



ECONOMIC IMPACT OF *HEWELIUSZ* IN POLAND

A REPORT FOR THE MOTION PICTURE ASSOCIATION

OCTOBER 2025



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EXECUTIVE SUMMARY

Heweliusz is a Netflix Polish limited series from acclaimed Polish director Jan Holoubek, inspired by the story of the 1993 sinking of the ferry *MS Jan Heweliusz*. The five-episode series, produced locally by Telemark, depicts the dramatic events experienced by passengers and crew at sea, as well as the aftermath on land, as families grappled with the consequences.

Heweliusz is the largest television production in recent Polish history and has contributed significantly to economic activity in the country. The project engaged around 2,560 businesses nationwide. This spending supported economic activity in every region in Poland and across a wide range of industries, while also indirectly stimulating additional spending by the Polish residents employed by the production and its supply chain.

This study, commissioned by the Motion Picture Association (MPA), analyses the production's total economic impacts in Poland in 2024–2025.¹ The study also considers the wider benefits to the Polish economy, such as supporting the local audiovisual industry. Similar production budgets and spending patterns in Poland are likely to produce similar economic impact results as those presented in this study.

In 2024–2025, **the production of *Heweliusz* spent PLN 61.7 million in Poland**, covering a range of expenses including the compensation of local production cast and crew, and goods and services provided by local businesses.

Oxford Economics estimates that, as a result of this expenditure, the production of *Heweliusz* **stimulated a PLN 78 million contribution to Poland's GDP in 2024–2025**. We find that for every PLN 1 million that the production's own activities contributed to the economy, it supported a further PLN 1.8 million of activity along its supply chain and through the payment of wages.

We also find that *Heweliusz's* production supported a total of **640 full-time and part-time jobs in Poland** during the production period. For every 100 people the production directly employed, its expenditure supported 47 additional jobs across the country. This does not include extras that were involved in the production.

2,560

Businesses engaged across Poland

640

Full-time and part-time jobs supported across Poland as a result of *Heweliusz*

PLN 78m

Contribution to Poland's GDP supported by the production of *Heweliusz*

¹ Throughout the report, the economic impact is presented in 2024 prices.

THE ECONOMIC IMPACT OF HEWELIUSZ IN POLAND

TOTAL IMPACT OF PRODUCTION

PLN 78m
total contribution to
Poland's GDP



640

Full-time and
part-time jobs
supported
across Poland



DIRECT IMPACT OF PRODUCTION

PLN 61.7m
spent across Poland



Around
2,560
local
businesses
supported



430
full-time and
part-time local
cast & crew jobs
employed



1. INTRODUCTION

Heweliusz is a five-episode Netflix Polish original limited series inspired by the real-life events surrounding the 1993 sinking of the *MS Jan Heweliusz*, a ferry that was crossing the Baltic Sea from Poland to Sweden. The series, produced locally by Telemark, follows the experiences of the passengers and crew as they endured the disaster, while families on land grappled with uncovering the truth about what happened.² The series' creative team was led by acclaimed Polish director Jan Holoubek and producer Anna Kępińska.

The Motion Picture Association commissioned Oxford Economics to independently assess the economic impact of the production of *Heweliusz*

on the Polish economy during the production period. For the study, Oxford Economics used spending data provided by Netflix to estimate the economic impact arising from the production of the limited series.

Heweliusz was filmed primarily in Poland (main locations Warsaw, Gdynia, Świnoujście) and in a studio in Belgium for some of the underwater scenes. Production ran from January to August 2024, totalling 105 shooting days, with postproduction continuing into 2025.

Shows produced with similar budgets and spending patterns in Poland are likely to produce similar impacts as those presented in this study.

² Netflix. "Heweliusz." Accessed September 16, 2025.



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2. PRODUCTION SPENDING



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The production of ***Heweliusz*** spent approximately **PLN 61.7 million across Poland** in 2024-2025, including the compensation of local production cast and crew, and goods and services provided by local businesses. This production spending directly generated employment whilst also boosting business revenue for the local economy. As well as providing a direct boost to the Polish economy, this spending also had positive impact for economic activity and jobs along the supply chain.

PLN 61.7m

**Production expenditure
in Poland**

2.1 BUSINESS SPENDING

Heweliusz's production engaged around 2,560 businesses from every region in Poland. In six out of the 16 regions, there were more than 100 vendors involved. Vendors from the Masovian Region (Mazowieckie) received

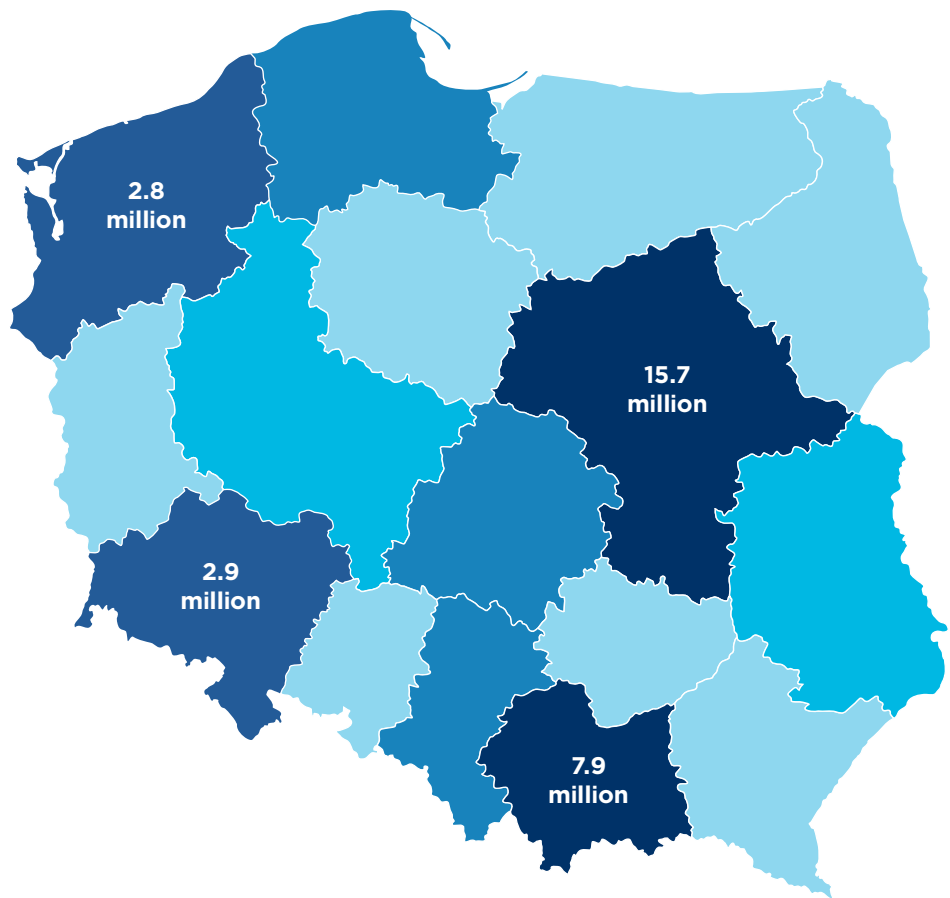
PLN 15.7 million in spending. The Lesser Poland Region (Małopolskie) also saw significant expenditure, receiving PLN 7.9 million. The remaining spend was more sparsely distributed, with notable amounts in the Lower Silesian

Region (Dolnośląskie, at PLN 2.9 million) and the West Pomeranian Region (Zachodniopomorskie, at PLN 2.8 million). Fig. 1 below shows the distribution of business spending across the country.

Fig. 1: Map of spending with Polish businesses by region

Total spending by region (PLN)

- < 100,000
- 100,000 – 500,000
- 500,001 – 1 million
- 1 million – 5 million
- 5 million +



Source: Netflix, Oxford Economics

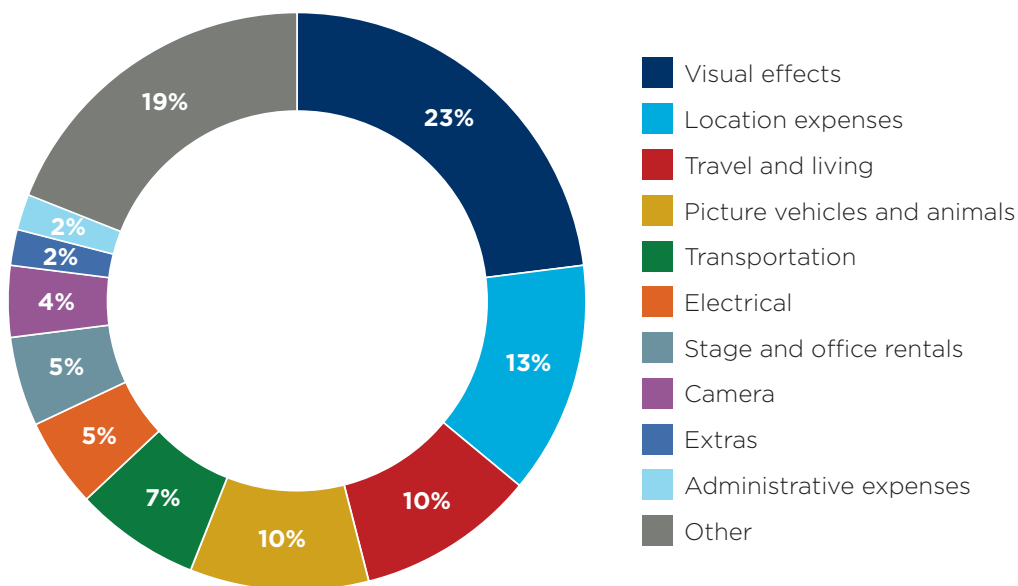
Series productions typically rely on a wide range of goods and services from many local businesses, and the production of *Heweliusz* was no exception. Spending on visual effects was the single largest spending

category with 23% of total business expenditure (PLN 7.6 million). This was followed by location expenses (PLN 4.5 million), travel and living (PLN 3.3 million), and picture vehicles and animals (PLN 3.3 million).

In terms of vendor numbers, the production engaged around 600 vendors for location-related expenses, 295 for set dressing, and 200 for wardrobe.

Fig. 2: Spending on goods and services in Poland, by category

Percentage of spend with vendors



Source: Netflix, Oxford Economics

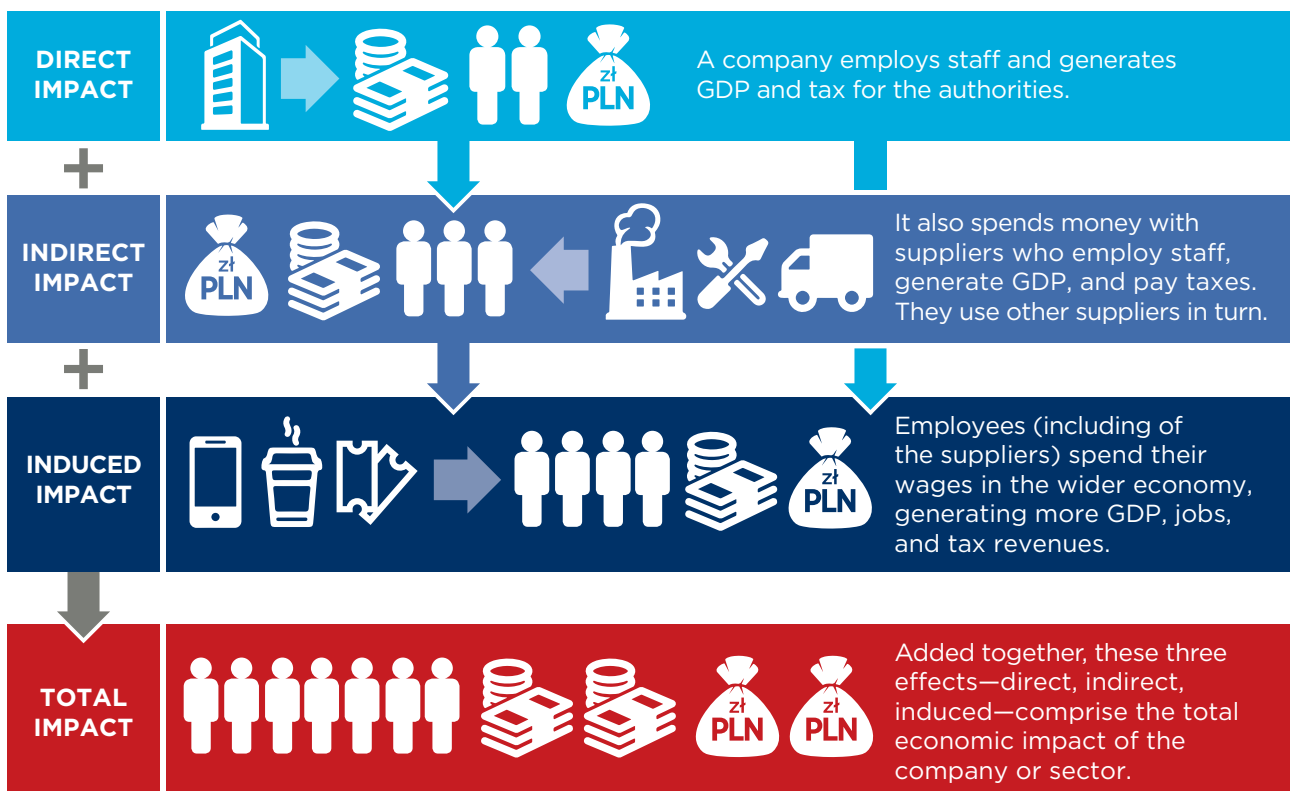


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3. ECONOMIC IMPACT

3.1 CHANNELS OF IMPACT

We calculated the impact of producing *Heweliusz* on the Polish economy using an economic impact assessment. This involves quantifying the production’s economic contribution across three channels of expenditure: the direct impact, indirect impact, and induced impact. The total economic impact of *Heweliusz* equals the sum of these three channels.



Source: Oxford Economics

PLN 78m

Contribution to Poland's GDP supported by *Heweliusz*

640

Full-time and part-time jobs supported across Poland from the production of *Heweliusz*

PLN 1.8m

In additional GDP for every PLN 1 million directly contributed by the production of *Heweliusz*

3.2 TOTAL IMPACT

We estimate that the production of *Heweliusz* contributed a total of **PLN 78 million to the Polish economy**. 36% of this total impact was generated directly by the production itself (direct impact), while the remainder came through the spending on local goods and services along the supply chain (indirect impact), and the spending of wages by local cast and crew, and employees at production vendors across the wider economy (induced impact).

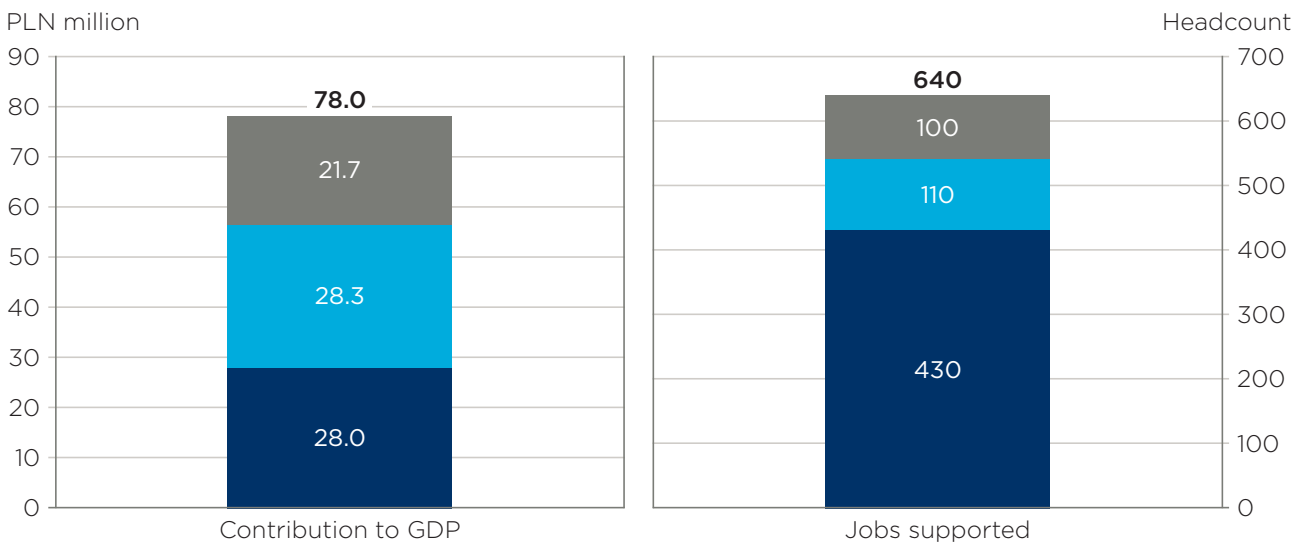
The production also made a significant contribution to local employment, **supporting a total of 640 full-time and part-time jobs**

during the production period. Of this total, around 430 were direct cast and crew jobs, making this channel by far the most significant in employment terms. However, the other impact channels also made an additional contribution to Poland's employment. Approximately 110 jobs were supported along the supply chain, while spending of wages across the country sustained a further 100 jobs in the wider economy.

These findings indicate notable multiplier effects from the production of *Heweliusz*. We estimate that for every 1 million zlotys directly contributed to GDP, a further PLN 1.8 million was added through secondary

Fig. 3: GDP and employment contribution supported by *Heweliusz* in Poland by channel of impact

■ Direct ■ Indirect ■ Induced



Source: Oxford Economics
Totals may not sum due to rounding.

effects.³ In employment terms, every 100 jobs in the production stimulated a further 47 jobs across the country.⁴

Based on the amount of Polish production incentives expected to be received, these are estimated to have produced PLN 5.2 in GDP for every zloty of incentive received by the production.

The remainder of this section describes the three channels of impact in more detail.

3.3 DIRECT IMPACT

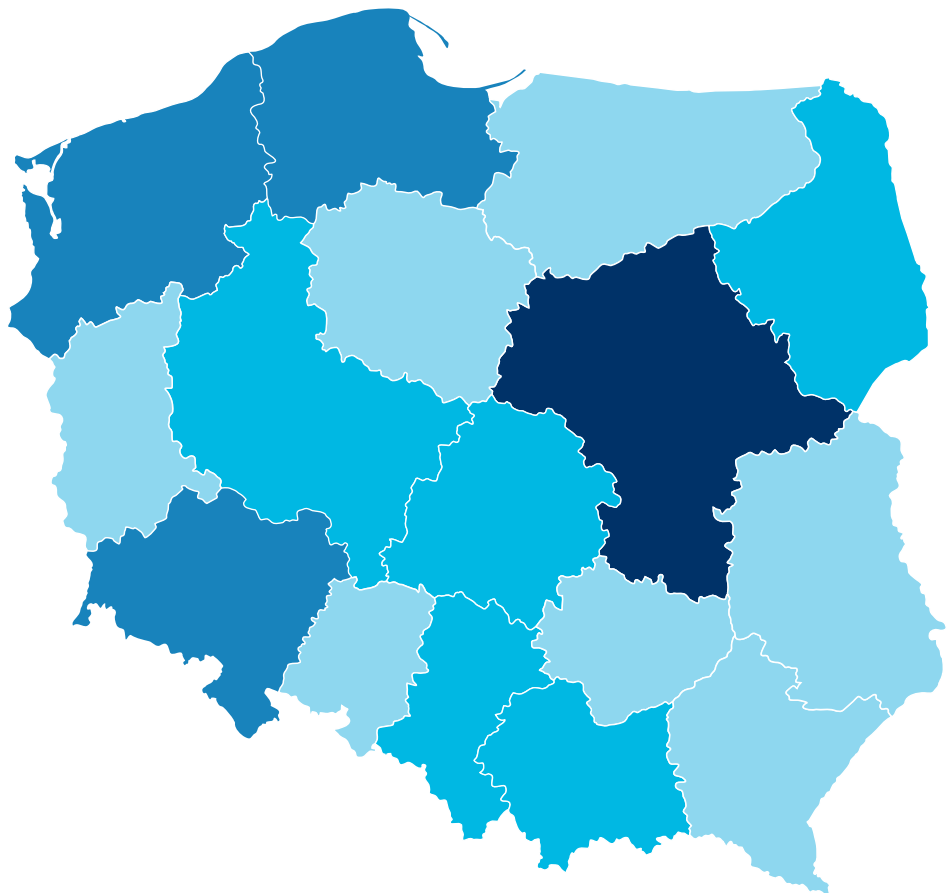
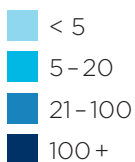
The production of *Heweliusz* directly employed around **430 full- and part-time cast and crew during the production period.** The Masovian Region (Mazowieckie) was the primary centre of employment, with 62% of the generated employment (270 jobs) located in that region. The remaining direct employment was spread across the other regions of

Poland, all of which experienced a positive employment impact to some degree.⁵

We estimate that the production of *Heweliusz* made a PLN 28 million direct contribution to the country's GDP in 2024–2025. This contribution reflects the compensation of employees, including wages, salaries, and employer contributions paid to local production cast and crew.⁶

Fig. 4: Map of production jobs by region of residence in Poland

Employment by region (headcount)



Source: Netflix, Oxford Economics

³ This GDP multiplier effect is calculated by dividing the total impact (PLN 78 million) by the direct impact (PLN 28 million) and subtracting 1.

⁴ This employment multiplier effect is calculated by dividing the total employment impact (640) by the direct employment impact (430) and subtracting 1. While the employment figures presented in this report are rounded, all calculations are based on the actual figures.

⁵ Direct employment does not include all the extras employed during the production of the series.

⁶ The contribution to GDP generated by a company or a project can be calculated as the sum of its surplus (profits) and employee compensation. This approach, known as the income approach, is consistent with the principles of national accounting. For the purposes of this study, we take a conservative approach to this calculation and focus on the employee compensation of local workers, excluding the profits associated with the production in our calculation of direct contribution to Poland's GDP.

3.4 INDIRECT IMPACT

The impact of *Heweliusz's* production on Poland's economy extended beyond the direct contribution it made through its own operations. This spending on goods and services from local businesses rippled through its supply chain, stimulating additional economic activity across the

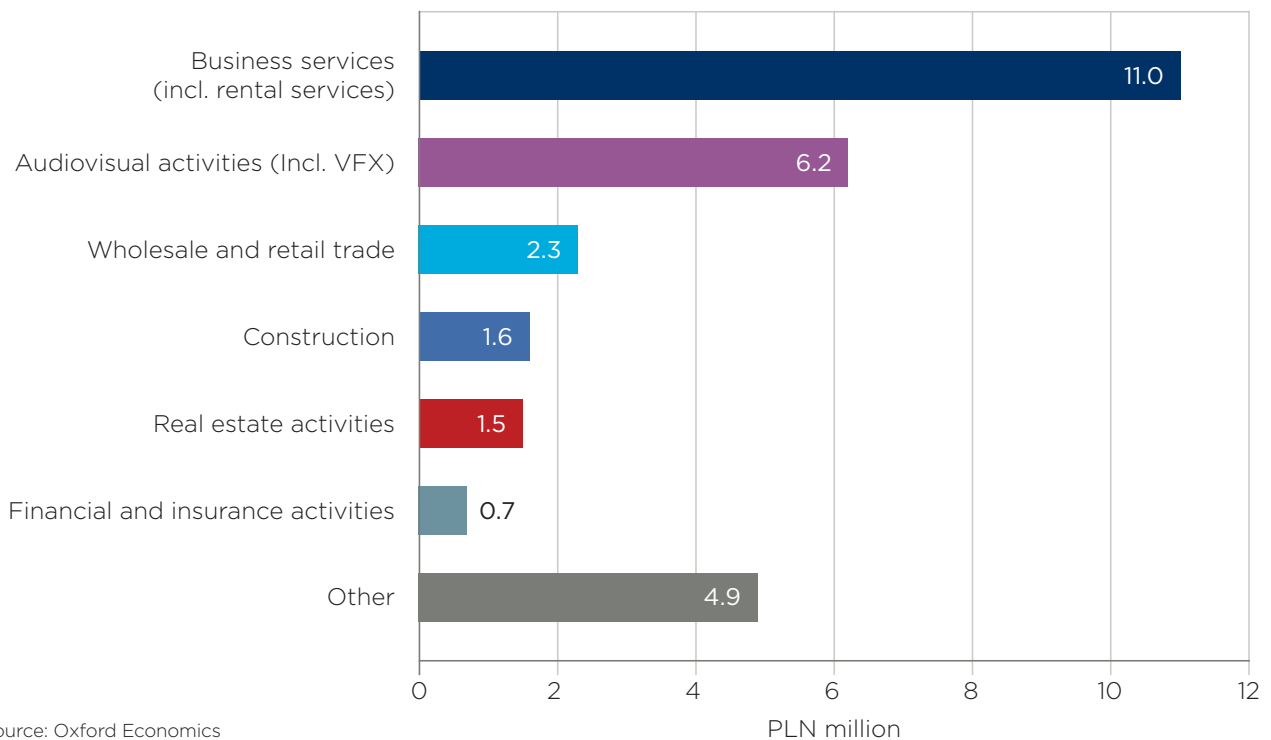
economy. This supply chain impact is also referred to as the *indirect* impact.

We estimate that ***Heweliusz's* indirect impact contributed PLN 28.3 million** to Poland's GDP. Around 39% of this contribution (PLN 11 million) was received by the business services industry, followed by the audiovisual sector,

wholesale and retail, and construction. Together, these industries made up approximately 75% of the total indirect impact of *Heweliusz's* production.

This indirect economic activity also had an employment impact, supporting almost 110 full-time and part-time jobs across Poland.

Fig. 5: GDP contribution stimulated by the procurement of goods and services from local suppliers, by industry



Source: Oxford Economics

3.5 INDUCED IMPACT

The approximately 540 local jobs directly and indirectly supported by this production received salaries, which they then spent across a wide range of sectors, from retail to leisure. This spending then stimulated further economic activity and employment at other businesses, which in turn rippled down their

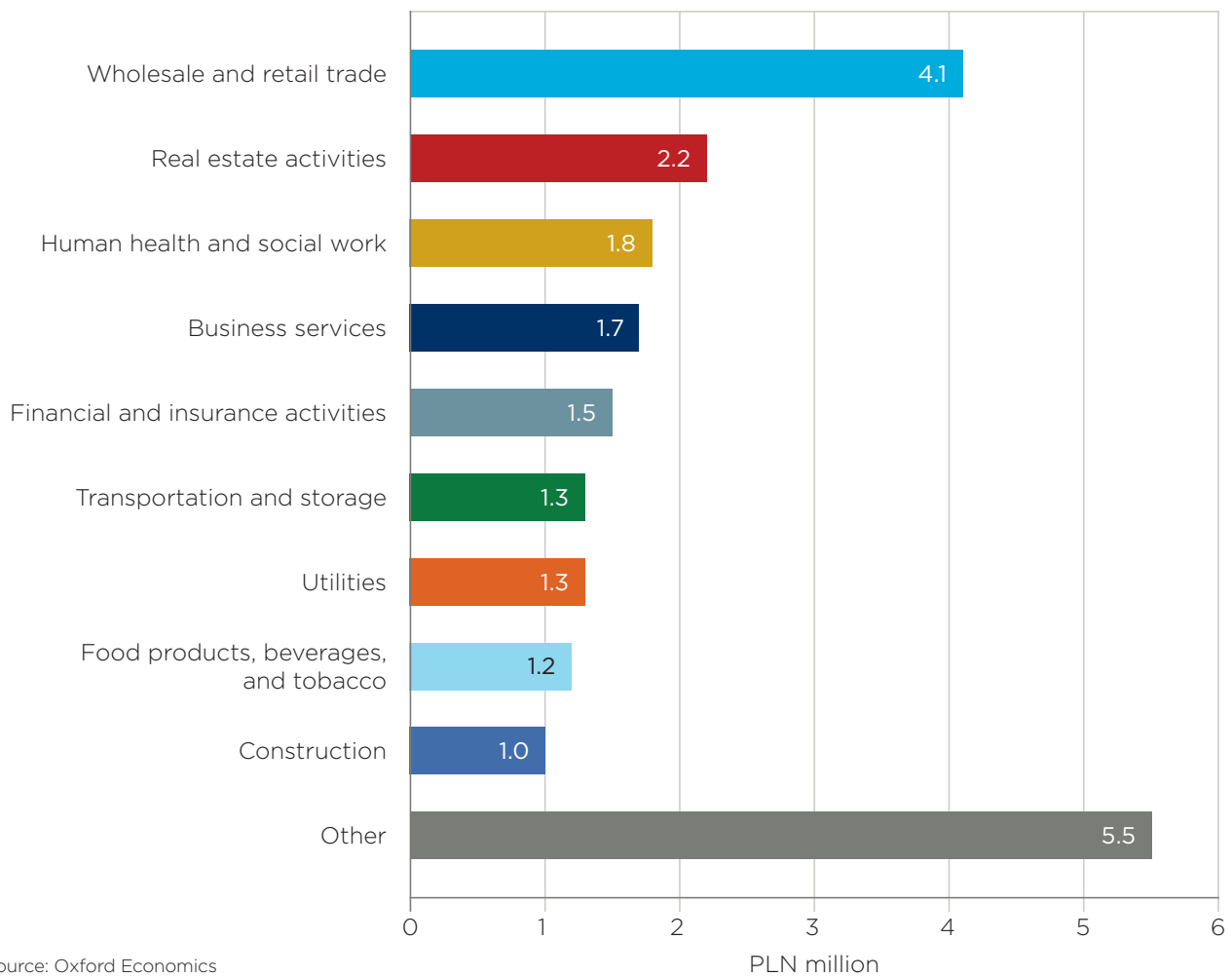
supply chains. The sum of this additional impact resulting from this local spending by the production’s cast and crew, as well as employees of production vendors, is *Heweliusz’s* induced impact.⁷

We estimate that the induced impact channel **contributed PLN 21.7 million to the Polish economy** during the production period. Wholesale

and retail received the largest uplift in economic activity (PLN 4.1 million) through this channel, followed by real estate and the health sector (see Fig. 6).

We estimate that the induced channel also supported an additional 100 full- and part-time jobs across the Polish economy during the production period.

Fig. 6: GDP contribution stimulated by the payment of wages to locally based workers, by industry



Source: Oxford Economics

⁷ The induced-impact estimates in this report include only the spending of local residents whose income is supported by the production. The temporary expenditures by non-resident cast, crew and visitors (e.g., on accommodation, food and leisure) are excluded; incorporating these additional flows would increase the estimated impact.



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4. WIDER IMPACTS

In addition to the economic impact generated by production spending, limited series such as *Heweliusz* can produce benefits that extend beyond the jobs and GDP they support.

Recognising the audiovisual sector's potential to drive economic development, the Polish government enacted the Act on Financial Support for Audiovisual Production in 2019. The legislation introduced a 30% cash-rebate incentive on eligible domestic spending, giving producers a strong reason to locate projects in Poland.⁸

The audiovisual industry in Poland has grown steadily over the past few years. Statistics Poland data show a sustained increase in film production, reaching an all-time high in 2022. Poland has also become a significant hub for documentary filmmaking. Of the 262 films produced for cinema and television in 2024, which includes 93 cinema films, and 169 television films, 52% were documentaries.^{9,10}

Productions like *Heweliusz* help drive Polish reputation not only as an important destination in the audiovisual production industry, but also as a domestic powerhouse that can tell compelling and authentic Polish stories. The limited series is the latest project from acclaimed Polish director Jan Holoubek, who has received widespread acclaim for previous works such as *High Water (Wielka Woda)*, *25 Years of Innocence*, and *The Mire*. This is a good example of how local work, as it becomes more widely recognized both in Poland and internationally, attracts new projects and increasing attention. This helps establish the reputation of Polish productions worldwide.

Large-scale productions also support the infrastructure that makes Poland an attractive place to produce film projects. Investments from productions like *Heweliusz* can help build the skills of the local workforce and contribute to

efficiencies that result from having a greater concentration of talent, infrastructure, and equipment. The series is the most ambitious Polish Netflix production to date in terms of production value and scale, involving more than 120 named roles, including very prominent Polish actors like Magdalena Róźczka, Jan Englert, Magdalena Zawadzka, and Borys Szyc. Additionally, 40 stunt actors, nearly 200 post-production specialists, and around 3,000 extra days were involved.¹¹

While we have not measured the wider impacts of the production of *Heweliusz* in this study, it is worth observing that film and television productions can also create additional economic, community, and social benefits. These may comprise film-induced tourism, the creation of job openings for apprentices or students, the development of business ventures, the formation of spin-off firms, and contributions to community and culture.

⁸ Polish Film Institute, "30% Cash Rebate Basics," n.d.

⁹ Statistics Poland, "Cinematography in 2024," May 2025.

¹⁰ Olsberg SPI, "Economic Impact of Screen Production in Poland," December 2023.

¹¹ Leon Pietrzak, "Heweliusz—OBSADA. Gwiazdorskie nazwiska w polskiej superprodukcji Netflix," for Eska Radio, February 2025.



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APPENDIX: METHODOLOGY

The impact of the filming of *Heweliusz* on the Polish economy is calculated using an economic impact assessment. This involves quantifying the production's economic contribution to the country across three channels of expenditure. The channels of impact are:

- **Direct impact** relates to the employment and economic activity generated at the filming locations across Poland.
- **Indirect impact** captures the economic activity stimulated by the procurement of inputs of goods and services from the locally based supply chain.
- **Induced impact** comprises the wider economic benefits that arise from the payment of wages by the production, and the firms in its local supply chains, to staff who spend a proportion of this income at local retail, leisure, and other outlets.

The total impact is the sum of the three channels. This enables us to build a picture of the limited series' overall contribution to the country across two key metrics:

- The gross value-added contribution to Poland's GDP.¹²
- Employment, measured on a headcount basis.

The results are presented on a gross basis, ignoring any displacement of activity from other firms or activities. The results do not consider what the resources currently used by the show's production, or stimulated by its expenditure, could alternatively produce in their second most productive usage. Additionally, the results also exclude economic activity generated outside of Poland, employment of non-resident workers, and spending with suppliers located outside the country.

Data on the direct impact of *Heweliusz*—including jobs and the show's contribution to GDP—were provided directly by Netflix. Direct GDP contribution in the country is taken to be equal to local employee compensation, which includes wages, salaries, and employer social contributions paid to local production cast and crew.

To estimate the indirect and induced GDP impacts of the show, Oxford Economics used Poland's input-output table as included in the OECD's Inter-Country Input-Output tables, which forms the basis of Oxford Economics' proprietary Global Economic Impact Model.¹³ A basic domestic input-output table gives a snapshot of an economy at a given point in time. The model shows the major spending flows from "final demand" (i.e., consumer spending, government spending, investment, and exports to the rest of the world); intermediate spending patterns (i.e., what each sector buys from every other sector—the supply chain in other words); how much of that spending stays within the domestic economy; and the distribution of income between employment income and other income (mainly profits). In essence, an input-output table shows who buys what from whom in the economy.

As input for the analysis, we used the amount spent by type of goods and services purchased from Poland-based businesses over the course of the production period. In order to calculate the induced impact, we took the figures for wages paid to workers, as provided by Netflix, and allocated those to the sectors where they would have spent those wages in line with the proportions in the Polish input-output table. We then used those figures to show how many zlotys of GDP the show's production supported in the Polish economy for every PLN 1 of direct GDP contribution; and how many jobs were stimulated across the country for every 100 people directly employed on the production.

¹² Where GDP is the main indicator of economic activity in the country. It is used to measure the rate of growth or decline of the economy, and when it enters a recession.

¹³ OECD, [Inter-Country Input-Output tables](#).

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October 2025

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