

The World of Competitive Gaming

ESPORTS: Rise in India

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Relevance of Esports : Innovation & Growth

- The world of competitive gaming i.e. Esports is rapidly growing in India
- It is significantly driving innovation and fueling economic growth
- Soon it will emerge as a distinct ecosystem

Point Covered

- 1. Understanding E-sports Ecosystem**
- 2. Legal Scenario in India**
- 3. National & International Esports events**
- 4. Innovation & Esports/Gaming**
- 5. Economic Impact**
- 6. Way Ahead !!**

Meaning of Esports

- E-Sports - electronic sports is organized competitive video gaming.
- It primarily involves teams competing against each other in tournaments for a cash prize.
- Can be Single or Multi-player.
- Functionally, it's the same as traditional sports.
- Top-level athletes are constantly vying for the top spots in their sport, or game, of choice.

Meaning of Esports

- Streamed online and featuring popular cross-category video game titles such as first-person shooter games, real-time strategy games, and sports simulations.

Esports Ecosystem

- Esports industry moved up from being a secluded amusement to an entire ecosystem.
- Its just like a movie – with multiple contributors.

1. Teams: Hundreds of professional teams currently compete in various esports events.

These professional teams have developed highly professional organizational structures and employ specialist staff like coaches, analysts, nutritionists, physiotherapists, and psychologists, showing advanced technical expertise.

Team players range from highly-paid professionals contracted by teams to compete in the most prestigious world-stage tournaments and leagues,

2. Publishers: Publishers in the context of gaming are usually companies that finance development, marketing, and manufacturing of video games.

- They perform market distribution by making deals with various distributors, retailers, and platforms.

3. Tournament Organizers: The organizers develop and operate competitions as outlined by a game publisher for each specific title.

5. Sponsors: They are important part of ecosystem. Since the esports is youth centric, the brands collaborating are with intent to target young population.

6. Broadcasting Platforms: These are streaming platforms.

- **Audience/Fans** : There would not be any esports without audiences. The ecosystem heavily relying on the millions of eyeballs tuning into video streams daily and the dedicated followers who attend live events

Esports fans are very specialized, building up communities on their own around particular games, competitions, regions, websites, teams, players, or other personas, showing their undying support and commitment.

Influencers play crucial role and have assumed status of ***“Celebrity”***

THE ESPORTS ECOSYSTEM



PUBLISHERS



TEAMS



TOURNAMENT ORGANISERS



BRANDS



BROADCAST PLATFORMS



FANS

The background features a series of concentric circles in light gray, some solid and some dashed, creating a ripple effect. A prominent red callout box is centered, containing the text 'Legal Scenario In India'.

Legal Scenario In India

Legal Frame work

- **Contract Law** plays important role in this Industry due to multiple stake holders involved.
- **Relevant IP laws:** Trademark, Copyright, Patents, Industrial Designs
- **IT laws:** Governing law
- **Other State laws** as applicable- Ex : RMG

Some Important Legal Updates

The Ministry of Youth Affairs and Sports has been appointed as the nodal ministry for E-Sports as a part of Multi-Sports events. It essentially means that E-Sports has now been formally recognized by the Government – this amounts to a huge reform in the sporting sector.

Economic Times: 28 December 2022

On February 25, 2021, adopted 'The Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules 2021 (hereinafter 'The Rules') under the Information Technology Act 2000.

Self-Regulatory Bodies

(SRB)

- Recent amendments suggest that online gaming companies need to register with a self-regulatory body to ensure their games are legal and comply with regulations.
- But the government is still actively reviewing and may establish further guidelines for their operations.

Netiquette

Breach of netiquette

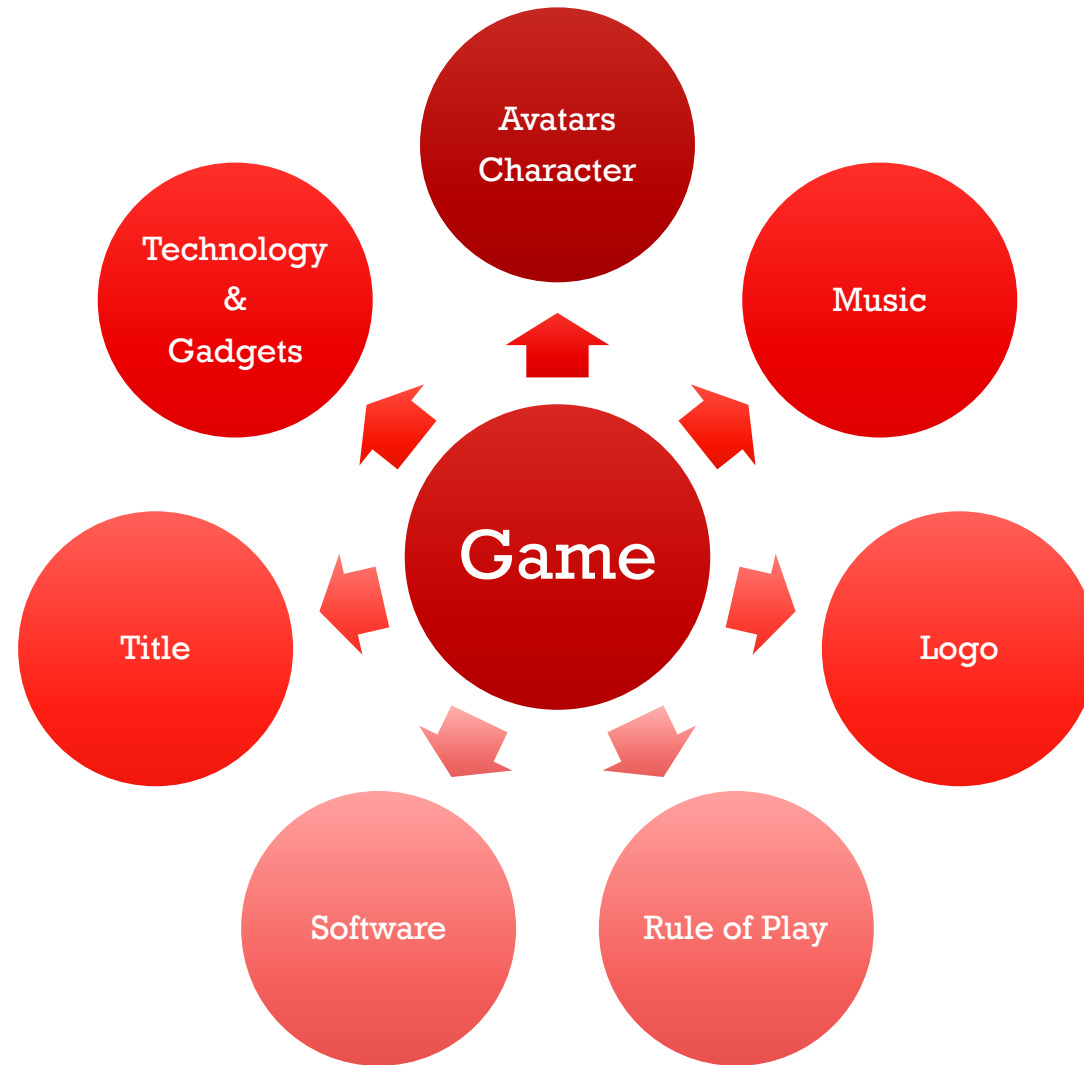
- For an orderly and pleasant game, it is essential that all participants have a sportive and fair attitude.
- Breaches of this rule will be punished with one (1) to six (6) penalty points.
- The most important and most common offences are listed below.
- However, the tournament administration may assign penalties for not explicitly listed types of breach of netiquette (e.g. harassment).

Monitoring -Online

- PUBG: BATTLEGROUNDS Anti-Cheat Team
- Investigation – Weekly basis ban accounts/ devices

A red speech bubble graphic with a white outline, pointing downwards. The text "Innovation & Esports" is centered inside the bubble in white font. The background features a pattern of concentric, overlapping circles in light gray, some solid and some dashed, creating a ripple effect.

Innovation & Esports



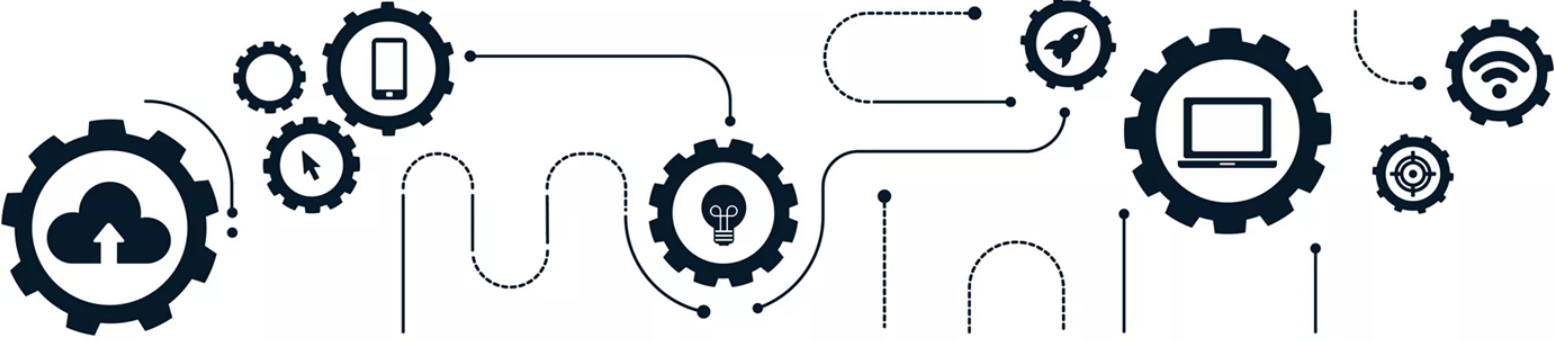
Important Facets of IP's

Innovation & Gaming

- **Advancements in Gaming sectors has triggered innovation & development for PCs, hardware and related peripherals and software's which are specially designed for gaming.**
- **As a result, multiple IP's are filed in this domain.**

Innovation in Digital Space ..





INNOVATION


Inspiration


Creativity


Analysis


Technology


Development


Teamwork


Success

➤ Digital Leadership



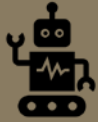
- Nvidia specialize in graphics, high-performance computing, and artificial intelligence
- GPUs series which makes high-end gaming possible at competitive level.
- A faster graphics card delivers higher frame rates that let you see things earlier and give you a better chance of hitting targets.
- AI/ML and Network & Communication seems to be the dominant area of patent filings for Nvidia.
- This reflects Nvidia's focus on technologies that power high-performance computing, networking, and AI applications.

Innovation & Esports





Virtual reality (VR) and augmented reality (AR): VR and AR are already here



Artificial intelligence (AI) and machine learning: AI could lead to more realistic and dynamic game environments.



Play-to-earn NFT games: These games combine gaming and blockchain technology, allowing players to earn real-world value.



The metaverse: The metaverse could be an open space where players can move from game to game with their friends

“Some trends that are likely to shape the future of gaming include...”

The background features a series of concentric, overlapping circles in light gray, some solid and some dashed, creating a ripple effect. A prominent red callout box is centered on the page, containing white text. The callout box has a rectangular top and a pointed bottom, resembling a speech bubble or a drop cap.

National & International
Esports events

DOGA
RC 24
ING 44



by JetSynthesys™

GEPL
GLOBAL e-CRICKET PREMIER LEAGUE

e-CRICKET KA MAHAYUDH

PRIZE POOL
₹ 3,05,00,000*

REAL CRICKET 24 SKYSPORTS global music junction

*T&C Apply

Season 2: 2025

Esports Event: India

The banner features a blue background with a faint image of a stadium. At the top, there are logos for the Sports Development Authority of Tamil Nadu, the Government of India, and the Government of Tamil Nadu, along with portraits of officials. The central text reads 'THE CHIEF MINISTER'S TROPHY 2024' and 'ESPORTS MAKES ITS DEBUT IN TN CM TROPHY AS A DEMO EVENT.' The bottom section lists the participating games: BATTLEGRINDS INDIAN, COD: WARZONE, FIFA 24, eChess, 2K25, F1 24, and STREET FIGHTER 6. At the very bottom, the logos for ESAT and SKYSPORTS are displayed.

SPORTS DEVELOPMENT AUTHORITY OF TAMIL NADU

THE CHIEF MINISTER'S TROPHY 2024

ESPORTS MAKES ITS DEBUT IN
TN CM TROPHY
AS A DEMO EVENT.

BATTLEGRINDS INDIAN COD: WARZONE FIFA 24 eChess 2K25 F1 24 STREET FIGHTER 6

ESAT SKYSPORTS

**India set to host first-ever International
Esports Tournament in March 2025**

International Esports Event: First Esports World Cup 2024















Largest prize pool ever awarded in the history of esports, shattering the previous record of \$45 million set by Gamers8 in 2023.

The prize pool for Cricket World Cup was \$ 10 million

PRIZE MONEY BY GAME TITLE

The highest-earning esports titles are also some of the oldest with two of the top five first released over a decade ago

| |  | FORTNITE |  |  |  |
|---------------------------|--|---|--|--|--|
| TOTAL PRIZE MONEY | \$ 319.7 M | \$163.3 M | \$155.3 M | \$102.4 M | \$74.2 M |
| PUBLISHER | Valve Corporation | Epic Games | Valve Corporation | Riot Games (Tencent) | TiMi Studio (Tencent) |
| GENRE | Real Time Strategy | Battle Royale | First Person Shooter | Real Time Strategy | Multiplayer Online Battle Arena |
| TOP TEAMS |    |    |    |    |    |
| TOP COUNTRY |  |  |  |  |  |
| LARGEST PRIZE POOL | \$40 M The International 2021 | \$15 M Fortnite World Cup 2019 | \$2 M PGL Major Stockholm 2021 | \$6.4 M LOL World Championship 2018 | \$10 M Honor of Kings Intl. 2022 |

Esports & Olympics

- The International Olympic Committee (IOC) announced that it has partnered with the National Olympic Committee (NOC) of Saudi Arabia to host the inaugural Olympic Esports Games 2025 in the Kingdom of Saudi Arabia.
- IOC Executive Board (EB) has established Olympic Esports Games. The proposal will be made to the IOC Session, which will be held on the eve of the Olympic Games Paris 2024.

Source:<https://olympics.com/ioc/news/ioc-announces-olympic-esports-games-to-be-hosted-in-the-kingdom-of-saudi-arabia>



NATALIE TOR



1

FINALS

BO3

1



NIGEL TAN





SEBASTIAN COLE
'Suns'



TAI STARČIČ
'TaySon'



Esports & Asian Games

- Esports make historic medal debut at 19th Asian Games in Hangzhou
- Seven sets of medals are on offer in esports' first appearance as a medal sport at an Asian Games, ranging from the likes of EA Sports - FIFA4 to classic esports favourite League of Legends.

Dated: 20 September 2023

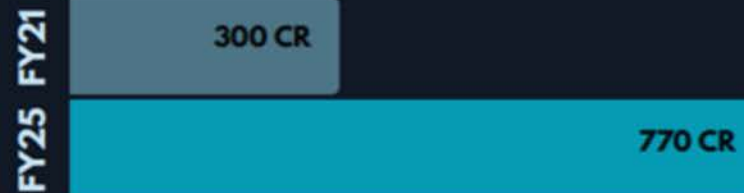
Source: <https://olympics.com/en/news/esports-historic-medal-debut-19th-asian-games-hangzhou-schedule-live>

ECONOMIC IMPACT IN INDIA



"India has seen a boom in the development of its gaming market. However, I want the country's youth to lead the gaming industry not just in playing but also in producing games. Indian games must reach the world." - Prime Minister Modi

TAX REVENUE COLLECTED (IN INR)



Esports Industry in India will generate an economic impact of 100 billion between FY21 and FY25

JOB OPPORTUNITIES

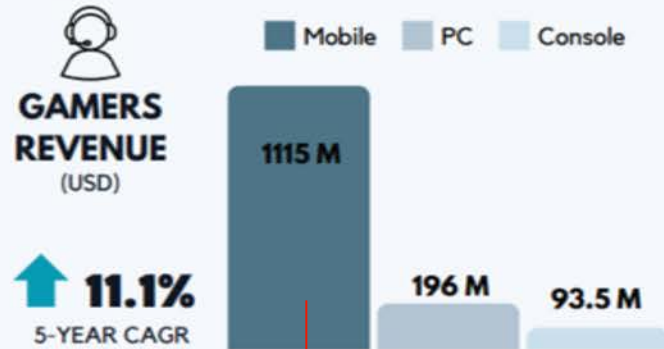
The esports industry will create over 11,000 direct and indirect jobs, including for game development and events by FY2025

*SOURCE NIKO PARTNERS INDIA REPORT 2024

INDIA'S ESPORTS REVENUE

The India video games market generated revenue of \$830 million in 2023, up 15.9% YoY

GAMERS REVENUE (IN USD)



FY22 REVENUE STATISTICS - GLOBAL

\$184.4 BN



\$26.2 BN



\$26 BN



Globally gaming is bigger than music and movie industry combined.

*SOURCE NIKO PARTNERS INDIA REPORT 2024

Mobile Gamers Revenue

Economic Projections

- India was home to 568 Mn gamers in FY23, of which 25% were paying users
- The number of gamers in India grew by 12% compared to last year, while the number of paying users grew by 17%.
- With 15.4 Bn game downloads, India retained its spot as a key leader in global game downloads.
- Avg time spent on gaming increased by 20%, to 10-12 hours per gamer per week
- India's gaming market hit \$3.1 Bn in FY23 and is projected to reach \$7.5 Bn by FY28.
- Future growth is expected to be driven by growth in in app purchases and ad revenues in casual and midcore games.
- Growth in RMG over the coming years is expected to be muted due to recent tax policies and industry consolidation.

Way Ahead !!!

- Merging of most streaming platforms
- Borderless world
- Overlap in governance
- Major technological shift – Metaverse
- Uniform guidelines at global level



As Esports is gaining traction
a major legal and economic shift is
projected globally.

GAME OVER



**THANK
YOU**

YOUR PRESENCE MEANT A LOT TO ME.

