# **SPIDOR**

# ANNUAL REPORT 2023

We create a responsible space for the development of the video game industry in Poland

Polish Video Games Association



# Video game industry

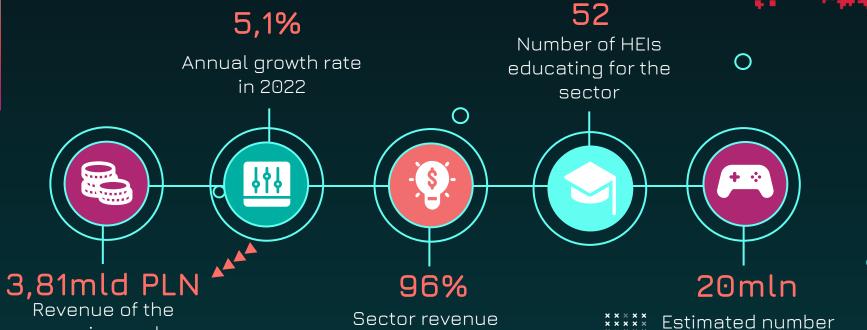




# Video game industry



of players



generated from exports



gaming and

esports sector

Source: The Gaming and Game Development Sector, Polska Agencja Inwestycji i Handlu, 2022 Perspektywy rozwoju branży rozrywki i mediów w Polsce 2023-2027 - PWC

# Players in Poland

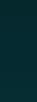








47% of gamers are women







88% of children 9-15yo play games ...



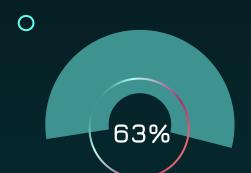




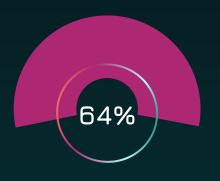


# The role of video games





They provide a break from everyday tasks



They give a sense of happiness



They help get through difficult times



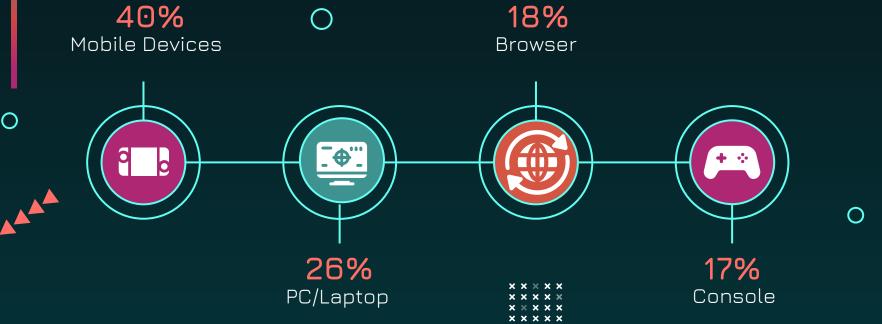






# Gaming Platforms







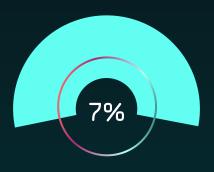
Source: We Are Gamers, PURR Media Publicis Groupe - Data science - Research, CAW, Marzec 2022, TG: 15-65

# Sales of games in Poland













Copies of TOP 10 games bought by players in 2023

Number of unique game titles bought by players in 2023 Year-on-year increase in the number of game copies sold

Share of PC games in overall sales







# TOP 10 games in 2023











Action Games		31%
Shooter		14%
Role-Playing		13%
Adventure		12%
Sports		10%
Racing	••••••	9%
Strategies	••••••	7%
Other		4%

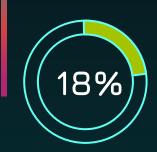


- 2. Hogwarts Legacy Warner Bros
- 3. FIFA 23 EA
- 4. GTA V Rockstar Games
- 5. Diablo IV Activision Blizzard
- 6. Red Dead Redemption Rockstar Games
- 7. Spider-Man 2 Sony Interactive
- 8. Star Wars Jedi: Survivor EA
- 9. Need for Speed: HEAT EA
- 10. Cyberpunk 2077 CD Projekt RED



# PEGI age rating



























SPIDOR - areas of activities



CSR



SOCIAL RESPONSIBILITY CONSUMER PROTECTION **EDUCATION** 



Comms



CONSUMER RESEARCH MARKET REPORTS **PUBLICATIONS** 



Daren Tang - WIPO Director General Zbigniew Czech - Permanent Representative of Poland to the UN in Geneva

**POLSKA IN THE GAME** 

\*DIGITAL DREAMERS\*

Where: WIPO MAIN LOBBY (BUILDING AB), GENEVA

When: 10-14 July

Public Policy



CONSULTATION **COOPERATION WITH** THE PUBLIC SECTOR



# Management Structure













Joanna Frej
Board Member
Xbox Platform
Category
Manager

Ilona Hinz
Board Member
Director of Finance
Sony Interactive
Entertainment Polska

Jarosław Kędzior Chairman Country Manager Polska Electronic Arts

Krzysztof Zych
Audit
Committee
Electronic Arts

Maciej Turski
Audit
Committee
General
Manager
Plaion

Mariusz Klamra
Audit
Committee
CEO
Gry Online SA



# CSR - EVENTS 2023



# EFG Esports Forum 2023



### FEBRUARY 2023

Representatives of SPiDOR, ISFE (<u>VGE</u>), and <u>SPG</u> participated in the EFG Esports Forum, an international conference during the Intel Extreme Masters finals in Katowice, with discussion panels:

- Poland: a European video games and esports powerhouse
- EU Parliament Initiatives: a chance for video games and esports?
  In addition, the program included open lectures, EGF research, and key trends in the esports industry.







# **VIRTUAL WORLDS:**

How video games are helping shape Europe's digital future

#### **MARCH 2023**

European Parliament - an exhibition dedicated to video games focusing on the impact of games on innovation, education and the labour market.

The exhibition was initiated by MEPs, including Tomasz Frankowski, and was held in cooperation with Video Games Europe, European Schoolnet and Playing for the Planet Alliance.

An important accent was the presentation of This War of Mine by Paweł Miechowski from 11 bit studios.



Read More: Exhibition Report

# Expert seminar: WHAT DO YOU PLAY?





The Polish Centre for the "Safer Internet" Programme, in cooperation with the Empowering Children Foundation, the National Research Institute (NASK), the Orange Foundation, and SPiDOR organised an expert seminar on children's safety in the context of games.

The seminar was addressed to teachers, people working with children, parents, and anyone interested in the subject of online safety.

Dr Dominika Urbanska-Galanciak – PEGI – how does the game rating system work? Patrycja Rodzińska-Szary – How parents take care of the safety of their children:

reality vs expectations

Prof. Mirosław Filiciak – Beyond Rating: new challenges Oliwia Chojnacka – Metaverse – threats and challenges

Read More: Cyberprofilaktyka.pl



#### Predator Games 2023

# **MAY 2023**

Predator Games Inter-School Esports is an educational project promoting the use of video games and esports in building peer relationships, and a bridge between the school, students, and their guardians. SPiDOR, as a substantive partner, has prepared a series of guides on games.

Organizer: Acer Poland

4 games: League of Legends, Rocket League, Fortnite

and chess,

1024 schools from all over Poland PLN 3,200,000 – total prize pool



Read More: <u>Predator Games Website</u>



# Women in Tech Summit 2023



The fifth edition of Perspektywy Women in Tech, which was visited by 10,000 participants (offline and online) from 80 countries around the world. The event was held under the patronage of over 100 of the largest technology companies and the best technical universities from Poland and around the world.

SPiDOR was the organizer of a discussion panel titled "Level The Game – Building a fair playing field in video games industry", featuring:

Sharon Tolaini-Sage – Women in Games (WIGJ)

Joanna Frej – Xbox

Monika Paplińska – PlayStation

Agnieszka Szamałek – CD Projekt RED

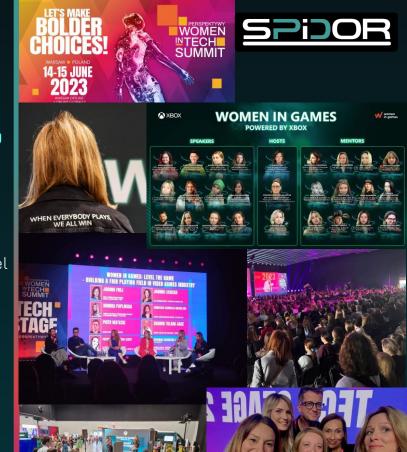
Piotr Matecki - Futuregames

Joanna Lisicka – Perspektywy Foundation

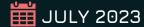
Patrycja Rodzińska-Szary – PURR Media

dr Dominika Urbańska–Galanciak - SPiDOR

See More: Women in Tech Summit 2023 Aftermovie



# Poland in the game: DIGITAL DREAMERS



POLAND IN THE GAME: Digital Dreamers - an exhibition organized by the Permanent Representation of the Republic of Poland to the United Nations Office in Geneva as a part of the General Assemblies of Delegates of the World Intellectual Property Organization (WIPO).

Representatives of SPiDOR and the gaming industry discussed the issues of intellectual property protection and the development of the creative sector. Well-known Polish games and award-winning projects of young artists were shown.

SPiDOR promotes Poland as a world leader in the gaming and innovation sectors, supports education and young talents, also in the field of employment equality and inclusion in the industry.

See More: WIPO Website



# XXXII Economic Forum V Cybersecurity Forum



# SEPTEMBER 2023

SPiDOR, at the invitation of the Ministry of Digital Affairs, took part in the 5th Cybersecurity Forum, as part of the XXXII

days, 30 panel sessions attended by national and international experts representing institutions, enterprises, universities and NGOs.

Dr Dominika Urbańska-Galanciak participated in two debates hosted by experts from NASK:

- Media education and threat prevention in the area of cubersecuritu
- The Metaverse A new take on old security issues.

Other participants: Prof. Agnieszka Iwanicka, Piotra Ciepiela, Szymon Wójcik, Dr Konrad Maj, Dr Dariusz Szostek, Jakub Turowski, Katarzyna Staciwa, Paweł Urzenitzok

5-7 XXXII Forum Ekonomiczne
KARPACZ, 5-7 WRZEŚNIA 2023 FORUM +470 +5000 22 GOŚCI

See More: V Cubersecurity Forum Aftermovie

# International Congress of Intellectual Property – Future, Challenges and Trends

# SEPTEMBER 2023

Dr Dominika Urbańska-Galanciak participated in a meeting between industry organizations representatives, that was a part of the International Intellectual Property Congress, organized by the Polish Patent Office, and the Ministry of Development and Technology.

During the meeting, the topics of discussion were the importance of the Polish economy on a global scale, and the development of creative industries, as well as joint activities aimed at developing effective solutions in the field of IP protection.

Participants:

Edyta Dęby-Siwek – President of the Patent Office of the Republic of Poland (PPO)

Daren Tang - Director General of the World Intellectual Property Organization (WIPO)

Antonio Campinos - President of the European Patent Office (EPO), João Negrão - Executive Director - elect of the European Union Intellectual Property Office (EUIPO)

Read More: Polish Patent Office Website



# 20th Anniversary of PEGI

### SEPTEMBER 2023

On the occasion of the 20th anniversary of PEGI - the Pan-European Game Information System, SPIDOR has prepared a series of activities promoting the responsible use of video games, including:

- Webinar HOW DOES PEGI WORK? What should you know about the game rating system?
- PEGI CHALLENGE The mission of PEGI at school educational lesson plans for video games.

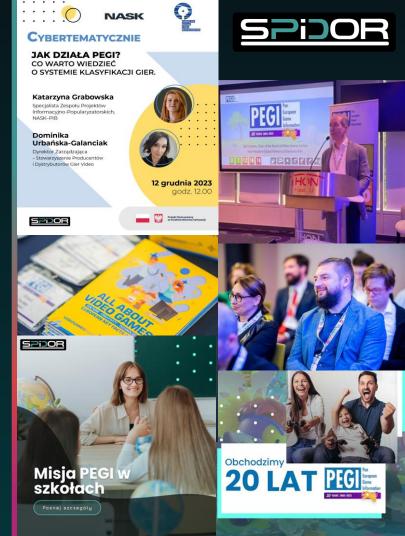
We've also participated in the meeting between expert committees, representatives of Video Games Europe member organizations, and the public sector. It was a great opportunity to summarize the activities for the protection of minors and to prepare plans for the coming years.

More than 2,600 companies have joined the PEGI Code of Conduct. Nearly 40,000 PEGI licenses have been issued for games in 40 European countries. 67% of parents and 73% of gamers in Europe recognize PEGI age labels.

Participants:

Prof. Mirosław Filiciak – SWPS
Dr Dominika Urbańska-Galanciak – SPIDOR

Read More: PEGI Website



# We Are Gamers: Marketing Talks



#### OCTOBER 2023

On October 18th, SPiDOR representatives were guests at the "We Are Gamers" conference organized by WE!RE Fantasy and Purr Media, which was attended by representatives of various industries and organizations interested in the use of video games in marketing and in their own business. The conference was held under the honorary patronage of IAB Poland and partnered by DIMAQ.

Dominika Urbańska-Galanciak, PhD, Managing Director of SPiDOR, took part in the panel "Is it possible to play games at school?", presenting the benefits that video games bring to the education system in Poland.

In addition, during the event there were panels on:

- the potential of the gaming context in effective communication,
- understanding of gamers as an important social and consumer group,
- developing the culture of e-sports and the use of games in education,
- the use of gaming in building intergenerational bridges.

Read More: We Are Gamers Website



### **GAMES FOR GOOD**

### MOVERMBER 2023

On November 2, 2023, SPiDOR representatives, together with <u>ESA</u>, <u>ESAC</u>, <u>GAME</u>, <u>IGEA</u>, <u>ISFE</u> (<u>VGE</u>), <u>K-GAMES</u>, and <u>UKIE</u> had the opportunity to participate in a unique event organized by the Global Video Games Coalition and the World Trade Organization in Geneva.

"Games for Good" is an initiative that showcases the positive impact of video games and how they help sustainability, support learning, and enable deeper social inclusion.

The event was attended by leading companies: Microsoft, Sony, Nintendo, Ubisoft, and Electronic Arts, which presented products and activities for the benefit of local communities, increasing the availability of games, and their use in the educational process.

The guest of the event was Paweł Miechowski - Chief of PR & Communication, 11 bit studios. He introduced the game This War of Mine, which was added by the Ministry of National Education to the canon of school reading for secondary schools in 2023.

Read more: Global Video Game Coalition website



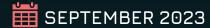




# **COMMUNICATION 2023**



# New website: SPIDOR.PL



The <u>www.spidor.pl</u> website is a showcase of the Association and an excellent form of showing our activities to current and potential partners and members.

#### We regularly publish:

- News
- Reports & Studies
- Publications
- Game Sales Rank
- Information about social campaigns



#### Aktualności





ZOBACZ WSZYSTKIE

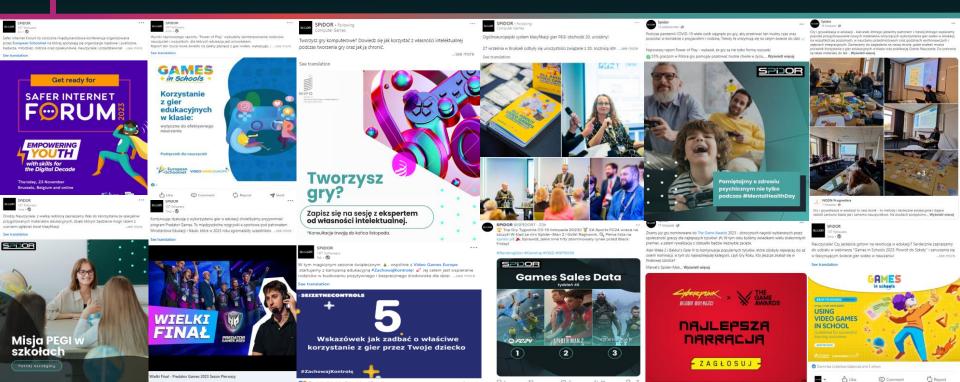
# Social Media Presence



In 2023, SPiDOR developed the following Social Media channels:

- \(\chi\)
- LinkedIn
- Facebook





# Report: POWER OF PLAY

### OCTOBER 2023

In October 2023, SPiDOR published the Power of Play report.

The study was conducted by AudienceNet with 12,847 respondents from 12 countries on request of Entertainment Software Association and in cooperation with various industry associations like ESAC, IGEA, K-GAMES, GAME, IIDEA, SELL, UKIE, SPIDOR, VGE.

The report highlights the role of video games in social relationships, the development of digital competences, and other health benefits.

Read more: Full Power of Play Report



# Campaign: SEIZE THE CONTROLS





During the pre-Christmas period, SPIDOR joined the European #<u>SeizeTheControls</u> campaign promoting the PEGI system, which **supports parents in making the right decisions** when choosing games for children.

As part of the campaign, aimed at showing parental control tools that make it easier to ensure the proper use of electronic entertainment, SPiDOR has prepared:

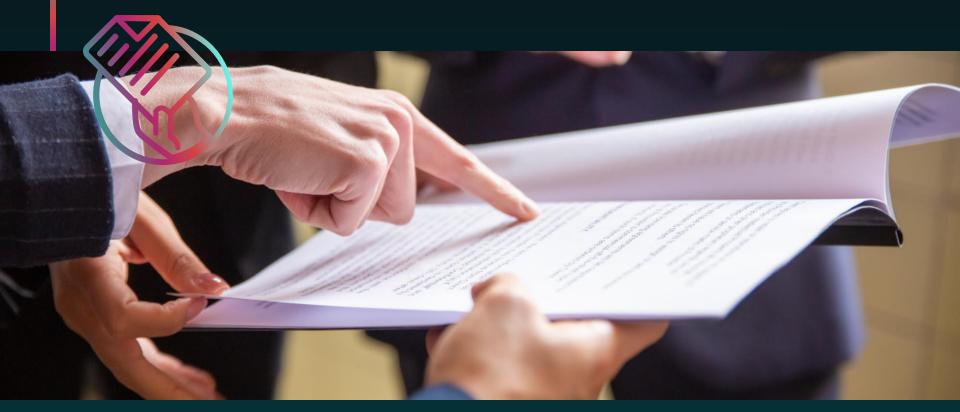
- new <u>ZAPYTAJoGRY.PL</u> website
- media activities
- cooperation with an influencer Agnieszka Pfeifer

#### Read More: Zaputaj o Gry Website





# PUBLIC POLICY 2023



# Partnership with Video Games Europe

### 2023

As part of its Public Policy activities, SPIDOR cooperates closely with VGE in the following areas:

- Monitoring of regulatory initiatives carried out by public institutions in Poland
- Participation in public and public consultations
- Presenting the positions of the video game industry
- Preparation of analyses of local activities
- Participation in VGE and PEGI SA events

#### SPIDOR representation in VGE working groups:

- AI and Technology
- Trust & Safety
- Data
- Diversity
- Environment









# Position papers submitted



# Copyright on DSM



# Product Liability

SPiDOR position submitted in public consultations. Proposals included in the new iteration of the project:

Transparency obligation (does not apply if it is part of a collective work or a collection of works).

Right of withdrawal - extension of the deadline for starting the use of the license from 2 to 10 years. The right of withdrawal is only available to authors whose contributions are independently significant.

Ministry of Culture and National Heritage Other entities: Game Dev

Position of VGE&SPiDOR submitted in November 2023 Points indicated:

Unclear status of software as a product (homogeneous treatment of all types) Video games as complex works Imprecise definition of defect The risk of controlling the content of cultural texts

Game Dev. Polish Chamber of Information Technology and Telecommunications



# Position papers submitted



# Right to repair



# Child Sexual Abuse Material

VGE&SPiDOR position submitted in

October 2023.

Points indicated:

Manufacturers' obligation to repair goods

5-10 years after purchase

Proposed solutions contrary to

intellectual property law (Trusted Platform

Module)

Other entities: Polish Chamber of

Commerce for Flectronics and

Telecommunications, Polish Agency for

Enterprise Development

Position of VGE&SPiDOR submitted in November 2023.

Points indicated:

Services that allow the posting of usergenerated content should be covered by

rules on risk assessment and mitigation

Online gaming - platforms with the lowest risk of illegal content sharing - research

The sector's commitment to children's online safety

LEAD INSTITUTION

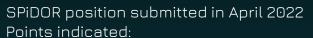
Other entities: Ombudsman for Children.

NASK. Polish Centre for Safer Internet



# Monitored issues





The importance of using artificial intelligence in the video game industry Proposal for codes of conduct to encourage providers of non-high-risk Al systems to voluntarily apply high-risk AI requirements

Chancellery of the Prime Minister, Ministry Other entities: Chamber of Commerce for Electronics and Telecommunications, Polish Agency for Enterprise Development



# **Esports**



Committee for Standardization Esports-related issues: Esports considered a sport since July 2017 There are no national leagues/associations that would effectively exercise this right Requirements for membership in an

International Sports Federation active in Olympic or other IOC-recognized sports

Other entities: Ministry of Digital Affairs, Polish Esport League, ESL Poland, Polish Olympic Committee



# Monitored issues







SPiDOR position submitted in 2019 IGP considerations:

The position of the Ministry of Finance on paid elements in games in accordance with the Gambling Act. Even though there is a random element, there is no payout mechanism, and points/VC/winnings remain in play.

LEAD INSTITUTION:
Ministry of Finance
Other entities: Game Dev

SPIDOR is preparing a position.
Considerations related to ECL:
Exclusions for video games that do not include services that enable interpersonal and interactive communication.

Communication in video games has an ancillary function that is inextricably linked to another service

LEAD INSTITUTION: Ministry of Digital Affairs

Other entities: Office of Electronic

Communications

# **SPIDOR**

Learn more: www.spidor.pl

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