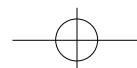
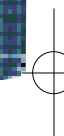


2003 KOREA GAME WHITE PAPER

Chapter 4



- 1
- 1
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- 3
- 1
- 2
- 4
- 1
- 2
- 5
- 1
- 2
- 3
- 6
- 1
- 2





1

1

2001 550 PC 2003 1%
 2005 770
 3%가 가
 2002 13% 2005 6.5%
 2004 가
 2002 215 가
 1~2
 가 2005~2006
 가
 PC 80-90
 2002 16 가

< 4-1-1-01> : 2001-2005 (:)

	2001	2002	2003	2004	2005
	280	294	309	331	348
	5%	5%	5%	7%	5%
PC	36	37	37.4	36	34.7
	9%	2.8%	1%	-3.7%	-3.6%
	35.6	56	76.2	96	114.4
	42%	57%	36%	26%	19%
	186	215	227	213	178
	35%	16%	5.6%	-6.2%	-16%
	9.5	16	24.4	47	94.7
	2,869%	71%	53%	93%	101%
()	547.1	618	674	723	769.8
	-	13%	9%	7%	6.5%

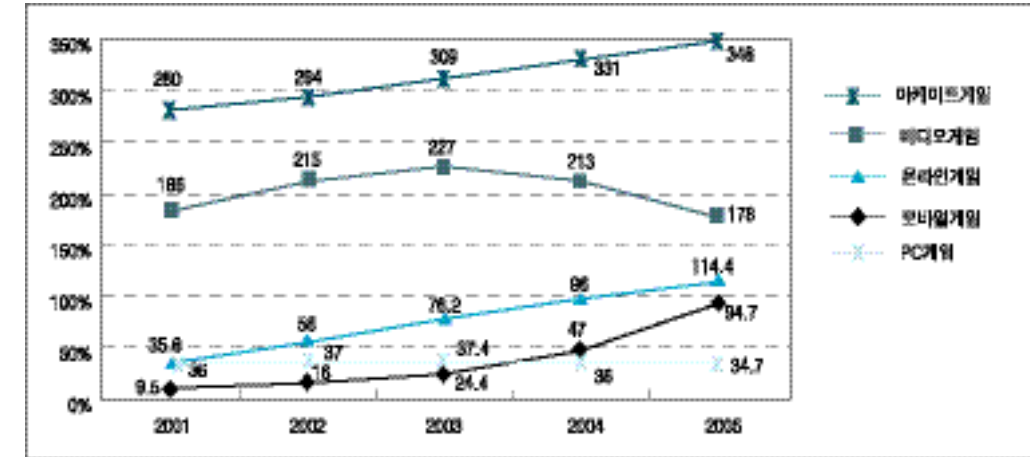
: Datamonitor, 2002 ; Screen Digest, 2002 ; DFC Intelligence, 2001 ; SOFTBANK Research, 2002 ; Informa media group, 2002 ; IDSA, 2001 ; DTI spectrum, 2003 ; Frost & Sullivan, 2002 ; CESA, 2002

80%

, 2002

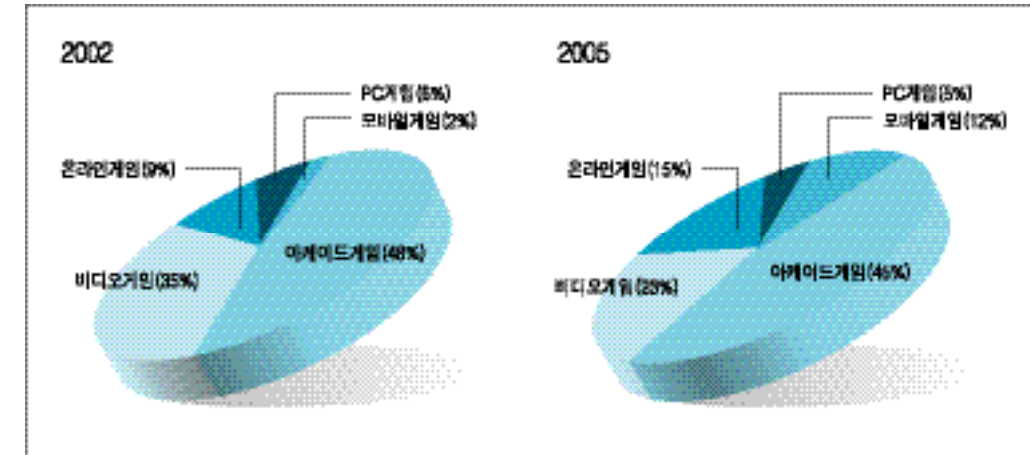
2002 가 (40%)
 48% 가 (35%), (9%), PC 2005
 (6%), (2%) 가 (40%)
 2004 가
 PC 가

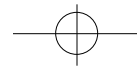
< 4-1-1-01> : 2001-2005 (:)



4

< 4-1-1-02> (2002 2005)





1

가

(Identity)

(,)

가

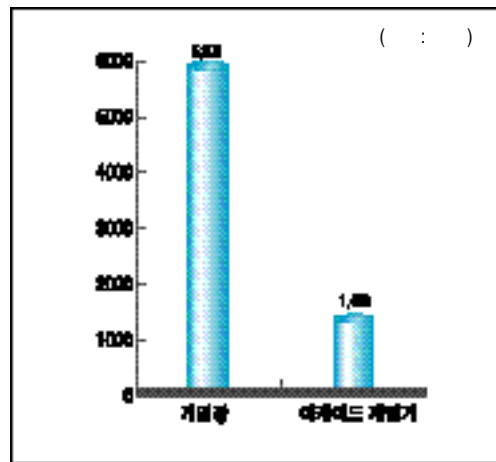
가 ,

2.

< 4-1-2-02>

< >

2001



: Gamejournal, 2003. 3

. 2002

81 4,600 ,

72

1,400 ,

4,500

, 2004

2003

가

2005

. 1994

2007

2008-

2009

PS2가

2003

2001

PC

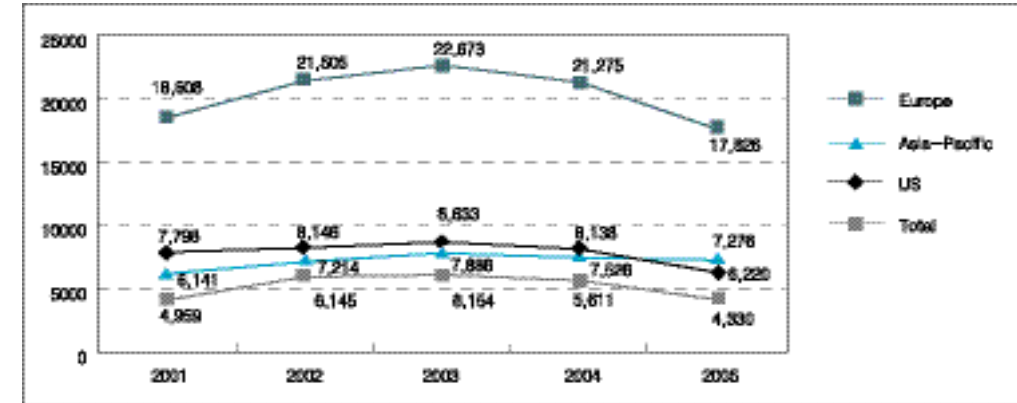
가 44%

56%

< 4-1-2-04>

: 2001-2005

(:)

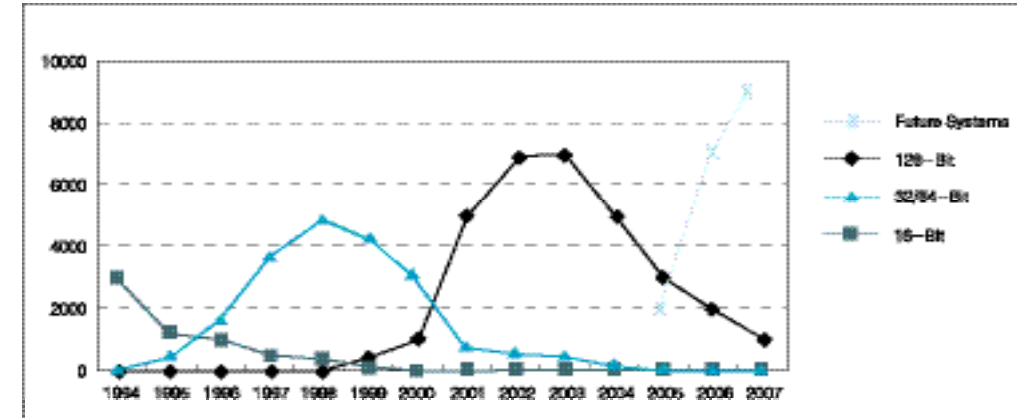


: DFC Intelligence, 2001 ; Informa media group, 2002 ; Datamonitor, 2002 ; IDATE, 2002

< 4-1-2-05>

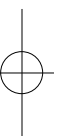
: 1994-2007

(:)

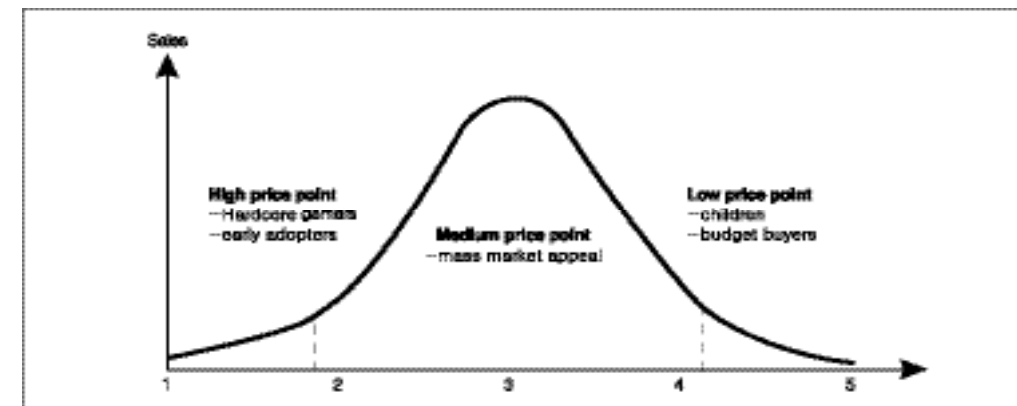


: DFC Intelligence, 2001

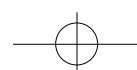
4



< 4-1-2-06>

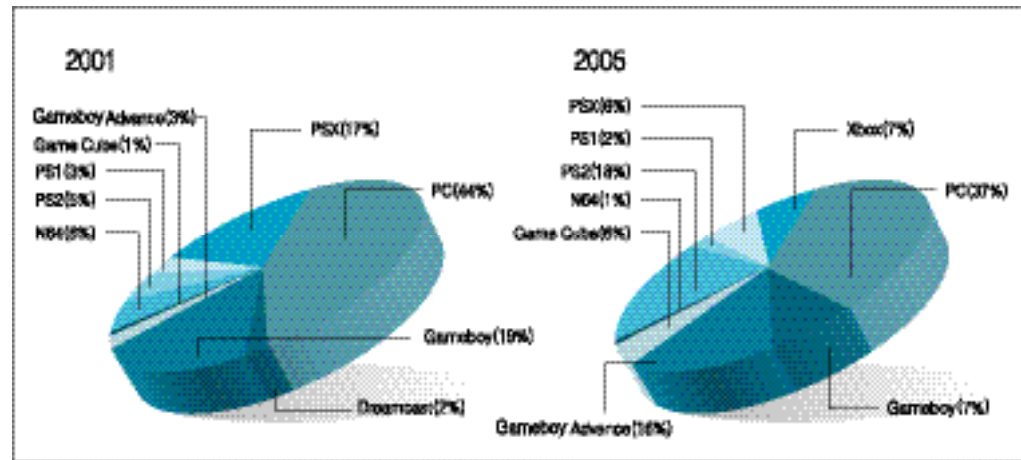


: DTI Spectrum, 2003



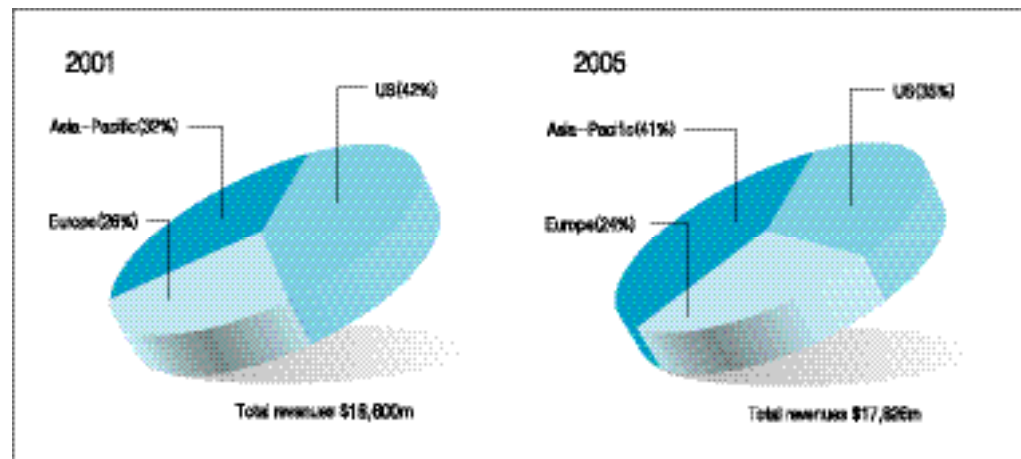
가 . 2005 , Gameboy
 PC Advance가 16%, X-BOX Gameboy가
 63% 7% .
 가 ,
 Gameboy 2001
 19% , N64(6%), 42%
 PS2(5%), PS1(3%), Gamboy Advance(3%) 32%, 26% .
 . 2005 , 2005
 PS2가 18% 가 41% 가

< 4-1-2-07> hardware installed base (2001 2005)



: Datamonitor, 2002

< 4-1-2-08> (2001 2005)



: DFC Intelligence, 2001 ; Informa media group, 2002 ; Datamonitor, 2002 ; IDATE, 2002

< 4-1-2-01> TOP Publisher(2002)

PS2	X-BOX	GameCube
EA	Microsoft	Nintendo
Take Two	Bethesda Softworks	Sega
Sony	EA	Capcom
Activision	Activision	Activision
Infogrames	Vivendi	Midway

: ARC Group, 2002

PC, 가

. 2002

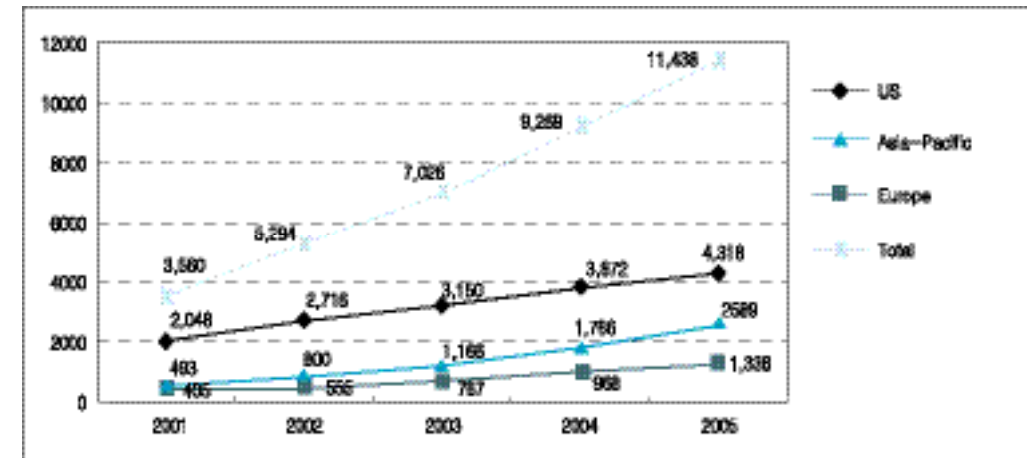
가 가

Top SONY, MS,
 Nintendo EA,
 Infogrames, Vivendi(VU), Activision,
 Sega, Capcom

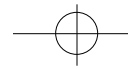
THQ, Disney, Atlus, Blizzad, 2002 53
 Tecmo, Namco , 49%

가 34% , 2005

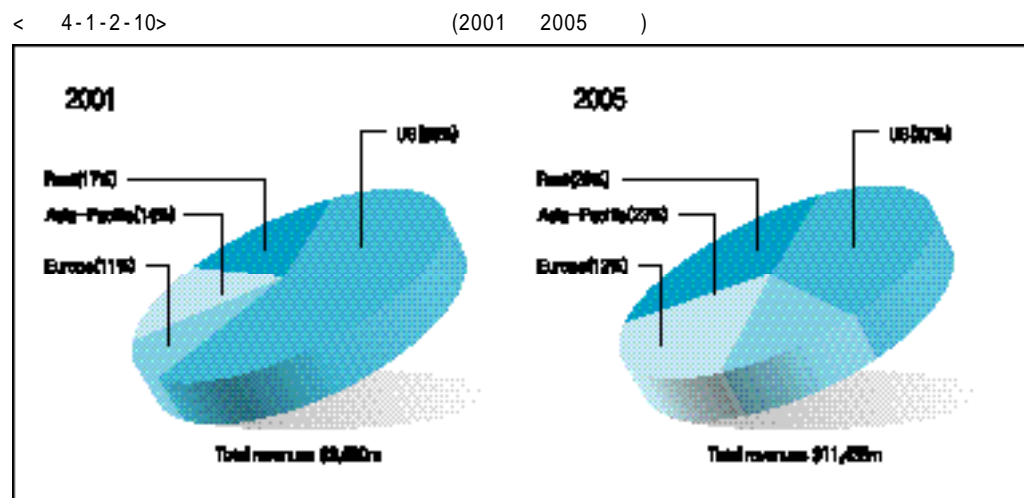
< 4-1-2-09> (:)



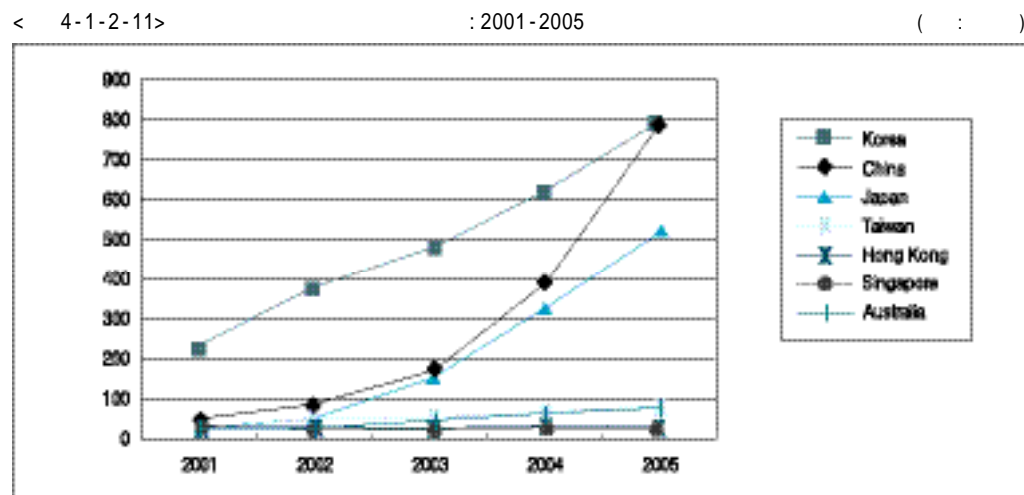
: Datamonitor, 2002 ; Screen Digest, 2002 ; DFC Intelligence, 2001 ; SOFTBANK Research, 2002 ; Informa media group, 2002



114) 2 26
 (58%)
 14%, 11%
 2005 (2002
 37% 5%)
 가가 가
 2005 (13 2001

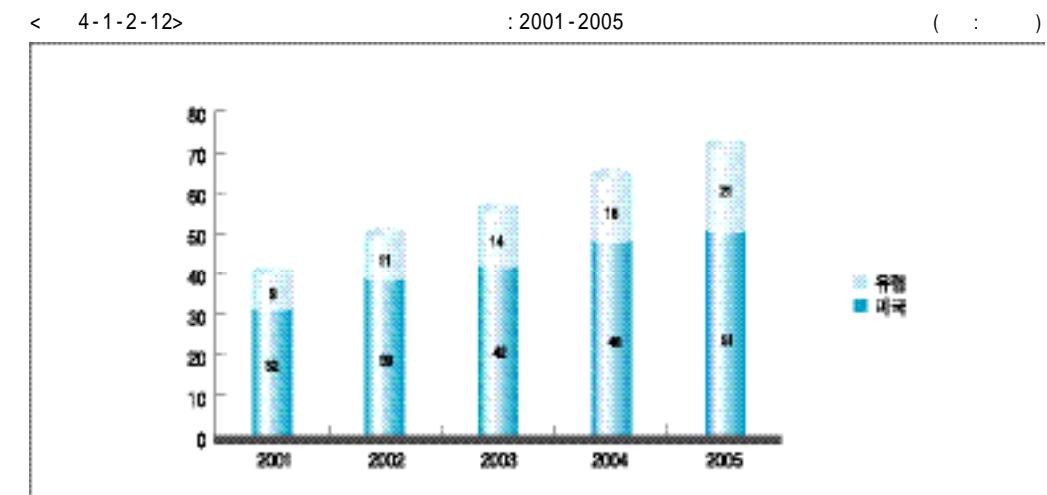


: Datamonitor, 2002 ; Screen Digest, 2002 ; DFC Intelligence, 2001 ; SOFTBANK Research, 2002 ; Informa media group, 2002

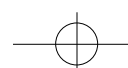


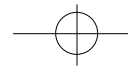
: Datamonitor, 2002 ; Screen Digest, 2002 ; DFC Intelligence, 2001 ; SOFTBANK Research, 2002 ; Informa media group, 2002

17% 2005 28% (67,000) , 2005 70 (84,000)
 가 377 가 84 ,
 41.3 , 38 , 10.4
 2005
 112% 가
 (780)
 612 , 523 가
 2002 5,000 , , SOE
 19%, 7.5% NC Soft /
 2005 5,000 , 2,100 EA
 가
 Yahoo!
 1 56



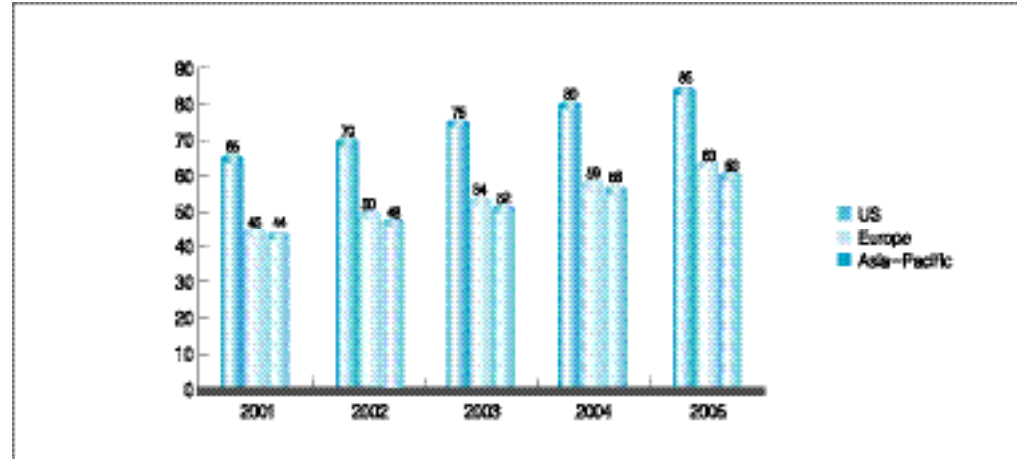
: DFC Intelligence, 2001





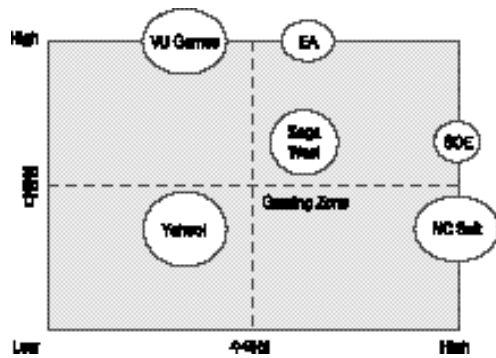
1

< 4-1-2-13> 1 (:)



: Informa media group, 2002

< 4-1-2-14>



: Datamonitor, 2002

가 SOE NC Soft
 'EverQuest', 'Lineage'
 VU Games 'Starcraft'
 EA VU Games
 NC Soft
 'Lineage'

(user base)

4. PC

Yahoo!

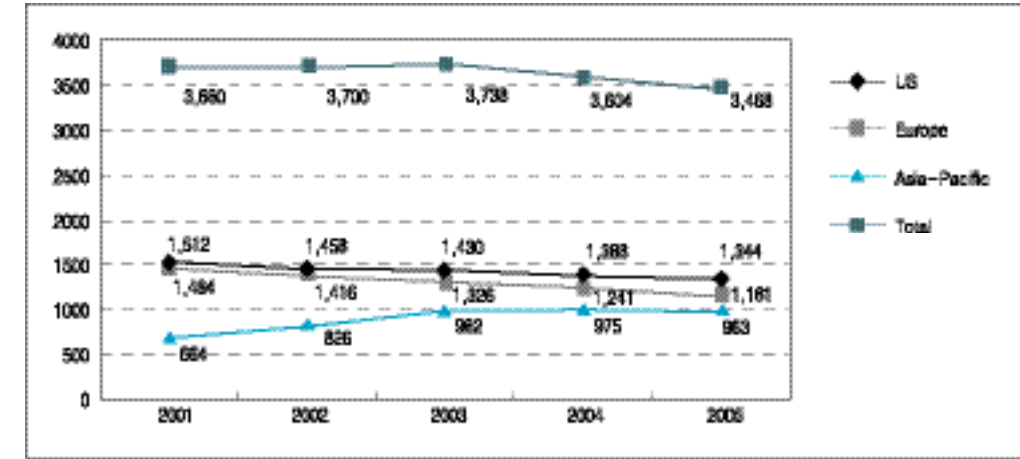
PC 가

Vivendi
 Universal Games(VU Games) 'Counter-Strike', 'Diablo', 'Starcraft'
 가, Sony Online Entertainment(SOE) 'EverQuest', NC Soft 'Lineage'

PC
 (hard core user)

PC 2002

< 4-1-2-15> PC : 2001-2005 (:)



: Datamonitor, 2002 ; Informa Media Group, 2002 ; IDSA, 2002 ; DTI spectrum, 2002

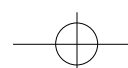
14.6 가 ,
 14 , 가 8 PC
 PC 가 2002 (unt)
 PC 가 2/3 가가
 PC 가
 PC
 31% 가
 PC
 2002 14.6 , 14 (19%), (18%), (17%)
 가 PC PC 2002

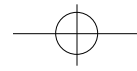
< 4-1-2-02> PC

	2001	2002	2003	2004	2005
()	1,484	1,458	1,430	1,388	1,344
()	68	73	66	64.3	62.5
가()	21.9	21.8	21.7	21.6	21.5
()	1,512	1,416	1,326	1,241	1,161
()	48	45.6	43.3	41.2	39.1
가()	31.5	31.1	30.6	30.2	29.7

: Datamonitor, 2002 ; Informa Media Group, 2002

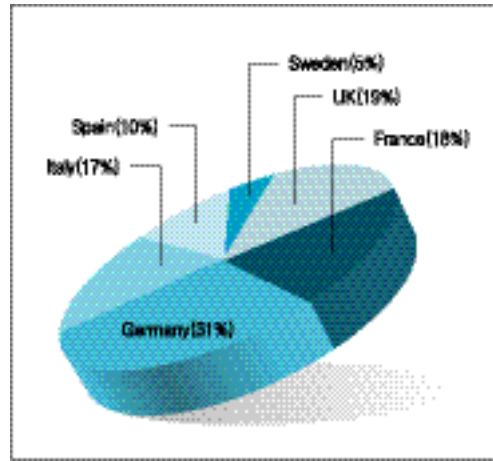
4





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< 4-1-2-16> PC (2002)



: Datamonitor, 2002 ; Informa Media Group, 2002

가 EA, Take

Two, VU, Infogrames, Activision

2001

, EA 'Sims'

'Harry Potter', VU 'Starcraft'

'Diablo2'

EA

PC 2002 가

'Sims'

EA . EA

가

VU Infogrames

가

Activision

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

가

PC

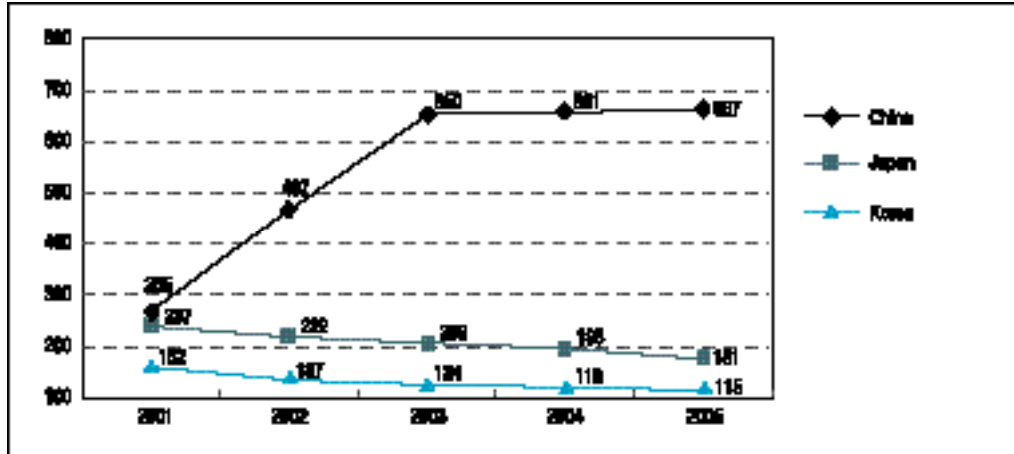
가

PC

가

PC

< 4-1-2-17> PC (:)



: Datamonitor, 2002

< 4-1-2-03> PC TOP : 2002

TOP Publisher	Title	Regionalization		
		US	Europe	Asia - Pacific
EA	Sims, Harry Potter			
Take Two	Grand Theft Auto, Max Payne			
Vivandi Universal (Blizzard)	Starcraft, Diablo2			
Infogrames	Rollar coaster Tycoon Civilization 3			
Activision (Lucas Arts)	Star Wars, Spider - man, Quake			

: ARC Group, 2002 ; Datamonitor, 2002

가 PC , 가

가

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5. 87% 가

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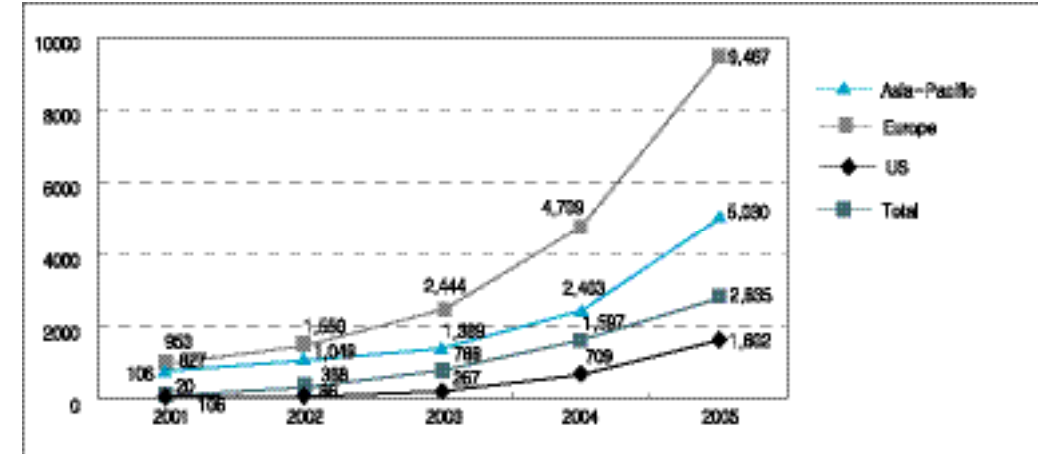
가

가

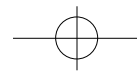
가

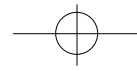
가

< 4-1-2-18> : 2001-2005 (:)



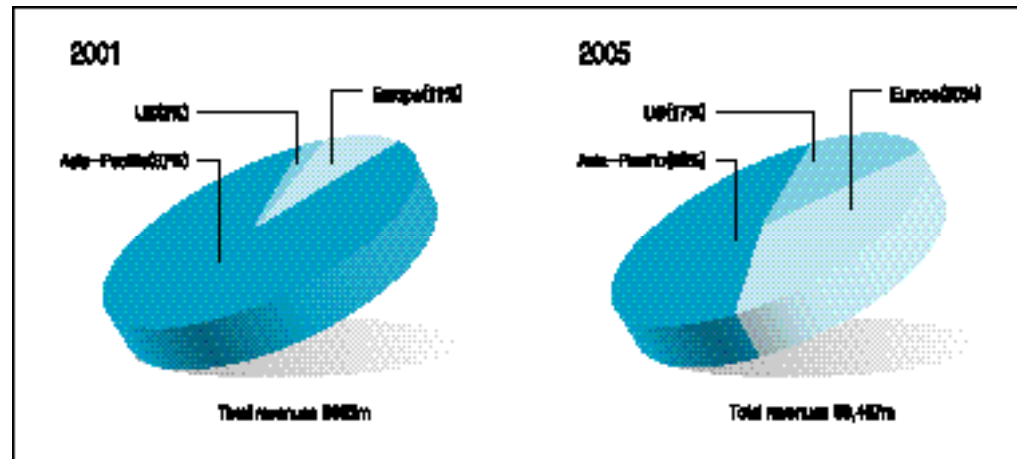
: Datamonitor, 2001, 2002 ; SOFTBANK Research, 2002 ; Screendigest, 2002 ; ARC Group, 2002





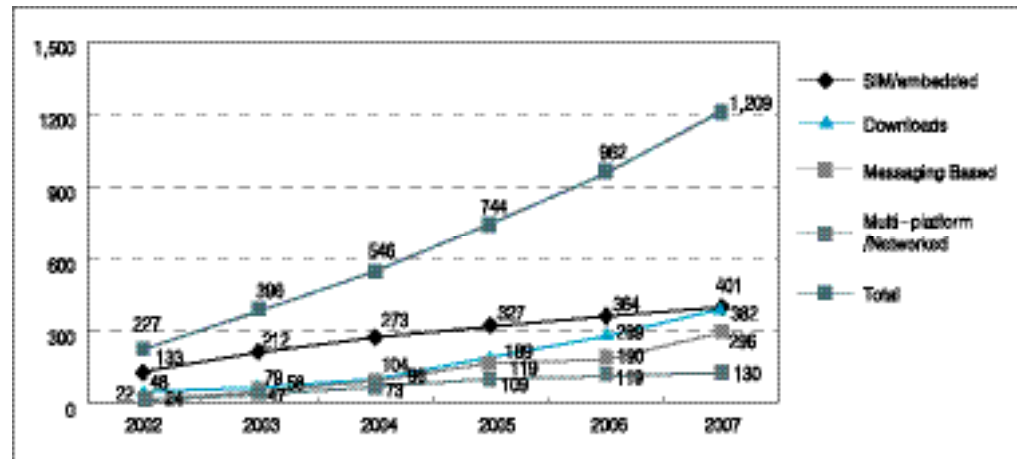
1

< 4-1-2-19> : 2001/2005



: Datamonitor, 2002 ; SOFTBANK Research, 2002 ; Screendigest, 2002; ARC Group, 2002

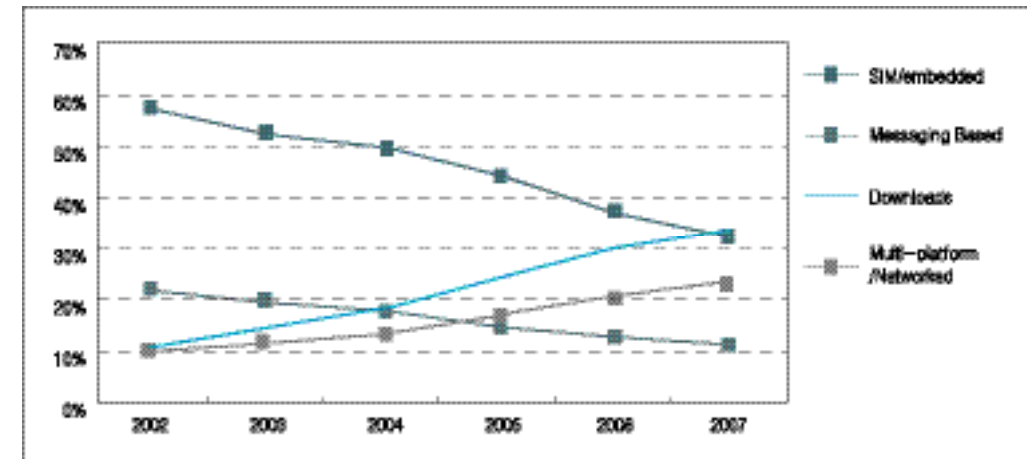
< 4-1-2-20> : 2002-2007 (:)



: ARC Group, 2002

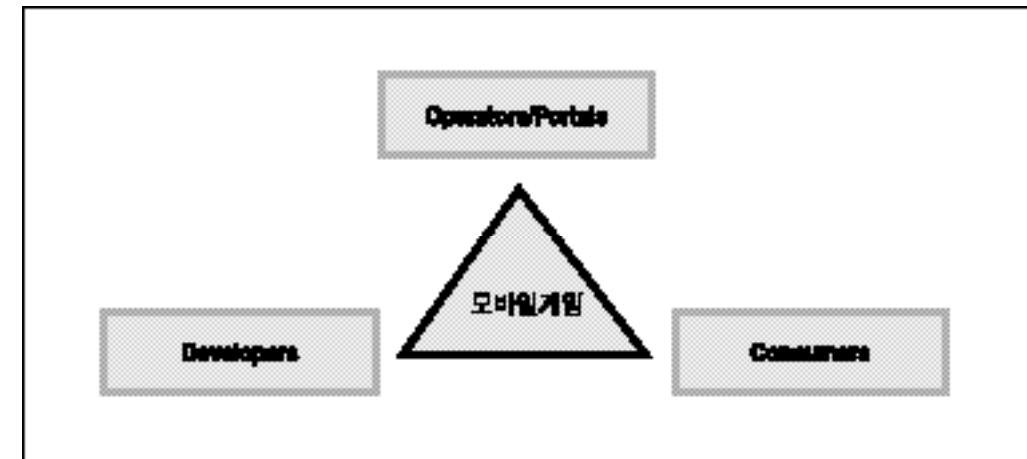
2005 3
 744 , 2007 5 1,209 Downbad 22 가
 가 가 , 401
 SIM/Embedded, Messaging Based,
 Downloads, Multi-platform/Networked
 47가 . 2002 가 가
 SIM/Embedded . SIM/Embedded,
 133 가 Messaging Based

< 4-1-2-21> : 2002-2007 (: %)



: ARC Group, 2002

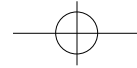
< 4-1-2-22>

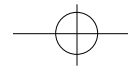


: Datamonitor, 2002

Downloads, Operators/ Portals 가 ,
 Multi-platform/Networked
 가 . Operators , NTT
 DoCoMo, Vodafone,
 Operator Orange, SKT
 Portal (Developer)
 Operators/ Portals 가
 가 , 가 .

4





< 4-1-2-04> Operators

가	Operator	가	Operator
Australia	Telstra C&W Optus Hutchison Vodafone Pacific CKW Wireless 3G Investments Austalia	Japan	NTT DoCoMo J - Phone KDDI
Canada	Bell Mobility Rogers Wireless Telus W2N Thunder Bay Telephone	Korea	KTFCOM SK Telecom LG Telecom
France	Orange SFR	Singapore	MobileOne Sing Tel StarHub
Germany	E - Plus Group 3G Mannesmann MobilCom T - Mobile VIAG Interkom	Sweden	HI3G Access Europolitan Tele2 Orange sverige consortium
Italy	H3G Iipse Wind Omnitel Telecom Italia Mobile	UK	Hutchison 3G Orange Vodafone One2One BT3G

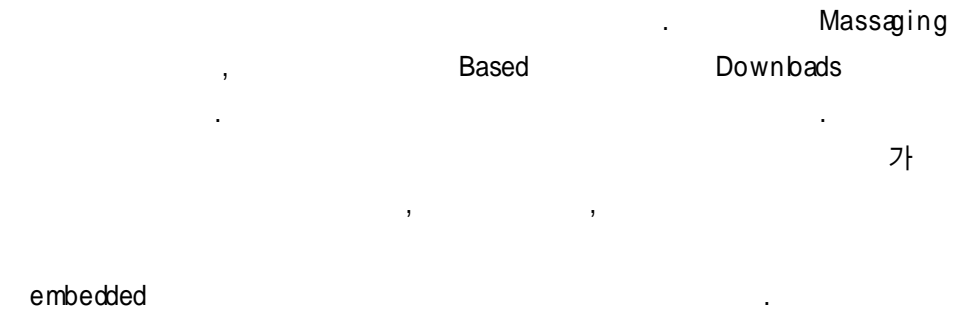
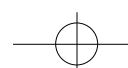
: Screendigest, 2002

< 4-1-2-05> Portals : Europe

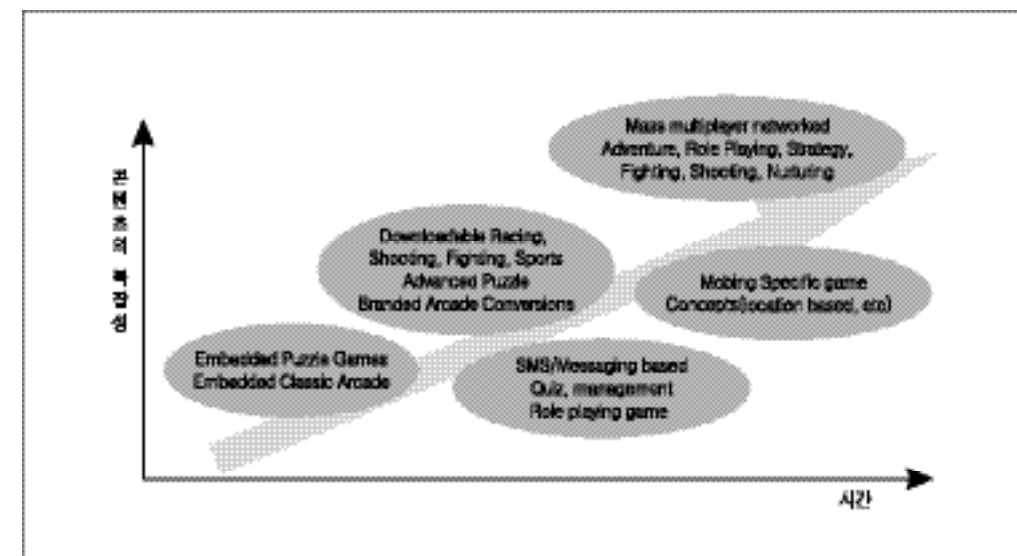
Game Developer/Provider	Networks/Portals
nGame	Alltel, A & C Mobile, AT&T, Bell Mobility, Freeserve, Jamba, Mviva, Orange, Quest, Sprint, Telefonica, Telstra, Telstra, Telus, T Motion, Verizon wireless, Vodafone, Voicestream
Digital Bridges/wirelessgames	Genie(NL, Germany, UK), Vizzavi(UK, Germany, Italy), T Motion(UK), BT Cellnet(UK), Juice(Cz), Orange(Switz, UK, France), Optimus, Terra,World Online(SA), Atrativa(Brazil), Sprint, Voicestream, Alltel, AT&T(all US), Telus, Bell Mobility, Aliant(all Canada)
In - Fusio	Orange France, SFR, Sunday, Telstra, Vizzavi, T Motion, Terra, D2 Vodafone, Omnitel, China Mobile, T - Mobile
Ludigames	Bouygues Telecom, D2 Vodafone, Viag Interkom, TIM, Itineris, Mobistar
Picofun	Vizzavi, BT Celinet, T Motion, Mobilix, Telefonica, Telia, Telia Mobile, Max.mobil, Europolitan, Sonera, France Telecom, Telenor, KPN, TMN,Excite, Omnitel, Jamba, Comxoq, One2One, Mviva, Zed, T - Online,Zvenska Dagbladet, Halebop, VXP, Genie, Inpac
iFone	One2One, T - DI, Max.mobil, Vodafone(UK)
Cash - U	Telefonica Moviles, cellcom, Omnitel
Motorola/Codeonline (Who Wants To Be A Millionaire?)	Eircell, Eurotel, Telstra Australia, Mobistar, Entel PCS Chile, Mobitel Slovenia, Swisscom, Vodacom South Africa, Telenor, Fastlink Jordan, Comex Romania, Vodafone Hungary, WestTe Singapore, Mobinil Egypt, T - Mobile Germany, Telefonica Spain, SFR
Firesoft	Orange UK, T Motion, Deutsche Telekom
Aspiro	TIM, Europolitan
Globalfun	Vizzavi, Telenor, Telenordia, Computel

: Screendigest, 2002

1



< 4-1-2-23>



: ARC Group, 2002

4

