied for estimating the scale of the sector is the one presented in the methodology chapter.

THE CREATIVE AND CULTURAL SECTOR IN EUROPE

Design/industrial is typically situated within two broader categories: the creative industries and the cultural industries. The cultural and creative industries are the subject of regular analyses by European Union institutions.

Evidence for the significant scale of the sector is provided by the European Investment Fund. According to the fund's report, the cultural and creative industries contributed EUR 354 billion of value added to the EU economy in 2020, representing as much as 5.3% of the total for this particular year. In Poland, this share amounted to 5.2%, close to the EU average. However, this positioned Poland not only behind Scandinavian countries (Sweden 8.1%, Finland 7.5%) but also behind parts of Eastern Europe — Latvia (8.1%), Bulgaria (7.5%) and Romania (7.3%).

More recently, according to Eurostat statistics, in 2023 the cultural and creative sector employed 7.8 million people in the EU, accounting for 3.8% of total employment. Similarly to the previous figure, in Poland, the sector's share in employment was 3.6%, slightly below the EU average. The highest percentages were observed in the Netherlands (5.3%), Luxembourg (5.2%), Estonia and the Nordic countries (Sweden (4.7%); Denmark (4.6%); Finland (4.5%); Norway (4.4%)).

The significant scale of the cultural and creative industries becomes clearer when compared with the rapidly expanding ICT sector — often presented as an economic champion — which employed 10 million people across the EU in 2023, was only about 28% more than the creative and cultural sector. Although ICT is considerably larger in terms of turnover, this comparison highlights the major role of the creative and cultural industries in the EU economy.

CREATIVE ACTIVITY IN EUROPE — THE MEZZO LEVEL

Although design constitutes only a subset of the cultural and creative industries, this proportion still indicates the important role that this area plays in the European economy. A sub-area more closely related to the design sector is “creative, arts and entertainment activities”. In 2021, approximately 500,000 enterprises, engaged in creative activities, were active in the EU. Poland ranked 8th in terms of the number of such enterprises, a result below the potential implied by the country's population and the strength of its economy.

By contrast, employment in the EU's creative industries already stood at 1.08 million in 2023, slightly higher than that of the pre-COVID-19 period, and accounted for 14% of total employment in the cultural and creative industries. In Poland, creative industry employment stood at 98,000, accounting for around 16% of the cultural and creative sector according to EU data. The majority of employees were under 39 years old (45%), followed by those aged 40–49 (29%) and 50+ (26%). This, however, is still a broader range than the design sector.

DESIGN ACTIVITY IN POLAND — THE MICRO LEVEL

For analysts, the most accurately available statistical source regarding Polish industrial design is in Statistics Poland data on enterprises classified under PKD 74.10.Z — specialised design activities (including interior design, industrial design, decoration and styling).



PLN 4.3–6.5 billion

— value of the sector



70,000–90,000

— total employment

It should be remembered, however, that the field of design extends significantly beyond the enterprises classified under this category. It covers many designers and creators employed in companies with a different profile, as well as emerging areas that remain difficult to unambiguously classify, such as UX/UI design, located at the intersection of the design, creative and technology industries.

With this caveat in mind, as of 31 December 2024, there were 93,775 enterprises registered under PKD 74 according to Statistics Poland data; 23,826 of these were PKD 74.10.Z companies, representing 0.5% of all business entities registered in REGON, the Polish National Business Register. The highest concentrations of design-related activities were recorded in Mazowieckie (24% of the national total), Małopolskie (11%), Śląskie (10%) and Wielkopolskie (9%). In terms of scale, the market is highly fragmented — Statistics Poland data shows that among PKD 74.10.Z companies, micro-enterprises make up 99.6%, with small enterprises accounting for 0.35%. As a consequence, the share of medium-sized and large enterprises is miniscule. For comparison, micro-enterprises represented on average 96.5% of all businesses in Poland at the end of 2024.

THE SCALE OF THE DESIGN SECTOR IN POLAND — TOP-DOWN METHOD

Based on the above data, as well as the adopted definition of the sector, a highly preliminary estimation of the scale of the design sector was carried out using a top-down method. This approach was based on an in-depth analysis of available sources. It should be stressed, however, that this study is preliminary in nature. A more precise estimation of the design sector will require additional, more detailed studies in the future. Therefore, the following estimation should be treated as approximate.

Under the above assumptions, the value of the design sector at the end of 2024 can be estimated at about PLN 4.3–6.5 billion, with employment standing at 70,000–90,000 people.

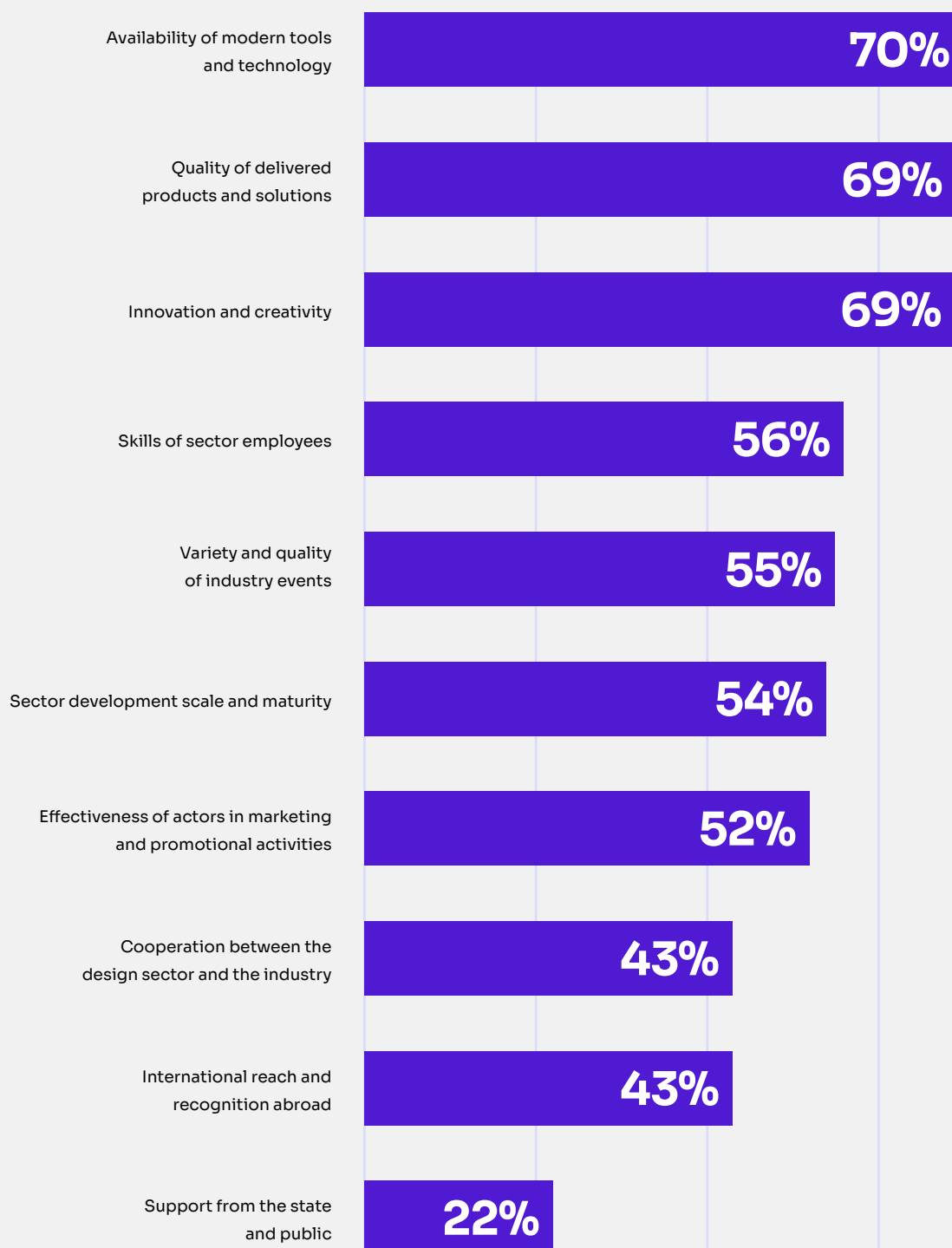
For details on the calculation method adopted, see the methodology note.***

KEY ASPECTS OF THE SECTOR THROUGH THE EYES OF ITS EMPLOYEES

The considerable scale of the sector — despite it often being perceived as niche or limited in scope — is, in the opinion of its representatives, also linked with both the high quality of solutions offered and significant financial challenges. This is reflected in responses regarding aspects of the industry that are perceived positively.

Respondents most frequently (70%) pointed to the availability of modern tools and technologies. Almost as many (69%) highlighted the quality of delivered products and solutions (69%) as well as innovation and creativity (69%). Fewer respondents, but still above half of them, pointed to the scale of development and maturity of the sector.

The percentage of respondents with a positive view of the selected aspects of the Polish design sector



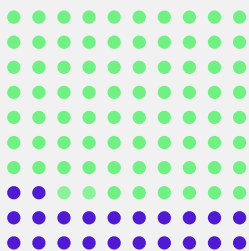
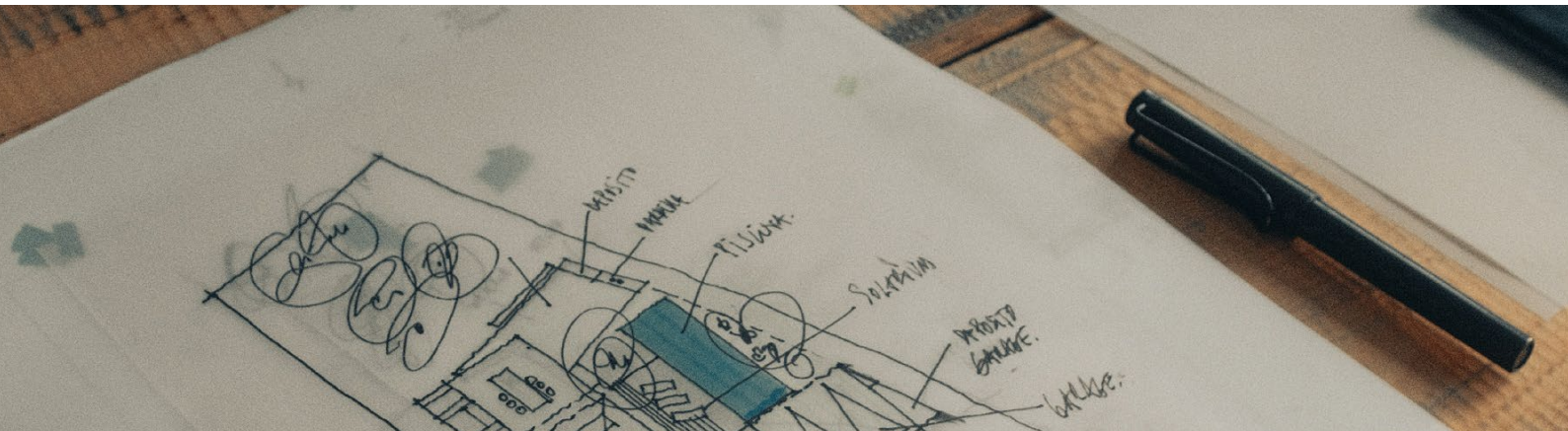
As one can see, modern tools, innovative ideas and quality are there. If so, what is lacking? To start with, strong support from the state and public institutions — only 22% of respondents rated this aspect positively. The level of cooperation between the design sector and the industry is also low — only about 4 out of 10 (43%) design professionals gave it a positive rating. The analysis paints a picture of an industry that, on the one hand, stands out for its quality, creativity, and innovation, but on the other hand remains “solitary” — without significant systemic support and lacking satisfactory dialogue and synergy with industry.

According to experts, this has been the case since 1989. As noted by Michał Piernikowski, Director of Łódź Design Festival: *After 1989, and certainly after 2004, the economic development of the interior and design sector was very dynamic, but it did not translate, in my opinion, into full exploitation of our design heritage. The state could have made better use of its existing assets by creating tools that would support manufacturers in building their own brands. This could have bolstered our advantages, for example in the furniture industry, but not only. Over the years, we have been primarily contract manufacturers, working for other brands; we have missed the moment when we could have easily reached for more and strengthened our own standing. Of course, we are not out of the game — we are still doing very well — but compared to the countries in our region, we had a unique potential that we could have leveraged even better to not only develop production but also to build recognisable brands. This strategic mistake was primarily about the image potential associated with a unique material heritage and recognisable aesthetics.*

ECONOMIC PATTERNS OF CHALLENGES

One of the challenges that the design industry has faced in recent years, and continues to face, is the slowdown resulting from the economic aspects of doing business. The turning point was 2020, which was a watershed moment for a large proportion of respondents: only 1 in 3 agreed that the situation in the Polish industry is better than before the COVID-19 pandemic. Recovery after a period of high austerity and uncertainty in this sector of the economy is still ongoing.

In the following years, the difficulties were exacerbated by the outbreak of a full-scale war in Ukraine and the increase in energy prices due to such things as sustainability pressures. The latter aspect is regarded as particularly acute, with two-thirds of respondents admitting that the increase in operating costs, including the rise in energy costs, was a major challenge for their companies. At the same time, there is a strong awareness that the design sector is not alone in this. The sector’s employees also note a slowdown at their clients — this was acknowledged by 55% of them.



22%
of the sector's
employees view
government
support positively



I have financed everything I do for years solely with money earned by the studio. In Scandinavia, the state takes on part of the financial burden related to the production of intellectual property. The result? More diversity, better quality, a stronger position in the industry. In Poland a designer is an enthusiast working in a niche, in a difficult profession, without much support from the state.

→ **MAJA GANSZYNIEC**
Studio Ganszyniec

DESIGN'S BIGGEST CHALLENGES

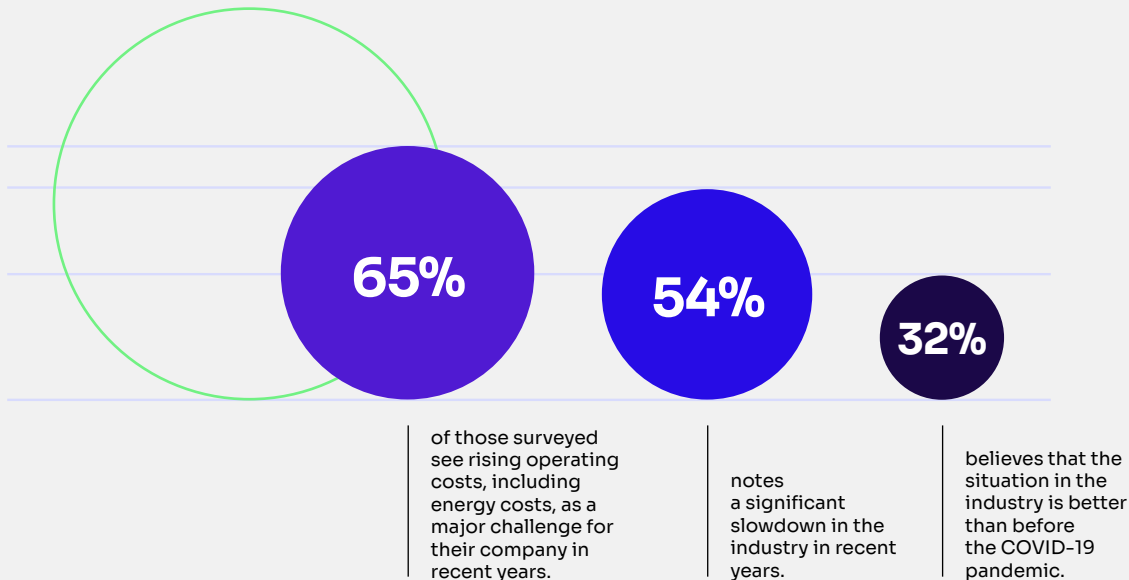
We asked employees in the design sector about what they thought were the biggest challenges they faced. However, none of the answers stood out in terms of frequency of selection over the others. This shows that there are many challenges, they are diverse and vary in degree, but nevertheless, they affect the entire industry.

48% of respondents pointed to a low level of customer awareness of product quality. This seems all the more important given that respondents cited quality as one of the sector's strengths. 46% of respondents considered rising production costs as one of their biggest challenges. Lower-cost foreign competition is identified as one of the biggest challenges by 42%. Katarzyna Kabo from Kabo & Pydo points to price and competitive pressures: *If there was no such wide availability of cheap products from Asia on the market, more people would probably choose nicer and better-designed items.*



While still at university, I entered a competition organised by the Regional Development Agency in Łódź. I went through training on how to create a business plan, which lasted several dozen hours. Without this, I would have had no idea how to price my work. I was not aware of the costs involved, I did not know the formal side of things, that VAT and income tax are two different things. It was incomparable to the business classes we had at university.

→ **WIKTORIA PODOLEC**
Weaver, Tartaruga Studio



On the other hand, for many people, price is a key criterion and aesthetics are becoming secondary. It is not always the case that a more expensive product means better quality, but it is often the well-designed things, made of better materials, that require a bigger budget.

As noted by Wiktoria Podolec of Tartaruga Studio: *“Rising inflation meant that customers were not shopping as much as before; on average, they were not spending as much money on a product as before. It was apparent that they were trying to save money, which was due to the unstable economic situation — both locally and internationally. Various investments were put on hold, costs were cut, and our product is a non-essential item. If something had to be cut in a project, the first things to go were the less necessary ones.*

The top five challenges are rounded off by artificial intelligence and its growing importance, coupled with a lack of regulation (35%). This is a civilisation challenge that is characteristic of almost all creative industries. One participant in the survey pointed to the growing pressure resulting from AI, particularly the use of generative AI tools that learn from existing intellectual property: *It is frightening that more and more companies are implementing projects based on or assisted by AI, which leads to a loss of individuality. There are fewer and fewer unique, creative products, which can result in monotony and a lack of human insight in projects. Most choose convenience and repeat mistakes and clichéd designs generated by AI.*



The most common challenges of the design sector



48%

Low customer awareness of quality



46%

Increasing production costs
causing rising prices



42%

A flood of cheaper, competitive
products from abroad



39%

Economic slowdown and decline
in residency



35%

The unregulated rise of artificial
intelligence

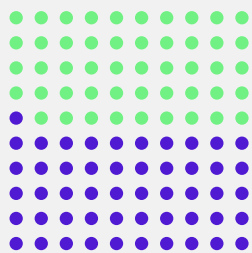
CAREER SATISFACTION AND DEVELOPMENT

Faced with economic uncertainty and the resulting challenges, employees are not satisfied with their careers. Almost exactly half of those surveyed are satisfied with their career path so far.

Slightly less than 4 out of 10 are confident about their professional future and job stability. Where do these low scores come from? One factor may be individual salaries, which 2/3 of respondents believe are lower than they realistically deserve.

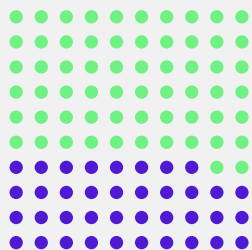
The nature of the work may also be a potential factor for lack of satisfaction, with one in three respondents believing that the work they do every day is not creative.

Many talented people starting out in design find it difficult to find work due to a lack of experience. To change this, it is worth increasing the number of junior positions and creating more opportunities for beginner designers. This would allow them to gain practical skills, not only allowing them to develop their competencies, but also preparing them for future career challenges. As noted by one of the respondents, these experiences can even lead to emigration: *In my career, I have seen many educated and promising designers, capable of creating innovative products, who eventually changed industries due to the limited number of jobs available. I went abroad myself in search of better conditions.*



51%

**of design professionals are satisfied
with their career so far.**



34%

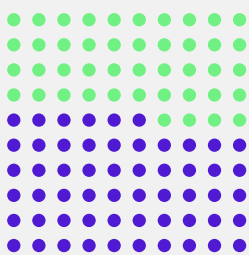
**of design professionals are confident
about the future and their job stability.**

MOST FREQUENTLY ENCOUNTERED DIFFICULTIES

What are the most common difficulties faced by employees in the design sector? The survey results show that the list of issues is long and some of them are systemic. The most frequently cited challenge is delays in payments from clients — as many as 47% of respondents declared that they had experienced such situations in their career. The same number of respondents drew attention to the poor quality of services and products provided by subcontractors, which significantly affects workflows and quality of implemented projects.

Financial problems are by no means limited to delays in client payments — one in four employees (25%) has experienced delays in salary payments at the companies where they worked. These high percentages indicate that financial difficulties are one of the biggest barriers to the daily work of design professionals.

Irregularities related to the protection of intellectual property also appear frequently among the difficulties. More than a third of respondents (34%) had encountered copyright infringement or copying of designs in their careers. Furthermore, 28% of respondents indicated cases of theft of ideas or designs by other companies or individuals. This shows just how common it is for people in the sector to break professional ethics and copyright laws, which is another thing that gets in the way of growth and job stability.



56%

of design sector employees believe that cooperation between the industry and the design sector in Poland is insufficient



Designer creativity is often limited by manufacturers' unsubstantiated beliefs about client expectations and other business considerations. The design process is sometimes cut short because there are not enough resources to thoroughly search for innovative and valuable solutions. The risk of market failure effectively inhibits the courage to experiment.

ANONYMOUS SURVEY PARTICIPANT

Manufacturers treat design solely as an aesthetic matter, and designers focusing on speculative design are unable to become an integral part of real design processes. And so the vicious cycle continues.

ANONYMOUS SURVEY PARTICIPANT



Polish design stands out for its ability to operate with limited resources — we can create excellent solutions on modest budgets. This ability could be our trump card on the international arena, if only it were supported by business and economic policy. However, for design to truly strengthen its position, systemic change is necessary — from education to design approach to tax mechanisms that encourage innovation.

→ **ZUZANNA SKALSKA**
Trendwatcher
Futures Thinking

EVALUATION OF EMPLOYERS

The employers themselves are rated relatively well. 3 out of 4 respondents believe that the quality of solutions provided by their company is good or very good. The alignment with current market needs is rated equally highly (72%). Business stability fares slightly worse — 6 out of 10 respondents consider it satisfactory. Growth prospects are rated similarly (60%).



Percentage of positive assessments of the company's activity in selected areas



76%

Quality of solutions provided



72%

Alignment with current market needs



60%

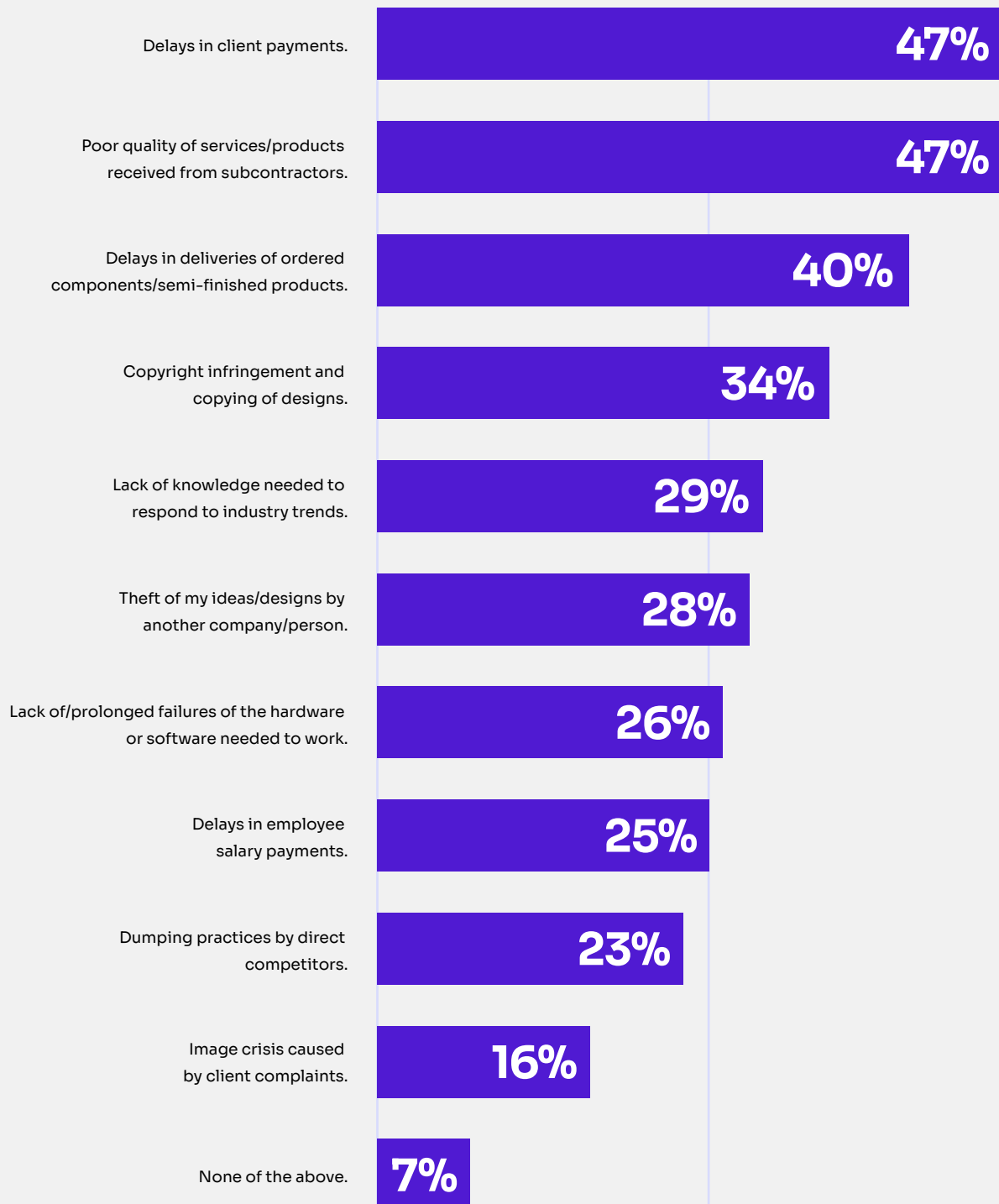
Development stability



60%

Development prospects

Most frequently encountered career difficulties in the design sector





The design ecosystem

Industry institutions and events

The design ecosystem.

Industry institutions and events

On paper, the design industry seems to have an extensive ecosystem of events, institutions and promotional activities. However, the picture of this ecosystem, as seen from the inside, is not so optimistic. **The potential of the sector and its cooperation is enormous, but often not leveraged on an appropriate scale.** While industry representatives are keen to participate in events and industry organisations announce many initiatives, a large part of the sector is dissatisfied with institutional support.

IN SEARCH OF NORDIC STANDARDS

Poland has a number of public institutions that deal with Polish design; however, their effectiveness and involvement is not perceived well by most of the industry professionals surveyed. Only 22% of respondents rated the support provided to the sector by the state and public institutions positively.

Almost 2 in 3 respondents (63%) believe that the design sector receives too little institutional support in Poland. This clearly shows how much room for improvement there is in this area, especially when compared to European design leaders. As noted by Maja Ganszyniec, a leading Polish designer: *In Poland, a designer is an enthusiast working in a niche, in a difficult profession, without much support from the state. Denmark, Sweden, Norway, Finland, but also France and the UK, have programmes to fund design projects. If I were Swedish, I could apply for a grant to develop a new product and receive funds to cover my labour costs. This creates a space where designers have the means to create and brands receive finished concepts, minimising risk and cost.*

DISSATISFACTION OR IGNORANCE?

Some harsh remarks collected during the survey are also directed at industry institutions representing the design sector. Only 44% of its employees agreed with the statement that these organisations operate effectively. The survey participants note that, in their opinion, industry associations often focus on poorly defined topics. As one of the respondents noted: *We lack initiatives similar to those pursued by the Design Council in the United Kingdom. These include not only promotion, but also raising awareness and promoting good practices. Poland has no institutions or associations that carry out activities on a similar scale.*

Anna Nowokuńska-Maksymiuk, Board Member at the Stowarzyszenie Twórców Grafiki Użytkowej [Association of Applied Graphic Designers, STGU], believes that the low assessment of some market participants may be due to insufficient knowledge of the activities of industry organisations: *The graphic design sector is highly fragmented, with many graphic designers working as freelancers or in small collectives, often without formal registration. As a result, contact with industry organisations is minimal, and knowledge about their activities is limited. If someone has not had the opportunity to make real use of an association's services, it is difficult for them to see its value and sense of existence. Nevertheless, as STGU, we strive to engage in activities that have a tangible impact on the sector and improve working conditions for designers, such as training courses and workshops, a mentoring programme, and initiatives to improve the quality of public tenders.*

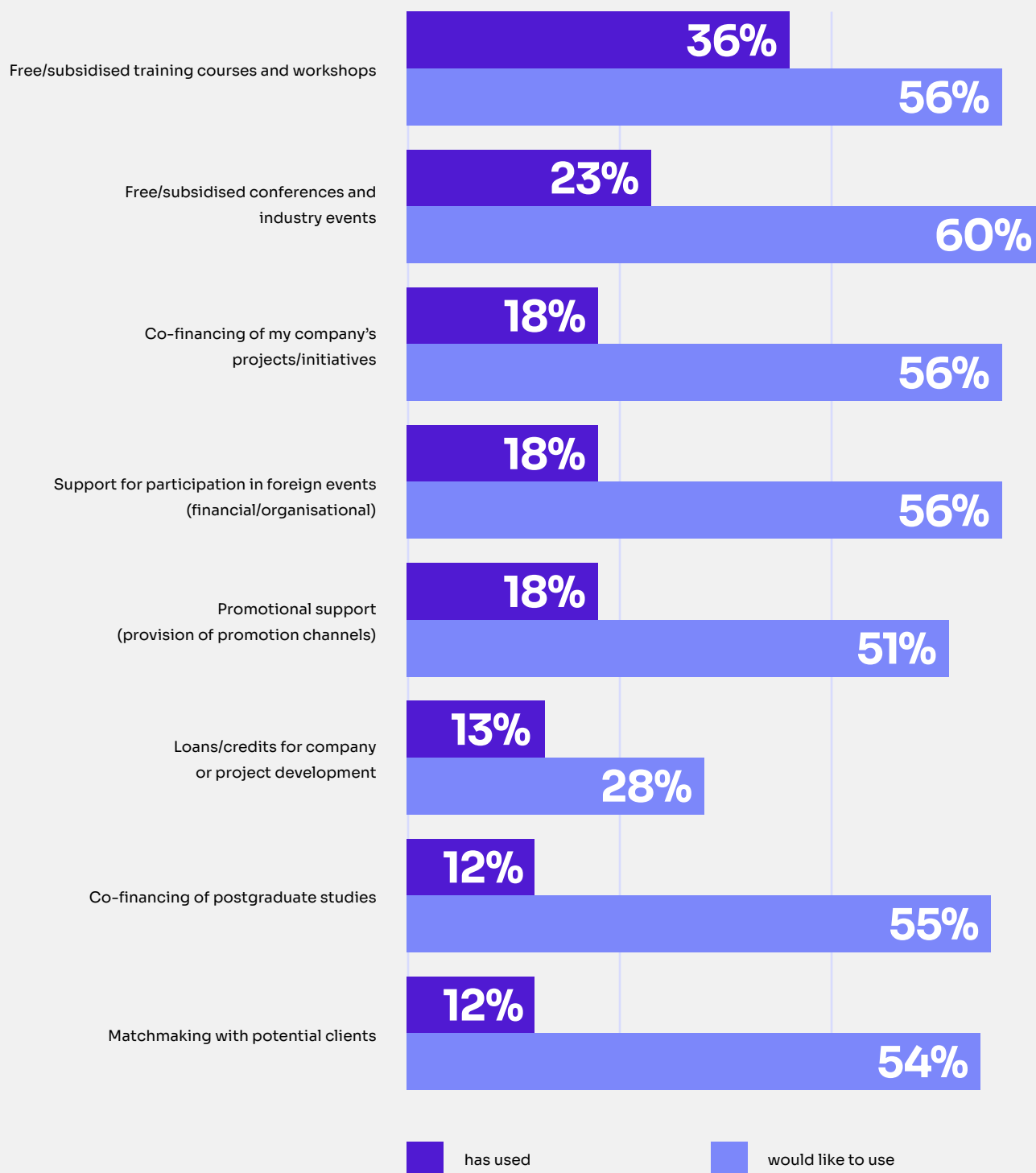
FORMS OF INSTITUTIONAL SUPPORT

The scale and form of institutional support has been raised by industry representatives as one of the areas that needs the most improvement. But what are the specific expectations regarding this matter?

We asked employees of the Polish design sector what forms of support their companies had used and what forms they would like to utilise. The most frequently selected response in terms of the tools used was free/subsidised training courses and workshops (36%). In turn, slightly more than half of the survey respondents (56%) would like to use them. Almost one in four respondents had taken advantage of subsidised or free conferences and industry events, while six out of ten respondents would like to take advantage of this option. This is also the form of support most frequently expected by the survey respondents.

The biggest difference between the percentage of a form of support used and a willingness to use it, can be seen in the case of funding for postgraduate studies. While as many as 55% of respondents would like to use this tool, only 12% of respondents had actually done so. Similarly, for intermediation between the company and potential clients, 54% of respondents were interested in this form of support, yet only 12% had used this option.

Forms of institutional support used and expected in the industry:

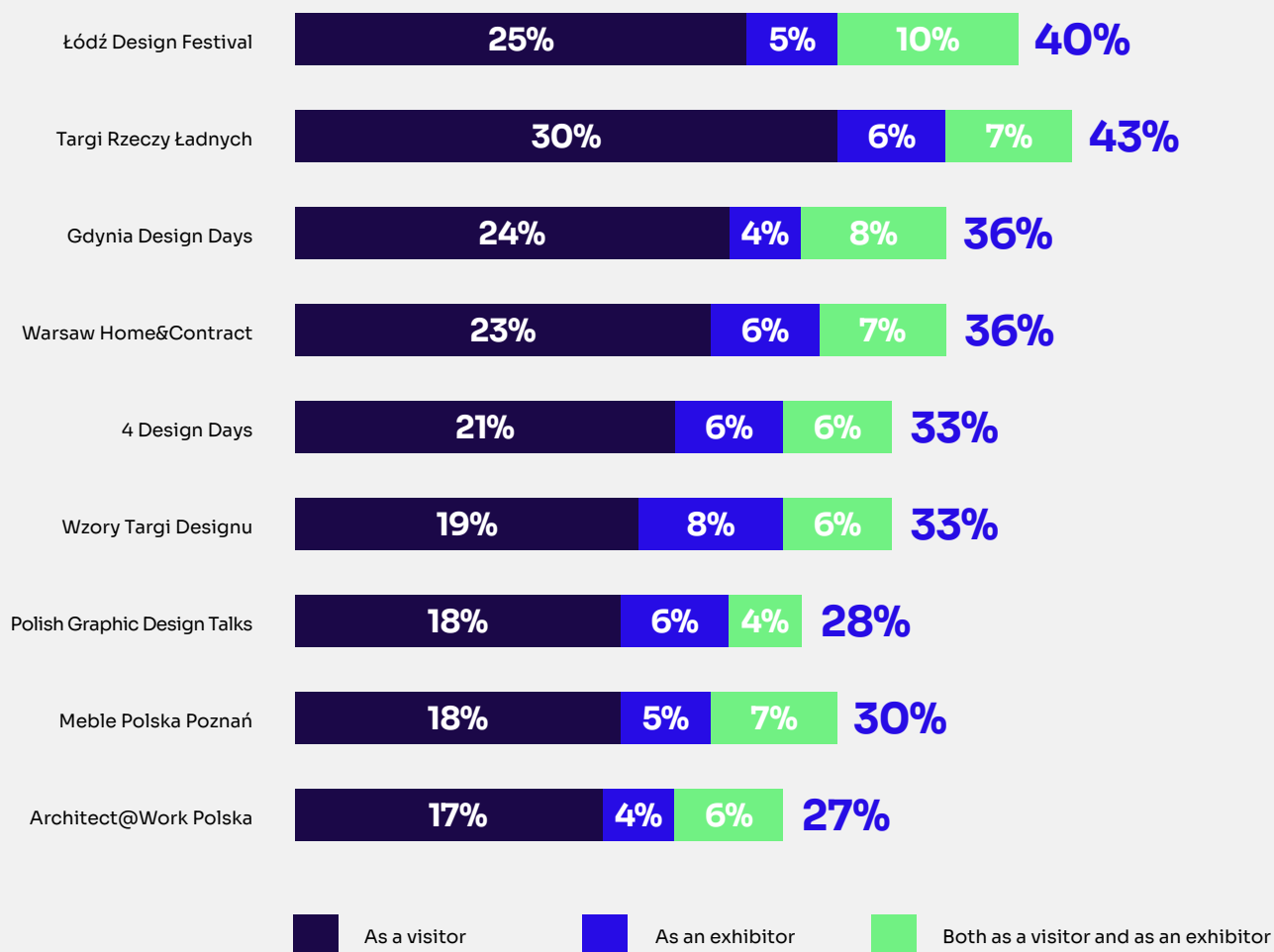


PARTICIPATION IN INDUSTRY EVENTS

Industry events for the design sector can be an opportunity to present concepts, products and solutions, as well as a space for inspiration as well as “networking”. The most recognisable events include the Łódź Design Festival — nearly eight out of ten respondents (79%) had at least heard of this event — and the Targi Rzeczy Ładnych [Pretty Things Fair] (75%).

Analysing the participation structure more closely, it is clear that the recognisability of particular events does not translate into attendance. In the case of the Łódź Design Festival, four out of ten respondents said they had participated, but mostly as visitors. The Targi Rzeczy Ładnych attracted slightly more people, 43% of those surveyed, but — as in the case of the Łódź Design Festival — they had mostly attended the event as visitors.

Participation of the design sector in industry events



Why do companies so rarely take advantage of opportunities to exhibit at industry events? Michał Piernikowski, director of the Łódź Design Festival, notes that with such a fragmented market (99% micro-enterprises), the decision to exhibit or promote oneself is based on simple business calculations: *To showcase your designs is always an investment, and much greater than participating in a conference and preparing a presentation. To do so is a choice made by companies, institutions and designers who see real value in this in terms of sales or image building.* However, he also notes that smaller brands should be able to benefit from financial support: *More and more events, such as our festival and other initiatives supported by public institutions— both Polish and European — make it possible to present products without major costs, or engage in activities that help to obtain grants and subsidies. Nonetheless, Poland noticeably differs from the rest of Europe in this regard — we still make little use of programmes such as Horizon 2020 and other EU mechanisms to support innovation and new product development. These schemes aim to reduce costs and mitigate the risks associated with product development in the broadest sense, which is particularly valuable for small brands.*

OVERVIEW OF INDUSTRY EVENTS

For this report, we decided to create a “map” of the most important Polish events and projects related to design so as to analyse the potential benefits and challenges facing the design community in Poland. Our analysis focuses on presenting the most important events in terms of their substantive significance, as well as popularity, recognisability and the number of visitors linked to design in the broadest sense.

For this analysis, we assumed that the main difference between a festival and a fair is the purpose pursued by the participants, both exhibitors and visitors. The main purpose of trade fairs is to conclude commercial transactions, whereas festivals also focus on imparting knowledge, while providing entertainment and artistic experiences. Festivals concentrate on showcasing trends, creating a platform for analysis and reflect the state of the industry, going beyond the elements strictly related to generating profit..

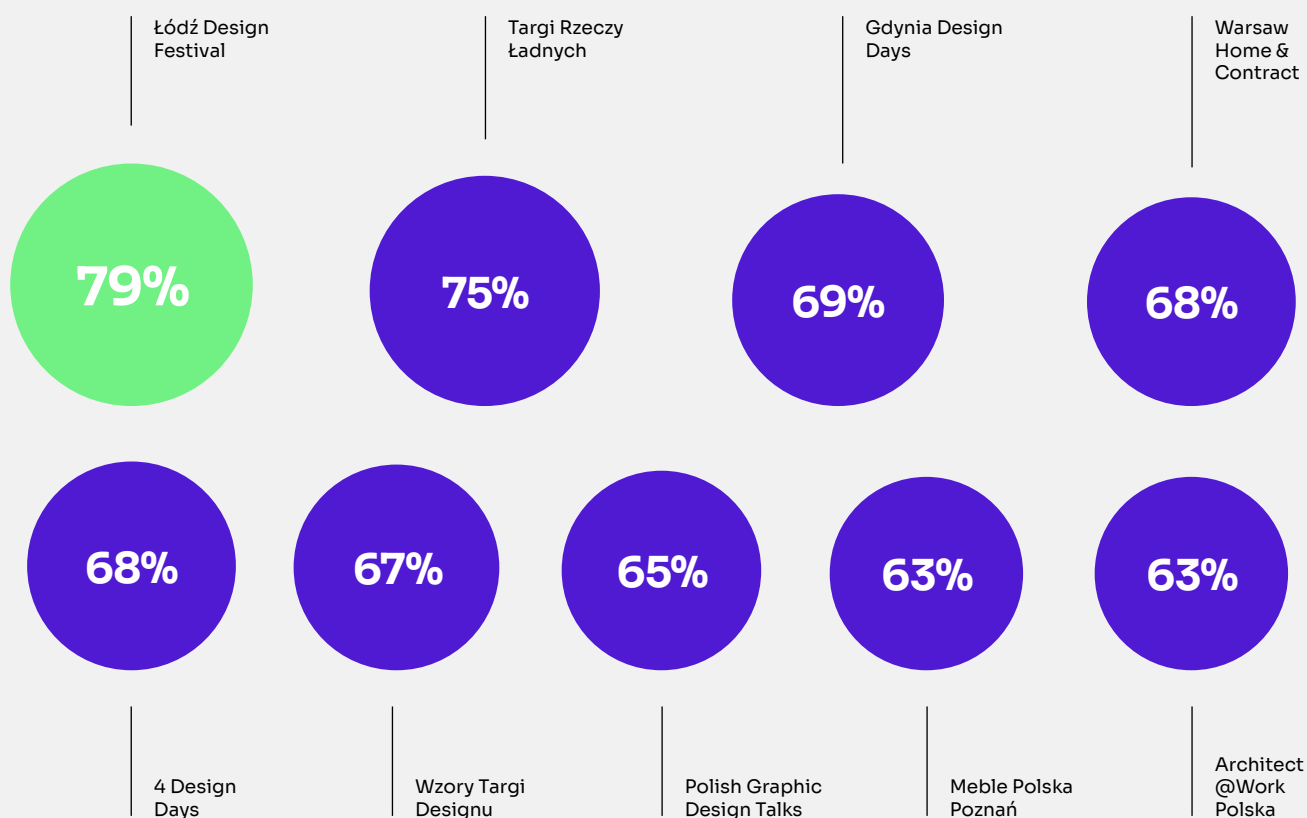
FESTIVALS

Festivals also serve to build the image of cities, regions and countries. A characteristic feature of festivals is that they combine:

1. Thematic exhibitions, devoted not only to specific products but also ideas and trends, building a narrative about the world of design and its various aspects.



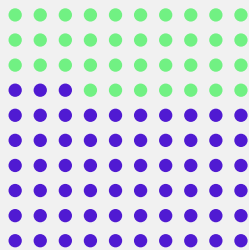
Industry events known to or attended by the respondents





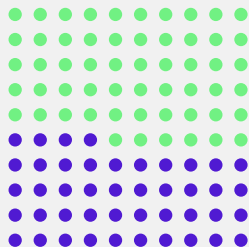
” One untapped opportunity in design is state support for systemic, strategic and innovative design. Currently, in most applications, we have to pretend we are artists because grants are directed to them.

ANONYMOUS SURVEY PARTICIPANT



63%

respondents believe that the industry receives too little institutional support.



44%

say that organisations representing the design sector are working effectively.

2. Conferences, meetings and workshops aimed at both transferring specific knowledge and skills (e.g. related to products such as furniture, construction materials, or tools dedicated to designers, e.g. graphic design software), as well as debating values, threats or criticism aimed at balancing commercial values with social and artistic ones.
3. Social activities targeted at improving selected aspects related to things like public space, the climate crisis and the availability of various solutions for people from groups threatened by social exclusion.

A number of events — festivals — devoted to design were held in Poland. Such events have taken place in Warsaw, Wrocław, Kraków, Szczecin, Poznań, Łódź, and Gdynia, as well as the Warmia and Mazury Design Festival, held across several cities including Ostróda and Olsztyn.

Globally, design festivals are strongly rooted in their urban context — most include the host city in their name. They often take the format of “design days” (e.g. Poland’s Gdynia Design Days) or “design weeks” (as is the case with most events affiliated with the World Design Weeks network). In some cases, events are organised under the banner of a design month — or more broadly, a creativity month.

At present, two design-related events in Poland stand out in terms of attendance, programme quality and supra-local significance: **Łódź Design Festival** and **Gdynia Design Days**.



Łódź Design Festival

NATURE OF THE EVENT

Established in 2007 as a local initiative focused on promoting Polish design, Łódź Design Festival quickly evolved to gain international status. Today, it is one of the most important design events in Central Europe, attracting designers, entrepreneurs, theorists and design enthusiasts. The festival aims to showcase design trends and to explore their impact on everyday life, the economy and culture. ŁDF is distinguished by its interdisciplinary approach, combining industrial and graphic design, architecture and innovative technologies with social reflection. Beyond the main festival dates, it also runs year-round activities, including exhibitions, conferences, research projects, online debates and lectures, as well as its own podcast.

ATTENDANCE AND REACH

In 2024, Łódź Design Festival attracted over 15,000 visitors. This included professionals, business representatives and individuals interested in design, trends and culture.

PROGRAMME HIGHLIGHTS

The LDF programme includes numerous exhibitions, workshops, lectures and panel discussions. Key programme highlights: “Make Me!” Contest — an international contest for young designers, awarding the most innovative ideas in design. “Must Have” plebiscite — a showcase of the best Polish design projects, distinguished for quality, functionality and aesthetics. Thematic exhibitions — addressing current design challenges and their societal impact, such as sustainability, new technologies and the role of design in public spaces. Workshops and networking sessions — designed both for professionals and general audiences.

Gdynia Design Days

NATURE OF THE EVENT

Launched in 2008 as a local initiative promoting design and young designers in the region, Gdynia Design Days (GDD) quickly gained national prominence, followed by international recognition. Held annually in the summer, it is now one of Poland's most important design festivals. The event focuses on using design as a tool for change, addressing contemporary challenges and creating solutions that benefit both people and the planet. It presents both speculative design projects and practical, real-world solutions

ATTENDANCE AND REACH

Each year, GDD attracts a diverse audience of designers, students and design enthusiasts. In 2024, attendance exceeded 10,000 visitors.

PROGRAMME HIGHLIGHTS

The GDD programme is rich and varied, primarily comprising on-site events. Each edition of GDD focuses on a selected theme that explores current social, environmental or technological challenges. In 2024, the theme was "Gdynia-Zdrój" [Gdynia Spa Town], focusing on the role of design in creating spaces that promote health and well-being.

The most important elements include: thematic exhibitions — hosted both at the Pomeranian Science and Technology Park (PPNT) and across the city, tied to the festival's annual theme, accessible to professionals and the general public alike. Student projects are also a key feature. Workshops — practical sessions for varied audiences, from professionals to children, encouraging manual skills, repair culture and innovative design approaches. Lectures and panel discussions — expert-driven debates and presentations addressing social, ecological and technological challenges from an interdisciplinary perspective. Guided walks — complementing the programme by exploring both exhibitions and Gdynia's urban architecture.



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There was a moment when companies shifted heavily towards online promotion. However, the awareness that face-to-face meetings are extremely valuable is returning. To showcase your designs at a festival is always an investment. To do so is a choice made by companies and designers who see real value in this in terms of sales or image building. However, more and more events are being organised with the support of public institutions, providing opportunities to obtain grants or make presentations without incurring significant costs.

→ **MICHAŁ PIERNKOWSKI**
Łódź Design Festival

TRADE FAIRS AND CONFERENCES

Over the past 20 years, Poland has hosted numerous trade fair events related to the design sector. These events vary in character, catering both to B2B meetings and to B2C presentations. All fairs are open to international exhibitors. Some, such as the International Furniture Fair in Ostróda, have ceased to exist, while others are transforming by experimenting with format and themes (for instance, Warsaw Home, organised in Nadarzyn).

At present, three major trade fair events are held in Poland: **Warsaw Home & Contract**, **Meble Polska** and **4 Design Days**.

4 Design Days

NATURE OF THE EVENT

Launched in 2016, 4 Design Days (4DD) is an annual trade fair held at the International Congress Centre in Katowice. It provides a platform for the exchange of knowledge, experience and inspiration between representatives of various sectors related to design, construction and real estate. The event is commercial and trade-related.

ATTENDANCE AND REACH

Every year, 4DD attracts between 10,000 and 14,000 participants, including architects, designers, investors, developers and manufacturers. It brings together a wide range of exhibitors and business partners presenting the latest technologies, products and services in the industry.

PROGRAMME HIGHLIGHTS

The 4 Design Days programme is comprehensive, catering to both professionals and the general public. Key highlights include discussion panels and conferences, product exhibitions, networking and a business zone.

Warsaw Home & Contract

NATURE OF THE EVENT

Warsaw Home & Contract is a trade fair dedicated to design, interior architecture and contract solutions for the commercial sector. Held annually at Ptak Warsaw Expo in Nadarzyn, the event combines product presentations for the construction and interiors industries aimed at a mass audience with events dedicated to business audiences, enabling designers, manufacturers and distributors to establish contacts. A distinguishing feature of the fair is its comprehensive nature, encompassing applied design, construction and luxury products.

ATTENDANCE AND REACH

Warsaw Home & Contract attracts around 40,000 participants annually, including architects, interior designers, investors and design enthusiasts. The event features exhibitors from all over the world presenting their collections and solutions.

PROGRAMME HIGHLIGHTS

Warsaw Home & Contract offers a rich programme tailored to different audience groups. Key elements include: thematic zones — the fair is divided into dedicated sectors such as Warsaw Home Furniture, Warsaw Home Kitchen, Warsaw Home Light, Warsaw Home Textiles and Warsaw Home Contract, which help participants find solutions of interest; workshops, lectures, panel discussions; networking programme — a dedicated space for establishing business contacts, organising B2B meetings and opportunities for cooperation with international partners.

Meble Polska

NATURE OF THE EVENT

Meble Polska Fair originated in the 1980s and has since developed into a key event for the Polish furniture industry. In 2010 its format was transformed into a contract fair. It is held annually in Poznań at the Poznań International Fair (MTP) grounds. Meble Polska focuses on presenting furniture and interior accessory manufacturers and distributors from Europe and Asia. The fair combines both B2B and B2C formats, linking retail and wholesale furniture sellers with buyers, enabling product showcases, trade relations and monitoring current market trends. The event is primarily targeted at professionals in the furniture sector, including retailers, wholesalers and representatives of retail chains.

ATTENDANCE AND REACH

Each year the trade fair attracts between 14,000 and 20,000 participants from over 60 countries, including key representatives of international retail chains. Exhibitors include the largest Polish furniture companies as well as foreign manufacturers. Meble Polska is regarded as one of the most important contract fairs in Europe.

PROGRAMME HIGHLIGHTS

The Meble Polska programme focuses on product innovation and building business relations. Key elements include: exhibition stands showcasing products; B2B meetings — specially organised spaces for establishing business contacts and concluding contracts between exhibitors and buyers from around the world; industry forum — a series of lectures, debates and panel discussions addressing market trends, technological innovations and issues related to export and international trade in furniture.

OTHER FAIRS AND CONFERENCES:

- **Architects @ Work:** an international event for architects, interior designers and other design professionals, aimed at presenting products related to architecture.
- **Polish Graphic Design Talks:** a series of events organised by Polish Graphic Design, focusing on practical aspects of work in the design industry, such as negotiating fees, project management and building client relations. Meetings feature lectures, panel discussions and workshops led by experienced professionals.
- **East Creative Conference:** a conference focused on the creative industries, organised in Lublin. It is aimed at creators, entrepreneurs and experts in design, marketing, new technologies and culture. The programme includes lectures, panel discussions and exhibitions. The conference is distinctive for its focus on Eastern Europe.

RETAIL FAIRS

Targi Rzeczy Ładnych [Pretty Things Fair] and **Wzory** [Patterns] are the most important recurring retail fair events (commercial events targeted at individual consumers) in Poland. Other events mapped in this survey are presented as examples of similar initiatives organised in most major Polish cities. These are often ephemeral, without sustained activities. This segment is characterised by considerable volatility, with most events not lasting beyond one or two editions.

- **Targi Rzeczy Ładnych:** Poland's largest event dedicated to the sale of products by Polish designers and artisans. In 2024, TRŁ organised several editions across the country. Exhibitors offer unique designs, including furniture, ceramics, textiles, graphics and decorations.
- **Wzory — Craft and Polish Designers Fair:** a popular design and craft fair held mainly in Warsaw, attracting enthusiasts of unique, handmade products. Exhibitors present a wide range of items including ceramics, furniture, textiles, jewellery and posters.
- **Targi Plakatu [Poster Fair]:** an online shop featuring works by Polish graphic designers and visual artists, which also organises fairs dedicated to the sale of posters and graphics. These are held regularly in Warsaw.

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Our mission is not only to support designers, but also to educate the market about good design and why it is worth investing in it. The low level of trust in professional organisations is due to structural factors. In design, there is no compulsory professional chamber, no licensing system.

The industry is highly fragmented and contact with organisations is limited. At the same time, we have been working for years to improve the quality of public fairs and competitions for designers.

→ **ANNA NOWOKUŃSKA-MAKSYMIOUK**
Member of the STGU Management Board
Designer of Visual Identity Systems



- **Targi Dobry Design [Good Design Fair]:** a fair organised in Wrocław, with recent editions held at Concordia Design. Exhibitors offer a wide range of products at the intersection of craft, art and design.
- **Targi Sztuki Studenckiej [Student Art Fair]:** organised in Łódź by the Academic Design Centre, this fair presents student art. Exhibitors showcase diverse products at the intersection of craft, art and design.

OVERVIEW OF INDUSTRY INSTITUTIONS AND ORGANISATIONS

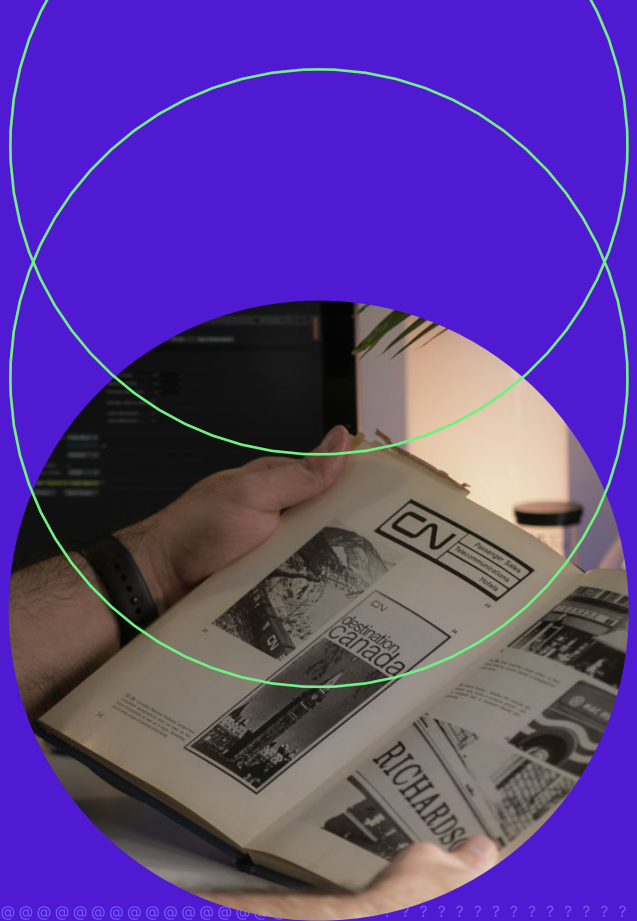
Despite the dissatisfaction expressed by a significant part of the sector regarding support, institutions dedicated to the creative and design industries play a crucial role in the development of this sector in Poland. They create spaces for collaboration, education and promotion of designers, supporting innovation and building bridges between business, culture and academia. Their activities influence the scale and professionalisation of the market and strengthen the position of Polish design both domestically and abroad. The following list presents a selection of several institutions associated with design.

- **Instytut Wzornictwa Przemysłowego [Institute of Industrial Design, IWP]:** one of Poland's oldest design institutions. It holds a vast collection of materials on the history of Polish and international design (also available online). Its activities include research, education and consultancy in the field of design. It organises the Dobry Wzór [Good Design] and Young Design contests.
- **Stowarzyszenie Twórców Grafiki Użytkowej [Association of Applied Graphic Designers, STGU]:** established in 2004, this association brings together professionals responsible for visual communication and graphic design in Poland. It unites active designers as well as representatives of related creative industries. It is a member of the International Council of Design.
- **Cieszyn Castle:** a centre for design and entrepreneurship that promotes good design and supports local creators and entrepreneurs. It organises exhibitions, workshops and conferences and runs educational programmes in design. The institution emphasises the combination of tradition with modernity and fosters regional development through design.
- **Instytut Dizajnu w Kielcach [Design Institute in Kielce]:** a municipal institution operating as part of the Wzgórze Zamkowe [Castle Hill] complex, which has implemented projects in the broad field of design since 2012. Its activities focus on production, exhibitions and education. Its facilities include studios for ceramics, paper and print, visual communication, spatial design and textiles. Each is equipped for educational purposes — workshops and training — as well as internships, placements and artist residencies.

- **Academic Design Centre (ACD):** a unit within the Strzemiński Academy of Fine Arts in Łódź, bringing together design departments from eight Polish art universities. It organises exhibitions and workshops, creating a shared space for contemporary art and business.
- **SPFP Design Association:** an organisation uniting Polish designers and academics in the field of industrial design. It conducts promotional, advisory and educational activities to support its members. The Association's mission is to integrate the design community and promote best industry practices.
- **Stowarzyszenie Architektów Wnętrz [Association of Interior Designers]:** a professional organisation of designers with specialist higher education, extensive professional experience in running their own studios and a track record of numerous projects. Its activities include training, industry conferences, debates, meetings with prominent creative personalities as well as key figures in politics shaping the working environment for interior architects.
- **Polish Graphic Design Foundation:** an organisation dedicated to promoting and developing Polish visual design, including graphic design, communication design and information design. It organises competitions, conferences, exhibitions and workshops in Poland and abroad to showcase the achievements of Polish designers and to strengthen the design community.
- **Design32:** an award for the best graduation projects from Polish art universities in design-related fields. The project includes an exhibition of selected works and the publication of a catalogue promoting the graduates' achievements.
- **Stowarzyszenie Architektów Polskich [Association of Polish Architects, SARP]:** an organisation bringing together professionals in architecture and design, working towards the development of high-quality spaces in Poland. SARP promotes best design practices by organising architectural competitions, exhibitions and workshops that support innovation and sustainable design.
- **Well Done:** a Polish brand created by the "Being Together" Foundation for the Development of Social Entrepreneurship. It combines the creativity of young designers with the activation of people re-entering the labour market. It specialises in functional and aesthetically designed home and office accessories made from natural materials, promoting the idea of sustainable development. WellDone is an example of socially engaged design, where product sales support the foundation's statutory goals and contribute to addressing important social issues.

- **The Design Pharmacy:** a space run by the Kraków Festival Office where design intersects with science, new technologies and activism. It houses design studios, co-working spaces and a reading room. The Design Pharmacy aims to integrate the design community, provide education in design and support innovative solutions across disciplines.
- **Adam Mickiewicz Institute:** an institution connecting Polish culture with audiences worldwide. As a state body, it fosters lasting interest in Polish design, strengthening the presence of Polish designers on the global stage. It promotes the work of both established and emerging creators.
- **Creative Industries Institute:** a state cultural institution established in 2022 with the mission of supporting and promoting Polish creative sectors, such as design, fashion, video games, music and artistic crafts. Creative Industries Institute implements a grant programme for the creative industries, as well as educational and talent development activities. It is currently working on a support strategy for the creative sectors, of which this report forms a part.





Between creation and practice.

Design education and competencies

Between creation and practice. Design education and competencies

Too much speculation, too little practice — this seems to be the verdict of the design industry when it comes to design education. Study programmes, particularly at art academies, are a source of considerable controversy within the sector. **Graduates and employers point to the lack of preparation for market realities** after leaving school. Lecturers, on the other hand, highlight measures taken to address this issue or the difficulties involved in challenging the status quo. The mismatch with the realities of a changing industry is also evident in the context of training opportunities, which many industry professionals would most readily take up.

In the design sector, knowledge is a key pillar of a designer's practice. Given the internal competitiveness of the industry and the strong influence of technology on its functioning, continuous development and keeping up with technological innovations and trends are essential. This is reflected in the survey results. Nearly three out of four (72%) employees in the sector state that they regularly expand their knowledge to keep up with industry developments. More than half (56%) continue to pursue the specialisation they chose at the beginning of their careers. On the one hand, this is a high percentage, yet almost every other respondent has at some point either chosen or been forced to change their original specialisation. This demonstrates the highly dynamic nature of the sector.

In an age of vast resources of knowledge and training available online, the role of higher education is no longer as crucial as it was 20 or 30 years ago. Nevertheless, higher education remains an important element in the development of aspiring designers — as many as 57% of respondents have completed degree programmes in disciplines within the broadly defined field of design, including architecture, interior architecture, industrial design, digital graphics, photography, graphic design, painting and textiles.

Education



Unfortunately, the survey results and expert statements portray higher education institutions as often lagging behind in terms of curricula, unable to keep pace with changes in the industry and ill-suited to contemporary realities. Only 45% of respondents declared that they use the knowledge they gained at university in their daily work. According to both respondents and experts, shortcomings are particularly evident in preparing students to enter the labour market or to run a business. Further, postgraduate studies and courses are met with limited trust — only 22% of respondents use this form of further education.

The challenges raised by respondents are not limited to art academies but concern design-related fields more broadly. Wiktoria Podolec of Tartaruga Studio, a graduate of textile architecture at Łódź University of Technology, points to tensions between the conceptual approach and graduates' later confrontation with the market: *I feel that there was no commercial approach. Many lecturers were people who themselves had graduated from art academies or came from artistic circles. They often also taught at the Academy and viewed design more conceptually than from a business perspective. Conceptuality is important, especially at university. That is the time for experimenting and doing all sorts of outlandish things. But when it came to being prepared for work in the real world, I did not feel well-equipped.*

THE GRADUATE AS A BUSINESS CHALLENGE

The Creative Industries Institute quantitative survey did not address employers' attitudes towards graduates directly. Nonetheless, their opinions strongly resonated in open responses and in the qualitative study. Katarzyna Kabo of Kabo & Pydo Studio admits that onboarding graduates into a company is always a complex process: We often discuss this with other designers and lecturers — many point out that students still lack practical preparation for implementation. In working with graduates, we see that the greatest challenge is the lack of skills in collaborating with clients and implementing projects under real conditions. They still need to learn the practical process of taking projects into production once they start work. Only when they go through the entire implementation process and face real production constraints do they gain the experience that their studies do not provide.

These observations are echoed by Maja Ganszyniec, whose studio attracts talents from Polish art universities. In her view, onboarding a new graduate into fully fledged professional work within a company is a demanding, two-year process: I always set a three-month trial period. In the first month, each person realises they have no idea what is going on or how the industry works. The next two months are about gradually familiarising themselves with professional reality. At the end of this period, a mutual decision is made — the candidate decides whether they want to work in this profession and I assess whether they are suited to further training. This onboarding is a difficult process — many young people cannot withstand the stress of this work for long. Where is a young person supposed to learn about furniture construction, standards, materials, implementation processes? Education often does not provide that. Of course, it gives some basics — software skills, general awareness, a chance to test yourself.

Practitioners' observations are reflected in the challenges faced by many employees in the design sector, for whom the first years in the profession prove to be a difficult path. As one respondent noted: From the perspective of someone fresh out of university, I can say this is the time-old classic: employers do not have the resources to train new staff. Since hiring us is such an obstacle, I assume that we did not learn many of the basic aspects of everyday workflow at university. Another recent graduate pointed to the lack of sufficient practition-

ers: There are many modern, up-to-date design solutions that we never had the chance to hear about, because our lecturers were simply too attached to older, familiar methods.

IN SEARCH OF REAL CHALLENGES

The issue of inadequate curricula and students' lack of practical training emerged most strongly in the open-ended questions of the quantitative survey and in qualitative interviews with leading industry representatives. The essence of most responses is well captured by one participant's comment: *Design-related curricula often focus on finding problems rather than solving existing ones. Another respondent added: Design majors should be offered at technical universities, and engineers and technologists should be educated about the real value of design.*

The issue raised by respondents clearly deserves further exploration in the future, for example in the form of a dedicated report. The challenge of preparing students for the labour market ties into the broader discussion on Polish higher education. According to research by Pracuj.pl, a Polish job search service, only 23% of employees aged 18–24 believe that university studies prepared them adequately to enter the labour market.

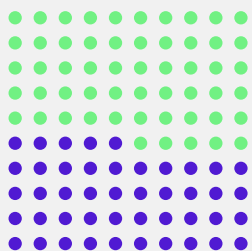
The difficulty of attracting top practitioner-lecturers was highlighted by Joanna Jurga, a neurodesigner and until recently a lecturer at the School of Form at SWPS University, who resigned from her academic role: *Having been a university lecturer for seven years, I am deeply convinced that curricula are poorly designed. We have a cadre of practitioner-lecturers who chose to teach because they had a mission, but it is not possible to make a living from that. So in practice we work two, three or even five jobs, and then eventually resign. The world is changing: AI, copyright law, competition from the Far East, and the challenge of creating a real curriculum that would bring business into the programme no later than the third year. But someone has to teach those classes. Universities have their budgets, but hiring experts is difficult with limited resources. The academic structure itself is also ossified. There are classes on contracts and copyright, but they are too few. There is no psychology or mediation either, yet a young designer will need to negotiate with materials engineers, clients and investors, as well as survive various setbacks along the way.*

Agnieszka Polkowska, Dean of the Faculty of Design at the Academy of Art in Szczecin, draws attention to actions undertaken to change the situation. At her institution, this is to be achieved through practical familiarity with techniques as well as a focus on concrete challenges: *We should be addressing problems that appear here and now — those in the region, those that are tangible and which we can see, touch and actually measure. Until now, the market has promoted iconic designers who created aesthetically and functionally iconic solutions for their time. Today, we need to address the challenges we currently face.*

At the Szczecin Academy, the bachelor's degree is based on the Bauhaus model, where students learn not only design strategies but also craft. The faculty has a fully equipped laboratory where students undertake the independent execution of their projects, with support from qualified lab technicians. The master's degree, in turn, features a strongly developed research module. Its name, "Design for Living Systems", indicates the ambition to address the needs of "living and live systems" — understood both as technological and natural systems, as well as systems of cooperation, for example at the local level. I know that similar research-oriented approaches exist at several other Polish institutions, where master's programmes remain interdisciplinary.

” In working with graduates, the greatest challenge is the lack of skills in collaborating with clients under real conditions. Graduates learn to create concepts and prototypes, but have no experience in consultations with technologists and designers. They do not learn how to hold discussions with clients, to convey arguments, to take feedback into account. These are key skills in the industry, because the final outcome of a project depends not only on creativity, but also on effective communication and adaptation to real production constraints.

→ **MAJA GANSZYNIEC**
Studio Ganszyniec



45%

of design professionals use the knowledge they have gained from their studies in their daily work.

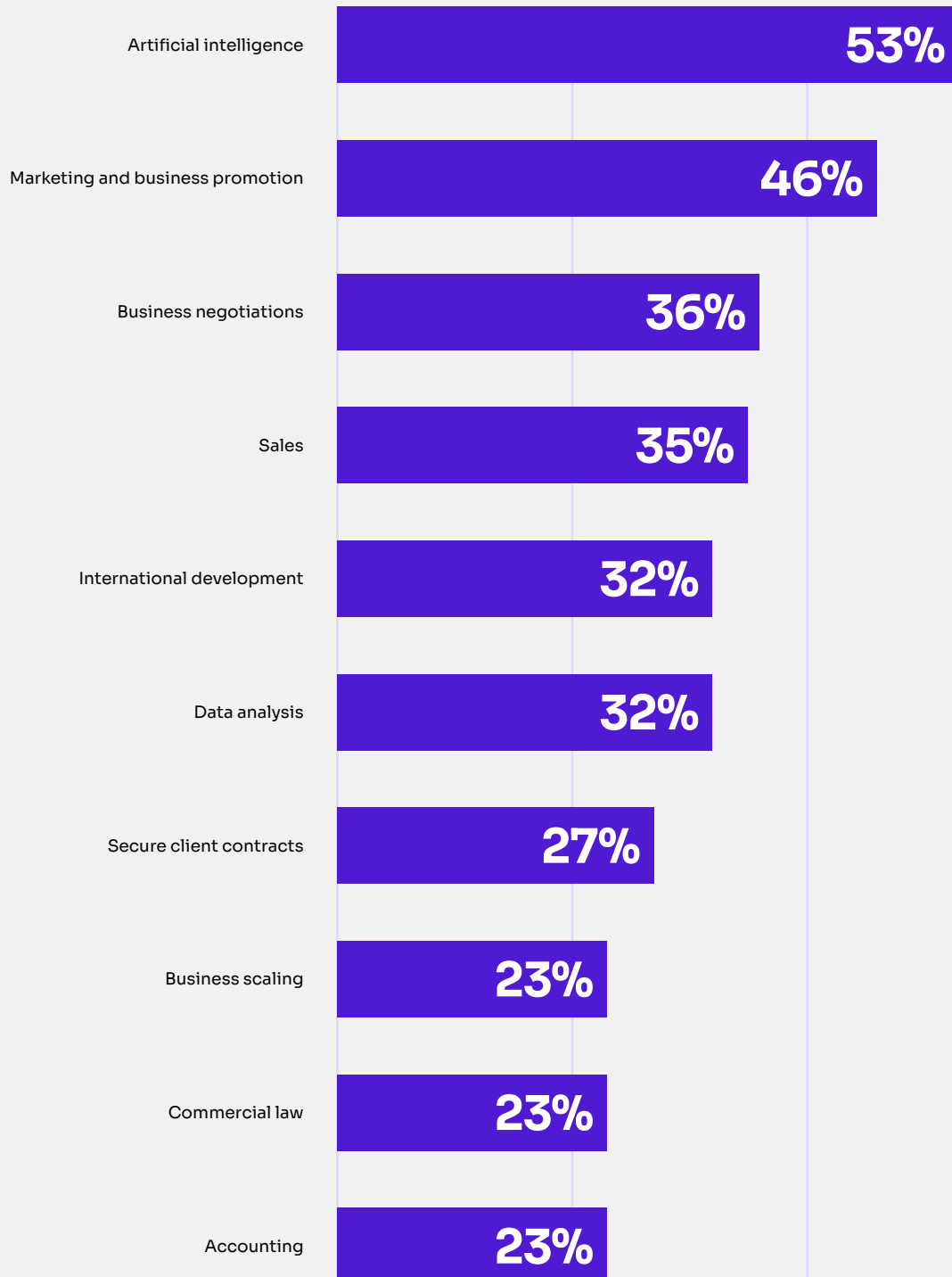


The academic system „evaluates” designers as if they were artists — through exhibitions, fair attendance and implementation projects. Research and teaching staff at the Academy are not obliged to publish scientific articles. As a result, the knowledge produced at Polish art academies and design faculties does not flourish, disseminate or function in the scientific discourse. There is also a lack of connection with other academies, which would help develop a dialogue between, for example, design and architecture. This systemic issue leads to a lack of coherence and makes it much more difficult for knowledge to permeate between disciplines. All efforts to bridge this gap are initiated from the bottom up.

→ **AGNIESZKA POLKOWSKA**

Designer, Dean of the Faculty of Design,
Academy of Art in Szczecin

The most desirable areas of professional training



FILLING THE KNOWLEDGE GAPS

Respondents were asked what free training courses would be most interesting to them. The most frequently chosen answer (53%) concerned artificial intelligence. This demonstrates a high level of awareness among design professionals regarding the digital revolution driven by AI and the potential of this tool — both in the context of design itself and in terms of work organisation or client communication. It also highlights the shortage of knowledge on this subject within formal education.

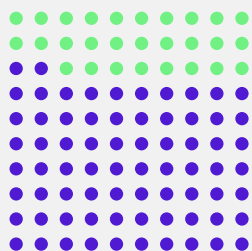
The strong interest in training in marketing and promotion (46%), negotiation (36%) and sales (35%) confirms the conclusions of earlier analyses. These competencies — related to operating within market realities, running a business, working with clients and the ability to sell one's services — are most often identified as missing in graduates.

The responses show that many design professionals seek to address these gaps during their professional careers, taking their own initiative in further education. This confirms the views of experts who pointed to the insufficient preparation of graduates for commercial realities and the necessity of independently acquiring the knowledge needed to function effectively in a dynamic, competitive industry.

NETWORKING: YES, BUT NOT NECESSARILY THROUGH ORGANISATIONS

The survey results show that professionals in the design sector draw on a variety of knowledge sources to stay up to date with trends and changes in the field. The most frequently mentioned method is conversations with other people in the industry — nearly half of respondents (49%) declared this. In terms of networking, trade fairs and industry events organised in Poland also play a significant role (47%). By contrast, industry events held abroad (27%) and meetings organised by professional associations (23%) were considered less important. Additionally, 45% of respondents participate in industry training courses and workshops.

Respondents also make use of online sources — social media profiles (47%), industry portals (46%) and webinars or online meetings (44%). Industry publications, such as books, reports, e-books and newsletters, serve as knowledge sources for one in three respondents (34%).



72%

of employees in the design sector regularly expand their knowledge to keep up with industry developments.



49%

Conversations with other industry professionals



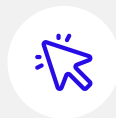
47%

Social media profiles



47%

Design fairs and events in Poland



46%

Web portals and industry press



45%

Industry training courses and workshops



Nothing teaches better than experience. Each company is governed by its own specifications and production processes, working with different materials. Only practice creates space for developing specific skills — not just those related to aesthetics, but also to technology and production.



KATARZYNA BRYZE

Vox Capital Group



Design universities and degrees in Poland

PUBLIC

ACADEMY OF ART IN SZCZECIN

- **Faculty of Design** (Department of Design, majors: Design — Product Design, Visual Communication and Design — undergraduate and graduate studies)
- **Faculty of Graphics** (Department of Graphic Design, majors: Graphic Arts — undergraduate and graduate studies)
- **Faculty of Interior Design and Scenography** (Department of Interior Design, majors: Interior Design — undergraduate and graduate studies)
- **Doctoral School**
- **Creative Industries Institute**

MAGDALENA ABAKANOWICZ UNIVERSITY OF THE ARTS IN POZNAŃ

- **Faculty of Architecture and Design** (majors: Design — undergraduate and graduate studies; Architecture — undergraduate and graduate studies; Interdisciplinary Design — five-year Master's degree programme)

- **Faculty of Interior Design and Scenography** (majors: Interior Design — undergraduate and graduate studies)
- **Faculty of Graphic Design** (majors: Graphic Design — long-cycle Master's degree programme);
- **Doctoral School**

UGENIUSZ GEPPERT ACADEMY OF FINE ARTS IN WROCŁAW

- **Faculty of Interior Design, Design and Scenography** (Departments of Interior Design, Furniture, Design — majors: Interior Design — undergraduate and graduate studies, long-cycle Master's degree programme; Design — undergraduate and graduate studies, long-cycle Master's degree programme)
- **Faculty of Graphic Arts and Media Art** (Graphic Arts — undergraduate and graduate studies, long-cycle Master's degree programme; Graphic Design — undergraduate and graduate studies)
- **Faculty of Ceramics and Glass** (majors: Glass Art and Design — undergraduate and graduate studies; Ceramics Art and Design — undergraduate and graduate studies)
- **Doctoral School**

ACADEMY OF FINE ARTS IN GDAŃSK

- **Faculty of Design** (Department of Design Methodology and Basics, Department of Product Design, Department of Design — undergraduate and graduate studies)
- **Faculty of Graphic Arts** (Department of Graphic Design, majors: Graphic Arts — undergraduate studies; Graphic Design — graduate studies)
- **Faculty of Architecture** (majors: Interior Design — undergraduate and graduate studies)
- **Doctoral School**

ACADEMY OF FINE ARTS IN KATOWICE

- **Faculty of Arts** (Department of Graphic Arts, majors: Graphic Arts — undergraduate and graduate studies)
- **Faculty of Design** (Department of Product Design, majors: Design — undergraduate and graduate studies; Department of Graphic Design, majors: Graphic Design — undergraduate studies; Designing Reading Experience and Multimedia Narratives — graduate studies; Department of Visual Communication Design, majors: Design — undergraduate and graduate studies)
- **Szkoła Doktorska**

WŁADYSŁAW STRZEMIŃSKI ACADEMY OF FINE ARTS IN ŁÓDŹ

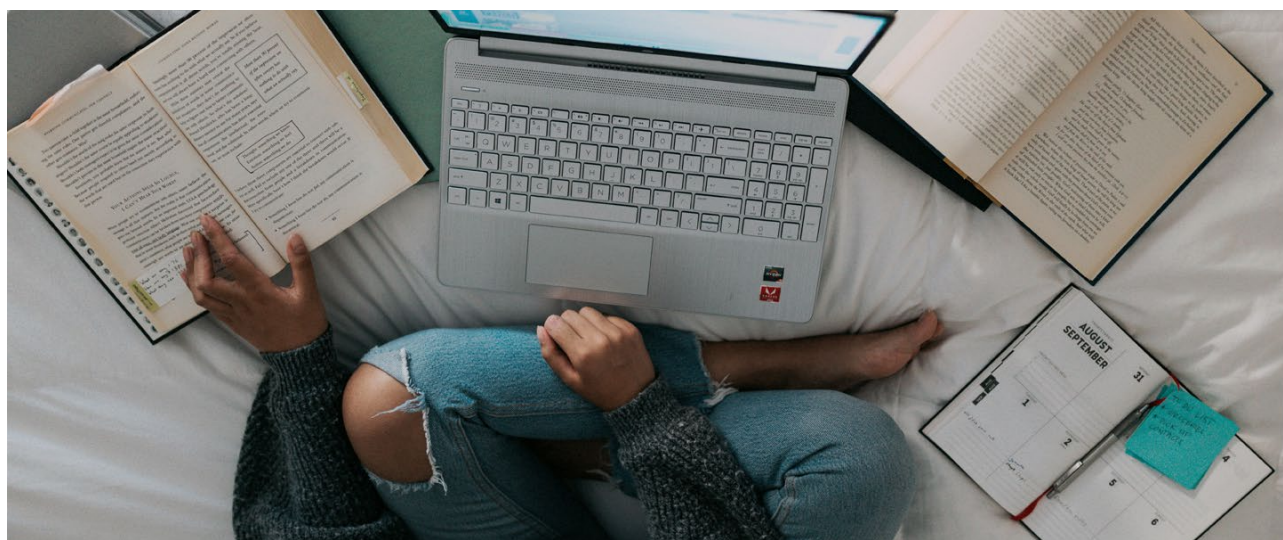
- **Faculty of Fine Arts** (majors: Graphic Arts — Master's degree programme)
- **Faculty of Design Arts** (majors: Design, Interior Design, Graphic Design — undergraduate and graduate studies)
- **Doctoral School**

JAN MATEJKO ACADEMY OF FINE ARTS IN KRAKÓW

- **Faculty of Industrial Forms** (Department of Product Design, Department of Sustainable Design, Department of Design Basics, Department of Ergonomic Design, Department of Visual Communication, majors: Design — graduate studies, long-cycle Master's degree programme)
- **Faculty of Graphic Arts** (Department of Printmaking, Department of Graphic Design, majors: Graphic Arts, long-cycle Master's degree programme)
- **Faculty of Interior Design** (Department of Interior Design, majors: Interior Design — undergraduate and graduate studies)
- **Doctoral School**

ACADEMY OF FINE ARTS IN WARSAW

- **Faculty of Graphic Arts** (majors: Graphic Arts, long-cycle Master's degree programme)
- **Faculty of Interior Design** (majors: Interior Design, — long-cycle Master's degree studies, undergraduate and graduate studies)



- **Faculty of Design** (majors: Product, Space and Communication Design, — undergraduate studies; Design and Research — graduate studies)

- **Doctoral School**

UNIVERSITY OF THE NATIONAL EDUCATION COMMISSION IN KRAKÓW

- **Institute of Art and Design** (majors: Design, Art & Design, Digital Design, Graphic Arts, Visual Communication — graduate studies)

JAN KOCHANOWSKI UNIVERSITY IN KIELCE

- **Faculty of Art** (majors: Design — undergraduate studies; Social Design — graduate studies)

TARNÓW ACADEMY OF ARTS

- **Design of Spatial Forms** (undergraduate studies)
- **Faculty of Art** (majors: Graphic Arts, Design — Design of Spatial Forms, Visual Communication Design, Graphic Design — undergraduate studies; Graphic Design — graduate studies)

STATE UNIVERSITY OF APPLIED SCIENCES IN PRZEMYŚL

- **Graphic Design** (undergraduate and graduate studies)

KOSZALIN UNIVERSITY OF TECHNOLOGY

- **Design** (Industrial Design, Visual Communication — undergraduate and graduate studies)

BYDGOSZCZ UNIVERSITY OF SCIENCE AND TECHNOLOGY

- **Faculty of Design Arts** (Design, Interior Design — undergraduate and graduate studies)

CRACOW UNIVERSITY OF TECHNOLOGY

- **Industrial Design Engineering** (undergraduate studies)

RZESZÓW UNIVERSITY OF TECHNOLOGY

- **Faculty of Mechanical Engineering and Aeronautics** (Industrial Design Engineering — undergraduate studies)



NON-PUBLIC

SWPS UNIVERSITY/SCHOOL OF FORM

- **Majors: Design** (specialisations: Communication Design, Product Design — undergraduate studies, in Polish)
- **Majors: Design** (specialisations: Communication Design, Product Design — undergraduate studies, in English)

POLISH-JAPANESE ACADEMY OF INFORMATION TECHNOLOGY

- **Graphic Design and Multimedia Art** (undergraduate and graduate studies in English)
- **Interior Design** (undergraduate studies)
- **Graphic Arts** (undergraduate and graduate studies in English and Polish)
- **Doctoral School**

WIT ACADEMY IN WARSAW

- **Graphics** (applied graphics, web design, multimedia techniques, undergraduate studies)

WSG UNIVERSITY IN BYDGOSZCZ

- **Design** (undergraduate studies)

WSB MERITO UNIVERSITY

- **Design in business** (undergraduate studies)

UNIVERSITY OF INFORMATION TECHNOLOGY AND MANAGEMENT IN RZESZÓW

- **Graphic Design** (graduate studies)

ACADEMY OF FILM, ART AND DESIGN IN ŁÓDŹ

- **Design** (Industrial Forms, Visual Communication — undergraduate and graduate studies)

SOPOT ACADEMY OF APPLIED SCIENCES

- **Faculty of Architecture, Engineering and the Arts** (Design — undergraduate studies)

UNIVERSITY OF TECHNOLOGY AND ARTS IN APPLIED SCIENCES

- **Faculty of Architecture** (Interior Design — undergraduate and graduate studies; Design — undergraduate studies)

ACADEMY OF SILESIA IN KATOWICE

- **Faculty of Architecture, Civil Construction and Applied Arts** (Design — undergraduate studies; Interior Design — undergraduate and graduate studies; Graphic Arts — long-cycle Master's degree programme)

KATOWICE INSTITUTE OF INFORMATION TECHNOLOGIES

- **Graphic Arts** (undergraduate art studies)



POSTGRADUATE STUDIES

MAGDALENA ABAKANOWICZ UNIVERSITY OF THE ARTS IN POZNAŃ

- Fundamentals of Residential Interior Design
- Graphic Arts

WSG UNIVERSITY IN BYDGOSZCZ

- Interior Design
- Design — Artistic and Applied Design

WARSAW UNIVERSITY OF TECHNOLOGY BUSINESS SCHOOL

- Total Design Management (in cooperation with Instytut Wzornictwa Przemysłowego [Institute of Industrial Design])

CRACOW UNIVERSITY OF TECHNOLOGY

- UX and UI Design

WARSAW UNIVERSITY OF TECHNOLOGY

- 3D Academy/3D Design and Printing

WSB MERITO UNIVERSITY

- Luxury Product Design
- UX Design — Design and Development of Digital Products
- Graphical User Interface Design
- Interior Design and Layout
- Branding and Content Marketing

WARSAW SCHOOL OF ARTS

- Graphic Design and Animation

KATOWICE INSTITUTE OF INFORMATION TECHNOLOGIES

- Computer Publishing and Advertising Graphics

SWPS UNIVERSITY

- Interior Design and Well-Being
- Advertising Graphics
- Home Design
- Design of public spaces
- Service Design
- Sustainable Digital Design
- Trend Master
- User Experience Design in the Age of AI
- UX/Product Design
- Innovation and Design Management

BYDGOSZCZ UNIVERSITY OF SCIENCE AND TECHNOLOGY

- Accessibility for Designers

ACADEMY OF SILESIA IN KATOWICE

- Interior Design
- 3D Design
- Advertising Graphics

WIT ACADEMY IN WARSAW

- Computer Graphics



Making more noise about design.

Promoting the industry at home and abroad

Making more noise about design. Promoting the industry at home and abroad

Quality on par with international standards... and weak promotion of Polish design abroad.

This is the image that emerges from the opinions of representatives of the Polish design sector.

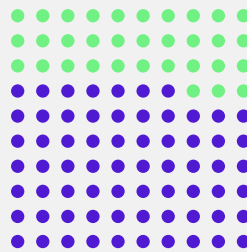
When speaking of Polish design and architecture, we tend to focus on individual international successes. But what does the situation look like on a macro scale? Although 7 in 10 professionals cooperate in some way with foreign entities, leading barriers identified include the weak recognition of Polish products abroad and the lack of suitable access and contacts. Equally important, established Polish designers with international success point to the weak presence of Polish design and the absence of coherent support in its promotion.

UNTAPPED POTENTIAL

The potential of Polish design is immense, and compared to foreign competition, there is nothing to be ashamed of — this is the message conveyed by industry representatives. As many as 71% of respondents declared they cooperate with foreign partners, with one in four identifying international operations as part of their core business. When asked to compare Polish design with other countries across six different aspects, in none of them did the majority of respondents give a negative assessment.



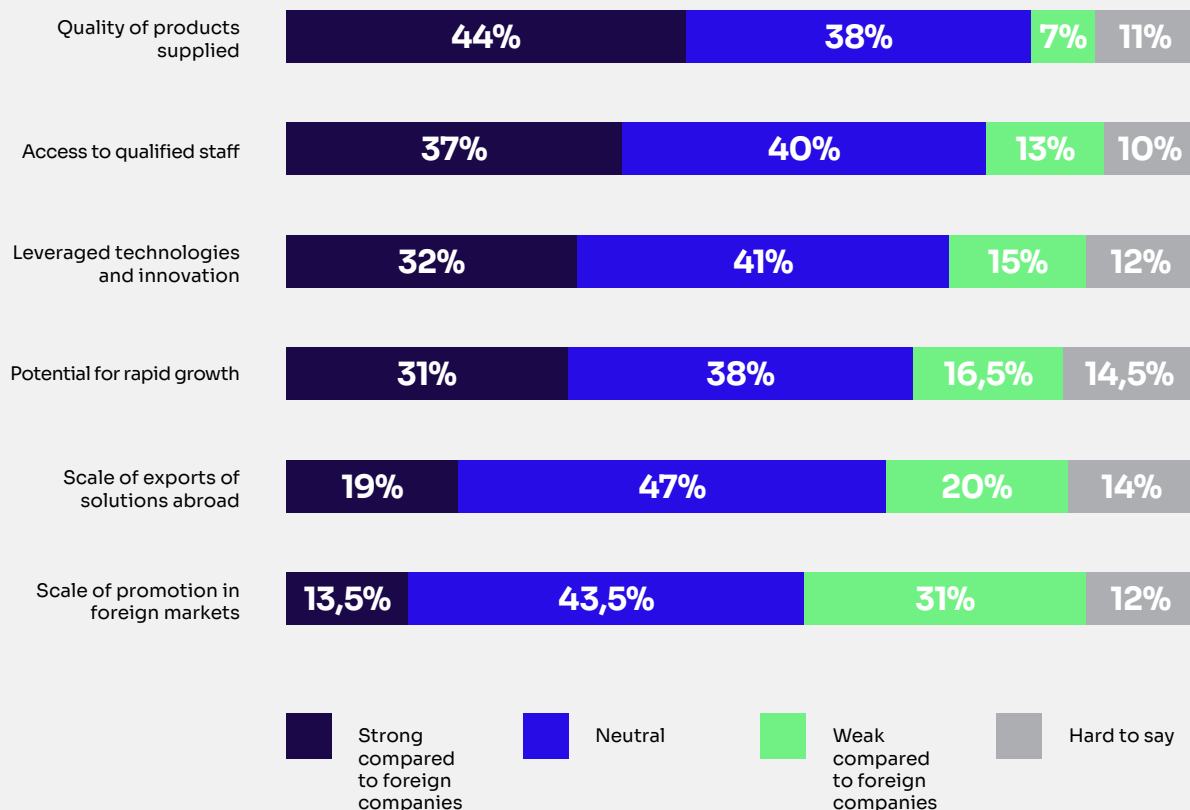
Poland vs. foreign competition



67%

of design sector employees believe that Poland lacks a national strategy for this sector's development.

Ratings by industry representatives



The most common barriers to growth in foreign markets



At the same time, the weakest results concerned the scale of exports and promotion in other markets. The quality and scale of international cooperation remain uncertain. Experts indicate that the domestic design sector suffers from the absence of a shared strategy for building a coherent Polish brand worldwide. Undoubtedly, one of the factors undermining progress is the high degree of fragmentation in the industry.

According to respondents, the strongest suite of Polish design enterprises is the quality of their products — 44% rated it as superior to foreign competitors, 38% as comparable and only 7% as worse. Access to qualified professionals also scored highly, with 77% of responses being positive or neutral. This confirms Anna Chwalińska's opinion: *To break through, you have to be either outstanding, resourceful, or simply work collectively. Poland has enormous potential — both in terms of industry and quality. What is needed is support — from entrepreneurs themselves as well as from the state.*

At the other extreme was the aforementioned scale of promotion in foreign markets — almost every third respondent (31%) considered this aspect to be weak in comparison with foreign competition. Symptomatically, this is nearly three times higher than the proportion of those who considered promotion a Polish competitive advantage (13%).

As Michał Piernikowski points out, striving to promote Polish design should become a priority for both the state and companies facing an increasingly competitive market: *We lack industry-wide cooperation in building a shared Polish design brand worldwide. Brands more often compete than collaborate in their image-building efforts abroad. This is why I value projects such as “The Polish Table”, which brought together three factories — working with crystal glass, porcelain, and stoneware — around a single concept. It is an excellent example of collaboration that strengthened the image of those companies. Italians or Scandinavians know how to promote themselves collectively, and I hope we will be able to build similar partnerships, not only business ones. Institutions, too, often act in isolation from the real needs of producers and designers, deciding arbitrarily, for example, which expansion directions are to be prioritised. We need cooperation and open dialogue to compete on global markets.*

BARRIERS TO DEVELOPMENT

Developing international operations is associated with a range of challenges that companies must overcome. The most frequently mentioned barriers were competition from local enterprises (35%) and the weak recognition of company products abroad (35%) — a result of the lack of a strong Polish brand that would help attract the attention of potential partners.

As noted by Maja Ganszyniec: *This is the greatest professional challenge I face — when it comes up in conversations that I am from Poland, the atmosphere deflates. When it comes to design, Poland has no standing. This is a serious issue that should be addressed promptly. Rebuilding Poland's position and credibility as a region with design competencies will take years.*

One in four respondents identified weak knowledge of foreign markets, language barriers, and limited awareness of foreign law and trade regulations as barriers to international growth. The answer to these three challenges could be support from industry-specific and public institutions — whose absence is highlighted both in quantitative data and expert statements. These findings also indicate where training opportunities could be developed for companies interested in expanding into foreign markets.

UNCONVENTIONAL CONTACT CHANNELS

The lack of a strategy targeted at foreign markets is also reflected in the nature of companies' external communications. When asked about ways of establishing contacts abroad, respondents most often pointed to promotion through social media (48%) and participation in international trade events (48%).

Government or public institutional support in this area was indicated by only 16% of respondents. Further, just one in four respondents reported making use of activities coordinated by industry organisations. This means that the majority of Polish design firms conduct international promotion independently and autonomously.

As one respondent remarked: *Poland has many talented designers in fashion, furniture, ceramics and industrial design, but their work often does not achieve international recognition. There is a lack of systematic support for promoting Polish design internationally, through trade fairs, exhibitions or PR initiatives. It is necessary to create systemic support programmes that would help designers build international contacts and present their work on global stages, which could significantly influence the development of the entire industry.*

IMPORTS AS A THREAT TO BUSINESS

In the context of effective international promotion — particularly of solutions characterised by high quality — it is equally important to emphasise the threats stemming from movement in the opposite direction. Imports of designs into Poland, including cheaper items from Asia that imitate classic designs or disregard copyright, are seen by industry representatives as a major problem.

The influx of cheaper foreign products was the third most frequently mentioned issue by respondents. Ahead of it were the low level of awareness regarding product quality and the rising costs of production, both of which also drive the popularity of production from countries such as China. Competition from larger foreign firms was also included among the top ten challenges. As one respondent noted: *Unfortunately, we are being flooded with junk from China, while Polish design has much higher production costs, so it loses out. Poles as a nation do not appreciate design, beauty and style. They are uneducated in this aspect, so they prefer to buy cheaper, though shoddy, products.*



3rd place

is taken by the flood of cheap products from abroad, which is a cause for concern among industry professionals.



40%

of those employed in the industry are afraid of losing their jobs to Asian production.

Competition from imported foreign products also affects feelings of security. As many as 40% of design professionals admit that Asian production is, in their eyes, a threat to their jobs.

CHANNELS FOR PROMOTING DESIGN IN POLAND AND INDUSTRY MEDIA

SELECTED MAGAZINES, NEWSPAPERS AND INDUSTRY PORTALS

- **VOGUE POLSKA LIVING** — An exclusive section of Vogue Polska devoted to interiors, architecture and lifestyle. It shows the beauty of design in the context of culture and aesthetics.
- **ELLE DECORATION POLSKA** — The Polish edition of the prestigious magazine about interiors. It features inspirations, trends and profiles of designers from all over the world.
- **WHITE MAD** — A magazine and portal about design, architecture and pop culture. It combines fresh ideas with an unconventional approach to aesthetics.
- **DESIGN ALIVE** — A magazine and portal about people, spaces and ideas in design. It inspires and tells the stories of creators and projects with a soul.
- **LABEL & LIVING** — A magazine and portal focused on design, interiors and lifestyle. It centers on thoughtful design and the beautiful details of everyday life.
- **FORMY** — An online magazine about design, published by the Faculty of Industrial Forms of the Academy of Fine Arts in Kraków. It focuses on a critical and reflective approach to design and art education.

- **DOM WPROST** — The lifestyle service of the “Wprost” weekly, concentrated on interiors and architecture. It offers accessible information on trends and practical aspects of home decoration.
- **ARCHITEKTURA MURATOR** — A leading magazine on contemporary architecture. It features analyses, project reviews and an overview of industry events.
- **ARCHITECTURE SNOB** — A magazine and platform on architecture, design and urban culture. It is characterised by a bold approach to the criticism and aesthetics of space.
- **CZAS NA WNĘTRZE** — A magazine about interior design, decoration and furnishing. It features inspirations, advice and reviews of products from the Polish market
- **BIZNES MEBLE** — An industry magazine for the furniture industry. It focuses on market analyses, trends and interviews with experts.
- **ARCHITECTURAL DIGEST POLSKA** — The Polish edition of the renowned magazine about luxury interiors and architecture. It centres on stylish homes and profiles of top designers.
- **STREFA DESIGNU UNIwersYTETU SWPS** — An educational platform operated by the SWPS University. It focuses on articles and events on the borderline of science and design.
- **MAGAZIF** — A multimedia platform about interiors and design. It features reports from trade fairs, interviews with experts and overviews of innovations.
- **PROPERTY DESIGN** — A service centred on architecture, interiors and the property market. It showcases design in the context of investment and business.
- **N6T / Notes na 6 tygodni** — A free illustrated magazine and portal presenting events in the field of contemporary culture, published by the Bęc Zmiana Foundation.

SELECTED PODCASTS

- **DESIGN PRACTICE PL** — A podcast about the practical side of design. It features conversations with designers about tools, processes and everyday creative work.
- **STREFA DESIGNU UNIwersYTETU SWPS** — A podcast focused on topics at the intersection of psychology, technology and design. It features experts who comment on current trends.
- **BEZPIECZNIK** — Joanna Jurga’s podcast about designing with empathy and a sensual approach to space.
- **DOBRE ZAPROJEKTOWANE WNĘTRZE** — A podcast about furnishing, design and style. It offers practical tips for anyone striving to create harmonious interiors.

- **SPOKOJNIE O WNĘTRZACH** — A podcast that talks sensitively and calmly about interiors. It centres on inspiration and expert interviews for lovers of aesthetics..
- **MAGAZIF** — A podcast that complements the MAGAZIF portal. It features industry voices, event coverage and conversations about the future of design.

SELECTED VENUES

- **WISE HABIT / DESIGN TALKS**
ul. Żelazna 34, Warsaw
- **DOMOTEKA**
ul. Malborska 41, Warsaw
- **CONCORDIA DESIGN**
Wyspa Słodowa 7, Warsaw
ul. Zwierzyniecka 3, Poznań
- **GALERIA DIZAJN BWA WROCŁAW**
ul. Rуска 46 a, lokal nr 103, Wrocław
- **FORUM DESIGNU**
Former Cracovia Hotel, ul. Focha 1, Kraków
al. Wojciecha Forfantego 6, Katowice



Our problem is Poland's weak brand image abroad. We are a solid part of the global design sector. We go side by side with others and gradually shape our own image. We are neither better nor worse, but instead of starting from the same line as those abroad, we have to make up an extra 200 metres. When you think of Scandinavian design, style immediately comes to mind. This is because Scandinavia has been investing in building the region's brand and supporting designers for decades.

→ **MAJA GANSZYNIEC**
Designer, Studio Ganszyniec



In Poland, there is still a major tug-of-war between price and quality. We see the market flooding with cheap imported products. Some companies operating in Poland are not manufacturers in the traditional sense — they import finished products and sell them under their own brand. As such, instead of investing in and developing their own design, they focus on distribution. This makes it difficult for designers to enter the market and limits the number of companies ready to work with them.

→ **KATARZYNA KABO**
Kabo&Pydo





New pathways.

Trends and developments as seen by the industry

New pathways.

Trends and developments as seen by the industry

Seizing new opportunities, but also the need for self-redefinition — these are two issues that resonate across every section of the report concerning the design sector. Inherent in both processes is the **reaching for innovation in design and addressing new and changing social needs.** However, the voices of industry participants are by no means unanimous. We can see repeated attempts to implement new ways of thinking and acting. Yet reaching for innovation still seems hampered by business, legal and mindset-related conditions.

BETWEEN DECLARATIONS AND REAL INNOVATION

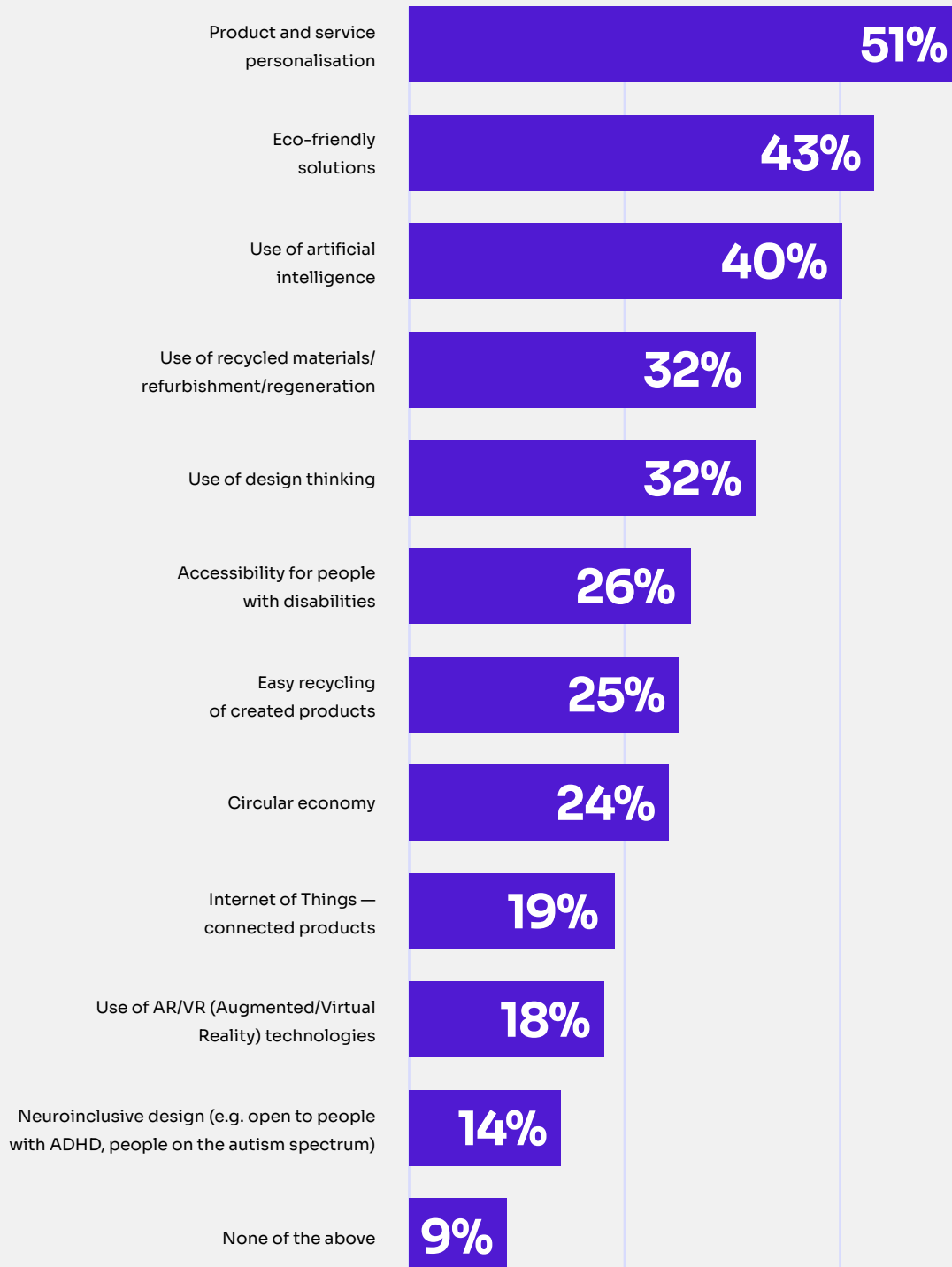
The Polish design sector is still in the process of seeking its own path in the context of ecology and innovation. This has already resonated in earlier sections of the report but becomes even more evident when we examine the quantitative survey results in relation to trends. Some of them, such as product personalisation (indicated by 51% of respondents) or eco-friendly solutions (43%), are indeed becoming increasingly present in design processes.

At the same time, these categories are broad enough that, at the level of declarations, they may cover both very basic and highly advanced implementations. For example, in the area of ecology, designers may limit themselves to introducing biodegradable packaging or using an eco-friendly material as a minor component of a product. Alternatively, they may adopt biomaterials and ensure a genuine reduction of CO₂ emissions throughout the product's journey to market.

In many other areas which internationally are considered crucial, innovations are still rarely adopted according to respondents' declarations. One alarming signal is the low percentage of design professionals working on projects that take into account accessibility for persons with disabilities (26%) or neuroinclusive design (14%). At a time of growing awareness of inclusivity and the needs of users with diverse sensory and cognitive experiences, such low levels of engagement indicate that these issues remain niche. As noted by one survey participant: *An important direction for the sector's development is educational and inclusive design, taking into account the needs of those often excluded due to disability or social status, while also shaping conscious citizens.*



Innovation and new developments in product design





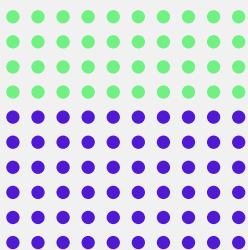
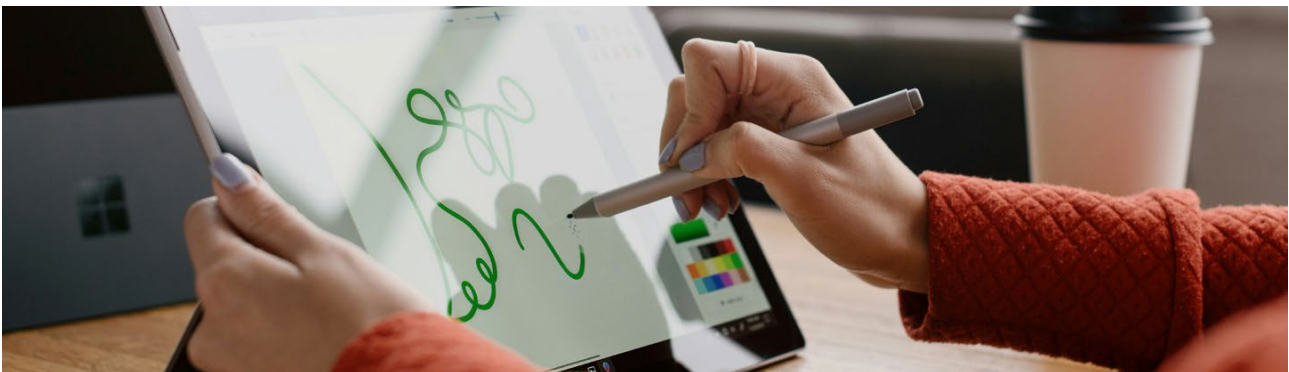
”

We are trying to make our products accessible to a wider range of users. This is a challenge in the context of the search for eco-friendly materials. While solving one problem, we face another — the rising final cost of the product. The willingness to pay more for eco-friendly packaging is still mostly just a declaration. A few years ago, a customer pointed out the excessive use of plastic packaging at VOX. We sought eco-friendly solutions, completely eliminating polystyrene and replacing it with paper honeycomb, as well as minimising the amount of plastic bags. However, this change increased the price of the product. For many people, this is not a valid reason to pay more.

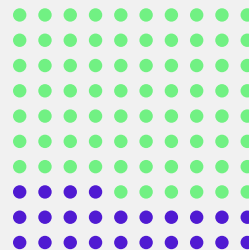
→ **KATARZYNA BRYZE**
Head of R&D
VOX Capital Group

BETWEEN THE NEEDS OF THE ENVIRONMENT AND... THE CUSTOMER

Similarly, although 60% of those surveyed say that sustainable design is a vital development, as many as 67% admit that clients do not want to bear the cost of green production. This shows that while environmental awareness in the industry is growing, there are still no systemic solutions that would realistically support companies in the transition to more sustainable operating models. As noted by Zuzanna Skalska: *The only effective way to make real changes is to introduce legal regulations that are enforced.*



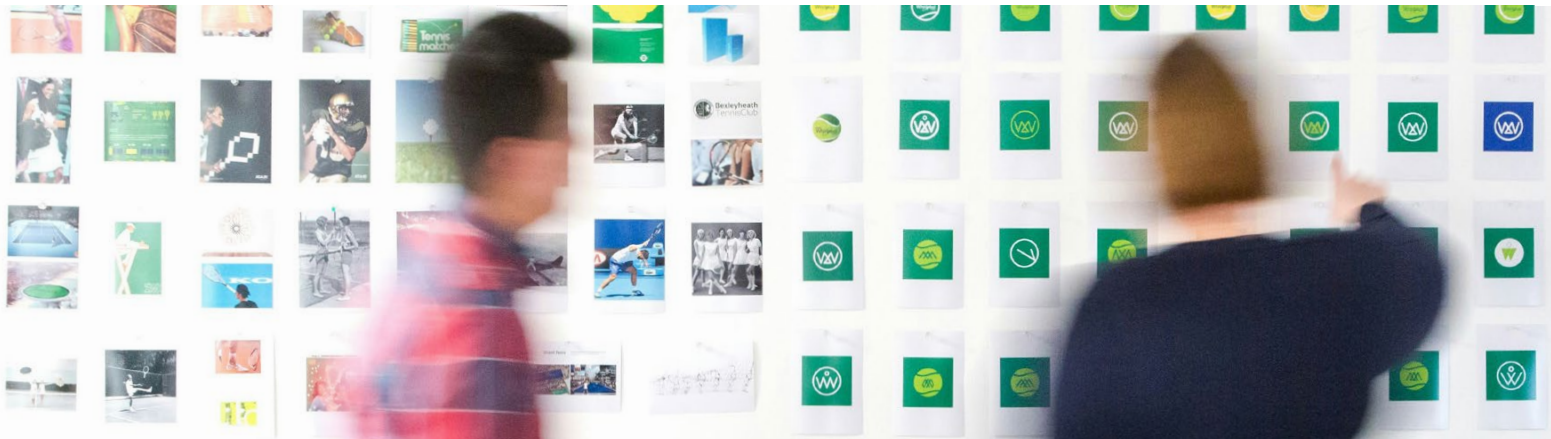
60%
of design professionals
believe that sustainable
design is the way
forward for the industry
in the near future.



24%
are implementing
circular economy
solutions.

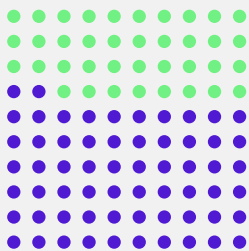
” Poland has considerable potential to become a leader in designing sustainable development solutions, such as modular and biodegradable products. Meanwhile, Polish companies still often focus on producing cheap, high-volume goods rather than durable and environmentally friendly ones.

ANONYMOUS SURVEY PARTICIPANT

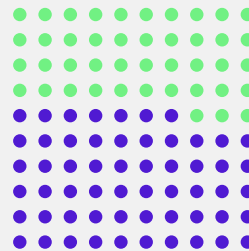


“ There was a time when circularity was a popular buzzword, and with it came greenwashing. However, this quickly faded. In a somewhat subversive way, I am glad that few companies talk about this, because it allows us to see who is actually doing something. I hope that there will be legal changes or that consumers will become more aware. However, for now, we are heading in the opposite direction.

→ **MAJA GANSZYNIEC**
Studio Ganszyniec



62%
of design professionals
believe that there is too
much greenwashing in the
industry.



57%
of employees believe
that there are no
clear standards for the
industry.

“ As long as there are no top-down requirements, restrictions on imports from the East and regulations concerning materials, quality and repairability, nothing will change. Any designer who is not a trendsetter will always make concessions to pay the bills.

→ **JOANNA JURGA**
Neuroprojektantka

As noted by Zuzanna Skalska: *As long as companies do not have financial incentives for eco-friendly production — for example through tax breaks — or face real consequences for greenwashing, the situation will not change. Countries such as the Netherlands are already introducing deposit systems not only for plastics, but even for wine bottles or jam jars. Real changes in Poland will be marginal until we start treating ecology as a systemic element rather than a marketing slogan.*

One example of this is the fact that despite their declared interest in recycling (32%), relatively few companies incorporate a circular economy strategy (24%) — which in itself seems to be a somewhat ironic. As noted by one respondent: *Poland still lacks a design culture that combines ecology, functionality and modern technologies in a holistic way.* Another respondent adds: *Polish companies still often focus on producing cheap, high-volume goods instead of their longevity and eco-friendliness. This area is yet to be developed.*

BETWEEN LOCALNESS AND TECHNOLOGY

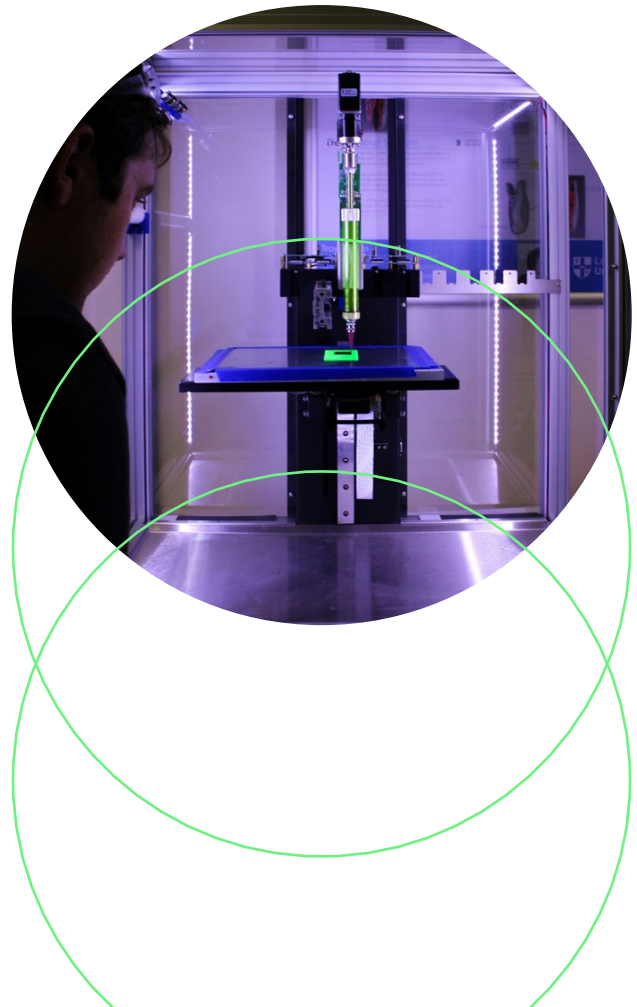
An interesting trend pointing to opportunities for the industry is the growing interest in local raw materials and the combination of traditional techniques with modern solutions. However, here, too, the results show clear barriers — financial and organisational alike. Despite the existing potential in such areas as ceramics, furniture or textiles, there is a lack of effective support mechanisms for designers and manufacturers to enable them to compete in the global market. As noted by one respondent: *Traditional folk arts and crafts can be a source of innovative inspiration for modern design. Skilful integration of these with technology could result in unique products that are valued worldwide.*

One interesting example of this type of activity was provided by Wiktoria Podolec of Tartaruga Studio, which built its brand by creating kilims, carpets and fabrics using traditional tools and techniques: *The Podlasie region has the Podlasie Textile Centre. A highly distinctive design style emerged there, developed over the years by a small group of people. This design stands out both technologically and aesthetically when compared to weaving techniques around the world. The fabrics are truly unique on a global scale. This should be promoted more, with more involvement from institutions, local governments and the central government.*

The survey results indicate a significant discrepancy between the declared industry development trends and the real state of implementation of innovations and pro-environmental solutions. Some aspects, such as personalisation and recycling, are becoming increasingly widespread. Others — such as inclusive design, a genuine shift towards a circular economy, and the strategic use of AI — remain marginal. Therefore, the key challenge for the sector seems to be not only the development of new trends, but also the translation of declarations into action.

An even greater gap appears in the use of new technologies. Although 40% of surveyed professionals declare that they use artificial intelligence, respondents' open comments suggest that this is not always done in a deliberate way. While AI is often treated as a convenient tool for automation, it simultaneously raises concerns about the homogenisation of projects and the loss of their individual character. Moreover, AI is still regarded as a novelty, rarely applied in a more strategic, well-considered manner.

At the same time, there is room for a creative approach to AI as a driver of innovation, as illustrated by one respondent: *The development of technologies such as 3D printing, digital design tools and AI opens up new possibilities in design, enabling faster prototyping and greater product personalisation. By embracing innovation and research in the field of design, we can contribute to further growth in this direction.*



”

I was asked if anyone listens to what I say about neuroinclusivity in design. I replied: „Yes, people who are not business decision makers”. Nonetheless, I know that if we do not do this, we will never move forward. It is still an information „bubble”, but it is growing. Knowledge about lighting is constantly improving. Biohacking is becoming fashionable as well. However, we are a long way off in terms of sorting out the visual information around us.

→ **JOANNA JURGA**
Neurodesigner





Key findings.

Highlights from the report

Key findings.

Highlights from the report

This survey has aimed to develop observations that could serve as a basis for creating an effective system of support for the design sector. It has enabled the formulation of a set of recommendations for further actions to support the growth of this unique segment. “Shaping Polish Design”, a report by the Creative Industries Institute, is the result of detailed analyses of the opinions of over 300 representatives of the design sector. It is essential that these voices, reflecting both positive and negative Phenomena, be heard. For the actual development of the sector, it is important not only to highlight its significance and promote its successes, but also to present the challenges and difficulties clearly signalled by the design community. Below we present a set of recommendations.

I. REVISING INDUSTRY TERMINOLOGY AND DEFINITIONS



The report highlights the absence of a uniform definition of the design industry, which hinders both the measurement of its scale and the planning of effective development efforts. The survey shows that the design community interprets terms such as “design” and “industrial design” in different ways. A broad debate should therefore be considered, involving representatives of the industry, public institutions, research centres and experts, with the aim of developing a common terminological framework and defining the scope of the sector. Such a shared position would make it possible to define the sector more precisely in statistics, strategic documents and support programmes, while avoiding issues indicated

by respondents such as competition for grant funding between industrial initiatives and projects of a purely artistic or speculative nature.

II. ANALYSING AND MEASURING THE SECTOR'S DEVELOPMENT



The process of conducting calculations showed that clearer definitions by national statistical authorities (including Statistics Poland) of entities as well as specific economic data would be helpful in monitoring the development of industrial design and design more broadly. Current PKD (Polish Classification of Activities) categories and statistical reports do not reflect the full picture of the design industry, making it difficult to assess the scale of employment and turnover in this field. Potential solutions could include expanding PKD classifications to include subcategories for industrial design and UX/UI design; regularly reporting employment and added value data for the sector; and incorporating specific design subsectors into research of creative industries, as is the case in some EU countries.

III. RAISING AWARENESS OF THE ROLE OF DESIGNERS



The report clearly shows that the importance of design in production, architectural and planning processes is still underestimated by both society and decision-makers. It would be valuable to launch awareness campaigns underlining the impact of designers' work on the quality of life, economic innovation and the attractiveness of public spaces. Such initiatives would not only influence public perception of support for the design sector, but also strengthen its position in public institutions, increasing opportunities for negotiating financial and institutional backing as well as attracting future talent to the industry.

IV. HOLDING ROUNDTABLE DISCUSSIONS FOR THE SECTOR AND PUBLIC INSTITUTIONS



Respondents clearly highlighted an insufficient level of support from public institutions. A series of meetings that would bring together representatives of the public sector, industry organisations, designers and entrepreneurs, should be considered. The aim would be to jointly identify barriers to the sector's development and both review and optimise existing support programmes. The outcome could be concrete recommendations for changes in public policies, grant schemes as well as educational and promotional activities. This process could also take on a cyclical character, leading to the creation of a permanent cooperation platform.



V. DEVELOPING THE POLISH DESIGN BRAND

The report shows that despite the high quality of Polish projects, international recognition of Polish design remains limited. It would therefore be crucial to initiate actions aimed at developing and consistently building a Polish design brand that would represent the sector, while also supporting exports, participation in trade fairs, and international partnerships. This brand could serve not only as a tool for economic promotion but also as a coherent message emphasising the uniqueness of Polish design — its functionality, innovativeness and grounding in local culture. It could be used in promotional campaigns at international trade events, industry competitions and within economic diplomacy initiatives.



VI. ANALYSING THE SECTOR'S FINANCIAL CHALLENGES

The report points to significant financial challenges for companies in the sector, including rising operating costs. There is a clear need for an in-depth analysis of the sector's economic situation, particularly regarding the impact of increasing energy, service and material costs on business profitability. This could be followed by an in-depth, cross-sectional financial analysis of the design industry, including not only statistical data, but also the experiences of entrepreneurs and designers. In particular, the analysis should examine the impact of rising energy prices and operating costs on company operations, as well as the scale of payment bottlenecks in the industry and their consequences for employment stability.



VII. PROVIDING PROTECTION AGAINST FOREIGN COMPETITION

The data collected indicate difficulties in competing with foreign entities, including Asian companies engaging in price dumping. The report highlights the need for legal measures that would protect the domestic market against foreign competition, e.g. through product quality control mechanisms, clarification of public procurement conditions, and preferences for locally created designs. Possible mechanisms could include introducing a quality control system for design products in trade; defining public procurement conditions in a way that favours local suppliers and designers; and creating criteria that reward designs developed in Poland or in cooperation with Polish businesses. In the longer term, consideration should also be given to legal tools enabling the elimination from the market of entities engaging in dumping or other unfair competition practices.

 VIII. PROVIDING SUPPORT IN THE CONTEXT OF AI DEVELOPMENT

The report confirms that the development of AI-based tools is having an increasingly significant impact on the design sector. Designers see both potential and risks in this phenomenon. Coordinated action is therefore needed in two key areas. Firstly, it is important to launch educational and training programmes enabling designers to develop competencies for the conscious and effective use of AI in design work. These programmes should cover both technical and ethical aspects of applying new technologies. Secondly, mechanisms for strengthening intellectual property protection in the context of AI development should be reinforced. Guidelines and legal solutions are needed to prevent the unauthorised exploitation of designs and models in datasets used to train AI algorithms.

 IX. ENCOURAGING COLLABORATION BETWEEN THE DESIGN SECTOR AND INDUSTRY

Respondents point to insufficient use of design potential in large enterprises. It would be beneficial to initiate measures aimed at stimulating cooperation between the design sector and industry. A key role could be played by grant schemes and support programmes which reward enterprises that strategically involve designers at the product planning and development stages. Such competitions could include quality criteria relating to the role of design in production and promote good practices of collaboration between companies and the design community. It would also be important to strengthen dialogue between designers and large enterprises, supported by public institutions. These actions should not only increase the role of design in the economy but also support knowledge and innovation transfer between the creative sector and industry.

 X. FOSTERING DIALOGUE BETWEEN THE SECTOR'S INSTITUTIONS

The survey highlights the need for greater effectiveness of institutions supporting the sector, especially in training, but also in addressing companies' everyday challenges. There is a clear need to initiate dialogue between industry organisations to review and adapt training, advisory, and educational offers to the real needs of the design community.

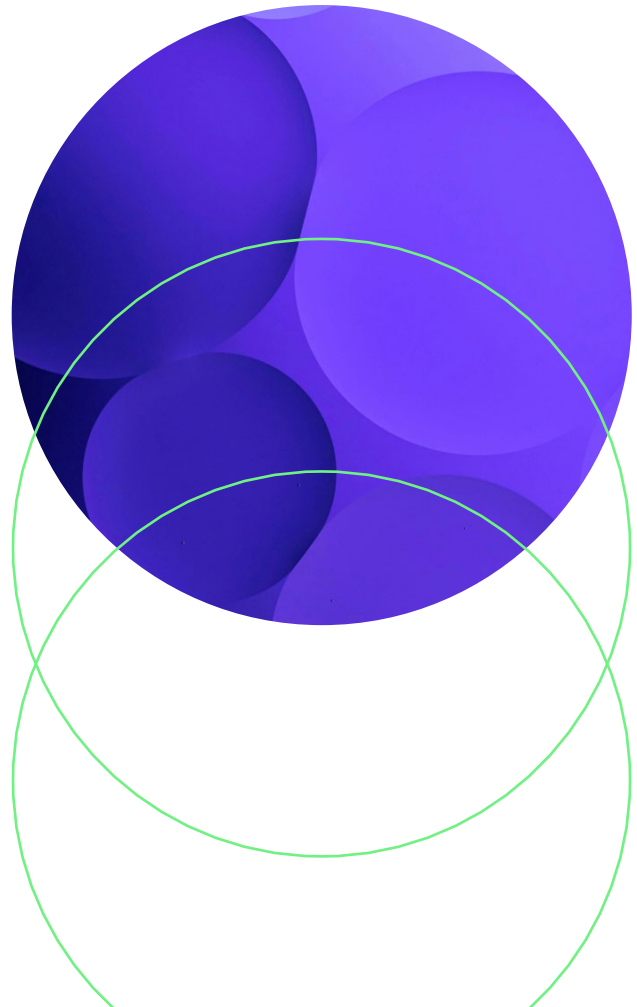
 XI. REVISING DESIGN EDUCATION PROGRAMMES

The report reveals a gap between the competencies of design graduates and the expectations of the market. A comprehensive review of educational programmes and their alignment with current economic needs would be helpful. It is also important to raise awareness of the role of design among students of other disciplines, including technical fields. Analyses should be conducted in close cooperation with practicing designers and entrepreneurs. Moreover, programmes should integrate cross-disciplinary education, covering technological, legal, business and intellectual property issues that are delivered by practitioners. There is also a need to intensify educational initiatives for students of other fields — particularly technical and managerial — to increase their awareness of the role of industrial design in production and the economy.



XII. SUPPORTING DEVELOPMENT AIMED AT NEW TRENDS

The report identifies key trends shaping the future of the design sector, such as sustainable design, neuroinclusive design and the use of AI. It is vital to introduce mechanisms to support industry development in these areas — both through grants and through tax incentives and priority criteria in competitions for projects addressing global challenges. This could include the creation of dedicated programmes supporting the sector in areas corresponding to global megatrends. They should cover financial instruments — such as grants, preferential loans and tax relief — as well as educational and advisory measures enabling entrepreneurs and designers to develop competencies in these fields. Equally important is the development of mechanisms that reward the implementation of innovative design solutions in public procurement and in programmes supporting industrial growth.





About the survey.

Structure of the research sample, methodology and sources

About the survey.

The structure of the research sample, methodology and sources.

The report, “Shaping Polish Design”, was prepared by the Creative Industries Institute. The dat:awesome by Linkleaders team was responsible for drafting the report’s content, as well as coordinating the quantitative study and analysing its results. The content was developed using quantitative and qualitative research techniques, along with desk research.

QUANTITATIVE STUDY — METHODOLOGY AND ASSUMPTIONS

The quantitative data presented in the report was obtained through an opinion survey conducted by a research firm IQS in January 2025 among 297 respondents via the Opinie.pl panel, as well as among recipients of Creative Industries Institute and Łódź Design Festival communications via these institutions’ LinkedIn profiles and the Łódź Design Festival newsletter. The survey was conducted using Computer Assisted Web Interviewing (a professional online questionnaire) on a verified base of potential respondents. The participants were representatives of the design sector, selected according to the definition adopted for the purposes of this study:

DEFINITION

The design sector encompasses a broad spectrum of activities related to the design of products, services and systems in terms of such things as aesthetics, functionality and innovation. Examples include industrial design, graphic design, architecture and interior design, arts and crafts, UX/UI design, household appliance/consumer electronics design, service design — designing and planning services in terms of potential client needs and mapping them.



 **297**
Representatives of the design sector

 **37%**
men

 **63%**
women

 **250**
Respondents
from IQS
Institute

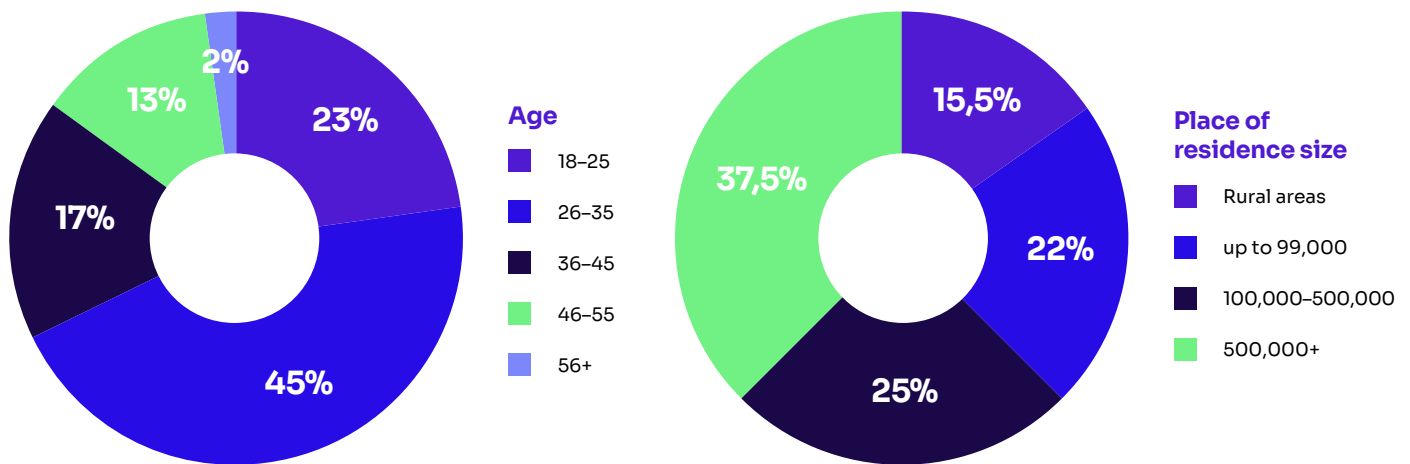
 **47**
Respondents
from the
Łódź Design
Festival
newsletter
(about 85%)

Quantitative study: Respondent profiles

The group surveyed in the quantitative study reflects the unique structure of the Polish design sector, which is characterised by specific demographic and professional features. Women dominate the sample, accounting for 63% of respondents, confirming the trend towards the feminisation of this sector observed in recent years.

The age of respondents is predominantly in the 26 to 35-year bracket, which points to the sector's relatively young demographic, with a significant proportion of individuals still in the process of developing their professional careers. The average length of professional experience is 7.7 years, indicating that many respondents have fairly extensive experience, and are still actively building their professional position.





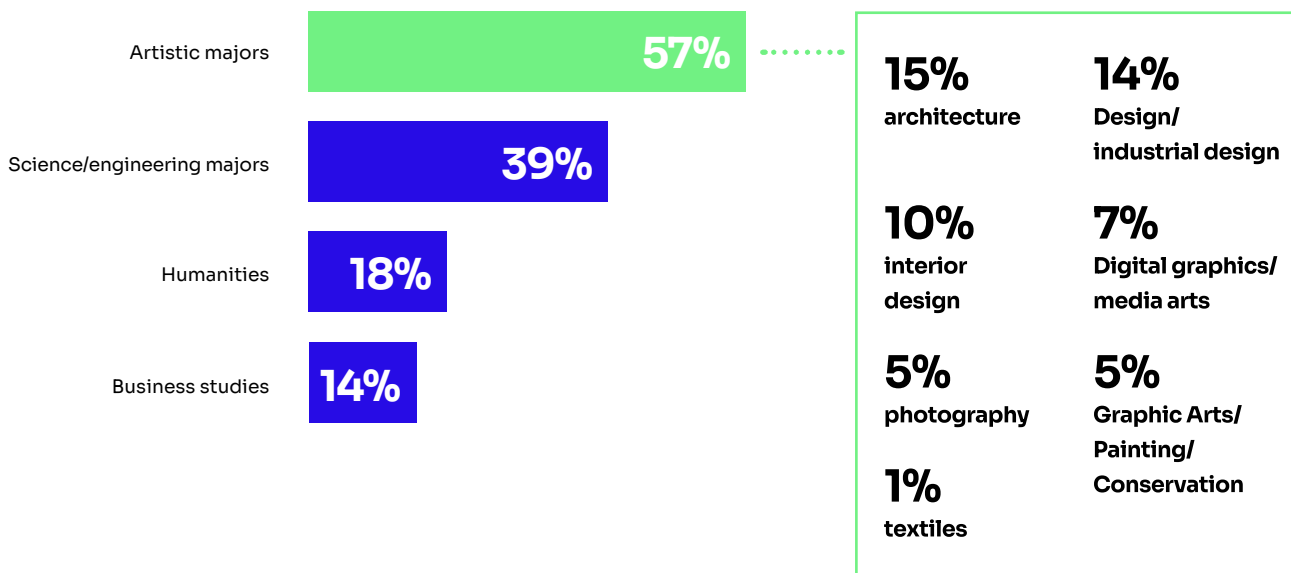
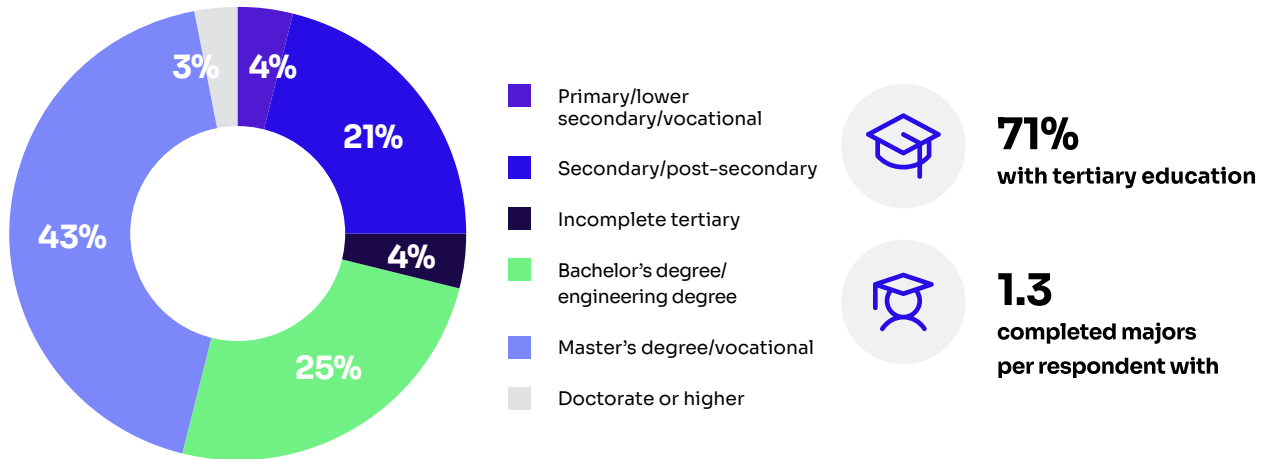
The vast majority of the survey's participants hold higher education degrees — as many as 71% have completed undergraduate, graduate or postgraduate studies. Notably, 57% of respondents are graduates of art majors such as industrial design, interior architecture and digital graphics. This educational profile demonstrates that the design sector in Poland is largely rooted in formal artistic and technical education, which may shape how the role and competencies of designers are perceived in the labour market.

Respondents predominantly reside in large cities — 37.5% live in urban centres with more than 500,000 inhabitants, and a further 25% in medium-sized cities (100,000–500,000). This suggests that the design sector in Poland is concentrated in larger metropolitan areas, where there is a higher density of employers and clients seeking design services.

As for employment, 70% of respondents work directly in the design sector, while 30% operate as subcontractors or external contractors, highlighting significant flexibility in collaboration models. Nearly one in four respondents run their own business (23%), while 59% are employed under a standard employment contract. This represents a markedly higher share of self-employed professionals compared to the general working population in Poland. At the same time, the predominance of salaried employees diverges from the common stereotype of a sector that is dominated by freelancers running sole proprietorships.

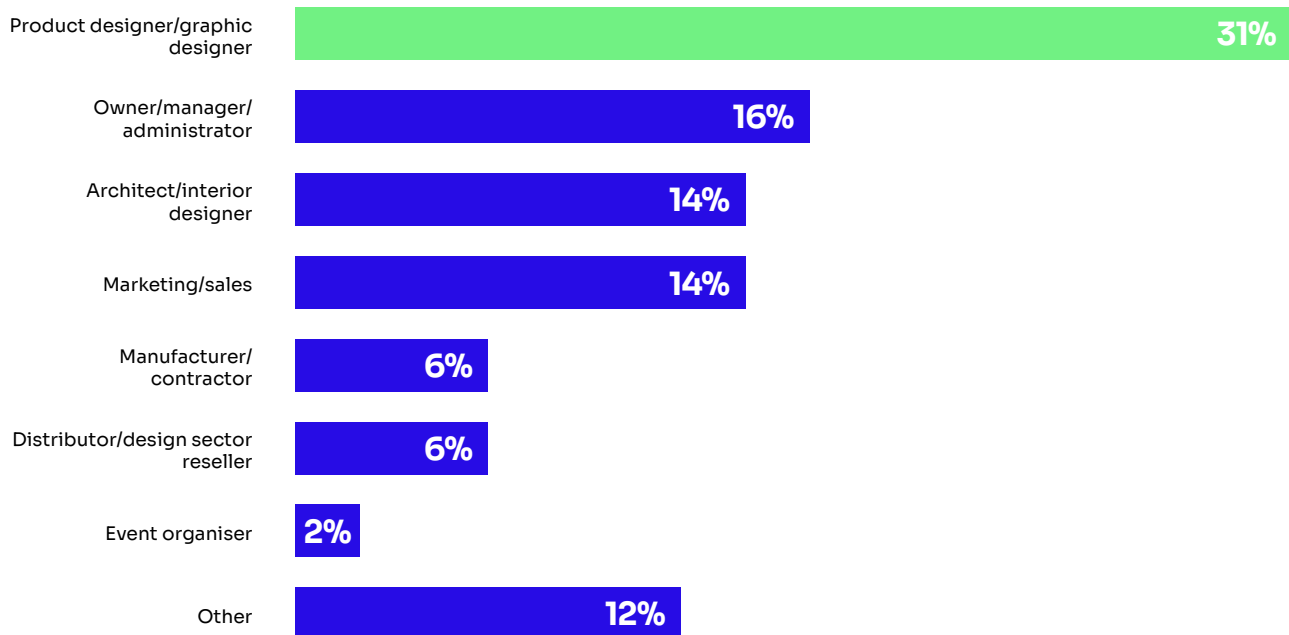
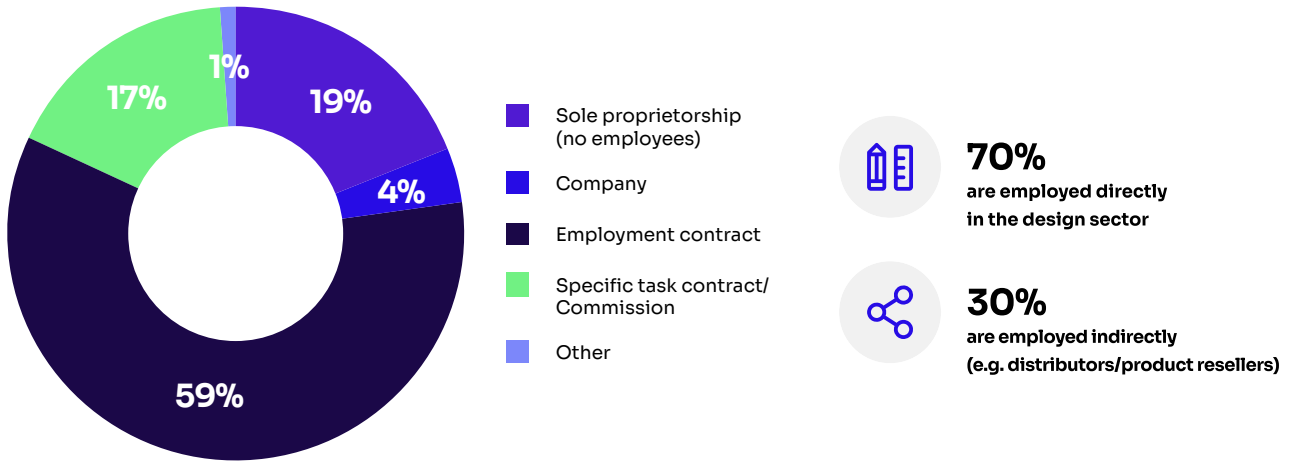
This factor is undoubtedly important to bear in mind when interpreting the findings. However, in the view of the study's authors, the perspectives of salaried employees within design are often overlooked or underrepresented, making their presence in this survey a vital contribution to the overall picture of the sector, which is frequently shaped by the voices of sole proprietors and established market actors

Education



Most people hold positions directly related to design — 31% are product designers and graphic designers, while 16% are owners or managers of design sector companies. Some respondents work in related sectors, such as interior design, marketing or sales.

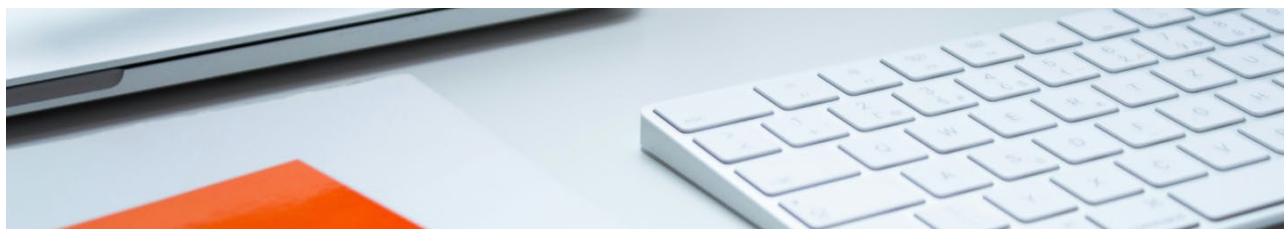
Employment form



In terms of design specialisation, respondents indicated a wide range of activities. The most frequently mentioned fields were graphic design and illustration (14%), architecture and interior design (13%) and service design (9%). Slightly fewer people were involved in designing furniture, fabrics and bathroom and kitchen fittings, which may reflect the specific nature of the market and the greater popularity of digital and graphic services.

Company specialisation

Specialisation	Share
Graphic design/illustration	14%
Architecture/interior design	13%
Service Design	9%
Finishing materials and accessories	7%
Furniture or lighting	7%
Transport/automotive	6%
UX/UI design	6%
Tools, home and garden accessories	4%
Textiles/textile fabrics/textile industry	4%
Toys/children's products	4%
Bathroom/kitchen equipment	3%
Household appliances/consumer electronics	3%
Computer hardware and accessories	2%
Other	17%

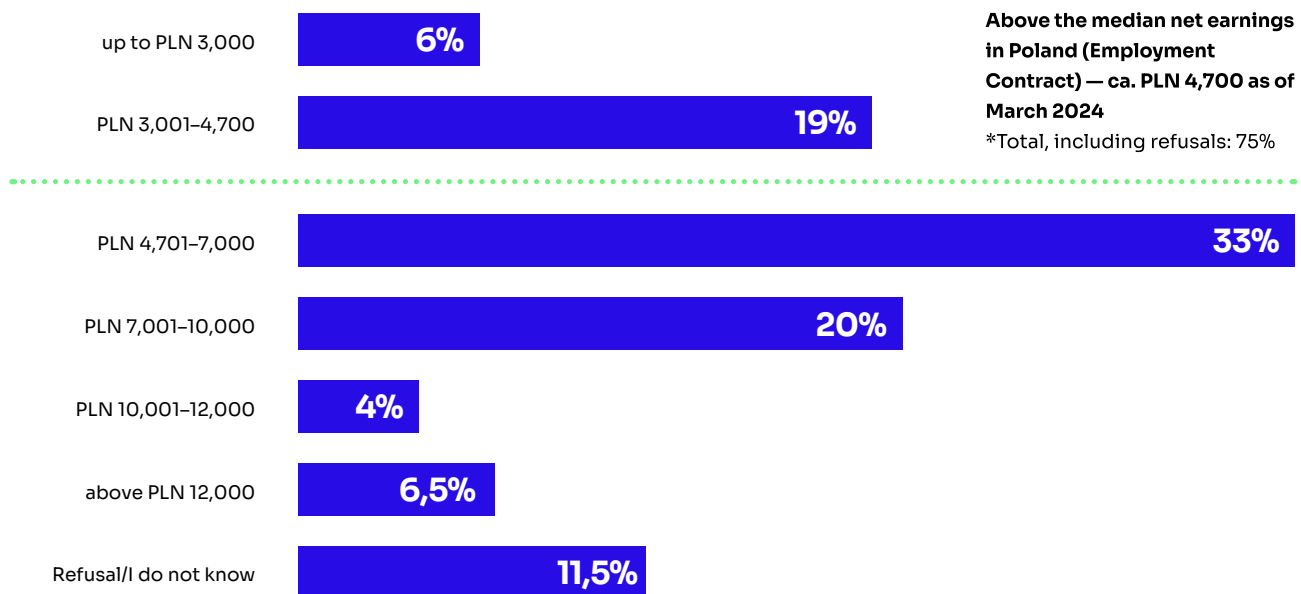


Salaries among respondents from the design sector vary widely — 63% of respondents made more than the median salary in Poland (PLN 4,700 net), but only 10% exceeded PLN 12,000. While most of the specialists surveyed earned relatively high salaries, significant stratification was evident. Salaries varied greatly — most of those surveyed earned between PLN 4,701 and PLN 7,000 net, which suggests a stable position in the middle-income segment, but at the same time only 10% earned more than PLN 12,000.

This means that few professionals enjoy the highest rates, and most of those surveyed were affected by considerable income polarisation. This situation is significantly influenced by the employment model — the dominance of sole proprietorships means that salaries may be irregular and dependent on the number and quality of orders. Consequently, even relatively high average incomes do not always translate into financial stability, especially when compared to the technology or engineering sectors.

There are also differences between individual specialists — some earn high incomes thanks to prestigious assignments and unique skills, while others, especially in the early stages of their careers, may find it difficult to reach a level that ensures financial security. This is confirmed by the fact that 6% of respondents declared earnings of less than PLN 3,000 net, which indicates that high incomes are not guaranteed. Thus, the design sector offers salaries above the national average, but at the same time requires flexibility and the ability to build a market position, as high, stable salaries are by no means the norm.

Individual monthly net income



QUALITATIVE ANALYSIS: IN-DEPTH INTERVIEWS AND OPEN-ENDED RESPONSES

Qualitative data was obtained in two phases: in-depth analysis of the open-ended responses given by 297 IQS survey participants (January 2025) and 10 qualitative interviews with leading industry representatives (26 February–20 March 2025). Participants in the IQS survey provided answers to two open-ended questions, with data later elaborated by the research team:

1. What do you think is the greatest untapped potential of Polish design? Where do you see the opportunity for its development, if the appropriate means and resources were available?
2. What type of products, solutions would you like to sell if you had the possibilities and resources to do so, regardless of what you are currently involved in?

The scenarios for the in-depth qualitative interviews with 10 representatives of the design sector were divided into three phases: a) introduction, b) questions addressed to all participants, c) questions tailored for the individual. The introduction in part a) was conducted according to a previously prepared research scenario. In part b), all participants were asked the following questions:

1. Please introduce yourself and say what you do for a living. What is your role in or association with the design industry?
2. What do you think is the greatest untapped potential of the Polish design sector that could strengthen its position and condition?
3. What do you consider to be the strongest aspect of the Polish design sector? What makes it stand out positively?

In part c), the interviews referred to selected results of the quantitative survey to provide additional context for the conversation. The grounded theory methodology served as inspiration when working on the interviews. The lowest possible level of pre-conceptualisation and hypotheses was adopted before the expert interviews took place, and the conclusions of the qualitative interviews were based on the stories of design sector actors (employees). The researchers emphasised that despite adopting this method, many observations from the interviews coincided with the conclusions from the quantitative survey.

DESK RESEARCH: ESTIMATING THE VALUE OF THE SECTOR

Desk research was used primarily to develop a top-down estimation of the value of the design sector, based on available macroeconomic data.



I. ESTIMATING THE VALUE OF THE DESIGN SECTOR

This methodological note describes the assumptions and analytical process used to estimate the added value of the design industry in Poland and the number of people employed in this sector. Due to the lack of precise statistics directly related to this industry, a top-down approach, based on available macroeconomic data and the structure of the creative sector, was used.

According to data from the European Investment Fund, the creative and cultural sector contributes 5.2% of added value to the Polish economy. Assuming that Poland's GDP is approximately PLN three trillion, the creative sector generates some PLN 155 billion in added value annually. Within the creative sector, a particularly important subsector identified by Eurostat is "creative, arts and entertainment activities", which accounts for 14% of the total value of Poland's creative sector, meaning that the added value of this subsector is about PLN 21.7 billion.

The design sector includes various subsectors such as industrial design, UX/UI design, service design, interior design, etc. Based on analyses of the structure of the creative sector and the scale of project activity in Poland, it has been estimated that the design industry accounts for approximately 20–30% of the added value of the "creative, arts and entertainment activities" sub-area, which gives the design industry a value of PLN 4.3–6.5 billion per year.



II. ESTIMATING DESIGN SECTOR EMPLOYMENT

According to Eurostat data, the cultural and creative sector employs 3.6% of all employees in Poland. Assuming that the total employment in Poland is around 16.8 million people, this gives approximately 605,000 people employed in the cultural and creative sector. According to Eurostat, employment in Poland in the "creative, arts and entertainment activities" subsector stands at 98,000 people, which represents 16% of the entire cultural and creative sector.

There are 23,826 PKD 74.10.Z companies registered in Poland. The structure of these companies indicates a predominance of micro-enterprises (99.6%), suggesting that many of them are sole proprietorships or include small teams. With a conservative assumption that the average number of employees in micro-enterprises is 1.5–2 persons, one can estimate employment in PKD 74.10.Z companies to be approximately 35,000–47,000. Nonetheless, many design professionals are employed in non-PKD 74.10.Z companies, e.g., in the IT industry (UX/UI design), household appliance/consumer electronics sector, services, etc.

A conservative assumption was made that at least twice as many people work in non-PKD 74.10.Z companies, resulting in a final estimate of employment in the design industry ranging from 70,000 to 90,000 people.



III. ANALYSIS CONCLUSIONS AND LIMITATIONS

The analysis shows that the added value of Poland's design sector is PLN 4.3–6.5 billion per year, which accounts for approximately 0.15–0.22% of GDP. Employment in the design sector is estimated at 70,000–90,000 people, including those who are self-employed, freelancers and designers employed in other sectors of the economy.

The limitations of the analysis stem from the lack of accurate statistics on the sector as a separate category in Statistics Poland and Eurostat data, and the need to use indirect estimation methods based on the creative sector. Further refinement would involve a comprehensive analysis of Social Insurance Institution (ZUS) data, company revenues and industry surveys; however, this would require analytical work that is beyond the scope of this Creative Industries Institute report.



IV. POSSIBLE OPTIONS FOR FURTHER ANALYSIS

To increase the accuracy of estimates, it is possible to analyse the financial statements of PKD 74.10.Z companies, supplement the data with the revenues of design sector enterprises and sole-proprietors, and conduct a qualitative business survey among sector representatives to estimate the average revenue and number of employees in design companies. Despite limitations in the available data, the top-down approach enabled a conservative yet credible estimation of the scale of the Polish design sector. The values obtained can serve as a reference point for further research and analysis of its role in the economy.

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