Confederation of Indian Industry

INDIAN DIGITAL GAMING SOCIETY

INDIA'S NEXT LEVEL GAMING REVOLUTION

A Patent Perspective Benchmarking

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CONTRIBUTED BY

JetSynthesys®

INNOIPS

INTRODUCTION

"India matters in gaming. The next question is whether it will matter in gaming innovation."

India is already a significant gaming market. But the more strategic question for companies, platforms, investors, & ecosystem stakeholders is this: **is India only consuming innovation, or is it beginning to create protectable gaming & esports technology of its own?**

This synopsis examines that question through a patent lens. Using refined patent-family datasets, we analysed two layers of activity:

- **Core Gaming** - broader gaming technologies such as multiplayer systems, game servers, streaming, cloud-linked play, adaptive gameplay, & player-state architecture
- **Esports** - the competitive layer, including tournament systems, ranking, spectatorship, replay, live viewing, & competition control

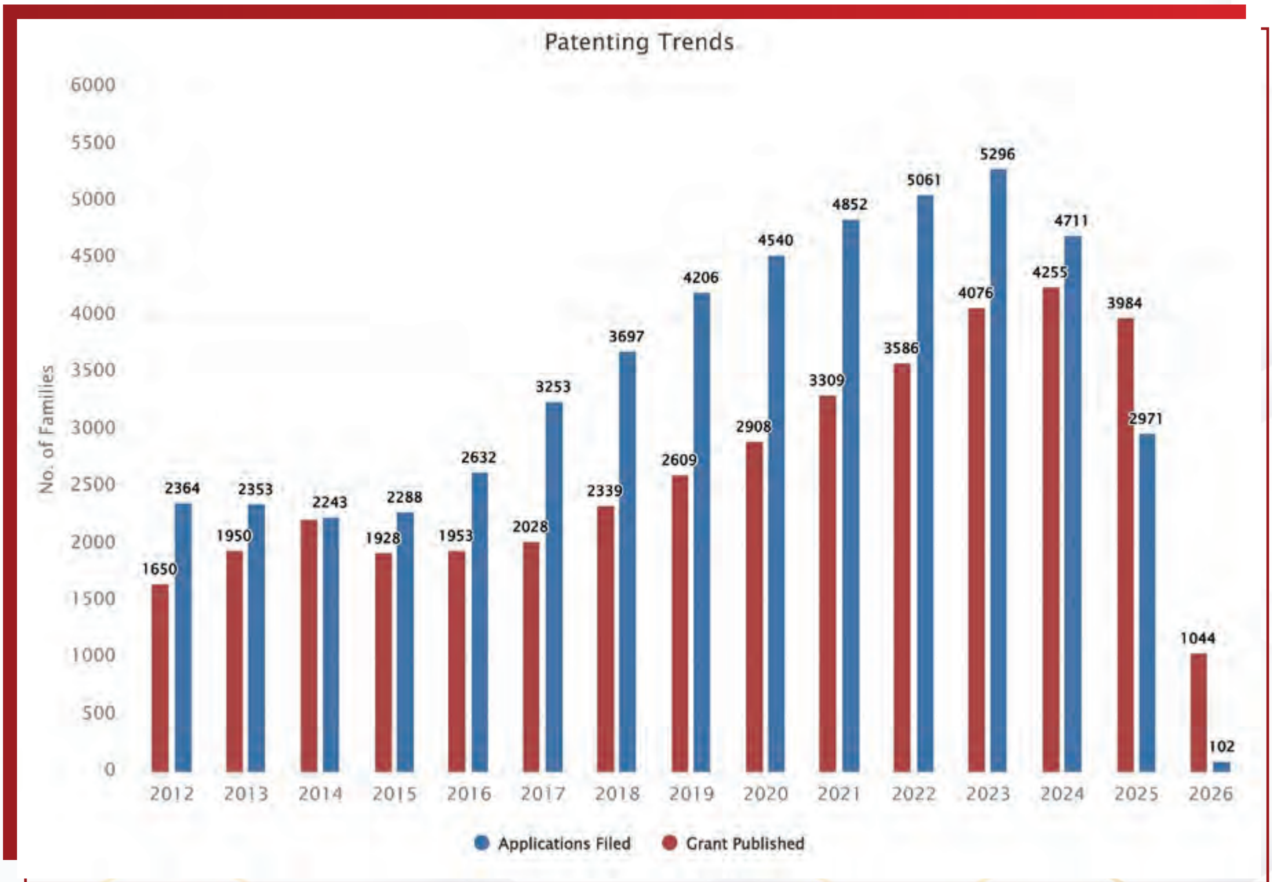
The result is a clearer view of where innovation is concentrated globally, where India is beginning to appear, & which technology spaces may matter most going forward.

"The datasets were iteratively refined to exclude real money gaming, fantasy sports, gambling, pachinko, amusement-machine filings, & generic sports tournament noise, so that the results more accurately reflect gaming & esports innovation."

The global gaming patent landscape is no longer emerging. It is already scaled, increasingly concentrated & technically sophisticated. A relatively small set of companies controls a disproportionate share of portfolios, the strongest innovation hubs remain concentrated in East Asia & the United States, & the most important patent activity sits not in broad game ideas but in the technical systems that make gaming persistent, connected, adaptive, & competitive.

Five messages define the global picture. First, gaming patenting has expanded materially over time. Second, ownership is concentrated among a small number of global leaders. Third, innovation originates in a limited set of mature ecosystems. Fourth, the technical race is centered on gameplay control, player state, servers, & interconnection. Fifth, influence is even more concentrated than portfolio size alone suggests.

Global Gaming Patent Activity
(2025 & 26 is considered partial years)

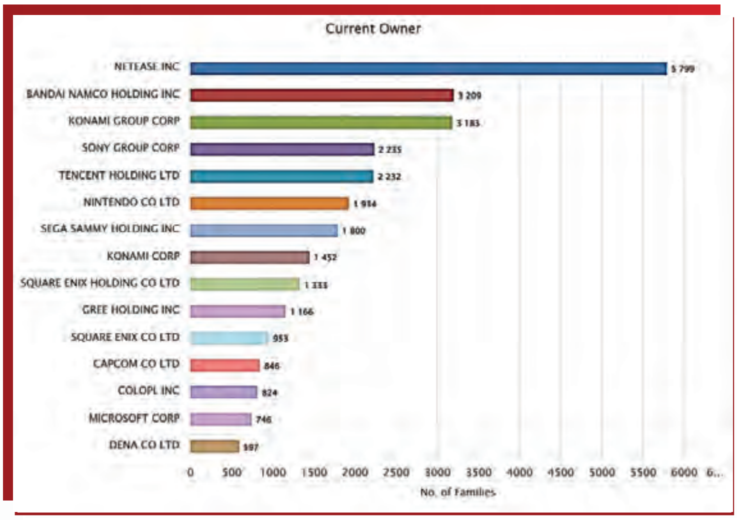


The patent record confirms that gaming is not a niche software field. It is now a scaled innovation domain. Applications filed rise from 2,364 in 2012 to 5,296 in 2023, while grants rise from 1,650 in 2012 to 4,255 in 2024. The pattern is not a temporary spike. It reflects a structurally larger field from the late 2010s onward. The significance is straight forward: gaming is attracting sustained technical investment, & the innovation cycle is still active. (2025)

"Gaming has become a serious technology battleground, not just an entertainment category."

A Small Group of Companies Controls the Global Patent Field.

Portfolio ownership is concentrated among a handful of major gaming & entertainment players.



NetEase leads with 5,799 families, followed by B&ai Namco Holding with 3,209, Konami Group with 3,183, Sony Group with 2,235, Tencent with 2,232, & Nintendo with 1,934.

The next tier includes Sega Sammy, Konami Corp, Square Enix, GREE, Capcom, Microsoft, & DeNA.

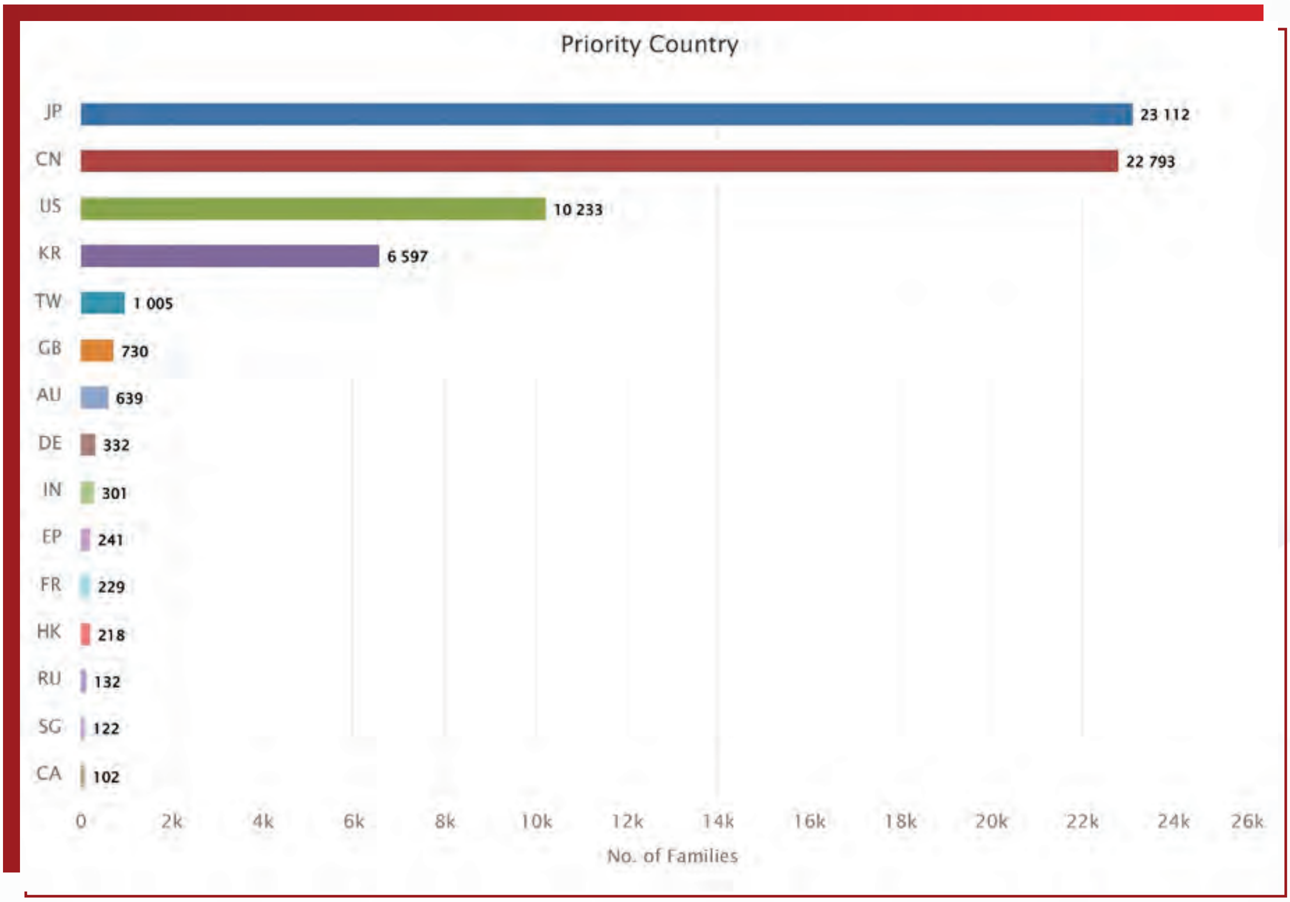
This tells us the field is not broadly dispersed. The strongest positions are already occupied by companies with scale, discipline, & long-term portfolio depth.

So what?

Gaming is already a crowded innovation field. New entrants are not entering an open frontier; they are entering a market with established portfolio leaders.

Innovation originates in a few ecosystems — and the race is being fought in technical infrastructure.

Global First-Filing Activity Is Concentrated in Four Innovation Hubs

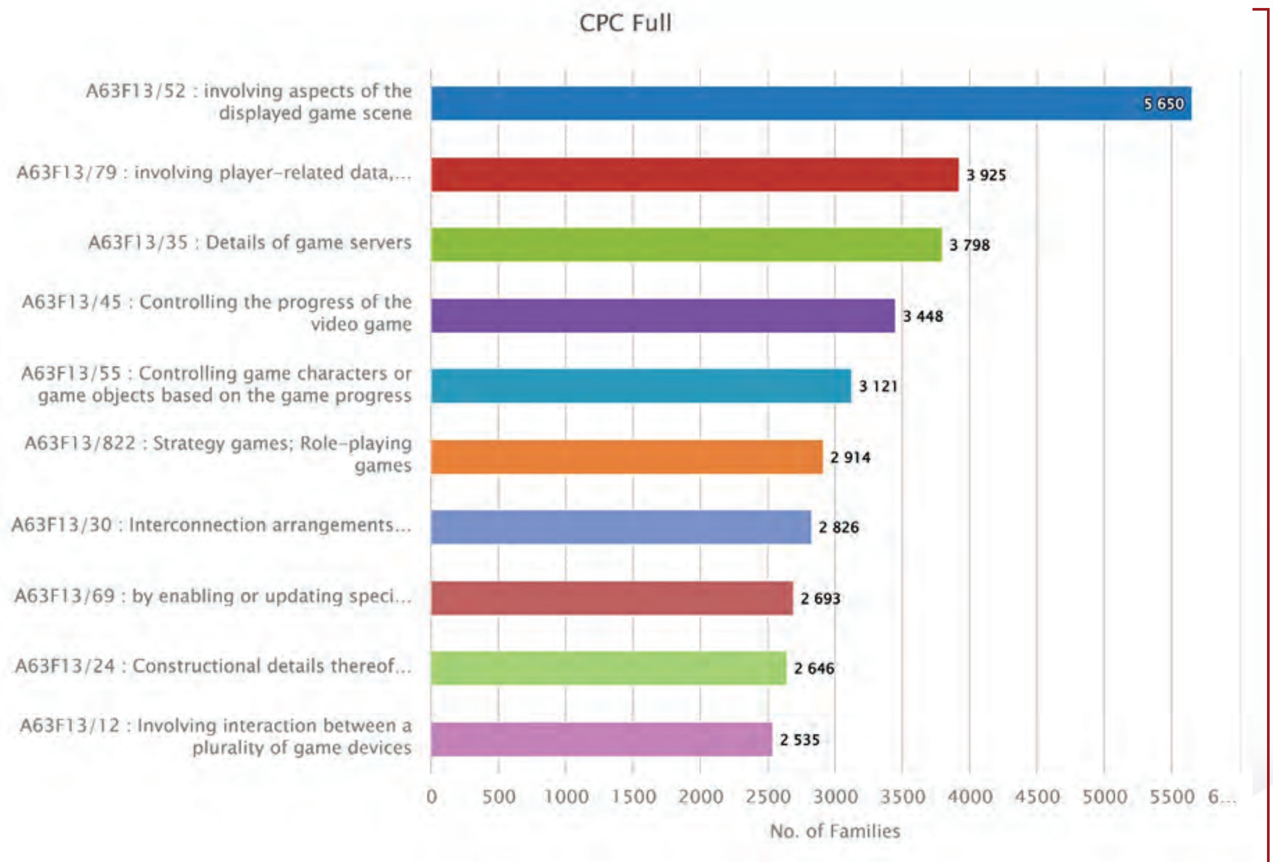


First-filing activity is dominated by Japan, China, the United States, &Korea.

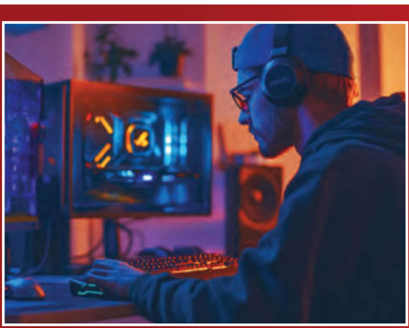
Japan leads with 23,112 families, followed closely by China at 22,793, then the United States at 10,233 & Korea at 6,597.

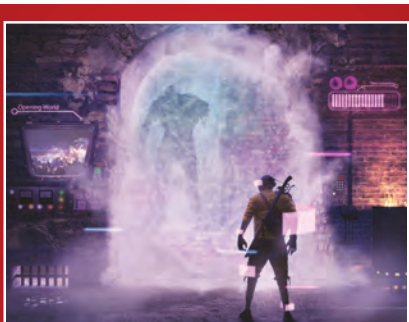
The geography of origin is highly concentrated. A small number of mature ecosystems continue to set the pace of gaming innovation, & the gap between the top four jurisdictions & the rest remains significant.

The technical center of gravity sits in gameplay control, player data, game servers, & multiplayer interconnection.

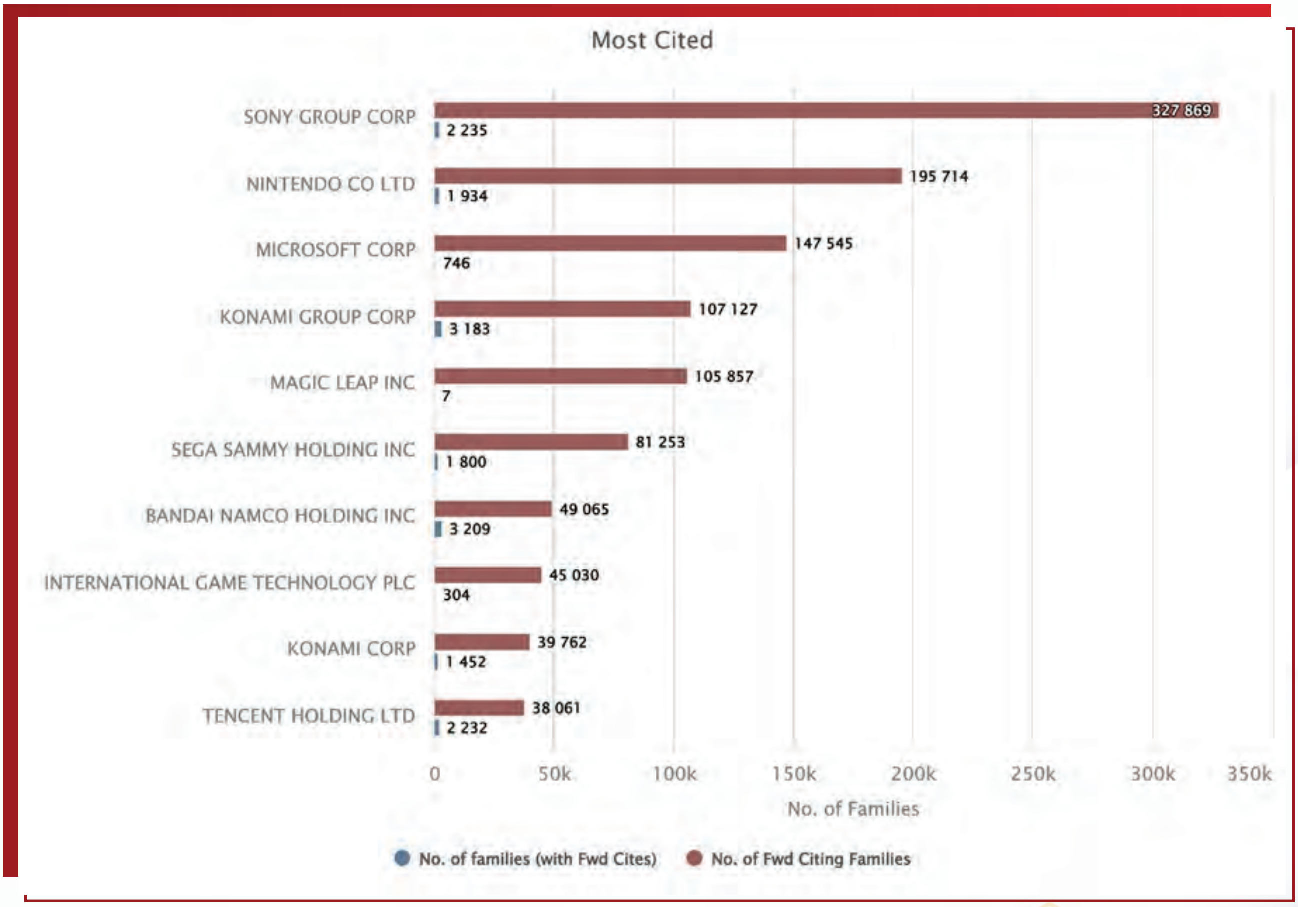


The most active patent classes are concentrated around displayed game scenes, player-related data, game-server detail, progression control, & interconnection arrangements. This shows that the global patent battlefield is centered on the systems that govern how games behave, how players interact, & how sessions are managed. The race is less about isolated game concepts & more about scalable technical infrastructure. The strongest moats are being built in control logic, server architecture, & connected gameplay systems.





Influence is even more concentrated than volume.



Sony, Nintendo, Microsoft, & Konami stand out not just as large owners, but as portfolios with outsized downstream influence.

Citation strength is a proxy for technological relevance. It helps distinguish which portfolios are merely large from which portfolios help define the field.

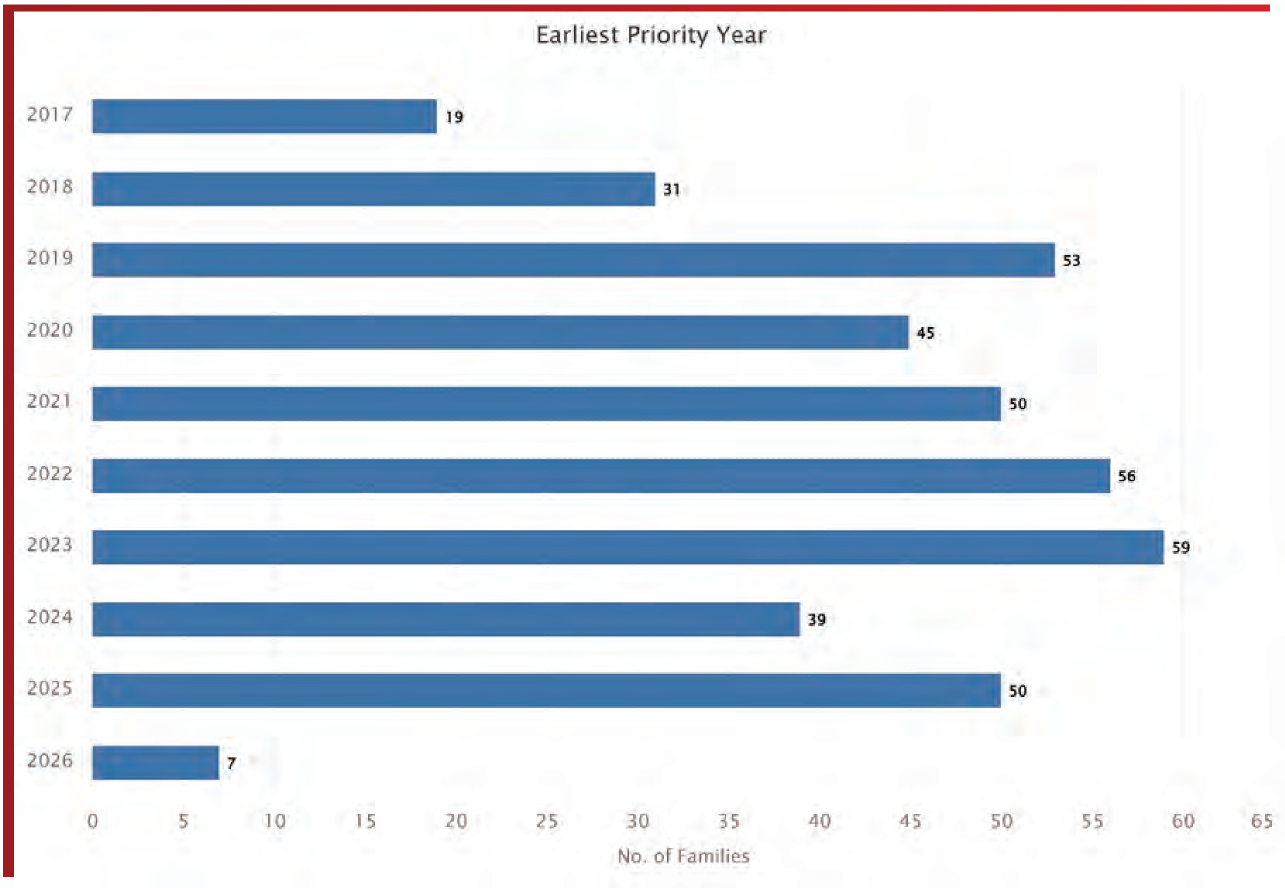
So what?

The global gaming patent race is being won through ownership of system architecture, player-state logic & connected-play infrastructure — not just through isolated game ideas.

INDIA'S POSITION

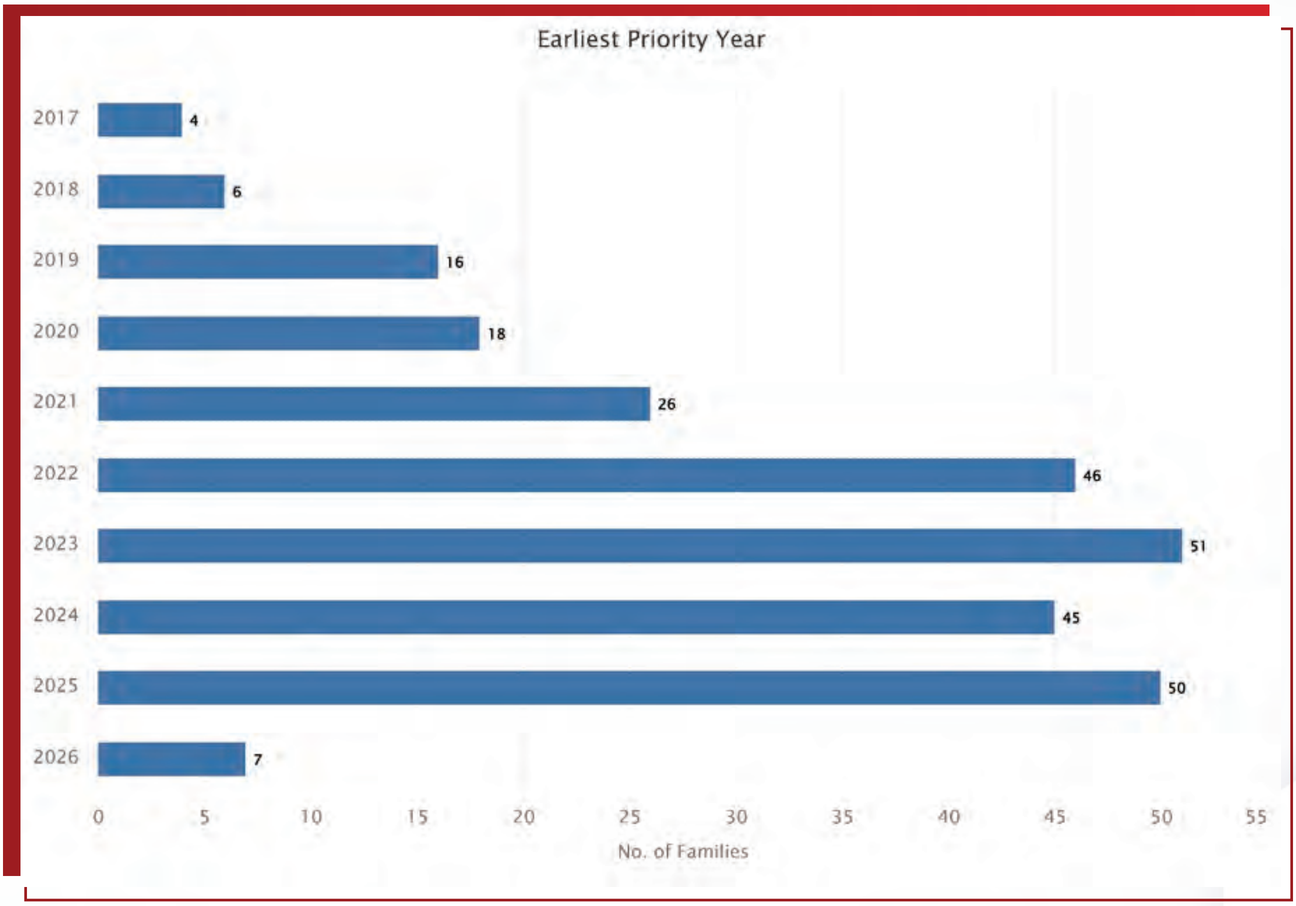
India is already relevant as a protection market. It is yet to matter as an origin market. India's patent story has two distinct layers. The first is India as a filing & protection jurisdiction used by major global gaming & technology players. The second is India as an emerging source of first-filed gaming & esports inventions. The difference between these two views is critical to understanding India's true innovation position.

India as a protection market -based on publication



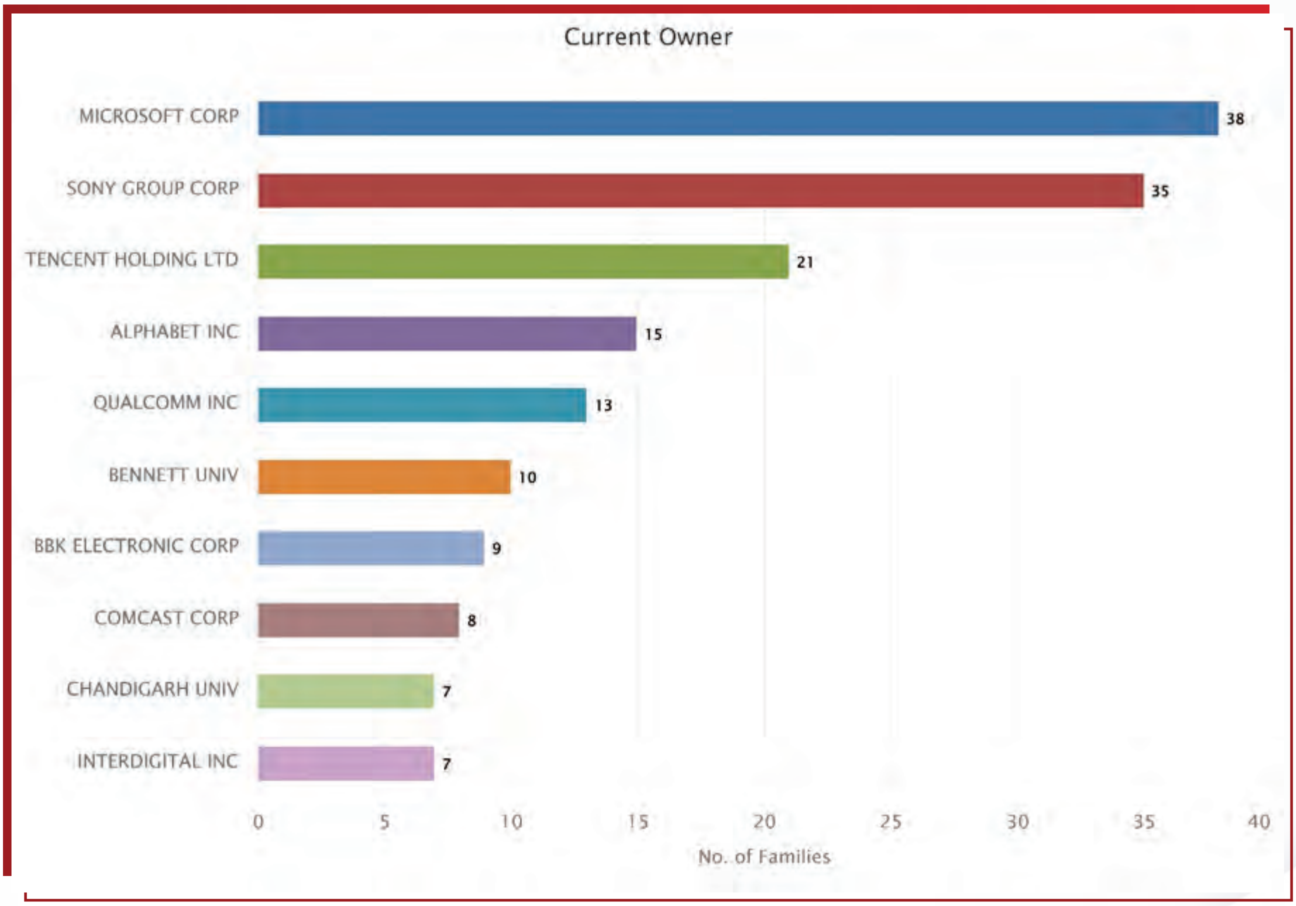
The India publication-country trend shows that major global companies consider India important enough to seek patent coverage here. Activity becomes materially more visible after 2018 & remains steady through the recent period. This indicates that India is not peripheral from a protection standpoint. It is increasingly part of the filing strategy of global gaming&technology owners.

India-Origin Gaming Patenting Is Small, but No Longer Incidental (priority of patent)

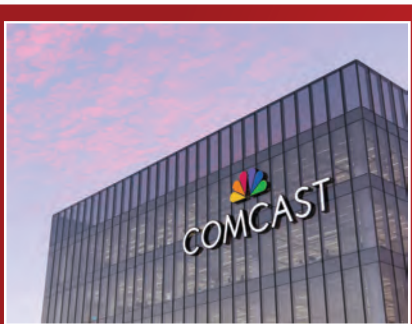


The India priority-country trend is much smaller than the publication-country view, but its post-2019 rise is strategically important. This suggests that India is beginning to generate first-filed gaming-related inventions rather than simply receiving imported protection. The pattern is still early-stage, but it is no longer negligible. The recent rise points to the beginnings of a domestic inventive base.

Global Players Continue to Dominate India Protection Activity

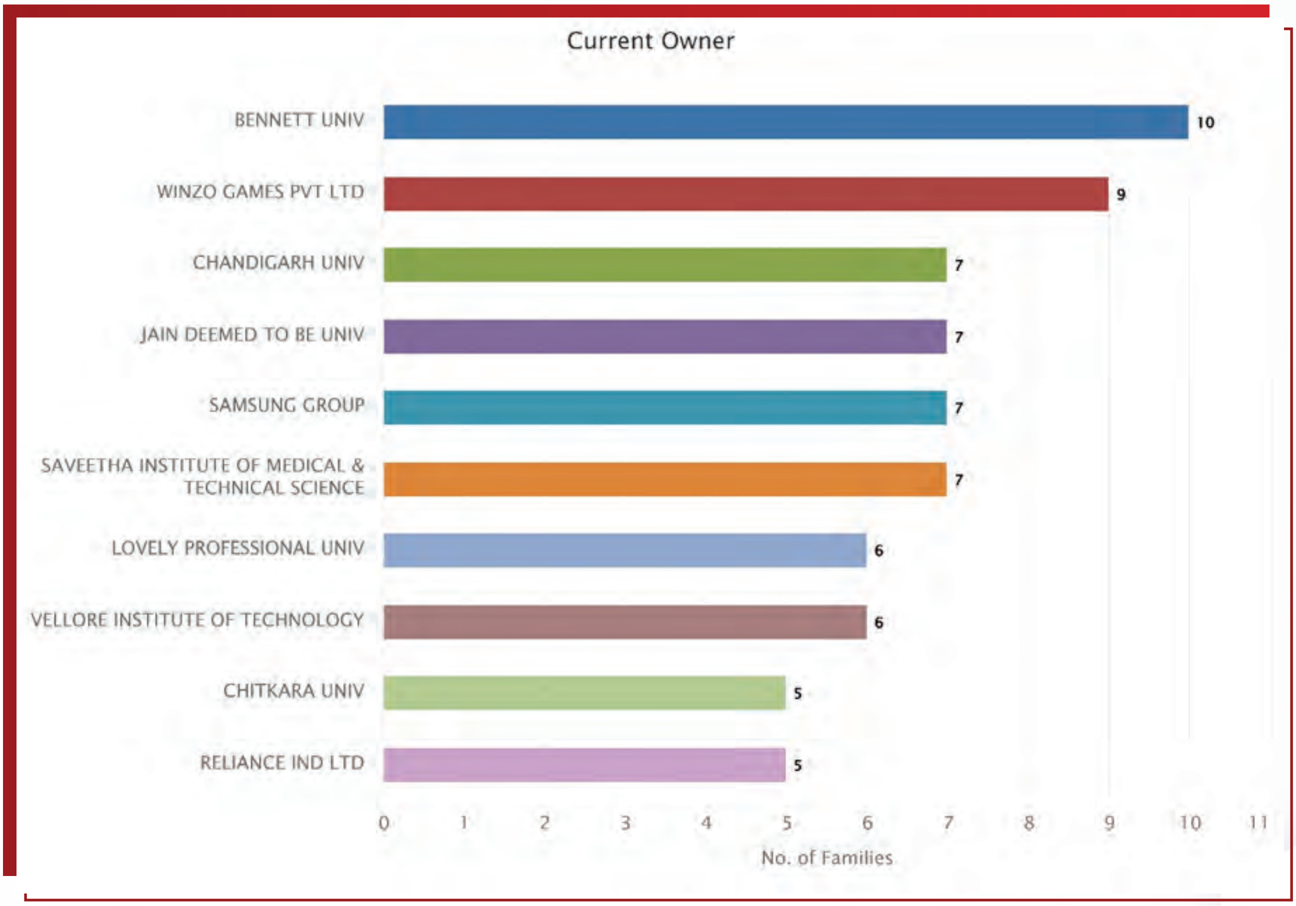


The India publication-country ownership profile is led by large global names such as Microsoft, Sony, Tencent, Alphabet, & Qualcomm. This confirms that India is being treated primarily as a strategic protection market by major portfolio owners. Domestic players are present, but global entities still dominate the visible filing landscape. India's importance, at this stage, is stronger as a market to protect than as a market originating large portfolio volume.



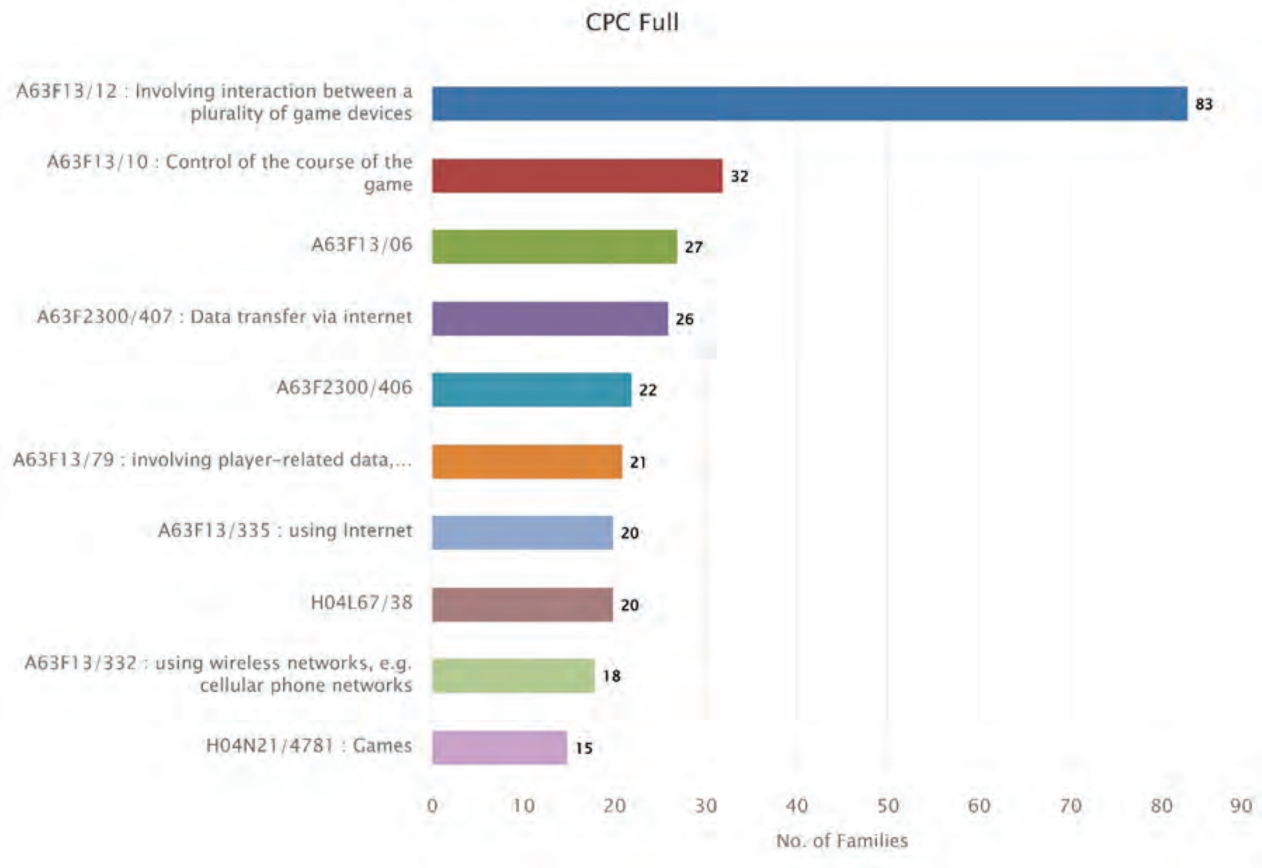
Microsoft

India-Origin Activity Has a Very Different Owner Profile



The India priority-country owner list shifts away from global giants and toward universities, startups, & selected domestic companies such as WinZO & Reliance. This is a very different pattern from the India protection view and suggests that India-origin patenting is still institution-led rather than company-led. The inventive base is forming, but it has not yet matured into a broad corporate portfolio story. That makes the current phase promising, but still early.

India's Strongest Patent Signal Is in Systems, Infrastructure, & Connected Play – CPC class- publication India



The India-origin technology mix is concentrated around multiplayer interaction, game-server detail, ranking, participation systems, player data & connected gameplay architecture. This suggests that India's current innovation footprint is more system-led than franchise-led. In other words, India appears stronger in the infrastructure that enables gaming than in the content layer that dominates global entertainment value. That is a narrower position, but also a strategically relevant one.

So what?

India is not yet a large gaming patent-origin market. But it is clearly more than a passive filing destination. The data shows the early formation of a domestic inventive base, particularly after 2019.

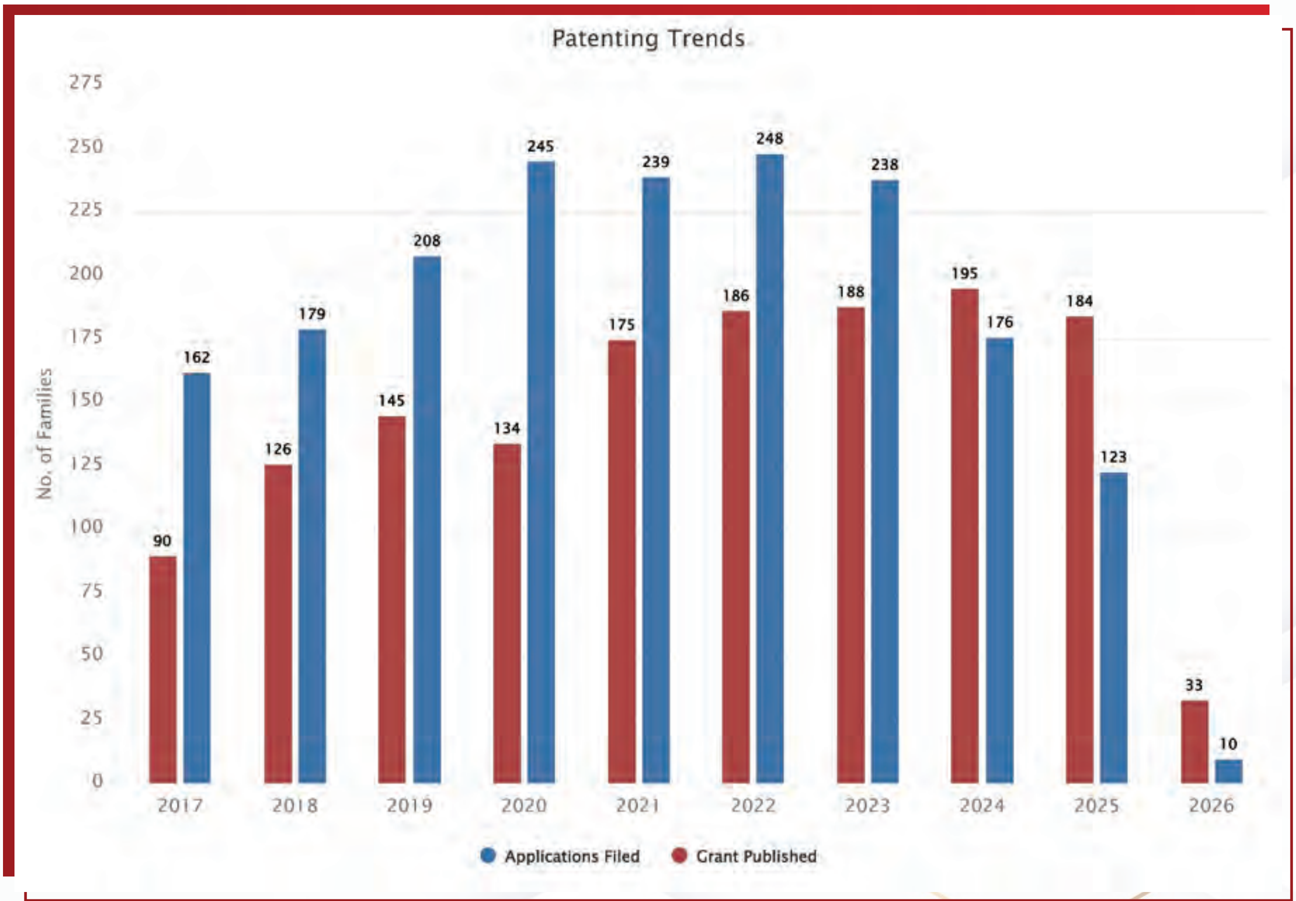
Esports is smaller than gaming — but it may be the sharper lens for India's next innovation wave. The esports patent layer is smaller than the broader gaming universe, but strategically richer than it appears. From a patent perspective, esports is not just about tournament administration. It is about ranking, spectatorship, replay, live viewing, competition control & multiplayer participation logic. This makes esports a particularly useful lens for understanding where India may build technical differentiation.

Core numbers

Global esports patent families: **3,682**

India publication-country esports patent families: **92**

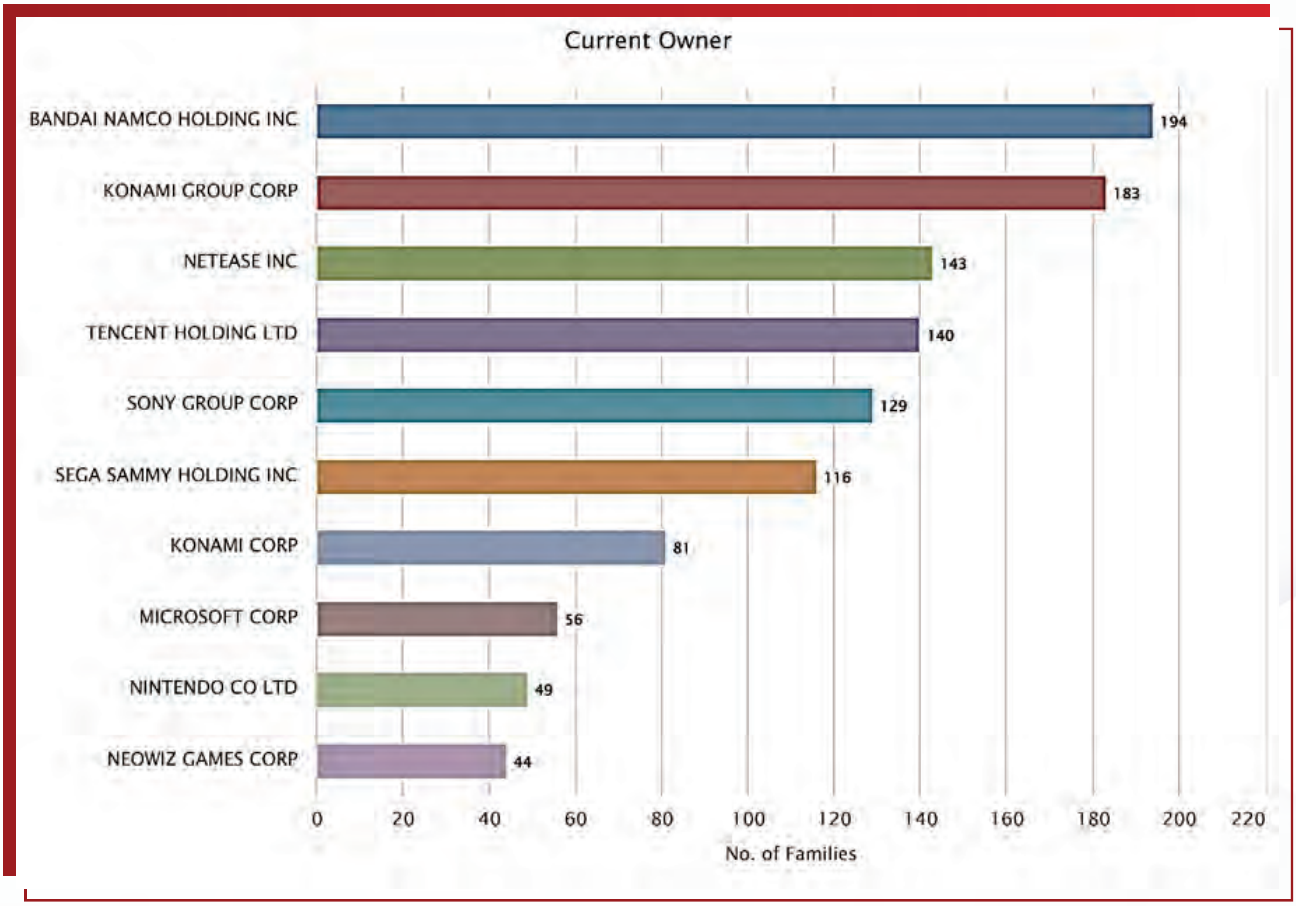
Esports Is Smaller Than Core Gaming, but It Is a Real & Persistent Patent Layer.



The global esports trend confirms that competitive gaming is not a marginal patent theme. While far smaller than the broader gaming universe, it has enough depth & persistence to be treated as a distinct innovation layer.

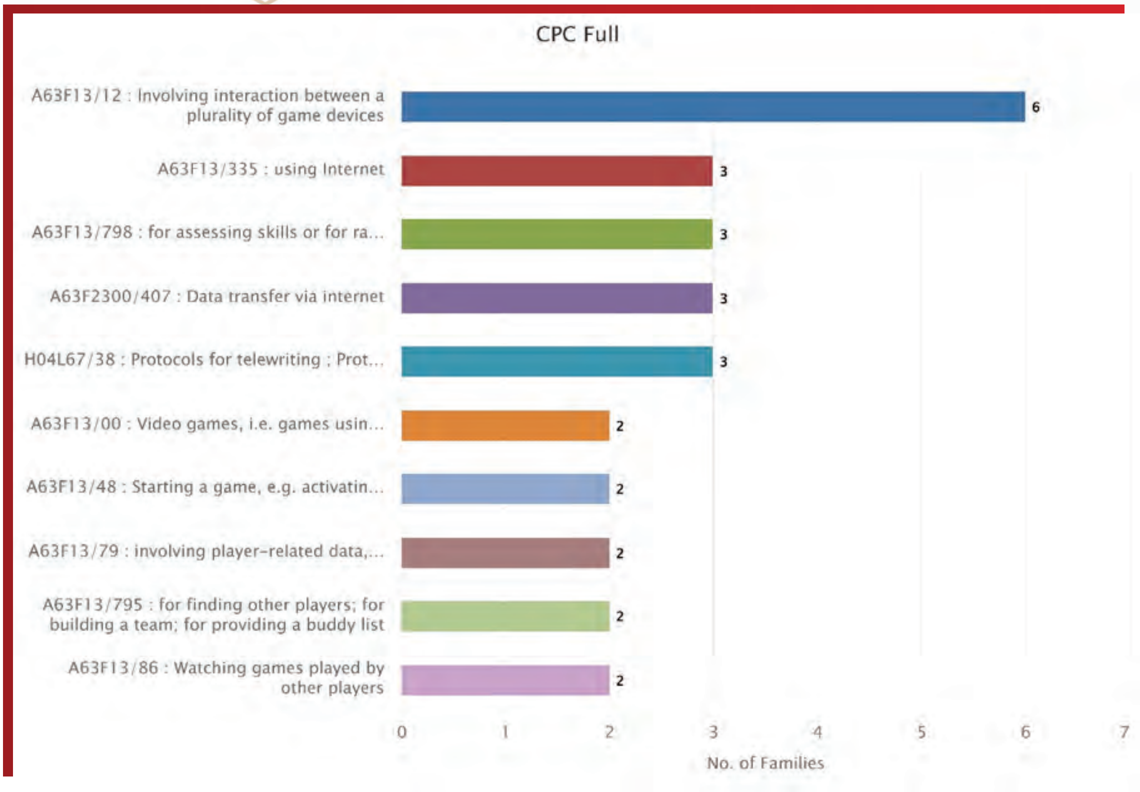
This suggests that esports is evolving into its own technical stack rather than remaining a simple extension of gameplay. It is becoming a meaningful category for portfolio building.

The Global Esports Layer Is Controlled by Established Gaming Leaders



Bandai Namco, Konami, NetEase, Tencent, Sony, Sega Sammy, Microsoft, Nintendo, & Neowiz lead the esports-related portfolio base. This shows that esports patenting is not being shaped only by specialist tournament operators. Instead, major gaming ecosystem companies are building competitive, spectator & ranking infrastructure around their platforms & titles. Competitive gaming is therefore best understood as a strategic technical extension of broader gaming ecosystems. Looking from the India priority lenses Winzo games, Hulm entertainment & couple of university are seen.

India's Esports Opportunity Lies in Ranking, Spectatorship, Competition Infrastructure



The India-linked esports technology mix points toward ranking, session control, replay, participation logic, & multiplayer coordination. This suggests that India's future role in esports innovation may be strongest in the technical infrastructure that supports competitive play, not only in the event layer. These are also the areas where domestic capabilities appear to align with broader digital & platform strengths. That makes esports a strategically relevant opportunity zone for India-focused innovation.

Opportunity boxes

- **Spectator & viewing infrastructure**

Watching, live viewing, replay, & fan-engagement layers remain important growth spaces.

- **Competitive trust & integrity**

Ranking, authentication, anti-cheat, score validation, & participation control will become more central as competitive ecosystems mature.

- **Multiplayer orchestration**

Team formation, player matching, session control, & game-server coordination align closely with India's visible strengths.

- **Cloud-linked & thin-client gaming**

Especially relevant for India's mobile-first patterns, varied device quality, & network constraints.

FINAL CONCLUSION

India is not yet a global gaming or esports patent powerhouse. But the patent record shows that it is no longer outside the innovation story. Today, India is clearly a relevant protection market (based on number of filings in India where India is not the priority country). More importantly, it is beginning to show the slight signs of an origin market, particularly in multiplayer systems, ranking logic, server-side architecture, connected gameplay, & competition infrastructure.

The scale gap with global leaders remains large. But the signal is now visible - and that creates a real window for strategic innovation leadership

"The market story is already here. The innovation story is now becoming investable."

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Disclaimer:

This white paper presents a patent-based view of gaming & esports innovation, with India as the focal market & global activity as the benchmark. The analysis is based on patent family datasets refined through iterative search cleaning in public patent databse.

The paper is intended for strategic & informational purposes and should not be treated as legal opinion on validity, infringement, or freedom to operate.

NOTES

The Indian Digital Gaming Society (IDGS) is a non-profit umbrella organization representing a wide range of stakeholders in the Indian digital gaming ecosystem. Established under the aegis of the Confederation of Indian Industry (CII) in 2018, IDGS serves as a proactive advocate, promoter, and acilitator for building a vibrant and responsible gaming ecosystem in India.

IDGS works closely with industry leaders and academic experts to strengthen the capabilities of the sector and drive its growth. Its focus spans policy advocacy, market research, emerging technologies, export promotion, indigenization and innovation, as well as education and skill development.

The Society regularly organizes India Gaming Shows, conferences, industry sessions, academia Industry connect program and publishes newsletters and reports to promote industry engagement and knowledge sharing.

To further its objectives, IDGS has constituted eight dedicated working groups responsible for driving policy recommendations, membership growth, and key initiatives aimed at strengthening and expanding India's gaming, esports and AVGCXR sector.

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