

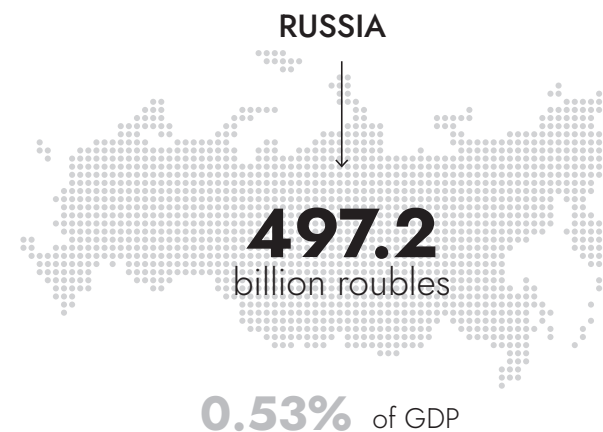
## IT AND VIDEO GAMES



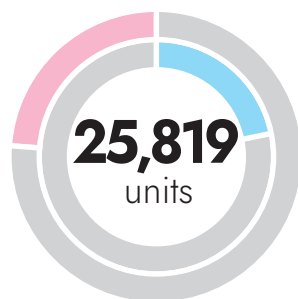
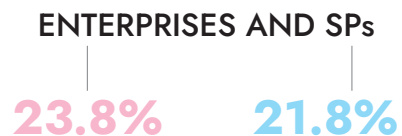
### OKVED2 CODES

- 62.01** Computer programming activities
- 62.02** Computer consultancy activities
- 58.21** Publishing of computer games
- 58.29** Other software publishing
- 63.12** Web-portals

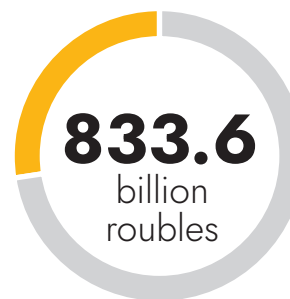
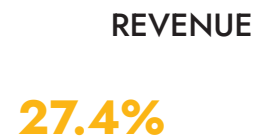
## CREATIVE INDUSTRY GVA ESTIMATES



## CONTRIBUTION TO MOSCOW'S CREATIVE ECONOMY



Of which enterprises — 13,920,  
sole proprietors — 11,899



Provided revenue reports for 2018 —  
7,036 enterprises (50.5%)

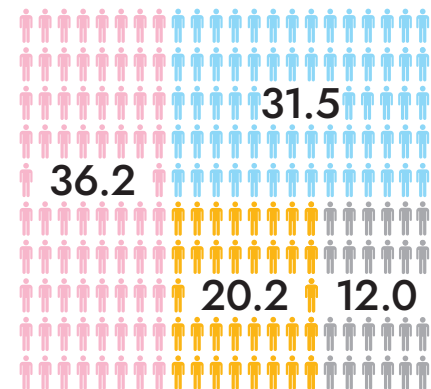
### EMPLOYMENT



Provided employment reports for 2018 —  
8,950 enterprises (65.4%)

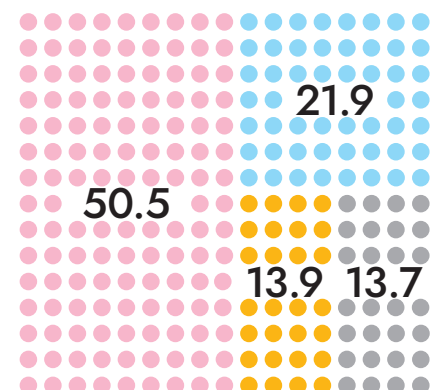
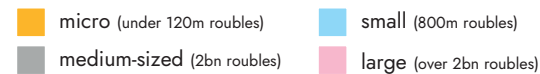
## EMPLOYMENT PERCENTAGE DISTRIBUTION

ENTERPRISES:

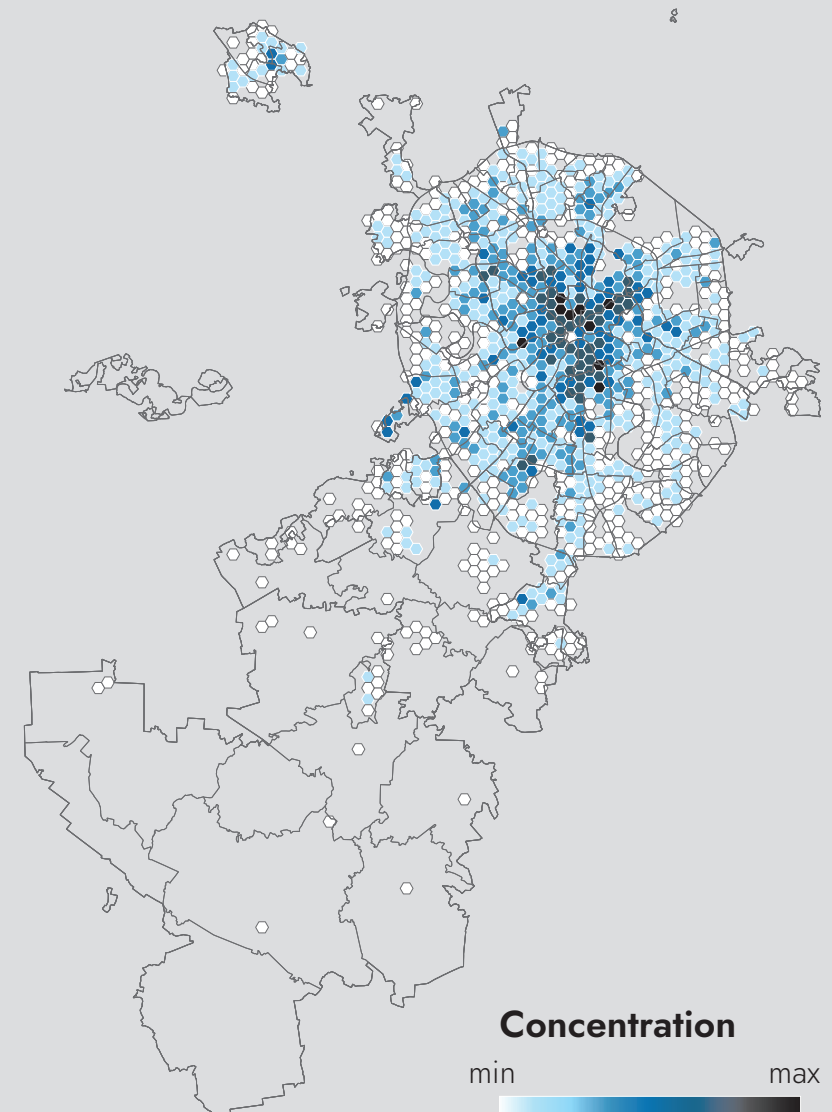


## REVENUE PERCENTAGE DISTRIBUTION

ENTERPRISES:



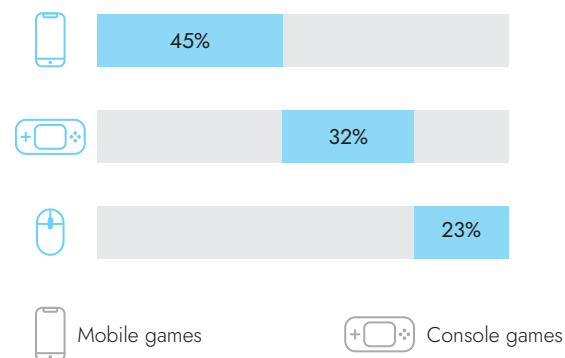
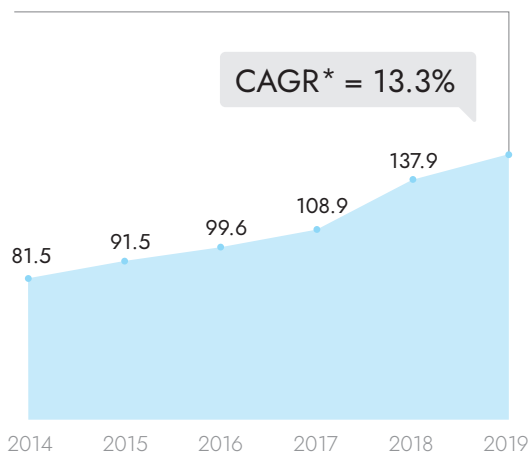
## IT AND VIDEO GAMES: LOCALISATION OF ENTERPRISES



## SIZE AND BREAKDOWN OF THE VIDEO GAME MARKET: 2019

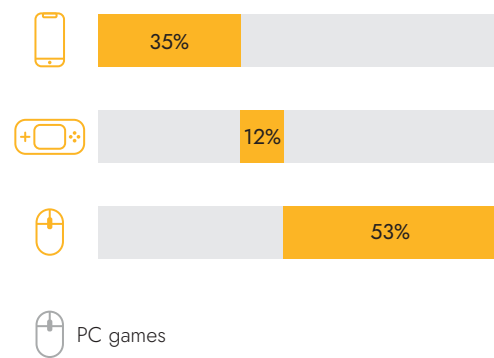
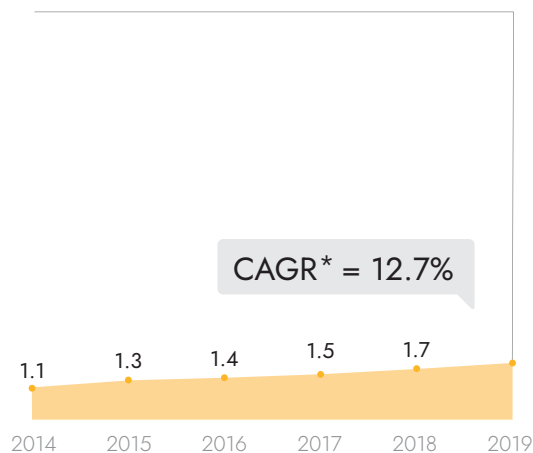
### WORLD

**152.1** \$US billion



### RUSSIA

**2.0** \$US billion



### LEADING COUNTRIES OF THE VIDEO GAME MARKET

	Share	Size, \$US billion
1. China	24.0	36.5
2. United States	23.3	35.5
3. Japan	12.2	18.6
4. South Korea	4.1	6.2
5. Germany	3.7	5.7
.....		
11. Russia	1.3	2.0

In 2014–2019, the global video game market gained on average 13.3% per year and by 2019 reached US \$152.1 billion. Countries leading by the share of gaming industry on the market is China and the United States: they occupy over a half of the global market.

\* CAGR — Compound Annual Growth Rate.

Source: HSE estimates based on the data of NewZoo (2014–2019) analytics platform and Yandex.Kassa.

## LEADING RUSSIAN VIDEO GAME DEVELOPERS AND PUBLISHERS: 2019

Company	Specialisation	Headquarters	Game projects
<b>Playrix</b>		Dublin former – Vologda	Gardenscapes Fishdom
<b>Mail.ru Group</b>	  	Moscow	Warface; Hustle Castle Alloids
<b>Pixonix</b>		Moscow	War Robots Robinson
<b>ZeptoLab</b>		London former – Moscow	Cut the Rope
<b>Banzai Games</b>	  	Moscow	Shadow Fight* Vector
<b>1C</b>	 	Moscow	IL-2 Sturmovik series, Planet Alcatraz
<b>Nival</b>	 	St Petersburg	Night Watch Heroes of Might and Magic V
<b>Gaijin Entertainment</b>	 	Moscow	Bumer: Sorvannye Bashni War Thunder
<b>101XP</b>	 	Moscow	Deiland Eternal Magic
<b>Game Insight</b>	 	Vilnius former – Moscow	Paradise Island Airport City
<b>Ice-Peak Lodge</b>		Moscow	Pathologic Tension
 Mobile games  Console games  PC games			

\* Publisher – Nekki.

Source: HSE estimates based on the data of AppAnnie and Riot Pixels portals, HSE HSBI, and open sources.

Russian video games market is relatively young and vibrant. **For the last five years it increased almost twofold, with annual growth rate of 12.7%. In 2019, Russia's share on the global IT market was estimated at 1.31% (ranked 11<sup>th</sup> in the world).**

The world and Russian gaming markets grew first of all due to the mobile games segment. In Russia, it accounts for 35% of the total market. High investment attractiveness of the gaming industry in the country is associated with global orientation of the developed products.

**A number of companies – leading world developers of mobile games – were founded in Russia.** Among them are Playrix (included in the top three largest global gaming companies), Zeptolab, and Game Insight. Many leaders of the Russian gaming market have headquarters in Moscow.