AWS China가 전하는 AWS를 활용한 중국 게임 시장 진출 전략

Ricky Lin
Senior Business Development Manager

What to Expect from the Session

- 중국 게임 시장 동향
- 중국내 게임 퍼블리싱 절차
- AWS China (베이징) Region 배경
- China Region 제공 서비스
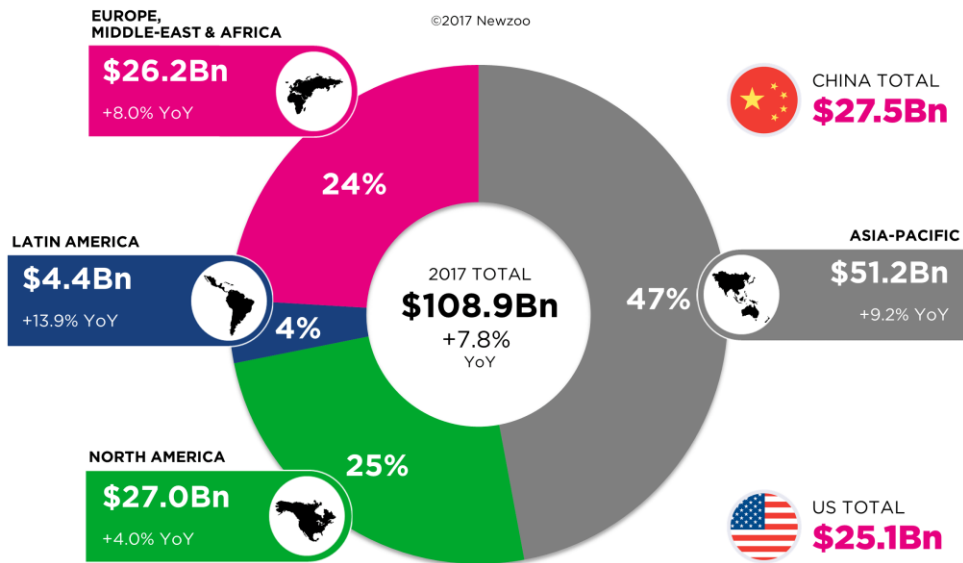- China (베이징) Region 접속 방법

aws

중국 – 세계에서 가장 큰 게이밍 시장

newzoo

2017 GLOBAL GAMES MARKET
PER REGION WITH YEAR-ON-YEAR GROWTH RATES

©2017 Newzoo

EUROPE, MIDDLE-EAST & AFRICA
$26.2Bn
+8.0% YoY

24%

CHINA TOTAL
$27.5Bn

LATIN AMERICA
$4.4Bn
+13.9% YoY

4%

2017 TOTAL
$108.9Bn
+7.8% YoY

47%

ASIA-PACIFIC
$51.2Bn
+9.2% YoY

NORTH AMERICA
$27.0Bn
+4.0% YoY

25%

US TOTAL
$25.1Bn

Source: ©Newzoo | Q2 2017 Update | Global Games Market Report
newzoo.com/globalgamesreport

In 2017,
47%
of all consumer spend
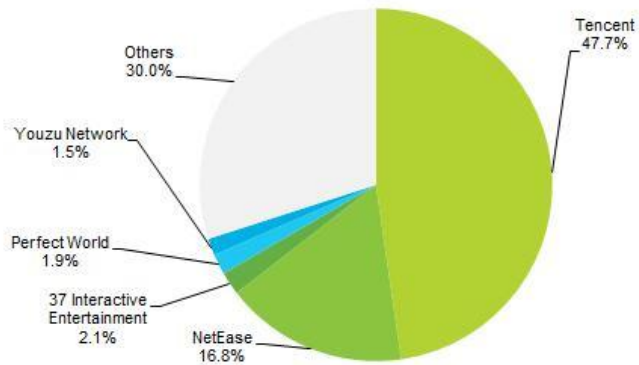on games will come
from the APAC region

newzoo

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Two Key Players – Tencent and Netease

Shares of China's Main Online Gaming Companies in Q2 2017

- Tencent 47.7%
- Others 30.0%
- Youzu Network 1.5%
- Perfect World 1.9%
- 37 Interactive Entertainment 2.1%
- NetEase 16.8%

Note: China's online gaming revenue includes the total spending of online game players in Chinese mainland and the total revenue China's online game companies gained from overseas market; The delisted companies aren't included (such as Shengda Games) for the date when they will be listed again has not been settled; The ranking is in line with the total revenue of client games, web games and mobile games, from the highest to the lowest; Some data will be adjusted in the reports about online games released by iResearch in 2017; Only companies whose main business is gaming are included, and the companies whose game revenue are less 10% are not included (like Baidu). Source:The data were calculated in accordance with the financial results published by enterprises and interviews with experts in iResearch statistical model.
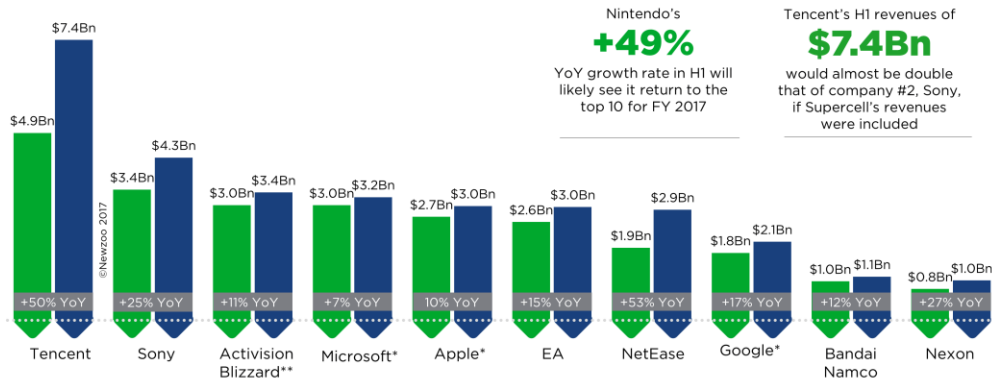
©Aug 2017 iResearch Global Group   www.iresearchinah.com

newzoo

TOP 10 PUBLIC COMPANIES BY GAME REVENUES
COMPARISON OF H1 2016 AND H1 2017 REVENUES ($BN)

● H1 2016 Revenues ($Bn)   ● H1 2017 Revenues ($Bn)

	H1 2016	H1 2017	YoY
Tencent	$4.9Bn	$7.4Bn	+50% YoY
Sony	$3.4Bn	$4.3Bn	+25% YoY
Activision Blizzard**	$3.0Bn	$3.4Bn	+11% YoY
Microsoft*	$3.0Bn	$3.2Bn	+7% YoY
Apple*	$2.7Bn	$3.0Bn	10% YoY
EA	$2.6Bn	$3.0Bn	+15% YoY
NetEase	$1.9Bn	$2.9Bn	+53% YoY
Google*	$1.8Bn	$2.1Bn	+17% YoY
Bandai Namco	$1.0Bn	$1.1Bn	+12% YoY
Nexon	$0.8Bn	$1.0Bn	+27% YoY

©Newzoo 2017

Nintendo
Nintendo's
+49%
YoY growth rate in H1 will likely see it return to the top 10 for FY 2017

Tencent 腾讯
Tencent's H1 revenues of
$7.4Bn
would almost be double that of company #2, Sony, if Supercell's revenues were included

Foreign exchange rate on December 31st, 2016 used for USD amounts

*Estimates of game revenues using quarterly earning reports in which these are not specifically segmented out
**Includes King revenues as of 23 February 2016, the day that King officially became an Activision/Blizzard subsidiary

Source: @Newzoo 2017 | Global Games Market Report | newzoo.com/companyrankings/

newzoo

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모바일 사업이 이끄는 게임 시장

2013-2020 CHINESE GAMES MARKET

REVENUES PER SEGMENT 2013-2020

TOTAL MARKET
+13.6%
CAGR 2013-2020

©2017 Newzoo

● Mobile   ● Other

Year	Total	Other %	Mobile %	Mobile $
2013	$13.8Bn	83%	17%	$2.3 Bn
2014	$18.0Bn	75%	25%	$4.5 Bn
2015	$21.2Bn	67%	33%	$7.1 Bn
2016	$24.6Bn	54%	46%	$11.2 Bn
2017	$27.5Bn	47%	53%	$14.6 Bn
2018	$29.9Bn	42%	58%	$17.2 Bn
2019	$32.0Bn	39%	61%	$19.5 Bn
2020	$33.7Bn	37%	63%	$21.3 Bn
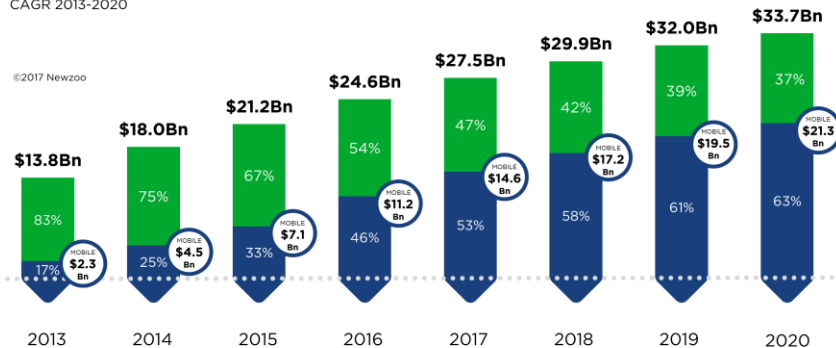
Source: ©Newzoo | Q2 2017 Update | Global Games Market Report
newzoo.com/globalgamesreport

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The Number of Chinese Game Players Q2 2015-Q2 2017

	Q2 15	Q3 15	Q4 15	Q1 16	Q2 16	Q3 16	Q4 16	Q1 17	Q2e 17
% Growth mobile	-0.8%	3.1%	-4.2%	6.4%	-3.2%	12.4%	0.3%	3.4%	2.5%
% Growth PC	-3.5%	-8.0%	-3.1%	-0.5%	-5.4%	-0.4%	-10.2%	-2.8%	-1.0%
Mobile game players (mn)	409.9	377.2	365.6	388.9	376.7	423.3	424.6	439.2	450.3
PC game players (mn)	499.8	515.5	494.0	491.6	464.8	463.0	415.8	404.2	400.0

■ Mobile game players (mn)   ■ PC game players (mn)
─●─ % Growth of mobile game players   ─●─ % Growth of PC game players
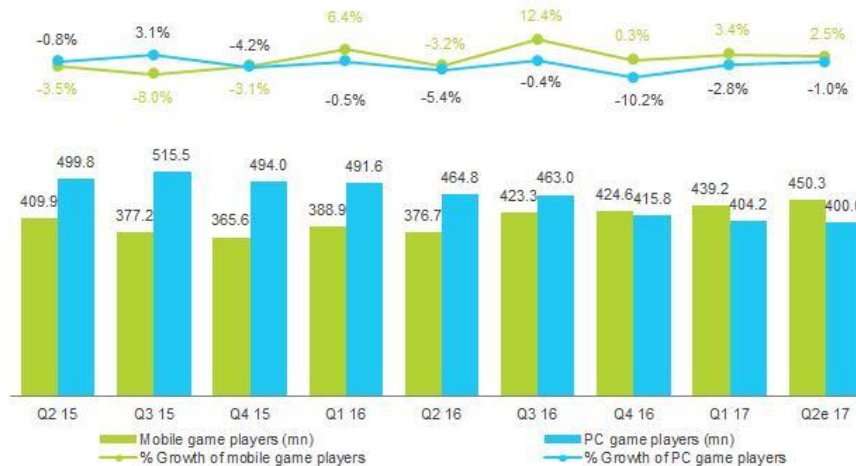
Source: mUserTracker, December 2016. The data were calculated based on its measurements of mobile apps on 4 million phones, tables as well as more than 100 million mobile communication devices.
iUserTracker, home & office version, April 2017. The data were calculated based on its measurement of online behaviors of 400 thousand samples at home or office (excluding).

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앱스토어의 다양한 게임사

IMAGE	RANK	APPSTORE	APPSTORE IN CHINESE	COVERAGE
	1	MyApp (Tencent)	腾讯应用宝	25.5%
	2	360 Mobile Assistant	360手机助手	14.8%
	3	Xiaomi App Store	小米应用商店	11.5%
	4	Baidu Mobile Assistant	百度手机助手	11.5%
	5	Xiaomi Game Center	小米游戏中心	10.3%
	6	Huawei App Market	华为应用市场	10.2%
	7	OPPO App Store	OPPO软件商店	7.2%
	8	Sogou Mobile Assistant	搜狗手机助手	4.4%
	9	PP Mobile Assistant	PP助手	3.6%
	10	Google Play Store	谷歌应用商店	3.6%

JULY 2017 ▼

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중국 내 E-Sports의 선전

China Online Entertainment = Consumers Increasingly Willing to Pay...
Led by Games + Livestreaming + Video

Online Entertainment User-Pay Revenue By Vertical, China, 2011-2016

- Online Game
- Online Literature
- Digital Music
- Online Video
- Livestreaming
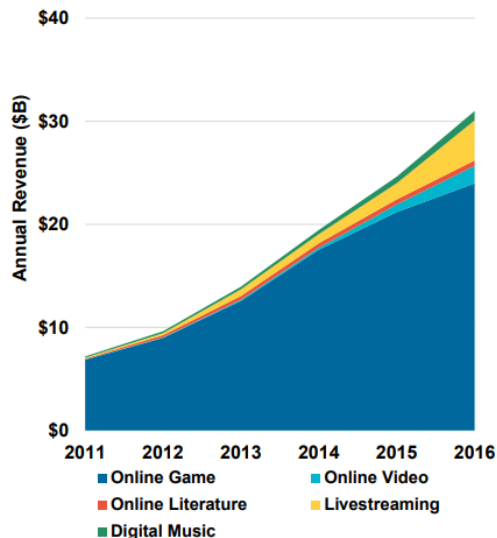
Online Entertainment User-Pay Revenue By Vertical, USA, 2011-2016

- Online / Console Game
- eBook
- Digital Music
- Online Video
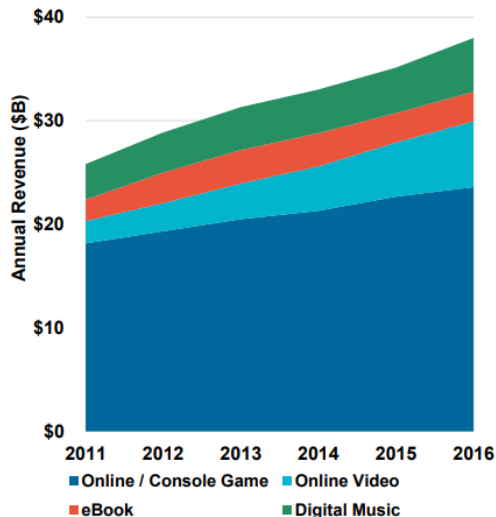
Source: Game industry data per per Newzoo and Hillhouse estimates, excludes console or PC hardware related revenue. Online video data per iResearch (China) and Hillhouse estimates (USA), excludes advertising related revenue. Digital music data (excl. advertising) per iResearch (China) and RIAA (USA). Livestreaming (China) data per Hillhouse estimates. eBook data per Hillhouse estimates (China) and AAP and Hillhouse estimate (USA)

KLEINER PERKINS

HILLHOUSE **Hillhouse Capital**

KP INTERNET TRENDS 2017 | PAGE 205

Revenue of China's Mobile E-Sport Games 2015-2019

	2015	2016	2017e	2018e	2019e
Revenue of mobile e-sport games (bn Yuan)	5.2	13.0	46.2	60.1	73.0
% Growth		148.1%	256.7%	30.2%	21.4%
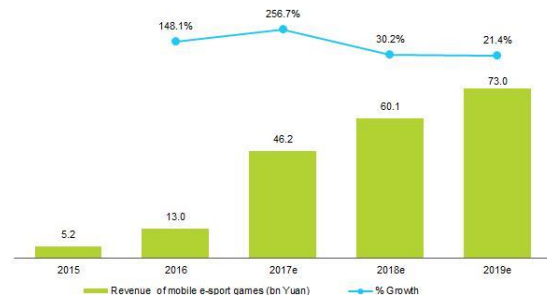
Note: The revenue of China's e-sport gaming covers: 1. the revenue of e-sport games, including ticket revenue, peripheral products revenue, crowd-funding, user payment, sponsorship, advertising revenue and other competition-related revenue; 2. Mobile e-sport gaming derivative revenue, including revenue from e-sport clubs, gamers, live streaming platforms, live streamers and other revenue from core links in the supply chain except e-sport gaming; 3. E-sports revenue including China mainland gamers' total spending on e-sports in a narrow sense. All the revenues mentioned above exclude client e-sports and competition revenue.
Source: The data are estimated in line with the financial results published by enterprises and the interviews related to the industry in iResearch's statistical forecast model.
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Number of China's Mobile E-Sports Gamers 2015-2019

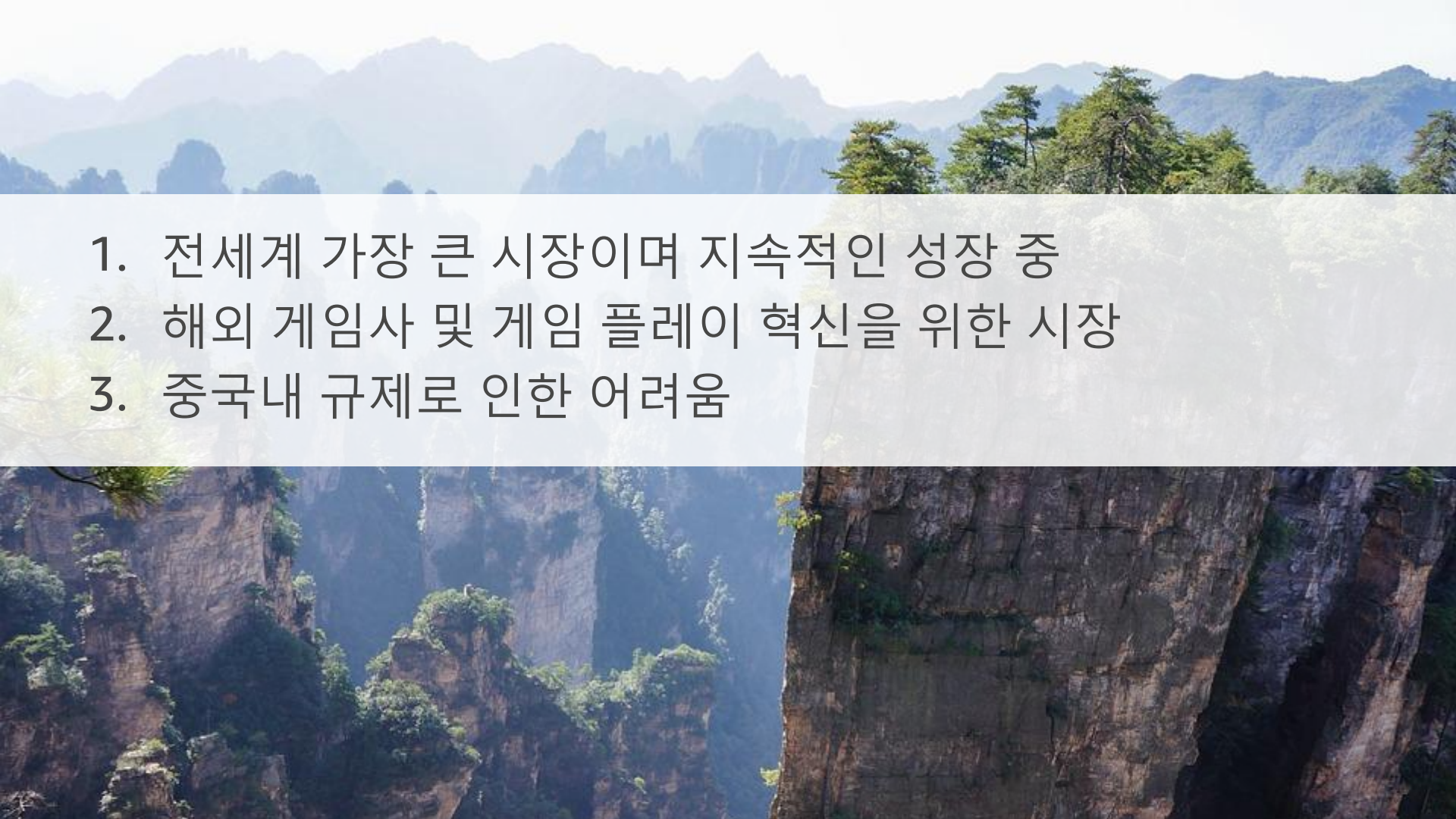|	2015	2016	2017e	2018e	2019e
Number of mobile e-sports gamers (mn Yuan)	86.8	118.5	285.3	319.5	351.4
% Growth		26.8%	58.5%	10.7%	9.1%
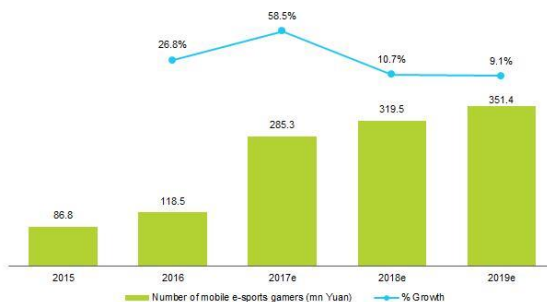
Note: The e-sport gamers here refer to players with one or more following behaviors: 1. watch or participate in a core mobile e-sports competition (including both professional and non-professional competitions) for one or more times in the recent half year; 2. frequently play core mobile e-sports games or watch live e-sports streaming every week.
Source: The data are estimated based on the financial results published by enterprises and interviews related to the industry in iResearch's statistical forecast model.
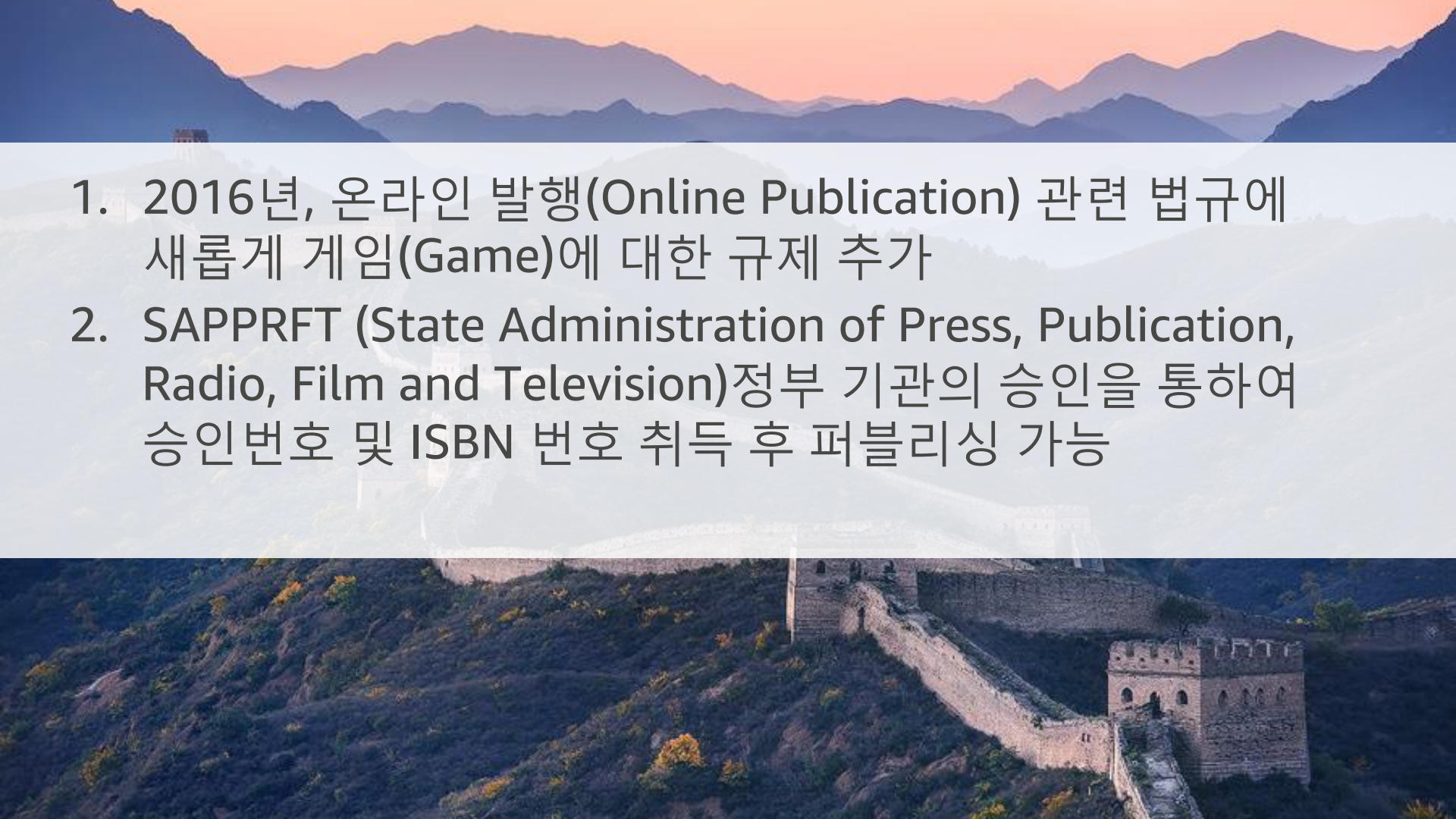©Apr 2017 iResearch Global Group   www.iresearchchina.com

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중국내 게임 퍼블리싱 절차

1. 전세계 가장 큰 시장이며 지속적인 성장 중
2. 해외 게임사 및 게임 플레이 혁신을 위한 시장
3. 중국내 규제로 인한 어려움

1. 2016년, 온라인 발행(Online Publication) 관련 법규에 새롭게 게임(Game)에 대한 규제 추가
2. SAPPRFT (State Administration of Press, Publication, Radio, Film and Television)정부 기관의 승인을 통하여 승인번호 및 ISBN 번호 취득 후 퍼블리싱 가능

게임 퍼블리싱사

- SAPPRFT에서 인가된 Online Publishing Service License 보유사

게임 운영사

- MIIT (Ministry of Industry and Information Technology)에서 인가된 ICP ("Internet Content Provider") License 보유사

- MOC (Ministry of Culture)에서 인가된 ICO ("Internet Cultural Operation") License 보유사

1. Online Publishing Service License 와 Internet Cultural Operation License 를 보유한 100% 중국 회사만이 퍼블리싱 및 게임 운영 가능
2. 국내의 지적 재산권**(copyright)**을 가지고 있는 수입 게임의 경우, 중국회사내 단일 운영권**(exclusive right)**을 위탁

중국내 게임 퍼블리싱 절차

Developer

1. 중국내 퍼블리싱 자격이 주어진 파트너(local partner) 검색

2. 저작권(copyright) 등록증 획득

Operator

1. MOC로 부터 게임 등록 승인

2. MOC로 부터 수입 게임 콘텐츠 리뷰 통과

Publisher

SAPPRFT 기관에 게임 승인을 위한 등록증 제출

SAPPRFT

1. 간단한 중국 게임의 경우 20일 정도 소요

2. 다른 중국 게임 혹은 해외 게임의 경우 20일 이상 소요

ISBN

승인이 완료 후 승인 번호 및 ISBN 번호 부여

원하는 앱스토어에 퍼블리싱 가능

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AWS China (Beijing) Region 배경

August 2016

Ningxia Region

Availability Zone A

Availability Zone B

Availability Zone C

Mongolia

Beijing
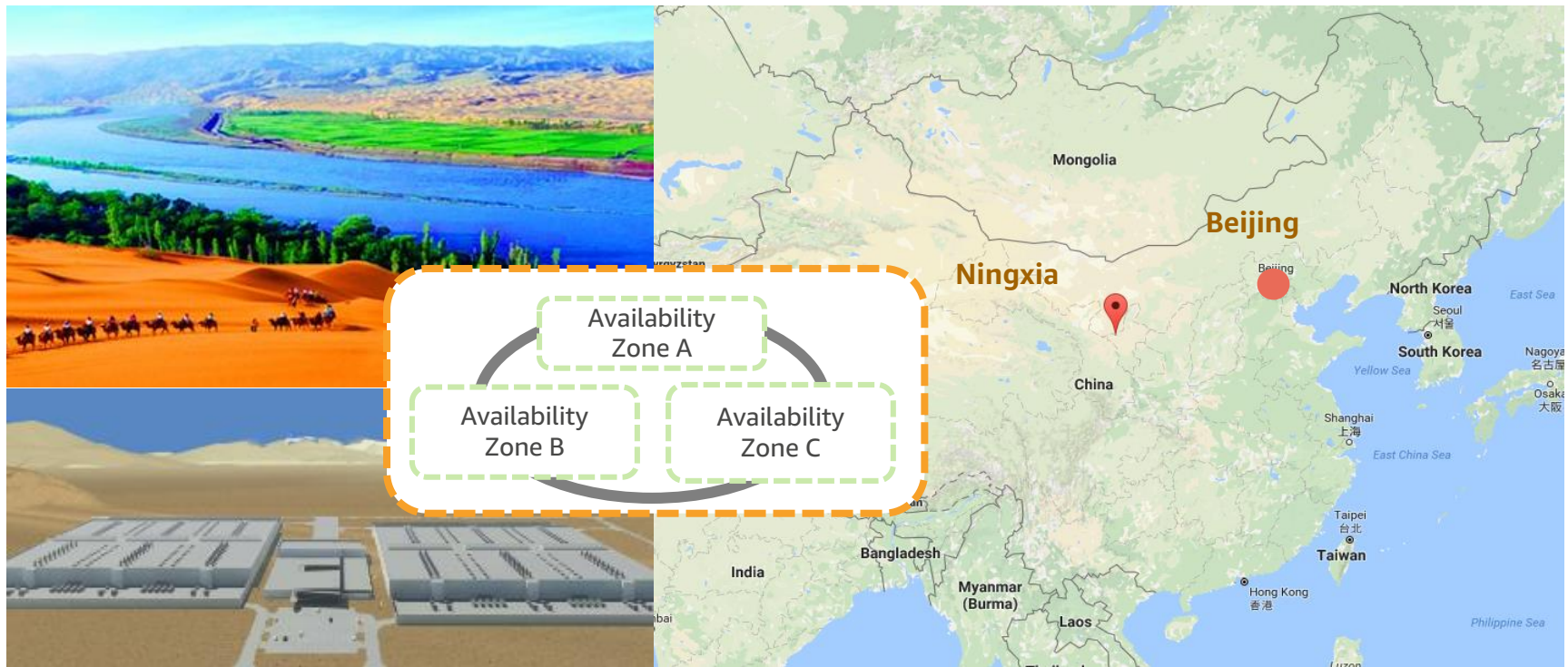
Ningxia

China

Front Shop in Beijing and Back Factory in Ningxia

China Region 고객 – Startups

China Region 제공 서비스

China Region 하이라이트
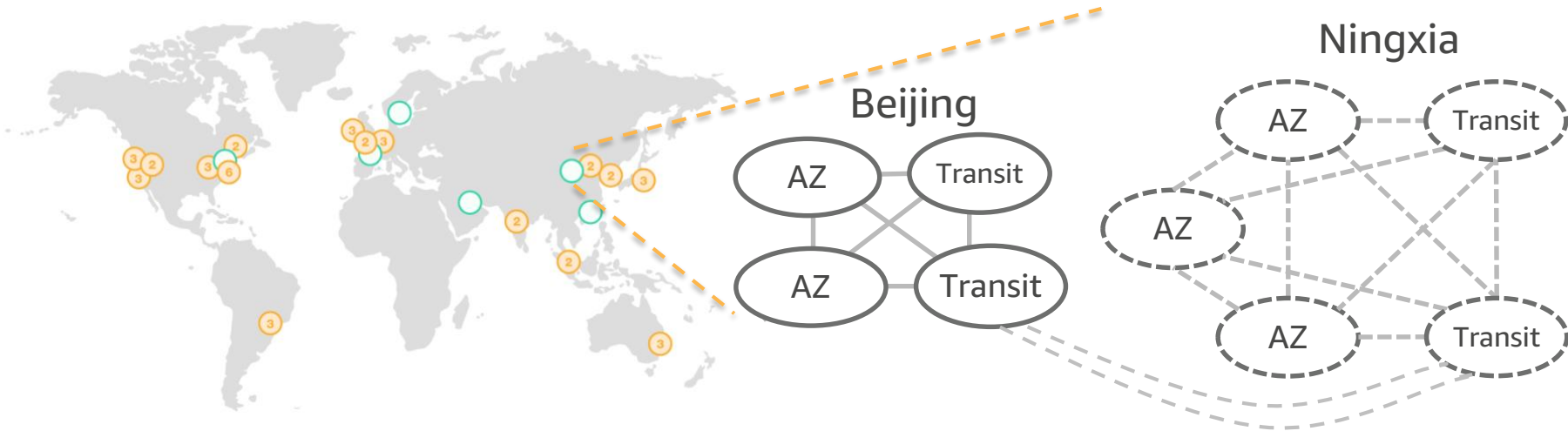
Beijing

Ningxia

- 전세계 표준: 가외성 및 이중화 구성, 표준 SLA
- 두개의 AZ가 Beijing Region에 위치하여 있으며 Ningxia Region에 세개의 AZ 보유
- 중국내 Tier 1 캐리어와 그외 작은 ISP와의 BGP 연결
- Beijing Region 과 Ningxia Region간의 Fiber 연결 준비 중

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China Region 하이라이트

China Regions

Beijing Region

Availability Zone A — Availability Zone B

Ningxia Region

Availability Zone A

Availability Zone B — Availability Zone C

- Beijing Region에 글로벌 Route 53 Geo와 Latency 기반의 라우팅 폴리시 적용
- 인터넷 혹은 VPN을 통하여 China Region 접속
- Beijing Region 에서 2개의 Direct Connect Location 제공 (Ningxia 추후 제공)

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Beijing Region – AWS Services

Compute

EC2
Virtual Servers in the Cloud

EC2 Container Service
Run and Manage Docker Containers

Elastic Beanstalk
Run and Manage Web Apps

Storage & Content Delivery

S3
Scalable Storage in the Cloud

Glacier
Archive Storage in the Cloud

Storage Gateway
Hybrid Storage Integration

Networking

VPC
Isolated Cloud Resources

Direct Connect
Dedicated Network Connection to AWS

Developer Tools

CodeDeploy
Automate Code Deployments

Security & Identity

Identity & Access Management
Manage User Access and Encryption Keys

Database

DynamoDB
Managed NoSQL Database

ElastiCache
In-Memory Cache

RDS
Managed Relational Database Service

Redshift
Fast, Simple, Cost-Effective Data Warehousing

Management Tools

CloudFormation
Create and Manage Resources with Templates

Config
Track Resource Inventory and Changes

CloudTrail
Track User Activity and API Usage

Trusted Advisor
Optimize Performance and Security

CloudWatch
Monitor Resources and Applications

Internet of Things

AWS IoT
Connect Devices to the Cloud

Analytics

EMR
Managed Hadoop Framework

Kinesis
Work with Real-Time Streaming Data

Mobile Services

SNS
Push Notification Service

Application Services

SQS
Message Queue Service

SWF
Workflow Service for Coordinating Application Components

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"파트너쉽은 **Beijing Region**을 위해 특별히 설계되었으며 중국의 데이터 센터에서 워크로드를 실행하려는 고객이 사용할 수 있는 세계적인 클라우드 서비스를 제공하려는 **AWS**의 약속을 나타냅니다."

- 1999년 1월 창립
- 2010년 Sequoia Capital로 부터 투자 유치
- 2014년 Shenzhen 증권 시장 등재
- 2016년 세입: $350.4M, YoY 성장률 290% 초과
- 중국내 가장 큰 데이터 센터 서비스 프로바이더
- 15년 이상의 데이터 센터 및 네트워크 인프라 운영 경력

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China (Beijing) Region 접속 방법

중국 Account Stack

Global Region

Sign in ⓘ

Email address of your AWS account
To sign in as an IAM user, enter your account ID or account alias instead.

[Next]

New to AWS?

[Create a new AWS account]

China Region

Account ID or alias
028496202718

IAM user name

Password

[Sign In]

- 일반 AWS region과 **논리적으로 분리**
  - 별개의 콘솔, IAM, 인증 스택
  - 별개의 엔드 포인트
- 중국 서비스를 위한 별도의 고객 합의서(customer agreement) 제공
- RMB payment 및 Fapiao 서포트

계정 등록을 위한
유효한 이메일 주소

중국 Mainland 내
Business License 를
보유한 합법적인 지사
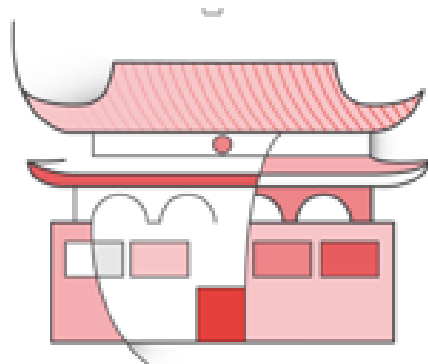
세금 계산서 발행을
위한 중국내 주소
(Fapiao)

ICP 서류

- 중국내 웹어플리케이션의 호스팅, 퍼블리싱을 위한 ICP (Internet Content Provider)번호가 필요

China Region 파트너 SINNET가 쉬운 절차를 도와드립니다:

Bureau of communications

ELB내 EIP혹은 고정 EIP 획득
Top Domain
비지니스 라이선스 및 연락처

ICP 발행 20 정도 소요

Beijing Region Customer Support팀 또한 고객 대응을 위하여 준비되어 있습니다.

Account Signup 절차

China (Beijing) Region은 별도의 계정 및
비밀번호 설정 필요

Steps
1) www.amazonaws.cn 접속
2) Request for an Account
3) 연락시 문서(Business License) 제출
4) 계정 활성화 이메일 전송으로
   singup 완료 **Fapiao/invoice를 위하여
   중국 법인 필요*
5) 필요시, ICP 등록
6) Beijing Region 사용 개시
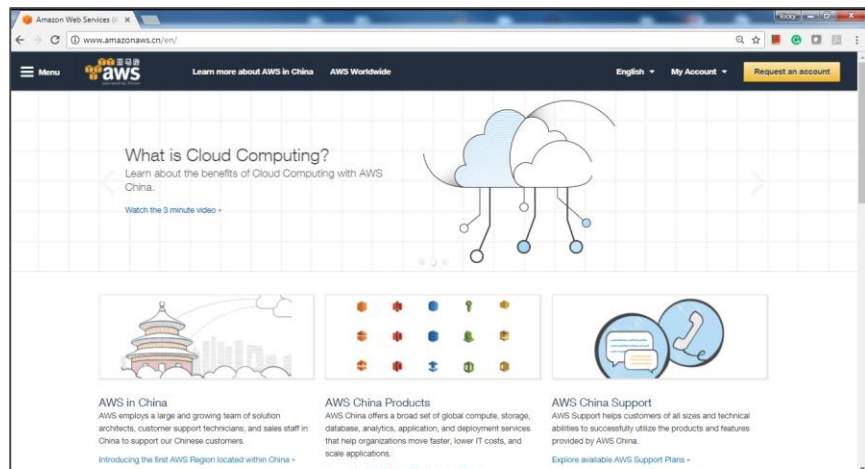
Billing Console

Dashboard

Bills

Cost Allocation Tags

Payment Methods

Payment History

Consolidated Billing

Preferences

Credits

Tax Settings

¥29.83

Support Center

Forums

Documentation

Other Resources

¥50

¥45.4

¥40

¥35.05

¥30

¥29.83

¥20

¥10

¥0

Last Month   Month-to-Date   Forecast

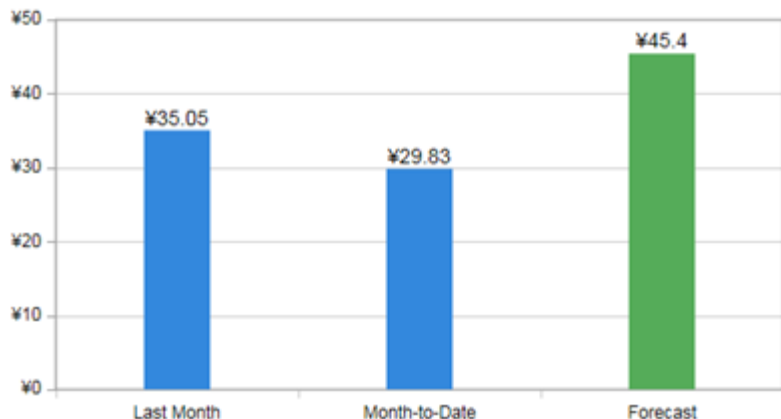▶ Important Information about these Costs   ☑ Include Subscription Charges

Tax Settings

Please note that "General VAT fapiao" cannot be used to claim input VAT credit and "Special VAT fapiao" can be used to claim input VAT credit. Please upload required information by creating a new "Account and Billing" case in Support Center if you have not done so already.
Please click Web link for fapiao information guide.

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