



A Roadmap
to **BRIDGING**
INDIA'S
M&E SKILL GAP

Knowledge Partner



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**A ROADMAP
TO BRIDGING
INDIA'S M&
SKILL GAP**

01

Summary from the Skill Gap Report





A ROADMAP TO
BRIDGING INDIA'S M& SKILL GAP

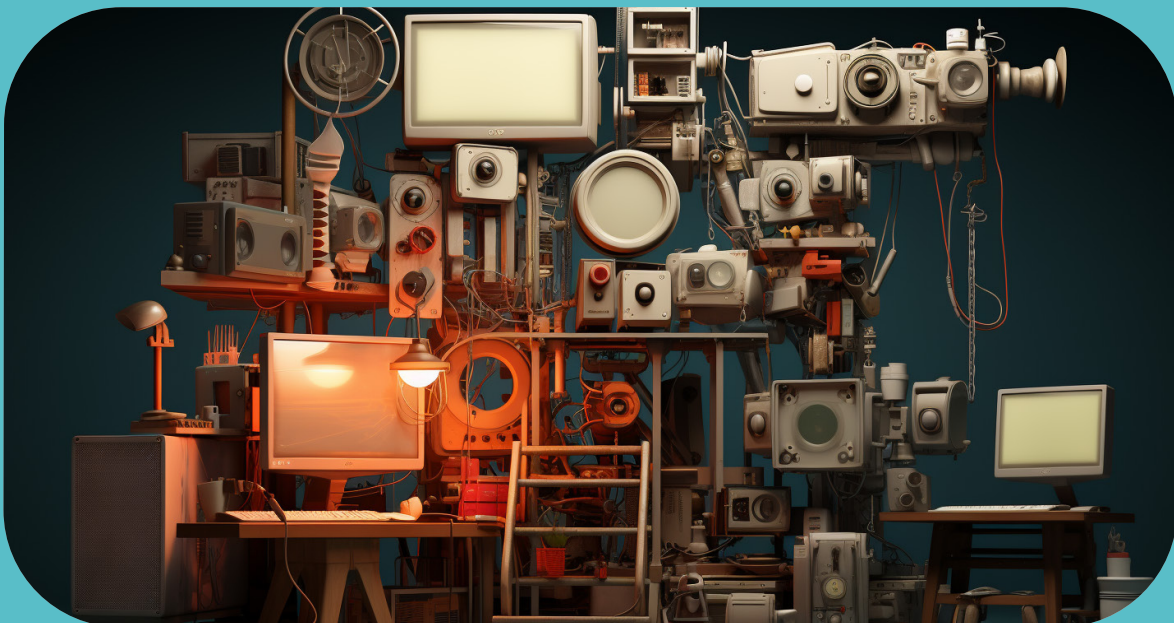
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1. SUMMARY FROM THE SKILL GAP REPORT

1.1 Introduction

Since fulfilling the SDGs is essential to accomplishing the 2030 Global Agenda for Sustainable Development, 4 of the 17 SDGs place a significant emphasis on skill development. Creating a more durable and sustainable environment will open up a wealth of opportunities and, as a result, produce stronger economies. Therefore countries around the globe, including India, are emphasizing more and more on skill development, which is also evident from the Niti Aayog 2017 brief on SDGs. Along the same lines, the Government of India has taken various initiatives to ensure meeting the skill development goals which have been covered in the report.

Aligned with the same vision, Media and Entertainment Skill Council (MESC), along with Primus Partners Private Limited, has commissioned a report titled “Realizing Media & Entertainment Sector Potential in India: Through the Skilling Lens” that highlights the skilling ecosystem in the Media & Entertainment Industry. The report aims to shed light on the status and emerging trends within the industry and look at the existing skill gaps in each sub-sector that needs to be addressed for a future-ready workforce. The report intends to fill the knowledge gap on how we can realize the tremendous potential of the M&E industry and position it on the global map. The M&E sector is one of the high-potential sector and the tremendous opportunities in this sector has been elaborated in the report.



1.2 M&E Industry in India

The Indian Media & Entertainment (M&E) Industry has seen various phases of evolution since ancient times, and it continues to evolve with the advent of new technologies such as Augmented Reality (AR), Artificial Intelligence (AI), 5G Networks, Blockchain, and cloud computing. While the technologies continue to evolve, the soul is deep-rooted in Indian culture in the form of ancient poems, songs, puppetry, dance forms, scripts, etc. This industry is still evolving at a swift pace and has seen substantial growth. Seeing such significant growth in the industry, the need for a skilled workforce has become more crucial than ever. The report elaborates on the potential of the M&E industry in India.

The M&E industry can be broken down into twelve subsectors which can be shown below. The report covers every subsector in detail to find subsectors trends and skill gaps.

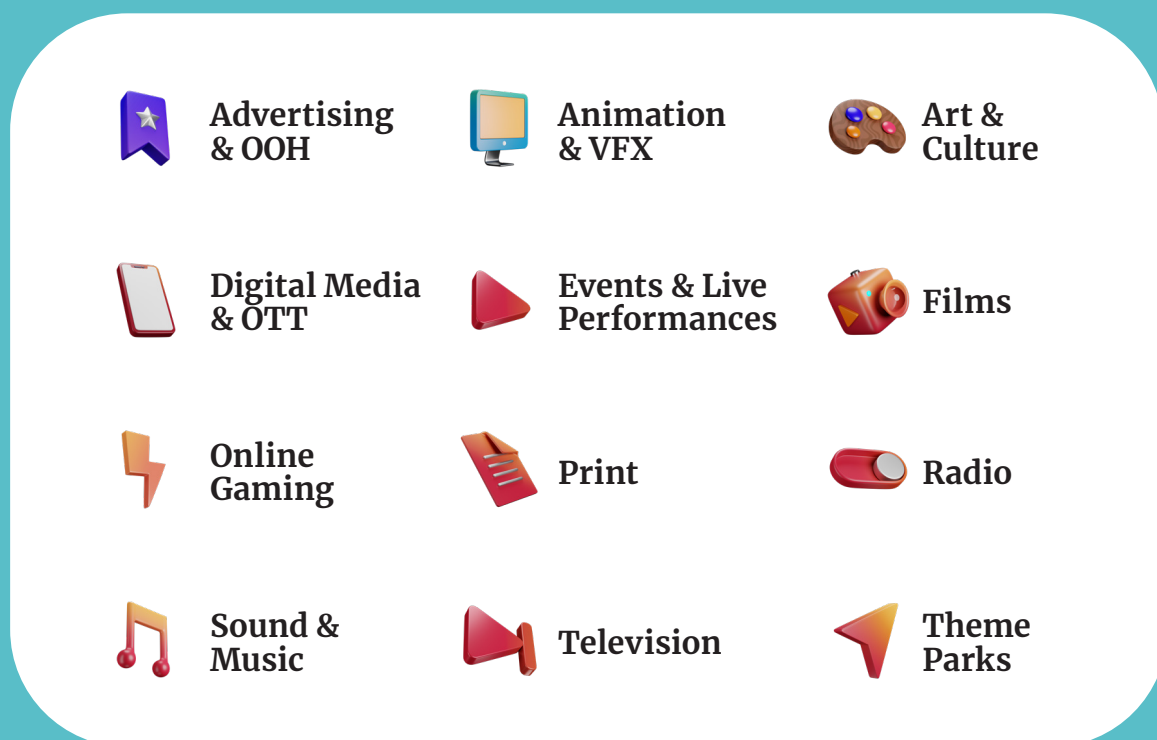


Figure 1: M&E subsectors

The industry is showing promising growth trends and projections, and it is projected to grow at a CAGR of 13%. As per the estimates, the M&E in India will be more than \$ 65 billion industry indicating the massive potential in India. The targets by the Ministry of Information and Broadcasting (MoIB) are even more optimistic for growth of up to \$100 billion in 2030 from the current \$23 billion. It shows the immense growth potential and confidence in the industry. The growth rates in India are much higher than that of other countries, as shown in the report. However, the growth of certain subsectors outperforms others, as can be seen from the figure below:

Comparison of Subsector-wise share in Media and Entertainment Industry Market Size – (2022 vs 2030)

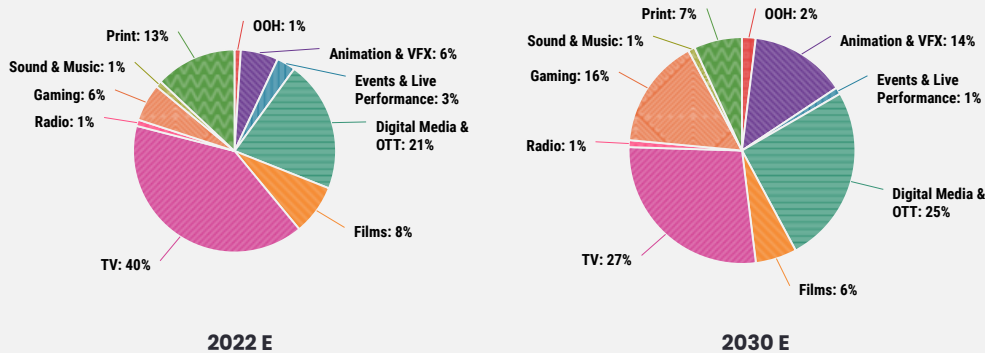


Figure 2: Subsector-wise growth rates

The figure above indicates the following trends that the newly emerged sub-sectors, Online Gaming and Animation & VFX are expected to grow at the highest rates with a CAGR of 35% and 32%, respectively. Their combined share in the industry market is expected to reach 30% by 2030. Digital Media and OTT are expected to grow at a CAGR of 24% to remain the second largest sub-sector after TV. TV will remain the largest sub-sector, but its share is expected to drop from the current 40% to 28% in 2030, and it will grow at a CAGR of 16%.

Interestingly, even during the COVID pandemic, when almost every industry was struggling, a few subsectors have shown positive growth. It's surprising because M&E was one of the worst-hit industries during the pandemic, majorly due to disruptions from the supply side. The analysis from this report indicates that two subsectors, Online Gaming and Digital Media & OTT saw growth of 21.54% and 6.33% respectively, in 2020 during the first COVID wave. Additionally, the subsector of sound and music was found immune to the COVID pandemic with little effect on the sector.

The rapid growth is led by high-growth subsectors like Online Gaming, Animation & VFX. Enabling the environment in India and rising demand are driving growth, while at the same time, attracting necessary investments. Furthermore, Indian content is getting recognized by global audiences aiding as an incentive for more creative content. The report talks about the various growth drivers of the M&E Industry in detail. The infographic below summarizes the drivers fueling M&E industry growth.

1 Increasing Demand

- Population Growth
- Demographic Dividend
- Disposable Income growth

2 Digital Transformation

- Internet Penetration
- High-speed, low-cost Internet
- Smartphone Penetration

3 Government Support

- Government focus to increase contribution of M&E sector in the national GDP

4 Rising Investments

- A few big investors include BBC, Bloomberg, NewsCorp, Discovery Channel, Sony, Walt Disney, Google, Netflix, Amazon etc.

5 Technological Advancements

- Artificial Intelligence
- Virtual Reality
- Cloud Computing
- Blockchain

6 Indian Content going global

- Indian stories resonating with global audience

Figure 3: Growth Drivers

1.3 Positioning Indian M&E Industry on Global Map

Though the M&E Industry is witnessing high growth rates and showing tremendous potential, it contributes less than 1% to the national GDP. India is ranked 7th largest M&E market in the world, showing one of the highest growth rates. Still, the global market share is only around 2%. The dominant players in this industry are US and China, with more than 50% global share.

The rapidly growing industry is battling various challenges, including the lack of authentic data, less research development, content piracy, regulatory complexities, changing consumer patterns, Skills Gaps etc. The report covers a detailed SWOT analysis to uncover the strengths, weaknesses, opportunities and threats of the industry.

The report identifies Skilling as one of the challenges of the M&E industry, if addressed properly, has the potential to be one of the greatest strengths due to the demographic potential of the country. The industry is still evolving, and so are the required skill sets. Advancements in technology and job roles have created a major skill gap in the industry. As the job roles evolve, already engaged resources need upskilling, and new resources need proper training. This surge in the demand for skilled workers has ensured that the skilling ecosystem has participation from all stakeholders, including decision-making bodies, enablers, executive bodies, and various beneficiaries.

1.4 Key findings from the study

To unleash the potential of the industry, a skill gap study has been commissioned and the findings are compiled in this report. The skill gap study categorises the findings into three types:

1. **High-demand Job Roles:** Currently, existing job roles of MESC which are in high demand in the industry.
2. **Medium Demand Job Roles:** The job roles for which demand is lesser than the high demand job roles.
3. **Futuristic Job Roles:** Identified skills for which we don't have existing job roles.

The findings from the study are summarized below:

- The analysis identifies demand in 60 existing qualification packs of MESC where there is a need for upskilling and reskilling the existing workforce while training the upcoming workforce on these skills. In addition to this the study identifies 44 futuristic skills that are expected to witness high demand in future.
- There is a need to develop a workforce with technical skills including Animation, Gaming, Character Rigging, Sound Engineering, Video editing, etc., to fill the skill gap in the industry.
- Digital Media skills are in demand owing to the rapid growth of the digital landscape in India, and hence the skills identified include the Digital Media skillset.
- The success of the M&E industry greatly relies on the quality of content, and hence appropriate weightage needs to be given to creative content creation in our skilling initiatives. Our skill gap analysis also suggests the need for content creation skills to provide the necessary boost to the industry.
- There is a need to develop business and management skills within the industry to provide the industry with the right support to maximize the content reach as well as acceptability.
- The demand for skilled workforce in the high-growth subsectors like Digital Media & OTT, Animation and VFX, and Online Gaming is getting translated into the skill gap analysis. Around 40% of the futuristic identified role are from these subsectors.

The study also identifies the workforce trends and projections for the M&E Industry. As per the analysis:

Employment Sub-sector wise	2019	FY 2020E	FY 2021E	FY 2022E	FY 2023E	FY 2024E	FY 2025E	FY 2026E	FY 2027E	Growth
Television	580000	527510	541858	578813	630906	694565	764646	8,41,799	9,26,736	6.03%
Film	256000	238080	242842	257412	278005	303026	330298	3,60,025	3,92,427	5.48%
Events & Live Performances	176998	132749	139386	156112	184213	210003	239403	2,72,919	3,11,128	7.31%
Art & Culture	121450	97160	102989	111229	120127	129737	140116	1,51,325	1,63,431	3.78%
Print	88408	82060	83579	85935	90181	92796	96461	1,00,272	1,04,232	2.08%
Online Gaming	49844	71073	89040	127380	157442	196884	255044	3,30,384	4,27,980	30.84%
Advertisement & OOH	48817	41983	45761	51253	58940	66013	73935	82,807	92,744	8.35%
Animation & VFX	48396	55394	67005	77431	89324	100222	114494	1,30,798	1,49,423	15.13%
Radio	44848	43188	44203	46568	50154	53339	56726	60,328	64,158	4.58%
Sound & Music	36800	30147	32860	37247	42722	48019	53782	60,236	67,464	7.87%
Theme Park	30751	23063	25369	28413	32249	36119	40092	44,502	49,398	6.10%
Digital & OTT	29298	38673	49502	61878	80441	100551	125689	1,57,111	1,96,389	26.85%
Total	1511610	1381080	1464394	1619671	1814704	2031274	2290686	25,92,505	29,45,510	8.70%

Figure 4: Employment Projection

- The Indian M&E industry will have more than 29 Lakh direct employment opportunities and more than 51 Lakh indirect employment opportunities by 2027. It's in line with the industry's growth potential and supports the claim of skill development in the industry.
- Online Gaming, Digital & OTT, and Animation & VFX are the fastest-growing sectors of the M&E Industry in terms of direct employment potential. Direct employment in these sectors is expected to grow at a CAGR of 30.84%, 26.85%, and 15.13% respectively.
- Television and Films will remain the sectors with the highest number of employees, but the growth rates will be lower (CAGR<6%).
- Print and Art & Culture subsectors are expected to witness the lowest growth in terms of direct employment potential.

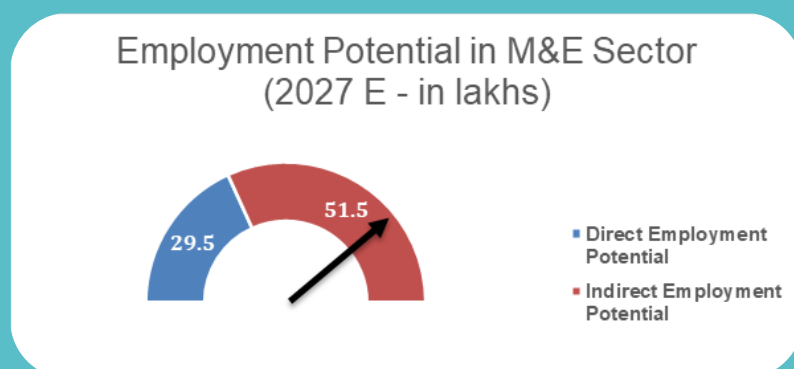


Figure 5: Employment Potential

The report identifies high and medium-demand job roles of MESC in detail and also finds subsector-wise futuristic roles, which are summarized in the figure below:

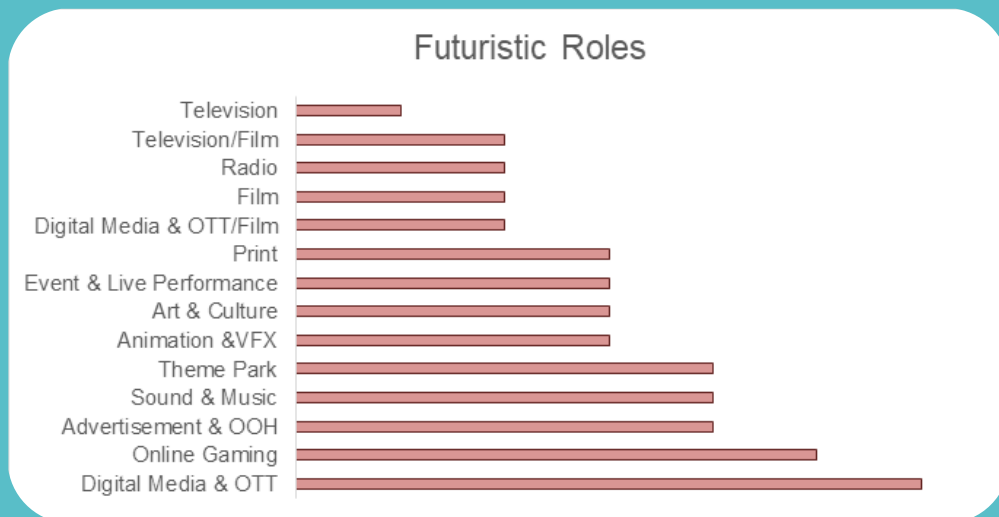


Figure 6: Subsector-wise futuristic job roles

1.5 Building Unique Edge for India: Doing it the “Desi Filmy Way”

The objective of this report is to unleash the potential of the Indian M&E industry and suggest ways to put it on the global map. In line with the goal, the report calls for doing it the “Desi Filmy Way” and suggests ways for the same which include:

- Innovative & Quality Content
- Invest in Technology
- Nurturing the Talent
- Marketing
- Strong education framework
- Improve Market Access

1.6 The role of states in realizing the potential

The report discusses the above areas to put India on the global map as a frontrunner in the Media & Entertainment Industry. The highlight of this report lies in the fact that it recognises and recommends an enhanced role for the Indian states to realise the potential of this industry. The states will have to play an even larger role in promoting the industry. The state governments can create a favourable environment and opportunities for the industry to grow. A holistic effort from the states and the centre will ensure fast-paced and 360-degree growth. The report covers state-specific M&E snapshots of a few states, Karnataka, Madhya Pradesh, Assam, Delhi and Rajasthan.

However, the recommendations in the report are from a broader lens, this document covers the broad intervention areas suggested to bridge the skill gaps in the industry with participation from every stakeholder. Various stakeholders are involved in the skilling ecosystem, which is covered in detail in the report.

1.7 Skilling in M&E in India

The Media and Entertainment (M&E) industry in India has experienced significant growth in recent years, and with the increasing demand for content across various platforms, the need for a skilled workforce has become more crucial than ever. Similar to the skilling ecosystem of any other industry, the M&E industry includes Educational & Skilling Institutions, Industry players, Thought Leaders, Industry Leaders, supporting industries, the Government, and a skills council to bridge the gap between industry demands and skills of the populace.



Figure 5: The skilling ecosystem

Developing the correct skillset is the most crucial task, but it does not end here, Upskilling and Reskilling go hand in hand. To stay on top of market trends, one should constantly put in efforts to upskill and reskill themselves. Apart from skilling the workforce, there is also a need to train the trainers. It will help ensure that the courses are evolving with time and do not stay stagnant and primitive. After COVID, the skilling methods have also been changed. The old practices of learning and education were converted to online learning. The concept of remote learning, gamification, video-based learning etc. came into existence and developed the educational system. This scenario can be seen as a notable example of technological advancement and rapid adoption of change.

1.8 MESC spearheading the skilling initiatives in the Industry

The Media and Entertainment Skills Council is supporting various industry-aligned initiatives for skills development in the sector. Apart from the skill gap study, MESC has started various initiatives/modules like Creative Warriors, Vidyadaan, Recognition to Prior Learning, Government Reward Money programs, Affiliation and accreditation to training partners, Apprenticeships, Wordskills, WorldSkills, MECAT, etc., While these initiatives are explained and covered in the report, MESC intends to play a larger role in the skilling ecosystem.

Therefore, in the following sections, broad intervention areas and the role of stakeholders are suggested to implement the findings of the skill gap study in bridging the gaps. Also, an implementation guide is attached to the subsequent section to undertake a skill gap study in various Indian States.

In future, MESC will be releasing detailed state-specific case studies, which can help them promote the M&E industry in their states. The upcoming launches by MESC:

- 
Realizing M&E Sector Potential in India: Through the Skilling Lens
 Skill Gap Report – Launched
 - 
Addressing the Skill Gaps
 Broad Intervention Areas and the role of stakeholders- Launched
 - 
Skill Gap Study – Implementation Guide for the States
 Implementation framework to approach skill gap study in states – Launched
 - 
M&E Report & Skill Gap Study – State-specific
 M&E overview and a skill gap study for three Indian states in FY 2024 – Coming Soon
 - 
Global Skill Awards
 A new concept – Coming Soon
-  Launched
 Coming Soon

Figure 6: MESC Planned Activities



02

Addressing the skill gaps





A ROADMAP TO
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While the report identifies and uncovers the skill gaps prevalent in the M&E industry hampering its growth to unleash its full potential, the section below is the extension to the report suggesting broad intervention areas recommended to address those skill gaps. As the need to address the gaps has already been established, let's look at the broad intervention areas that will require multi-stakeholder engagement to make it happen and witness unprecedented M&E Industry growth.

2.1

Broad Intervention Areas

2.1.1 Defining identified gaps in the study as Job Roles, Qualification packs & strong integration with the Education Framework

The identified gaps in the skill gap report need to be put in perspective of the Job roles that are expected to be in demand in the near future and the corresponding skillset required. Such roles can be categorized as high-demand and medium-demand roles. For example, roles such as Sales Manager (Media Organization) – TV and Search Engine Marketing Executive, belong to the high-demand futuristic roles whereas roles like Account Executive (Advertising Agency) and Layout Designer, belong to medium-demand roles. In order to create a strong integration of the job roles with the education framework, it is imperative to define the job roles in terms of their specific Qualification Pack (QP) ID, National Skills Qualification Framework (NSQF) level, training duration and the sub-sector.

National Skills Qualifications Framework (NSQF) is a nationally integrated education and competency-based framework that enables persons to acquire desired competency levels. The NSQF organizes qualifications according to a series of levels of knowledge, skills and aptitude. A Qualification Pack (QP) defines the set of NOS which are aligned to one Job Role. A Qualification Pack aligned to NSQF drives both the creation of a course, curriculum & content, and assessments.

Defining the skill gaps and aligning it with QP IDs and NSQF will prove as a guide for the educational ecosystem to design and conduct courses in alignment with the needs and demands of the industry.

2.1.2 Standardization of Education focused on the Sector

Standardization of education in the Indian Media and Entertainment sector is imperative to ensure that the academic curriculum is in alignment with the current trends of the industry. The approach towards standardization of the education includes multiple dimensions including:

- **Faculty Development:** Investment in these programs is vital to ensure that teachers are up to date with the latest direction of the industry and are trained to provide learning experience to create future ready professionals. Further, experienced professionals of the M&E sector can also be invited to bring sector acumen into the learning space.
- **Facilities and Infrastructure:** The infrastructure plays a vital role in ensuring that students absorb the teachings efficiently. Equipment and relevant technology according to the level of study is necessary.
- **Hands-on Training:** To gain the relevant practical skills, inducting projects with the industry to increase placements and hence improve the employability candidature of the students in accordance with the M&E sector demands.
- **Standardised Evaluations:** Assessments and evaluations should be put in place to establish the training material to meet the industry standards.
- **Legality and Ethical Standards:** In addition to the creative and artistic concepts, there should be modules covering the legal and ethical facets of the M&E sector in depth. Courses covering modules such as intellectual properties and right to free speech and censorship are important in the current day and age. The institutes shall work closely with the relevant regulatory bodies to ensure that the standardised education curriculum meets the regulatory requirements.
- **Global Perspective:** The formulation of courses shall also encompass the suitable principles taught in the multi-national discourse of the Media and Entertainment.



2.1.3 Developing course content and delivering courses at par with International Standards

With the globalization of the economies and services, the geographical borders seem to have been blurred by technological advancements. The relevance of global perspective has become even more important now as the world look towards India to provide not just the IT services, as it has over multiple decades, but also act as a destination for M&E related work. Therefore, building a talent pool with skills at par, if not better, than the international standards is extremely important and developing courses with this in mind shall prove to be crucial. Some of the key components for a truly global learning, exposure and experience shall include:

- **Student Produced Content:** University of Southern California' School of Cinematic Arts produces programs such as Trojan Vision by students which is broadcasted to the entire campus and global audience through the internet. This creates an instant feedback loop for the students.
- **Multi-Cultural student body:** London Film School is one of the most prestigious institutions in the world, with more than 60% of international students. This concoction of ethnicities provides a wider scope and perspective to skill development strategies.
- **Networking Opportunities and Visibility:** Leading Educational institutions such as University of Southern California' School of Cinematic Arts hold career fairs with entertainment recruiters like 21st Century Fox, Disney, Sony and more.

London Film School, Graduation films regularly screen at Oscar and Bafta qualifying festivals, and often at A list Festivals such as Cannes La Cinef, BFI London Film Festival, TIFF, and Berlinale. This provides students the chance to network with world renowned names and build skills.



2.1.4 Promoting Creative Thinking in Schools

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In the culture of most schools subjects such as music, drama and visual arts are not given much attention compared to the academic subjects and are often merely an elective subject. A higher standard needs to be set in the creative curriculums of schools, which will stimulate students in their creative talents and further motivate them to pursue their interests. A creative curriculum can be designed to include components such as:

- **Open-Ended Questions:** Students should be given exercises that comprise of open-ended questions that are thought provoking and don't expect a formatted answer. This will encourage students to lean into their imaginative tendencies and help cultivate them further.
- **Brainstorming Sessions:** Exercises based upon real-life scenarios/case studies that require students to conduct brain storming sessions and come up with unique solutions, will provide agency to foster their creative abilities.
- **Technology Usage:** In the vast majority of schools, only the fundamentals of computer courses are taught, in addition to the existing computer science courses available. There needs to be an upgradation in terms of provision of choice in specialisation, where students can choose their field of interest. Specialisation could include modules on coding platforms, web designing and cloud computing.
- **Guest Speakers:** Invite professionals from artistic fields to share their insights with students. Workshops on storytelling and innovation can inspire creative thinking.
- **Encourage Curiosity:** Nurture a culture of curiosity by allowing students to explore topics of interest, ask questions, and pursue independent research.
- **Creative Assignments:** Assignments should be designed to urge students to apply their understanding of the concepts taught, in agreement with their ingenuity.
- **Teacher Development Programmes:** There should be training sessions for teachers that help them curate and conduct the above-mentioned techniques of assignments and exercises.



2.1.5 M&E-related skilling courses in schools

In addition to instilling and nurturing creative thinking in schools, it is important to create awareness around the various career opportunities in the M&E domain and build a pipeline of courses that can act as an introduction to M&E related skills at the school level. Since secondary and senior secondary are the earliest decision-making stages for young minds, an introduction of subjects pertaining to the M&E sector at a secondary and high school level can pose as a predecessor to the courses available at UG and PG level.

- **Curriculum formation in accordance with the industry:** Developers of curriculum can collaborate with industry professionals and experts to create courses that conform with the latest industry standards and technologies.
- **Regular Upgradation:** A committee can be set up at a school, UG and PG level that regularly assesses that current curriculum and the current M&E Industry trends and ensure that the academic syllabus is revised according to the evolving industry requirements.
- **Formation and Regulation of Digital Courses:** Although online-learning is available and taken seriously in the post-pandemic world, the courses would benefit through upgradation of the user interface to create interactive courses. This can be done through creating applied games and short-term projects.
- **Workshops:** training sessions and workshops, projects should be improved and expanded and increase the number of guest lectures delivered by industry professionals.

2.1.6 Promoting high-quality and well-structured education across Under Graduation and Post Graduation

For young minds that are seeking to pursue a career in the media and entertainment industry, a slew of courses at both undergraduate and postgraduate levels is required. While the courses at the undergraduate level may focus more on the foundational aspects, use of technology and industry exposure through internships, the Postgraduate courses may focus more on specialized skillsets within the M&E domain as well as certain other skillsets including management, leadership, etc., through mentoring and apprenticeship programs.



Undergraduate Level:

- **Foundational Courses:** There is a need for foundational courses that provide education about the fundamental skills required in the M&E sector, which equip individuals with the rudimentary skills required in the sector. These courses could include a set of subjects such as: Creative Arts, Communication Studies, Creative Writing or Screenwriting, Visual Arts or Design, Digital Media Production or Multimedia Technology, Narrative Studies or Storytelling Techniques, Journalism or Media Research, Media Industry Trends and Adaptation, Project Management in Media, Media Collaboration and Team Dynamics, Media Industry Networking Strategies and Marketing and Promotion.

- **Industry-Integrated Curriculum:** The application of theoretical and practical skills in mentorship and internship opportunities according to the latest M&E industry trends and technological advancements should be delved in deeper by formulating a list of learning outcomes specific to the latest advancements.
- **Technical Skills Development:** While there are pre-existing courses on technical skill development, it requires upgradation based upon the latest advancements in the field of technology. Artificial Intelligence is and is expected to be dominant in the field of technology, henceforth it is important to construct courses that teach the amalgamation of the necessary skill set with AI and how they can support each other. ADD in PG as well.



Postgraduate Level:

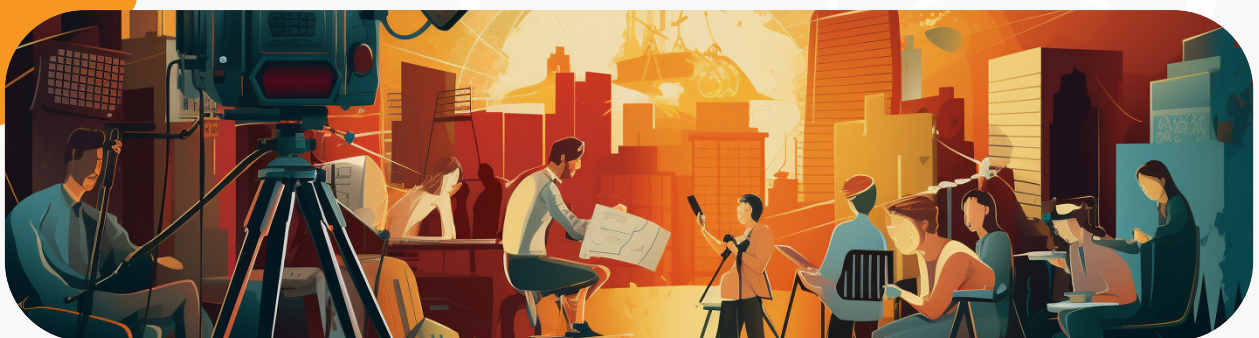
- **Industry Projects and Research:** Research projects based upon industry challenges that are practical in nature, such as budgeting crises, data privacy concerns, licensing requirements, etc.
- **Management and Leadership Skills:** The development of skills such as management, entrepreneurship and leadership are all required to skill students for managerial roles in the M&E sector.
- **Apprenticeship Programs:** The academic curriculum can have apprenticeship and internship opportunities constructed with objectives pertaining to school-level expected outputs, in the M&E sector companies. The opportunities could be spread across various departments and disciplines.
- **Mentorship Programs:** Establish mentorship programs that connect PG students with experienced professionals who can guide them in their career aspirations.



2.1.7 Common Aptitude Test for the M&E Industry – MECAT

The Media & Entertainment Creative Aptitude Test (MECAT) is an assessment tool designed to evaluate the creative aptitude and potential of individuals interested in pursuing careers within the media and entertainment industry. It serves as a standardized platform for assessing candidates' suitability for various sub-sectors and programs within the industry. Popularizing and promoting MECAT can help in aligning workforce capabilities with industry requirements. It will contribute to effective recruitment, skill development, career progression, and overall industry growth and sustainability. Several benefits of MECAT will include:

- **Standardized Evaluation:** MECAT will offer a standardised method of assessing an individual's abilities, knowledge, and skills within the M&E industry. It will promote uniformity and fairness in the process.
- **Skill Validation:** MECAT will validate an individual's skills and expertise in areas crucial for success in various subsectors of M&E. This validation will be valuable for employers seeking to hire qualified candidates, and hence help in bridging the skill gaps.
- **Training and Development:** MECAT will identify areas where employees/students may need further training and development. By targeting specific skills and knowledge gaps, we can create targeted training programs to enhance workforce competencies.
- **Career pathing:** Individuals can use MECAT to identify their strengths and weaknesses within the industry. This information can guide them in choosing suitable career paths within various subsectors and making informed decisions about their professional development.
- **Benchmarking:** MECAT will establish benchmarks for performance and skills within the industry. It will both individuals and employers to compare their capabilities against industry standards and identify areas for improvement.
- **Industry Knowledge:** MECAT will assess an individual's understanding of industry-specific concepts, regulations, and practice to ensure safety, quality, and compliance within the industry.
- **Upskilling and Reskilling:** As we know that M&E is evolving and adopting new technologies and practices. MECAT will help individuals and organizations adapt to these changes by assessing their readiness to embrace new trends.
- **Identify Skill Gaps:** Aggregated data from MECAT can provide insights into trends, skill gaps, and areas of expertise within the M&E across geographies. This information can inform industry research and policy decisions and help in the identification of skill gaps.



2.1.8 Recognition of Prior Learning (RPL) in the sector

RPL allows individuals to receive formal recognition of existing skillset through certifications that showcase the experience and knowledge exhibited in the M&E sector. RPL can be an important aspect for the upskilling and reskilling requirements of the M&E sector. Following are the ways in which RPL can be utilized in the M&E Industry:

- **Skill Recognition:** Talented individuals with experience in film and TV production can be in pursuit of RPL to gain formal recognition that verifies their skill set and can upskill through various bridge courses available. It is especially beneficial for those who have been in the industry for a long time and don't have a UG/PG qualification. RPL can be utilised for the following skill sets:
 - a) Performance and Acting
 - b) Animation and Visual Effects
 - c) Digital Media and Content Creation
 - d) Advertising and Public Relations
 - e) Journalism and Media Communication
- **Validation of Documents:** The documentations that testifies the individual's skill sets such as portfolios, project summary/report, etc., can be substantiated through RPL.



2.1.9 Enhanced role of Industry in sector-related Skilling & Mentorship

While education-based learning through schools and colleges is important and lays the right foundation for professional development, the industry needs to play a much larger role in ensuring that the skills are put to use, and the young professionals are guided into the right direction.

- **Technical Training:** The M&E industry can offer technical training in areas like film editing, sound engineering and visual effects. This would help individuals acquire specialized skills that are in demand within the industry.
- **Content Creation and Storytelling:** The industry can conduct workshops and courses on content creation, including screenwriting, cinematography, directing, and storytelling. This can help aspiring filmmakers, writers, and artists improve their craft.
- **Mentorship Programs:** Experienced professionals within the M&E industry can serve as mentors to guide and nurture emerging talents. Mentorship can provide valuable insights, feedback, and networking opportunities to individuals looking to establish themselves in the field.
- **Apprenticeship related programmes:** With the rapid growth of digital media and technology, the M&E industry can provide training in digital content creation, social media management, online streaming platforms, and data analytics for content optimization. Programmes such as Apprenticeship India is an initiative taken by the government which aims to develop skills through apprenticeship opportunities across various sectors such as IT.
- **Train the Trainer:** With the setting up of Sector Skill Councils and advent of National Occupational Standards (NOS) for various job roles across sectors, it is important for the existing and aspiring trainers to be up to date with all these developments. A trainer can deliver great results only when he/she understands the basics and is able to cater to needs of the learners. Hence, it is important to build a network of Master Trainers from the Industry that can upgrade the skillset and exposure of trainers across various educational institutions, learning centres etc.



2.1.10 Capacity Building of professionals working in the Sector for future readiness

Capacity Building of professionals is a key element in the Indian M&E Sector to help prepare them for the opportunities and challenges that lay ahead. Due to the rapid growth and technical evolution of the industry, Capacity Building is an important tool to assist professionals keep up with the expanding skill requirements.

- **Re-skilling and Up-skilling Seminars:** Workshops and seminars can be organised on digital content creation, virtual reality production, emerging technologies by industry experts and professionals, to help assist the adaption of the new techniques of the industry.
- **Integration with Digital Learning Programmes:** Such seminars and workshops can also be available on digital platforms as courses on sites such as Udemy, Coursera and LinkedIn Learning.
- **Mentorship Programs:** The opportunity to work under the mentorship of seasoned professionals provides the hands-on reskilling and up-skilling prospects.
- **Interdisciplinary Training:** Professionals can be encouraged to go beyond their specialised fields and expand on building content creation strategies.
- **Soft Skill Development:** Skills such as communication, problem-solving and teamwork are just as imperative as technical skills.
- **Networking Events and Conferences:** Networking opportunities can be arranged through conferences, seminar, and events to help connect with Industry professionals and increase visibility in the sector.



2.1.11 Expanding Geographic & content reach of Skilling, improving quality of content created

Our goldmine of regional stories, representing the rich culture and diversity of India can be translated into content. By merging the characters from our local stories with educational content

- **Content for Children:** The significant increase in viewership of children's content provides a great opportunity to expand our geographic reach and represent Indian heritage. This can be done through creating content inspired from Indian origin stories and refurbish them with contemporary situations.
- **Polyglot Content:** Material for training in different regional languages should be provided to ensure that every region gets access to the learning resources.
- **Multi-Modal Training:** Training should be provided across all modes of media and disciplines such as television, Film making, Screenplay, Sound Design, Cinematography, broadcasting, and visual language.
- **Investments:** Investment of resources through inter/intra-governmental and public and private collaborations, will aid the M&E sector in producing quality content in terms of technology.
- **Indian Film Industry:** Encouraging collaboration of Indian Film Production houses and their talent (Actors, Singers, Costume Designers) with international labels will assist in marketing Indian ethnicity and culture. Talents such as Priyanka Chopra and SS Rajamouli being visible in mainstream media of the west, has brought attention to the Indian M&E sector.
- **Social Media Content:** The educational institutions can collaborate with influencers to understand the current trends of social media and cooperate in creating content that represents their culture.



2.1.12 Focusing on the indirect industry-related job roles

Industries that provide support to the Media and Entertainment industry through their services and/or products to help facilitate its operations. Following are some of the job roles that fall in the indirect industry.

- **Distribution and Logistics:** The logistics of distribution channels is handled by the distribution and logistics team. They are responsible for delivering media content to platforms such as theatres, streaming services and television.
- **Market Research and Analytics:** Professionals who analyse market trends and viewer data that steer the decision-making in the M&E sector output, fall into Market Research and Analytics.
- **Legal and Copyright Services:** Protection of intellectual property is one of the top most priorities of the M&E industry. Professionals who assist in copyright and legal requirements of projects in the sector are pivotal.
- **Facilities Management:** This role involves managing the physical infrastructure required for media production, including studios, sets, equipment, and post-production facilities.



2.2

Role of Stakeholders

In order to address the skill gaps effectively and efficiently, it is important that the entire ecosystem comes together in a cohesive manner playing their roles. The skilling ecosystem must consist of the following, each stakeholder contributing towards the same goal:

2.2.1 Government

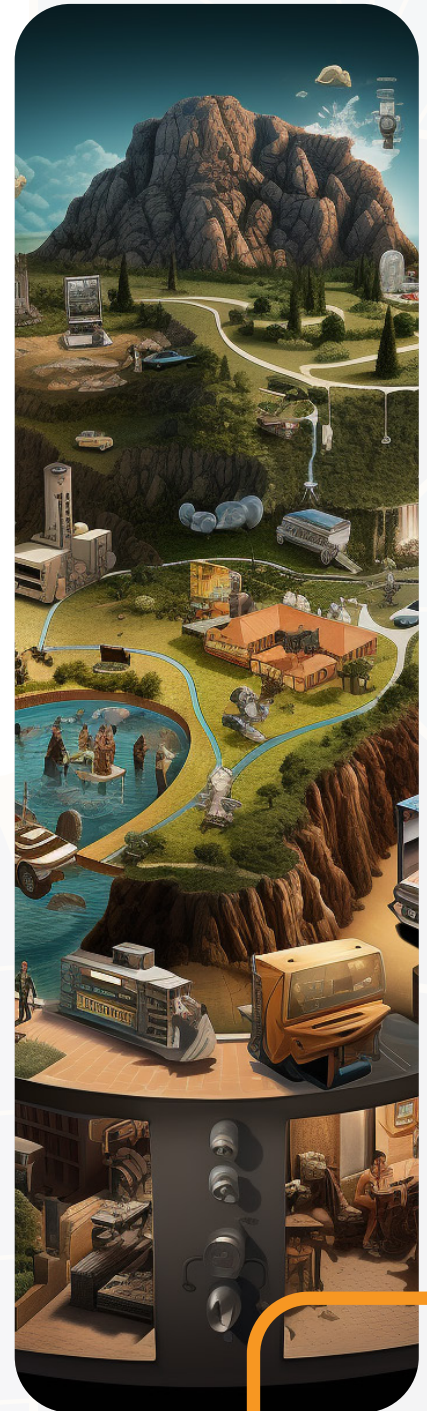
The governments (both the central and state governments) need to align towards the common goal of creating a conducive environment towards skilling for M&E sector in India. The governments contribute towards the following:

- **Policy making:** The government stakeholders shall work towards defining policies related to skilling and education dedicated to the M&E sector. The policies shall focus on standardisation of courses at all levels, improving accessibility to the courses through scholarships & government funded programs as well as promoting academic – industry collaboration.
- **Defining NSQF and QPs for M&E:** The government stakeholders shall be responsible for defining and delivering the courses and skills aligned with the NSQF and having dedicated QPs in the M&E sector.
- **Incentives:** Governments can announce incentive schemes for production, postproduction, animation, VFX, gaming and comics to promote demand of skilled workforce thus making it a lucrative career opportunity for young professionals.
- **Infrastructure development:** The public sector shall endeavour to build infrastructure in remote geographies with the aim to provide accessibility to the people of the region. This will allow the indigenous population to get skilled and create content based on the local folklore and take it to the world.
- **IP Laws:** The government stakeholders need to focus heavily on the menace of piracy and other IP infringements to safeguard the financial interests of the content producers in the M&E Sector.

2.2.2 Academic Institutions and Training Centre

Academic institutions such as schools and colleges are responsible for providing the foundational education that can enable young professionals to pursue a career in the M&E sector. Further, multiple avenues such as certification courses, online training applications such as UpGrad, Udemy, Coursera as well as training centres such as MAAC, Arena etc. provide focused skilling opportunities for professionals and students to get deeper into the chosen subject. These institutions, online teaching portals and training centres are an important part of the skilling ecosystem in the M&E sector and need to be responsible for providing the skilled workforce for the industry. The key responsibilities of these institutions include:

- **Defining NSQF and QPs for M&E:** The academic institutions need to work in close contact with the government and the industry in identifying and defining the QPs based on the NSQF keeping in mind the latest demand from the industry and the availability of skilling infrastructure.
- **Global Curriculum:** The academic institutions need to ensure that the curriculum designed and provided in their centres are at par, with the international standards. It is the responsibility of these institutions to ensure that the students graduating from such institutions and courses shall possess all the relevant skills and knowledge to contribute to the Indian M&E sector at an international level.
- **Industry based Training Programs:** The collaboration between academic institutions and the industry to provide real-life exposure to the students in form of trainings, apprenticeships, guest lectures etc. is vital. Such collaborations empower students to understand the inner workings of the industry and skills that shall be in demand.
- **Open & creative thinking:** It is the responsibility of the academic institutions to promote and cultivate an environment conducive for open and creative thinking. In an industry such as M&E, creative thinking is of utmost importance and the professionals who can demonstrate such thinking tend to add more value to the ecosystem.



2.2.3 Industry

The industry being the end consumer of the skilled workforce shall need to play a pivotal role in addressing the skill gap. The industry, comprising of production studios, AVGC studios, technology solution providers, etc. shall be responsible for contributing to the skilling ecosystem through:

- **Apprenticeship Programs:** While the industry players are mandated to onboard apprentices under the mandate of the Apprenticeship India initiative from MSDE, it is important that the industry goes above and beyond the mandate of the initiative and does not limit the number of apprenticeships to the bare minimum. Such apprenticeships allow young professionals to gain better understanding of the skill requirements and gives real life exposure to hone their skills in the right direction. Further, these apprentices can be absorbed into the formal workforce post completion of their apprenticeship basis their performance.
- **Mentorship:** Industry leaders can act as mentors to the students and young professionals and guide them through the various prospects of the industry including aspects such as the high demand skillsets, the subsectors that are seeing exponential growth and the possible employers that are right for the individual.
- **Networking events:** While the industry has various networking events, a lot of the events end up being closed and exclusive for the people already part of the industry. Creating a mechanism to allow access to young and budding professionals and students into such events can allow them to interact with stalwarts of the industry and gain first hand insight into the skilling demands of the industry.

Case Study

Autodesk, acknowledged as a Technology Leader, actively engaged in a national-level workshop hosted by MOIB & NFDC, emphasizing its role as a catalyst for significant skilling initiatives in the AVGC sector. Operating under the MOIB's auspices, Autodesk is presently conducting a training pilot benefiting 100 students from the Northeast while providing access to laptops and a suite of its licensed software. The program encompasses a six-month training period, succeeded by a two-month on-the-job training, exemplifying a steadfast dedication to empowering the forthcoming generation of AVGC professionals in India.





03

Skill Gap Study – Implementation Guide



Media & Entertainment Skills Council



**A ROADMAP TO
BRIDGING INDIA'S M& SKILL GAP**

M&S&E

One of the standout points of the MESC skill gap report is the much-needed impetus given to the role of states in addressing the skill gaps. In line with the recommendations from the report, this section suggests a framework to conduct a skill gap study in various Indian states from the perspective of the M&E Industry. It is not only recommended but also crucial to take up this study for all the states to address the skill gaps and unlock the true potential of the M&E Industry. Let's look at the framework.

Steps to Approach Skill Gap Study in the States:

The **DICAMER framework** for skill gap study in the M&E sector for various Indian states -



Define	Define the Scope and Objectives: Current position of the various M&E subsectors. Identifying the high-growth M&E subsectors for the state.
Identify	Identify important skills aligned with the priorities: Identification of the required skillsets and their importance for the priority subsectors.
Collect and Analyze Data	<ul style="list-style-type: none"> a. Surveys and Assessments a. Interviews with industry leaders and HR teams, students, placement committees of academic institutes, teachers, etc. a. FGDs with student groups, parents, etc a. MECAT.
Measure	Measure Current Skill level to find gaps and identify voids (Futuristic skills)
Estimate	Estimating the Workforce: Estimate the demand and supply from the presence of industry and academic institutions.
Recommend	Recommending actions to bridge the gaps.

Note: While implementing this framework, it is advised to pick recommendations relevant to a particular geography. It is also recommended institutional support, if available. Credible secondary sources can be identified to support the study.

3.1 DEFINE SCOPE AND OBJECTIVES

As the famous quote says, “A problem defined is a problem half solved”, the first step of defining the scope and priorities of the skill gap study is often the most critical. The first step will involve the following activities:

- a. The current positioning of the M&E sector as compared to other Indian States
- b. Contribution of various M&E subsectors
- c. Agree on the priority subsectors for the states assessing its geography, potential, culture, heritage, political will, technological advancement, and overall skilling ecosystem in the state.
- d. Assess and present potential economic, social, cultural, environmental, and impact of industry growth in the state.
- e. Define the scope and objectives of the study



3.2 IDENTIFY THE IMPORTANT SKILLS

Aligned with the defined scope and objectives, identify the skills required to support the industry's growth. All the skills need to be categorized as below:

	Relevancy in subsectors	Importance	Skill level required (Outsourcing vs In-house)
Skill 1	<Names of Subsectors>	High/Medium/Low	On a scale of 1-10
Skill 2	<Names of Subsectors>	High/Medium/Low	On a scale of 1-10
Skill 3	<Names of Subsectors>	High/Medium/Low	On a scale of 1-10

The recently launched skills gap report by MESC – “Realizing sector potential in India: Through the Skilling Lens” covers various skillsets relevant to different subsectors within the M&E industry. A lot of insights can be derived from the report to identify the relevant skills. MESC has also prepared qualification packs and RPL modules specific to the M&E industry.

Additionally, the researcher should consult with the industry stakeholders to understand their skill requirements. Close collaboration with the industry while conducting the skill-gap study is essential to reflect market trends. Industry workshops can be organized inviting industry leaders from various industry subsectors to discuss the evolving skill demands of their industry. Targeted discussions can be planned to get the required details.



3.3 COLLECT AND ANALYZE DATA

The crucial step in the skill gap study is to collect the primary data. Primary data is the source of credible, reliable, accurate, relevant, customized, in-depth, and contextual information required for the skill gap study. Different methods are recommended to collect primary data for the M&E skill gap study, and each requires extreme thoughtfulness and clarity to exercise. In all the methods, the most crucial step is designing the methodology. Let's look at the data collection techniques:

3.3.1 Surveys and Questionnaires (SnQ)

SnQs are the most effective source for primary data. The survey makes it possible to reach out to the population in a time-bound manner, which otherwise would be impossible to track. The survey is a science, and following all the steps is necessary to get the desired information:

- i. **Define objectives and Problem Statements:** The survey objectives should align with the skill gap study scope and priorities. Moreover, the researcher should identify the problem statements that require solutions through the survey. The problem statements should be prioritized to seek more targeted information about subsectors. The problem statements will look like this:
 1. Assessing the current skill level of students and professional workforce
 2. Identifying the required skill level from the industry
 3. Identification of specific gaps in academia
 4. Gauging the futuristic trends from the industry and the academia
 5. Current macro trends in the M&E sector and subsectors

These statements should be contextualized to the scope and priorities of the skill gap study. Above are the indicative problem statements.

ii. **Selecting the Audience:** Only by collecting information from various perspectives we can assess the skill gaps without biases. Therefore, it is recommended to collect information from the following population sets:

1. HR and talent acquisition personnel from the industry
2. Students and Industry-ready workforce
3. Working Professionals from the industry
4. Professors and teachers from the academia

Aligning steps 1 and 2, the researcher should define which population subset will be apt to provide a solution for a particular problem statement. Accordingly, the problem statement should be mapped to the population sets. For example

Population Sets	Problem Statements
HR and Talent Acquisition from M&E Industry	Assessing the current skill level of the professional workforce Identifying the required skill level from the industry Gauging the futuristic trends from the industry Current macro trends in the M&E sector and subsectors
Students and Industry-ready Workforce	Assessing the current skill level of students and professional workforce Identification of specific gaps in academia
Working Professions in M&E Industry	Assessing the current skill level of students and professional workforce Identifying the required skill level from the industry Gauging the futuristic trends from the industry Current macro trends in the M&E sector and subsectors
Teachers and Professors from the academia	Identification of specific gaps in academia Gauging the futuristic trends from the academia Assessing the current skill level of students

*Indicative Mapping

iii. **Designing the survey:** The survey should be designed and tailored to the specific geographic needs, priorities and population sets. A well-designed survey will provide the information necessary to arrive at the skill gaps. Please note that the survey questionnaires will be different for the various population sets.

iv. **Pre-Test the Survey:** It is recommended to conduct a pilot test or pre-test of the survey with a small group to identify any issues with wording, question order, or response options. This helps ensure the survey is clear and easily understandable.

v. **Data Collection:** After finalizing the survey, the researcher should identify the correct mechanism for collecting the data. A few mechanisms that can be used are the following:

1. Online surveys
2. Offline surveys
3. CATI
4. Mailed Questionnaires

The data collection techniques should be chosen which will be time efficient and effective.



3.3.2 Interviews

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The key stakeholders we have not covered in the surveys should be included in the surveys. While surveys are a great mechanism for quantitative data and finding directional trends, interviews can help with more qualitative information and ascertaining the information trends received from the survey. The population sets that should be covered for interviews may include the following:

- i. M&E Industry Experts and Associations from the state or outside
- ii. Placement committees and management of M&E-related academic institutions
- iii. Parents of students studying in the M&E industry
- iv. Industry Leaders and Management

3.3.3 Focused Group Discussions

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Focused Group Discussions: To verify directional information and collect more qualitative insights, the researcher should organize focused group discussions. These discussions can prove to be insightful to understand perspectives and ascertain reasons for the identified trends and hypotheses. The FGDs can be organized for:

- i. Students
- ii. Professionals from different subsectors
- iii. Teachers and professors



3.3.4 MEDIA & ENTERTAINMENT CREATIVE APTITUDE TEST (MECAT)

The Media & Entertainment Creative Aptitude Test (MECAT) is an assessment tool designed to evaluate the creative aptitude and potential of individuals interested in pursuing careers within the media and entertainment industry. It serves as a standardized platform for assessing candidates' suitability for various sub-sectors and programs within the industry. MECAT has the great potential to objectively measure the proficiency of candidates, identify the gaps, and extrapolate the findings for the whole sector.

The steps and methods shown above will provide the data required to find the skill gaps. The next step will be to analyse the data to arrive at a conclusion and insights. The researcher will review the collected responses to check for errors, inconsistencies, or missing data. Clean the data by correcting errors and validating responses. The analysis will involve the following steps:

- i. **Quantitative Data Analysis:** Data collected from surveys and MECAT will require to be analysed quantitatively to arrive at the insight.
- ii. **Qualitative Data Analysis:** Data collected from surveys, interviews, and FGDs will require quantitative analysis to find insights.



3.4 MEASURE THE SKILL LEVELS TO FIND GAPS

After step 3, the researcher should be able to answer the following:

- i. Current and Required skill levels of identified skills in Step 2
- ii. Void in current skill sets or futuristic skills
- iii. Subsector-wise split of relevant skillsets
- iv. List of industries in each subsector
- v. List of academic and training institutions in each subsector

After getting the above information, it is recommended to measure the gaps and label the skills and high, medium, and low demand. At the same time, it is recommended to list the futuristic skills. For example

	Relevancy in subsectors	Importance	Skill level required (A)	Current Skill Level (B)	Measurement						
Skill 1	<Names of the Subsector>	High / Medium / Low	On a scale of 1-10	On a scale of 1-10	<table border="1"> <tr> <td>High Demand</td> <td>If A-B ≥ 5</td> </tr> <tr> <td>Medium Demand</td> <td>If A - B ≥ 3 & < 5</td> </tr> <tr> <td>Low Demand</td> <td>If A - B < 3</td> </tr> </table>	High Demand	If A-B ≥ 5	Medium Demand	If A - B ≥ 3 & < 5	Low Demand	If A - B < 3
High Demand	If A-B ≥ 5										
Medium Demand	If A - B ≥ 3 & < 5										
Low Demand	If A - B < 3										
Skill 2	<Names of the Subsector>	High / Medium / Low	On a scale of 1-10	On a scale of 1-10	<table border="1"> <tr> <td>High Demand</td> <td>If A-B ≥ 5</td> </tr> <tr> <td>Medium Demand</td> <td>If A - B ≥ 3 & < 5</td> </tr> <tr> <td>Low Demand</td> <td>If A - B < 3</td> </tr> </table>	High Demand	If A-B ≥ 5	Medium Demand	If A - B ≥ 3 & < 5	Low Demand	If A - B < 3
High Demand	If A-B ≥ 5										
Medium Demand	If A - B ≥ 3 & < 5										
Low Demand	If A - B < 3										

Similarly, the skills which are not identified in Step 2 but have emerged in Step 3 will be categorized as futuristic skills.

Futuristic Skill 1

<Name of the subsector>

Futuristic Skill 2

<Name of the subsector>

Futuristic Skill 3

<Name of the subsector>

Futuristic Skill 4

<Name of the subsector>



3.5 Estimating the Workforce

In steps 1-4, we have identified the skill gaps as well as futuristic skills. However, the stakeholders will also be interested in finding the overall skill gap in the sector and the potential to employ the workforce. To arrive at a number, demand and supply estimation will be required. After steps 1 to 4, the researcher will have a list of industries present in the state to estimate the demand. At the same time, the list of all the academic and training institutions will help estimate the supply.

Studying the performance of the industry in the state, the growth rates and the required future workforce can be estimated to arrive at the workforce projection.

Total Demand of the skilled workforce by the M&E Industry in the state - Total Supply of skilled workforce by the academic and training institutions in the state = Skill Gap in the M&E industry in the state

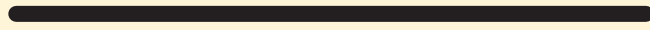
3.6 RECOMMENDATIONS

Basis on the findings from the skill gap study, the researcher should recommend interventions to bridge those gaps to provide necessary boost to the industry and the state economy. A few interventions are suggested in this report above which can be referred to as benchmarks.





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