



Realizing
**M&E SECTOR
POTENTIAL**
in **INDIA** *Through the
Skilling Lens*



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Since the ancient times of Ramayana and Mahabharata, India has had a history of storytelling and other entertainment forms like traditional songs, dance, puppetry, etc. The modern Media and Entertainment industry is a reflection of India's rich tradition of storytelling and culture. Technological advancements have enriched the consumer experience of Media and Entertainment, and it is evolving at a swift pace. Yet, the Indian M&E Industry contributes less than 1% to its GDP, but it has the potential to contribute more. We are yet to realise its full potential due to several reasons, and one of the major among them is the skill gaps.

Skilling, if harnessed properly, can become the greatest strength of the Indian M&E industry. India is one of the youngest nations in the world, with over 60% of the population in the working age group and about 46% below 25 years of age. We should leverage the demographic dividend of India to establish the Indian M&E market on the global map as the most skilled one.

This report is an attempt to suggest ways and provide insights about unleashing the potential of the M&E industry in India, covering all the aspects to make it comprehensive while focusing on the skilling part through a skill gap study. The report encompasses not only the skill gap study of the M&E Industry but also the overall industry overview, industry trends, comparison with global markets, the skilling ecosystem, and recommendations to foster the M&E Industry in India.



The report also contains sectoral snapshots of a few states.

While the industry is poised to grow at a CAGR of 13%, a few subsectors like Online Gaming, Animation & VFX, and Digital & OTT are outperforming the growth rates, and are set to lead the human resource demand of the industry. Television and TV will remain the subsectors with the most number of people, but their growth rates are projected to be lower.

Taking cues from the identified skill gaps in this report, every stakeholder of the skilling ecosystem must play an enhanced role. We would require participation from industry organizations, thought leaders, education & skilling institutions, the

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MR. DHARMENDRA PRADHAN

Minister of Education and Minister of
Skill Development and Entrepreneurship

Government, and other professional & allied companies. Together we all can contribute to building a robust skilling ecosystem reflecting the industry needs while exceeding international standards. It will help nurture new talent, upskill and reskill our existing workforce, develop trainers up to date with the latest realities, make international alliances to support skilling initiatives, and meet the demands of the industry. From a macro view, it will help India achieve a competitive advantage over other markets.

It is time to realise the true economic and socio-cultural potential of the M&E Sector in India.

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While the Media and Entertainment industry is growing, the sector needs to step up the game to catch up with the world. The Indian M&E market still contributes less than 1% to the country's GDP, and its global share is less than 2.5%. However, the growth rates are the fastest in India. To unleash the full potential of M&E in India, the Government is ready to play its part and to support the industry's growth.

This report is a holistic Indian M&E sector analysis with a focus on skilling, which I do believe is one of the biggest challenges to overcome. This report has curated a list of skill gaps in the current market and also identified futuristic skills. This identification of gaps will help address the skilling needs of the industry and prepare the workforce of the future.

The subsectors within the industry, such as AVGC, and Digital Media & OTT are projected to grow at a much faster pace and will lead the industry growth. Over 40% of the identified futuristic skills in this report are from these subsectors. The Ministry of Information and Broadcasting has taken



cognisance of this fact and has taken several measures to catalyse its growth and will continue to do the same. While policy and infrastructure support are crucial, skilling and nurturing talent is the need of the hour. The sectors will only thrive on the backs of young, talented, and skilled individuals.

We need to build a skilling ecosystem which can constantly evolve to the industry's needs. Our professionals must meet international standards and our technologies need to be up to date. These efforts may appear tough to do but are very much doable. It requires upgraded infrastructure, cutting-

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MR. ATUL KUMAR TIWARI

Secretary, Ministry of Skill Development & Entrepreneurship Government of India

edge technology, skilled professionals, and sustained efforts from all stakeholders. This report will help us plan for a better ecosystem reflecting the need of the industry.

We must unleash the potential of M&E by overcoming the challenges. I see immense potential in this industry, and M&E will contribute to the Rising India story, its economy, culture, growth, society, and people.

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MR. APURVA CHANDRA

Secretary, Ministry of Information and
Broadcasting, Government of India

While the Media and Entertainment industry is growing, the sector needs to step up the game to catch up with the world. The Indian M&E market still contributes less than 1% to the country's GDP, and its global share is less than 2.5%. However, the growth rates are one of the fastest in India. To unleash the full potential of M&E in India, it must overcome the challenges. The industry is battling several challenges hindering its growth, and the Government is ready to play its part and will do whatever it takes to support the industry's growth.



This report is a holistic Indian M&E report which focuses on skilling as a challenge to overcome. Aligned with this thought, I do believe that skilling in M&E is one of the biggest challenges to overcome. This report has curated a list of skill gaps in the current market and also identified futuristic skills. This identification of gaps will help address the skilling needs of the industry and prepare the workforce of the future.

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We need to build a skilling ecosystem which can constantly evolve to the industry's needs. Our professionals must meet international standards and our technologies need to be up to date. These efforts may sound far-fetched but are approachable. It requires infrastructure, efforts from all the stakeholders, technology, professionals, and will. This report will help us plan for a better ecosystem reflecting the need of the industry.

I see immense potential in this industry. M&E will contribute more to India, its economy, culture, growth story, society, and people. When India will become a superpower, and it will, M&E would have played a significant role in bringing transformation. We must unleash the potential of M&E by overcoming the challenges.

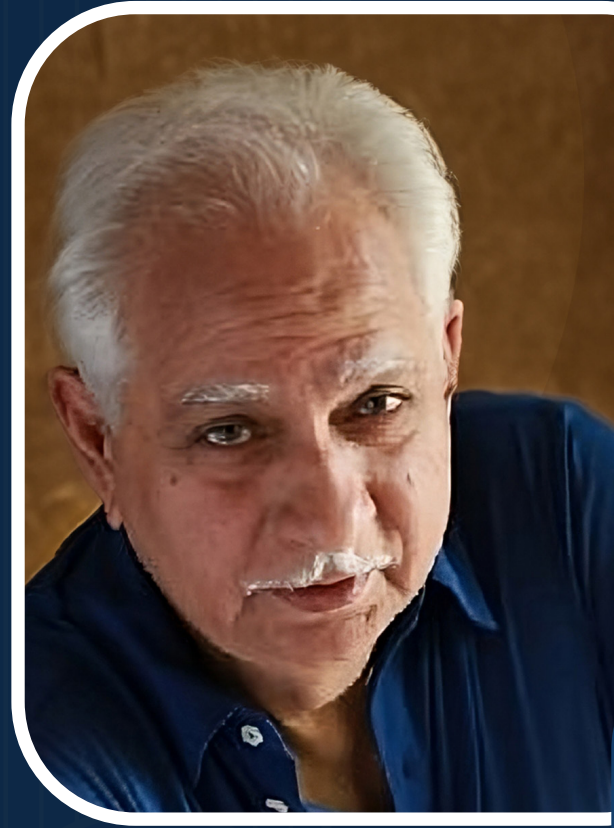
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The expression of India and its rich culture through media has traditionally been a niche interest within the global market. However, over the past decade, a gradual yet consistent shift has been observed, indicating a growing global fascination with Indian media. This was evident in the 2022 documentary, “Elephant Whisperers” which made history by becoming the first Indian film to win an Oscar. Additionally, the song “Naatu Naatu” from the movie “RRR” achieved the distinction of winning the prestigious award for Best Original Song at the Oscars. Moreover, actresses Priyanka Chopra and Deepika Padukone have been gaining significant popularity in Hollywood. These developments affirm the notion that the world is now eager to explore and embrace India and its media in a manner unprecedented before.

As such, this is the prime time to push for growth and development within the Indian Media and Entertainment industry, to push for Indian stories on a global stage, and to realise the true potential of this sector. However, the industry can only be as good as the workers, and one of



the biggest issues faced by the M&E sector currently is the lack of skilled workforce within the same.

The report tackles the same issue, pointing out the need to invest heavily in retraining and upskilling employees, investing in a self-sustaining skilling ecosystem, greater research and development, and futuristic skills whose relevance increases day by day.

The report also highlights the fact that in the coming years, the relevance of alternative forms of media, such as AVGC (Animation, Visual Effects, Gaming, and

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Chairman, Media and Entertainment Skills Council (MESc) Renowned Indian Filmmaker, Director, Producer & Educationist

Comics), Digital Media, OTT (Over-The-Top) platforms, etc., are expected to undergo tremendous growth. Over 40% of the required futuristic skills identified are also in line with the development of these sub-sectors.

Currently, Media and Entertainment contribute less than 1% to India's GDP and less than 2.5% globally. If the true potential of the industry is realised, and policies are made with the findings of the report, it would not be a leap to suggest India emerging as one of the global leaders in the M&E sector in the coming years.

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MR. ASHISH KULKARNI

Vice President, Media and Entertainment
Skills Council (MESCC)

In recent years, the Indian Media and Entertainment industry has witnessed remarkable progress in its development. The industry is now poised for a significant boom, driven by increasing demand, rising disposable income, rapid digitisation, and more. However, to fully capitalise on this future growth, the industry must align with global standards while retaining its distinct Indian essence. The Indian M&E market currently contributes less than 1% to the country's GDP, while the potential for outstanding contribution remains restricted by the skill gap.



why the skilling of workers is needed, the overall industry overview and trends, global market comparisons, and more. It is intended to be a starting point to foster a better realisation of the potential of the M&E industry in India.

The stakeholders role and active participation are crucial in realising the possibilities before us. Moreover, there is an expectation that emerging technologies will garner increased attention. In light of the industry's estimated compound annual growth rate (CAGR) of 13%, it is worth noting that specific subsectors such as Online Gaming, Animation & VFX, and Digital & OTT are outperforming the overall growth rates. As a result, these subsectors are expected to generate substantial demand for human resources within the industry. On the other hand, despite maintaining their appeal to many individuals, television and TV are anticipated to encounter relatively modest growth rates.

As we face rapid growth, it is essential to maintain simplicity in content—new technology provides different perceptions, but the stories we tell should remain our own. Maintaining the distinct Indian character would be a positive, helping differentiate us and giving India a competitive edge over other markets.

An industry is only as good as the people working within it, and to expand this industry, further investment in skilled labour is essential. One of the youngest countries in the world, India has over 60% of its population within the working age group and over 45% below 25 years of age. The report highlights that this demographic advantage needs to be utilised, stating they should be upskilled and reskilled in matters directly valuable for the future. Creating a mechanism and framework that focuses on the same would also provide sustainable growth within the industry.

This report deals with the aspects involved in unleashing the potential of the M&E industry in India, the duties of stakeholders,

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Indian culture has always fostered a deep connection with the performing arts, as showcased in celebrated epics like the Ramayana and Mahabharata and captivating dance forms such as Bharatnatyam and Kathak. Yet, storytelling in India extends far beyond the confines of literature, encompassing a myriad of expressive mediums like paintings, songs, and even awe-inspiring architectural marvels. Given this rich cultural tapestry, it is no surprise that the Media and Entertainment industry is poised for remarkable growth in the coming future.

To fully unleash the potential of this industry, it is imperative to address various challenges and undertake focused efforts. This report endeavours to identify and tackle the existing barriers impeding growth. Among various challenges, skill development emerges as the most pivotal aspect having the potential to provide the necessary boost to industry growth.

In response to this pressing challenge, the report meticulously analyses the current skill gaps in the market and identifies the futuristic skills indispensable in the evolving landscape. The ultimate objective is to cultivate a proficient workforce through a dynamic skilling ecosystem that consistently adapts



to meet the industry's ever-evolving needs.

Promisingly, certain industry subsectors such as AVGC (Animation, Visual Effects, Gaming, and Comics), Digital Media, and OTT (Over-The-Top) platforms are anticipated to experience unprecedented growth rates. More than 40% of the identified futuristic skills align with these subsectors. To foster effective growth, strategic measures must be implemented.

The industry's growth trajectory is not merely projected; it is substantiated by the fact that it has already surpassed pre-COVID levels in 2022— the industry is set to grow at an impressive compound annual growth rate

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MR. MOHIT SONI

CEO, Media and Entertainment Skills Council (MESC)

(CAGR) of 13%, placing it among the highest globally. Additionally, it is worth noting that the Indian Media and Entertainment industry currently holds the 7th position worldwide.

These ample growth opportunities signify tremendous employment potential. However, the onus also falls on state governments and other stakeholders to fulfil their roles in bolstering the skilling requirements of the sector, thus enabling the realisation of the true potential of the Media and Entertainment industry in India. MESC will continue to play its role in addressing the skilling needs of this industry and hence aid in its growth.

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MR. NILAYA VARMA

Co-founder & CEO,
Primus Partners

“Let’s do it desi filmy way” is the call from this report to position Indian M&E as a global leader. The Indian M&E is growing, and it will, but what will make it stand out is the essence of India and its culture in our content. The world wants to see our culture, and with technology, now we are more equipped to tell our stories livelier than ever. “Desi Filmy way” sounds like marketing jargon, but it has a more deep-rooted meaning.

The report tells us about the spectacular prospects of Indian



M&E and the growth enablers making a flourishing environment. The Indian M&E is fast growing but way behind global competitors reflected in its market share. While deep diving into the industry, weighing the nuances and studying the trends, the report suggests a way to increase the market share and the way happens to be “desi-filmy”.

Let's reflect on the recent events. The Elephant Whisperers made history by being the first Indian production to ever win the Oscars, the world's most prestigious film award. In the past, we might have refrained from telling a story like this to a general audience because we anticipated the difficulty of finding an audience.

Also, when the song “Naatu Naatu” from India won the Oscars, it announced the diversity of Indian Media and Entertainment. Tales from the heartlands, folklore, or even mythology are finding a proud home on the global stage today. These tales are primarily of Indian provenance. The world is eager to learn more about India, its distinctive characteristics, and what sets us apart from other nations.

It's true not only for films but for every subsector. Let's go back to our roots and tell amazing stories in more creative forms like gaming, animation, VFX, or OTT. Let's revive our fictional characters like Chacha Choudhary, Nagaraj, etc. Let's tell the Indian story to the world.

Though the report is comprehensive, covering every aspect of the industry, it focuses on skilling. It identifies skilling as one of the challenges having the potential to build a unique edge for India. It will be our people who will make a difference in the industry and put it on the global map.

I am confident that this report will serve as the industry benchmark and bring all the stakeholders together to work towards bridging the skilling gaps to realise the true potential of M&E in India.

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Media & Entertainment Skills Council

**REALIZING
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Realizing M&E Sector Potential in India:

Through the Skilling Lens

EXECUTIVE SUMMARY

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.

The industry is showing promising growth trends and projections, and it is projected to grow at a CAGR of 13%. The rapid growth is led by high-growth subsectors like Online Gaming, Animation & VFX. Enabling environment in India and rising demand are driving growth while at the same time attracting necessary investments. Furthermore, Indian content is getting recognised by global audiences aiding as an incentive for more creative content. India is ranked 7th largest M&E market in the world showing one of the highest growth rates. Still, it contributes to less than 1% of the nation's GDP, with around 2% of global market 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.



Skilling is one of the challenges, and if harnessed properly, has the potential to become the greatest strength to build a competitive advantage for India. M&E Industry has the potential to provide 29.5 Lakh direct and another 51.5 Lakh indirect employment opportunities in India. Skilled individuals will make a difference in putting the Indian M&E Industry on the global map. There are various stakeholders in the skilling ecosystem with an enhanced role to play in the uplifting including the Industry, Education and Skilling Institutions, Human Resource pools and freelancers, etc. Ever-evolving skill requirements require an up-to-date skilling ecosystem ready to incorporate the changes in needs. Upskilling & Reskilling are as important to keep the existing workforce relevant to the new challenges, and the same is true for the trainers.

The skills gap study in this report suggests that Online Gaming, Animation & VFX, and Digital Media & OTT will lead the human resource demand in the industry. Technical, Digital Media, creative content creation, and management skills are the functional areas with more skill gaps in the industry. 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 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 summarised 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.
- 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 maximise 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:

- 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.





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

- Digital Media & OTT, Online Gaming, Advertising & OOH, Sound & Music, and Theme Parks are the subsectors leading the futuristic skills.
- It is followed by Animation & VFX, Art & Culture, Event & Live Performance, and Print.
- The subsectors with lesser identified futuristic skills are television, Film, and Radio.

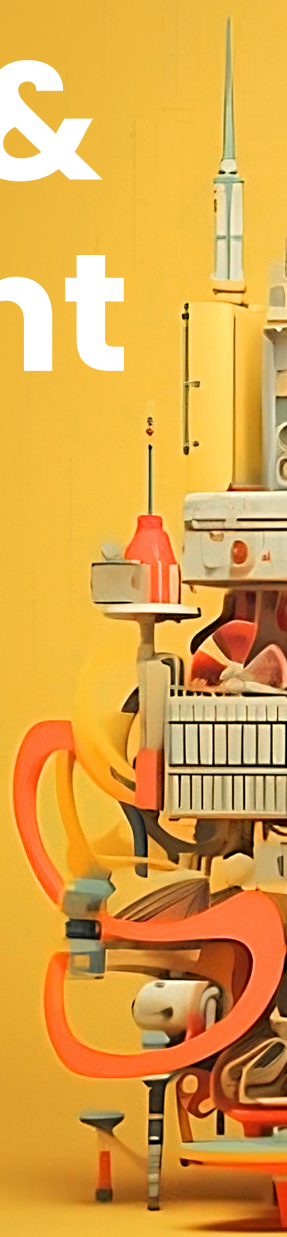
Skilling is a crucial deciding factor for the future of the M&E Industry to build a unique edge for India. However, looking at a broader lens, the Indian M&E industry should focus on innovative & Quality content, Nurturing Talent, Marketing, Technological advancements, improving market access, and designing a strong education framework. Focusing on these steps will help unleash the full potential of the industry and contribution to the Indian GDP.

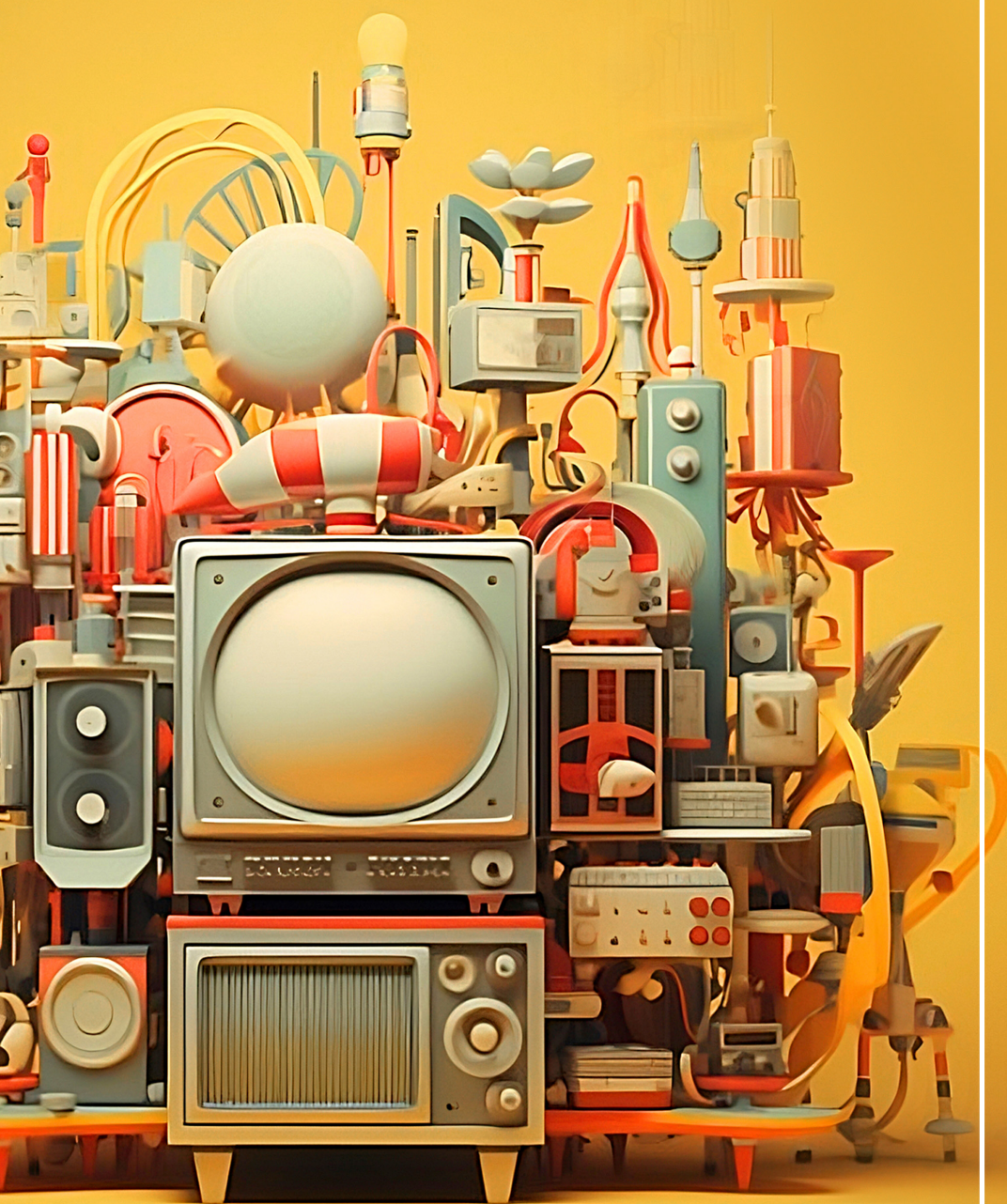
The states will have to play an even larger role in promoting the industry. The state governments can create a favourable environment and opportunities for the industry to grow, and we have listed a few state-specific snapshots. In future, MESC will be releasing detailed state-specific case studies, which can help them promote the M&E industry in their states.

As explained in the report about the various initiatives taken up by MESC, the MESC intends to play an even bigger role in shaping the Indian M&E industry. Hence, along with the skill gap study, MESC will be realising a toolkit comprising broad intervention areas to address the skill gaps and a skill gap study implementation guide for various Indian states. As we recognise the role of states in bridging the skill gaps will be more crucial, a greater emphasis can be seen in these reports.

01

An Overview of the Media & Entertainment Industry





**REALIZING M&E SECTOR
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M&E

1.1

INTRODUCTION TO THE M&E INDUSTRY

India is one of the oldest civilizations in the world, with a diverse and rich cultural heritage. The cultural fabric of India is an amalgamation of many languages, religions, literature, art and dance forms, music, food, architecture, and customs that together define the rich heritage of the country. The conventions, practices, and beliefs popular today were developed thousands of years ago.

From ancient times, India has developed various entertainment forms deeply rooted in the culture of this country. One can see a glimpse of the different modes of entertainment through the rich Indian classical dance forms, classical music, games, and art forms like puppetry, painting, sculpture, drama, etc. The oldest proof of the existence of dancing comes from the 9000-year-old cave paintings that were found in India, which depict various scenes of hunting, childbirth, religious rites, burials and most importantly, communal drinking and dancing. Sports like wrestling and games like chess were invented more than 3000 years ago in India. Arguably, puppetry also originated in India around 4000 years ago.

Interestingly, these media were utilized not only for entertainment but to fulfil the role of media to provide information, educating people, provide a discussion platform, and a medium to express emotions on policies, business, and other social issues. The traditional dance forms, folklores, dramas, paintings, and music tell stories to provide information to the audience. These mediums not only provided entertainment for the overall well-being of society but acted as a source of media to provide critical information to the masses and educate them in the absence of advanced technologies.





MEDIA AND ENTERTAINMENT INDUSTRY

The Media and Entertainment industry has seen different phases of evolution since then. In ancient times, entertainment and news were primarily shared through oral traditions, such as storytelling, poetry, and songs. These traditions were used to convey historical events, cultural values, and societal norms. The invention of the printing press in the 15th century revolutionized the way information was disseminated. This allowed for the mass production of books, newspapers, and other printed materials, which enabled the spread of ideas and knowledge on a much larger scale. The invention of the radio in the early 20th century allowed for the broadcast of news and entertainment to a mass audience. Television followed soon after, allowing for the visual broadcast of news and entertainment. The rise of digital technologies revolutionized the

Media and Entertainment industry in the late 20th and early 21st centuries. The internet has allowed for the creation, distribution, and consumption of digital content on a global scale. This has led to the rise of social media, video-sharing platforms, and streaming services, which have disrupted traditional media companies. The proliferation of smartphones and tablets has further enabled the consumption of Media and Entertainment on the go. Mobile devices have also enabled new forms of content creation, such as short-form videos on platforms like TikTok and Instagram. The development of virtual and augmented reality technologies has opened new possibilities for immersive entertainment experiences. These technologies are still in their early stages, but they are likely to have a significant impact on the industry in the future.

FIGURE 1: KEY MILESTONES FUELLING THE EVOLUTION OF THE MEDIA & ENTERTAINMENT INDUSTRY

01

Oral traditions



Storytelling, Poetry, Songs were more prevalent during the ancient times

02

Writing



Creation of Literature after the invention of writing - Novels, Plays, Poems

03

Printing Press



Its invention in the 15th century enabled mass production of books, newspapers & other printed material

04

Photography



Its invention in the 19th century led to growth of Photojournalism and emergence of new forms of visual entertainment, such as motion pictures

05

Radio and TV



In the 20th century, radio and television became the dominant forms of mass media, leading to the rise of new industries such as advertising and broadcasting

06

Internet



Its invention in the late 20th century enabled the emergence of new players such as social media platforms and streaming services, which have disrupted traditional media companies

07

Virtual & Augmented Reality



It has opened up new possibilities for immersive entertainment experiences. These technologies are still in their early stages

08

Mobile Devices



The proliferation of smartphones & tablets has further enabled the consumption of Media and Entertainment on the go.

The Media and Entertainment (M&E) industry has been through various stages of evolution, including the recent crisis during the COVID outbreak. Technology has revolutionized the industry. TV is now SMART and interactive, online games are in the trend, news has become hyper-local, online streaming of songs has almost become a norm, films are now released online & OTT platforms are gaining on subscription, digital media established as one of the key segments of the industry.

The industry is still evolving at a swift pace owing to the advancements in technology, consumer preferences, lifestyle, and external environment. Several cutting-edge technologies are transforming the Media and Entertainment industry. Here are some of the newest technologies in this space:

Augmented Reality (AR) and Virtual Reality (VR)

AR and VR are immersive technologies that are enabling new forms of storytelling, gaming, and other interactive experiences. AR overlays digital information in the real world, while VR creates a completely virtual environment. Both technologies are being used in gaming, movies, and other forms of media.

Artificial Intelligence (AI)

AI is being used to personalize content recommendations, analyse audience data, and automate various aspects of media production. For example, AI-powered cameras can automatically track subjects and adjust focus, while AI-powered editing software can automatically cut footage into a polished final product.

5G Networks

5G networks enable faster and more reliable data transmission, crucial for streaming high-quality video and other media content.

Blockchain

Blockchain technology is being used to create new content distribution and ownership models. For eg., blockchain-based platforms allow creators to sell their content directly to viewers without going through intermediaries like streaming services.

Cloud Computing

Cloud computing is allowing media companies to store and process vast amounts of data more efficiently, which is critical for streaming and other digital media applications. Cloud-based solutions are also enabling more collaborative and remote workflows for media production teams.

These are just a few examples of the newest technologies transforming the Media & Entertainment industry. As technology continues to advance, we can expect to see even more innovation and disruption in this space. Let's explore the current industry structure and the different sub-sectors constituting the modern industry.



1.2

THE M&E INDUSTRY: SUBSECTORS

We can segregate the M&E industry into 12 sub-sectors. Technology has evolved every sub-sector including TV, Advertising & OOH, Print, Radio, Films, Events & Live Performances, Sound & Music, Art & Culture, and Theme & Amusement Parks. While at the same time introducing new subsectors like Animation & VFX, Digital Media & OTT, and Gaming.



**Advertising
& OOH**



**Animation
& VFX**



**Art &
Culture**



**Digital Media
& OTT**



**Events & Live
Performances**



Films



**Online
Gaming**



Print



Radio



**Sound &
Music**



Television



**Theme
Parks**

1.3

THE M&E INDUSTRY: GROWTH PROJECTIONS

The Media and Entertainment (M&E) industry has been through various stages of evolution, including the recent crisis during the COVID outbreak. Even then, the Indian M&E industry stands tall and boasts of becoming the 7th largest M&E industry in the world.

M&E Industry in India (Figures in INR Crores)

Source:
FICCI - Indian Media & Entertainment Industry Reports (2010-2022)

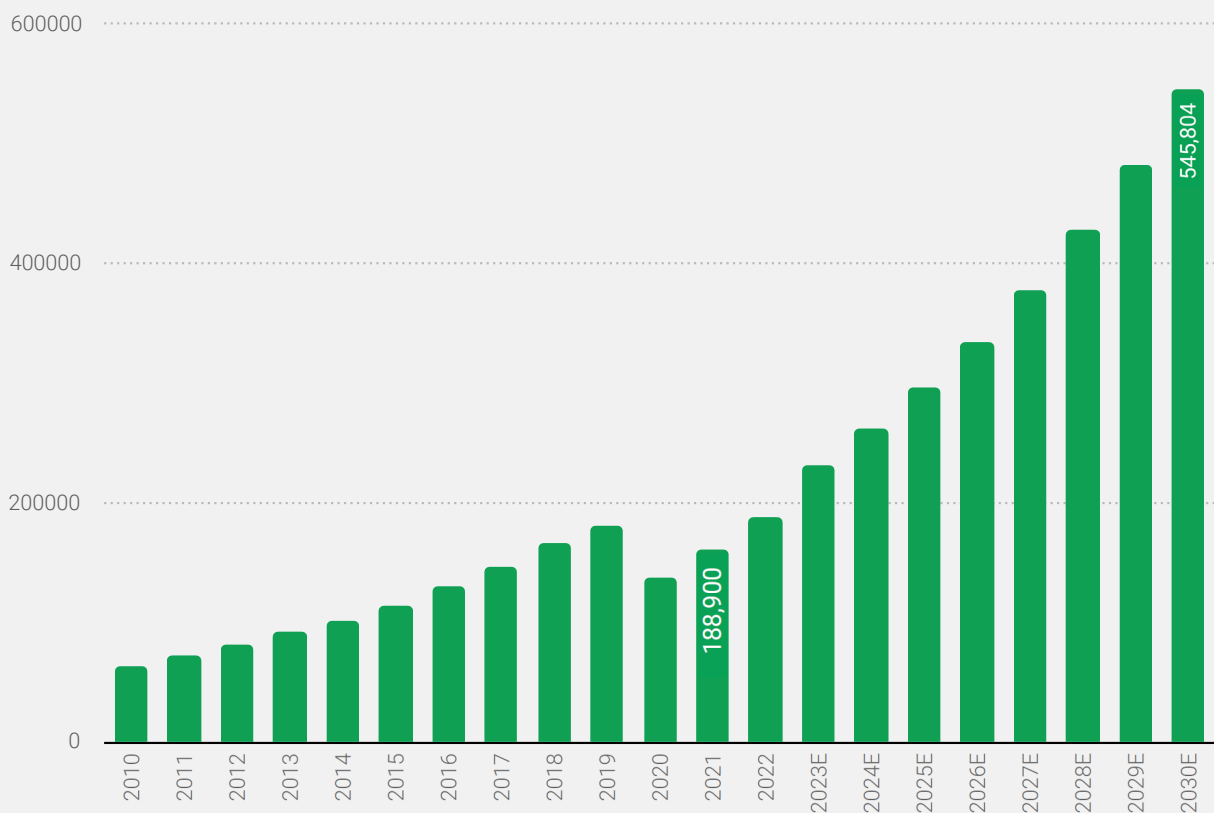


FIGURE 3: M&E INDUSTRY TRENDS

The growth trends of the Indian M&E industry look promising. The Indian Media and Entertainment (M&E) industry is currently at \$23 billion and should grow to \$100 billion by 2030, as per the Ministry of Information & Broadcasting ¹. The industry recovered to its pre-COVID levels thanks to the promising macroeconomic recovery fuelling consumer demand. In 2019, the M&E sector contributed 1.27% of the national GDP, but currently, the contribution is less than 1% due to the industry crash during the COVID pandemic.

The growth before the COVID-19 pandemic was steady, indicating a stable environment for the industry. However, it was one of the badly hit industries during the pandemic. In the post-pandemic era, we expect the industry to grow quickly due to the growth of digital technology, content localization, and new technologies such as AI and VR driving the growth. Let’s look at the sectoral trends:

Comparison of Subsector-wise share in Media and Entertainment Industry Market Size [2022 vs 2030E]

Source: FICCI-EY Report
Estimates by Primus Partners Pvt. Ltd.

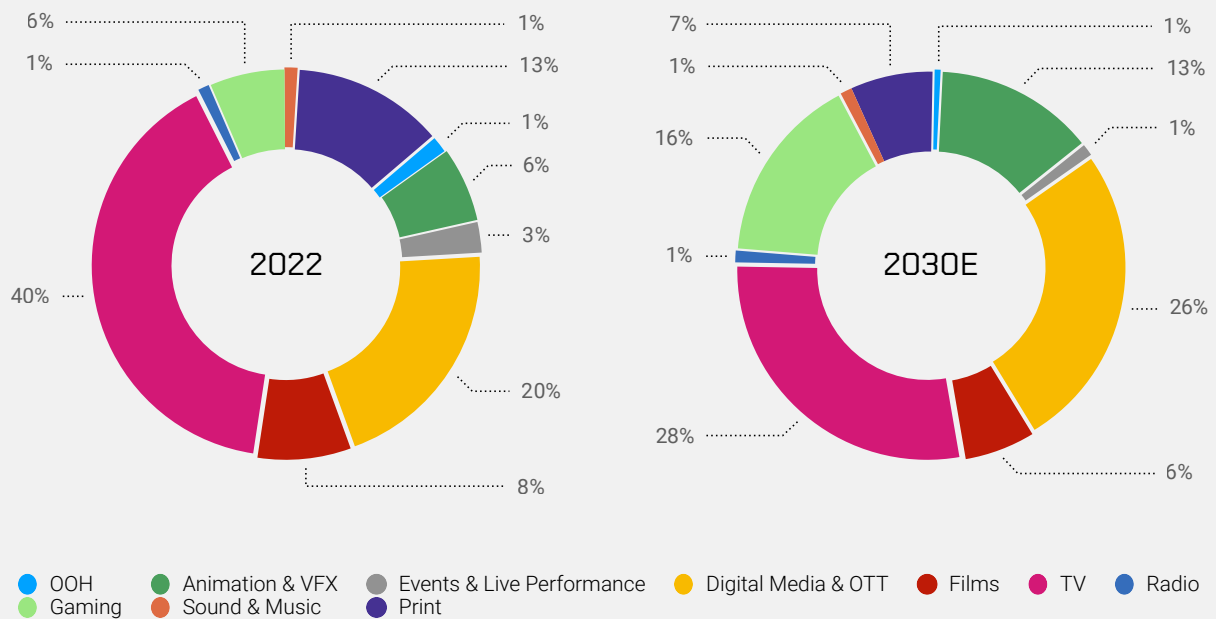


Figure 4: M&E Industry – Comparison of Subsector-wise Share

1. <https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1862505>



Media & Entertainment Skills Council

Realizing M&E Sector Potential in India:

Through the Skilling Lens

Key takeaways from this analysis

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%.



1.4

M&E INDUSTRY OVERCOMES COVID-LED SUPPLY SIDE DISRUPTIONS

The COVID-19 pandemic has had a significant impact on various sectors of the Indian economy. It has completely transformed the way we live, work, and communicate with each other. The pandemic has had a significant impact on the global economy, with many businesses shutting down and job losses increasing. Governments worldwide have implemented various stimulus measures to mitigate the economic impact of the pandemic. Some of the worst-hit sectors include Tourism & Hospitality, Aviation, Retail & E-Commerce, Automotive, Manufacturing, etc.

Like other sectors, Media & Entertainment Sector was also affected by the pandemic. As seen in the previous section, there was a 24% dip in the industry size in 2020 when the pandemic first knocked on the doors. However, the M&E sector was one of the sectors where the losses in sub-sectors were not consistent. Some subsectors like Film, Radio, Print, Sound & Music, Live Events & Performances had an adverse impact because of the pandemic but some others like Online Gaming and Digital Media remained unaffected. However, in some subsectors like Television, Advertising, Animation & VFX, COVID-19 has adversely affected revenue projections, but the user base or viewership has increased tremendously during the pandemic.

Overall, like in the case of other sectors, the M&E sector has met with substantial challenges with all modes of outdoor entertainment coming to a complete standstill and there were several operational disruptions with difficulties in content creation and distribution through the traditional media outlets. These issues became graver due to the monetary setbacks due to decreasing ad spending across several media outlets except Digital media.

Online gaming and digital media & OTT were two of the industries that remained robust throughout the pandemic. In reality, the pandemic has aided in the advancement of India's digital adoption strategy. Almost everything has gone digital, from businesses and schools to stores selling common groceries, showing a shift in customer behaviour. As there were few entertainment options available during the pandemic, the gaming sector has also experienced a quick increase in user penetration and engagement levels. Since almost everyone in the country was quarantined inside their homes, Over-the-Top (OTT), streaming services, and other digitally enabled services also saw extraordinary subscriber growth and demand during the pandemic. Consequently, COVID-19 had a significant impact on how one accessed content at home and elsewhere.

Though the industry impact was severe, facts point towards a bright future for the M&E industry. Thanks to digital technologies, a few sub-sectors were able to survive and even flourish during the pandemic. It brings us to think about the debate of looking at the M&E sector as a need or a want. Media and Entertainment can be considered both a need and a want, depending on the individual's perspective and circumstances.

On one hand, Media and Entertainment can be considered a need, as they provide essential information, education, and communication channels. News and current affairs programs help people stay informed about the latest events happening around the world, while educational shows and documentaries can help improve knowledge and skills. Entertainment programs such as movies, TV shows, and music can also help people relax and unwind, reducing stress and improving overall well-being.



Figure 5:
**Viewership during COVID-19
Pandemic**

Source:
<https://www.hindustantimes.com/tv/ramayan-is-world-s-most-watched-show-now-breaks-all-records-with-7-7-crore-viewership/story-CaaGYIhVxcxXPUkha9AiM.html>

On the other hand, Media and Entertainment can also be considered a want, as they are not essential for basic survival. People can live without access to entertainment and media, although it may lead to a less fulfilling life.

However, the trends during the pandemic suggest that more individuals prefer M&E as a need which is a positive sign for the industry. Even the losses in the M&E industry were lesser when compared to others like Tourism, Aviation, Retail & e-commerce, etc.



Realizing M&E Sector Potential in India:

Through the Skilling Lens

Subsector-wise trends during COVID-19

Subsector	2019	2020	2021	Trendline	% Growth in 2020
OOH	39	16	20		-58.97%
Animation & VFX	95	53	83		-44.21%
Events & Live Performance	83	27	32		-67.47%
Digital Media & OTT	221	235	303		6.33%
Films	191	72	93		-62.30%
TV	787	685	720		-12.96%
Radio	31	14	16		-54.84%
Gaming	65	79	101		21.54%
Sound & Music	15	15	19		0.00%
Print	296	190	227		-35.81%

TABLE 1: TRENDS DURING COVID-19 PANDEMIC

Key takeaways from this analysis

Two subsectors, Online Gaming and Digital Media & OTT saw growth of 21.54% and 6.33% respectively, in 2020 during the first COVID wave.

The worst hit subsectors were Events & Live Performances, Films, OOH, Radio, Animation & VFX, and Print.

The subsector of sound and music was found immune to the COVID pandemic with little effect on the sector.

1.5

GROWTH DRIVERS IN THE M&E INDUSTRY

As we discussed, the Media and Entertainment (M&E) sector in India has been growing rapidly over the past few years and is expected to continue to do so in the future. Some of the key growth drivers of the M&E sector in India include:

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

1.5.1 India's demographic potential pulling up demand in M&E industry

The demand of Media and Entertainment content is rising in India due to variety of factors including:

India's demographic potential:

The percentage of people who are working age has increased from 50% to 65% during the past seven decades, leading to a striking decrease in the dependency ratio. India will have one of the largest workforces worldwide, according to the World Population Prospects 2022. A younger population means that new Media and Entertainment content will be more widely accepted.

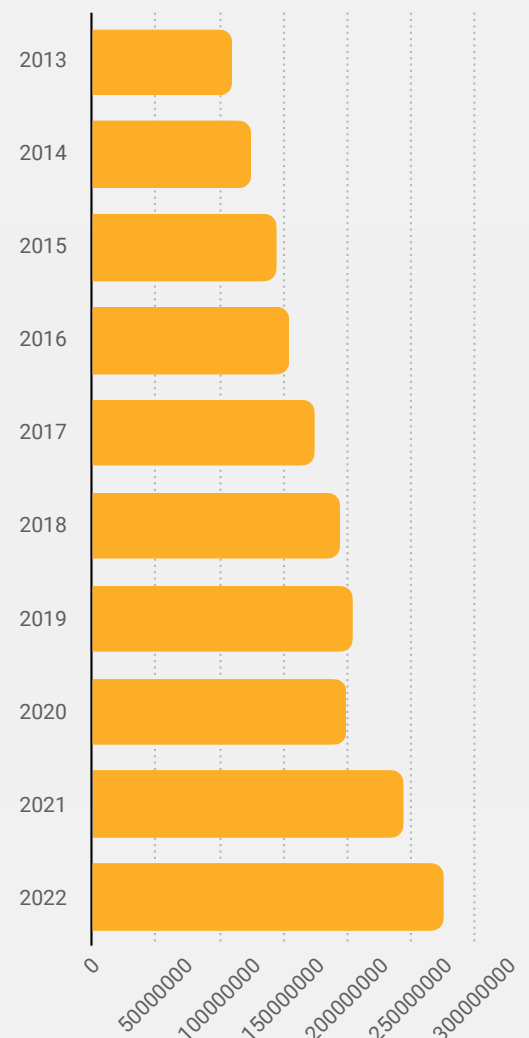
Rise in disposable incomes of individuals:

Disposable personal income in India is expected to reach INR 284,276,336 million by the end of 2023, according to Trading economics global macro models and analysts' expectations.

Overall population growth in the country:

A few reports suggest that India is now the most populous country in the world, with a population of over 1.4 billion. Such a large population allows a large consumer base for Media and Entertainment industry which other countries are lacking.

**Disposable Income in India
2013 - 2022**
(In INR)



Source:
Ministry of Statistics and Programme Implementation

Figure 7: Rise in disposable income in India

1.5.2 Digital India fuelling growth in M&E Industry

The rapid adoption of digital technologies, such as smartphones, internet, and social media, has led to a surge in online content consumption, thereby fuelling the growth of the digital media industry.

INCREASED INTERNET PENETRATION

In an era of information, the internet is one of the defining technologies that drives access and democratizes a nation. Realizing its significance in bridging the digital divide, the government along with the private sector have worked towards strengthening India's digital economy. In 2014, India had just over 233 million internet users with a penetration rate of around 20%. Since then, India has witnessed a revolution in its digital economy with internet penetration doubling to 45% and internet users increasing to 825 million as on 31st March 2021. This number is expected to surpass 1 billion by 2025 with a penetration rate of over 80%.²



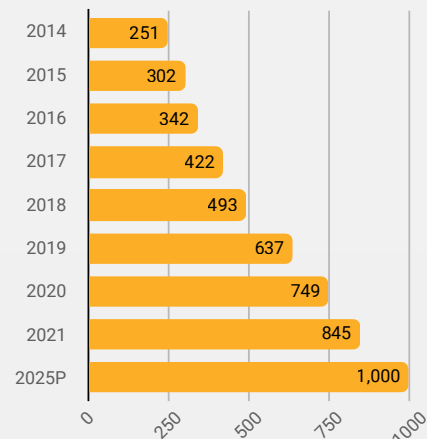
Realizing M&E Sector
Potential in India:

Through the Skilling Lens

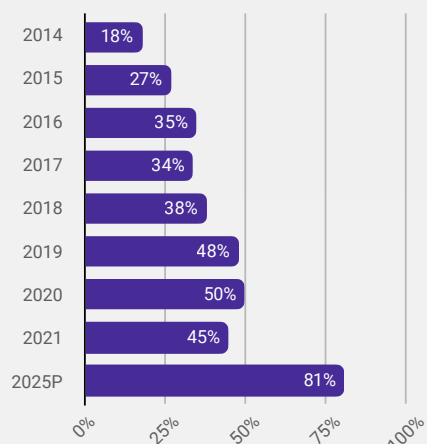
Figure 8: Internet Penetration in India

Source: <https://www.analyticsinsight.net/india-estimated-to-reach-1-billion-internet-users-by-2025/>

Internet Users in India
(In Million)



Internet Penetration in India
(In %)



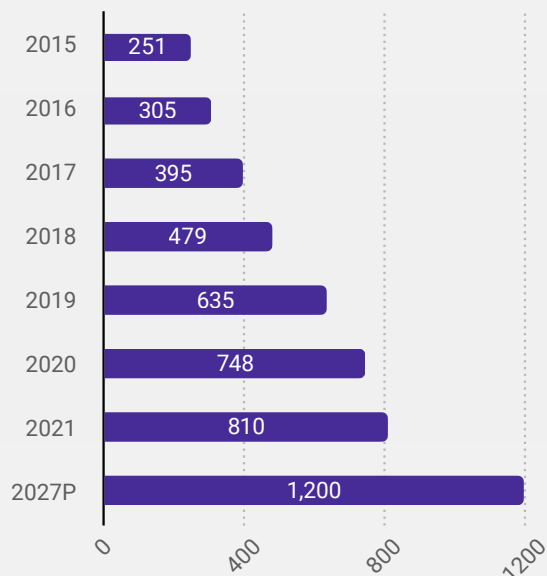
Availability of high-speed, low cost Internet

Today, the average cost of 1 GB data in India is Rs.51.3 as compared to over Rs. 250 in 2014.³ This is well below the global average, making India one of the cheapest destinations for internet data. Further, with the deployment of 5G in India, the nation will witness faster speeds, lower latency, and increased capacity and reliability, bringing several benefits to the esports industry. It is expected that by 2027, India will have 500 million 5G users, accounting for 39% of all mobile subscribers in the country. With this, the number of 4G subscribers will also decline at 2% annually.⁴

Smartphone penetration in India

The smartphone penetration in India has significantly increased in the last decade especially with the launch of affordable smartphones. As per the Ericsson Mobility Report, the number of Indian smartphone users will grow from 810 million at the end of 2021 to 1.2 billion by 2027 at a compound annual growth rate (CAGR) of 7%.⁵ Smartphones have already become the preferred mode of consumption of online content.

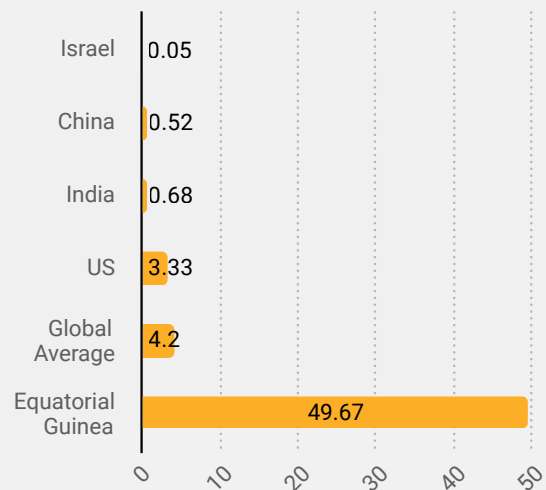
Smartphone Users in India (In Million)



Source: Statista

FIGURE 9: SMARTPHONE USERS IN INDIA

Average Price of 1GB Data in 2021 (In USD)



Source:

<https://www.cable.co.uk/mobiles/worldwide-data-pricing/#highlights>

FIGURE 10: INTERNET COST COMPARISON

- <https://economictimes.indiatimes.com/tech/technology/data-consumption-increased-400-in-rural-india-in-past-one-year/articleshow/84975447.cms>
- Ericsson Mobility report, November 2021
- <https://www.livemint.com/industry/telecom/indias-5g-subscriber-base-expected-to-reach-500-mn-by-2027-11638301188656.html>

1.5.3 Government Interventions catalysing M&E Industry growth

The Indian government has been supportive of the M&E sector by providing tax incentives, easing foreign direct investment (FDI) regulations, and introducing policies to encourage growth in the sector. Let's look at a few initiatives by the Government to support the sector:

- The Government has **increased the FDI limit in teleports, DTH, cable networks, Multi-System Operators (MSOs), mobile TV, and headend-in-the-sky broadcasting services** from 74 per cent to 100 per cent.

.....
- Additionally, the Government has allowed **100 per cent under the FDI route in publishing/printing scientific and technical magazines/speciality journals/ periodicals and in the publication of facsimile editions of foreign newspapers.**

.....
- TRAI announced the **New Tariff Order (NTO) 2.0** by amending the existing NTO. It was to address the teething issues faced by the consumers. After the implementation of NTO 1.0, despite the options being available for selecting each channel and paying only for those channels, 80-85% of customers opted for boutique packs only. It was due to the huge discount given by the distributors on the bouquet of channels. After the implementation of NTO 2.0, there is a provision of a maximum 33% discount on bouquet channels. Additionally, 200 Channels are offered at the base NCF (Network Capacity Fee) price of Rs. 130, while the NCF rates for Multi TV connections were slashed at the same time. It has been a significant growth factor for the television industry.

.....
- In Sep 2018, the Government introduced the **National Digital Communications Policy 2018 (NDCP-2018)** for affordable digital communications infrastructure and services.

.....
- The Government has also targeted to have a **large investment in digital infrastructure over the next few years as part of the recently proposed National Infrastructure Pipeline (NIP)**, including universal digital services, high-speed and quality broadband services, availability of digital payments and e-governance infrastructure for delivery of banking and public services etc.

.....
- A government scheme called **Pradhan Mantri Gramin Digital Saksharta Abhiyaan (PMGDISHA)** is a scheme which aims at making 6 Crore people in rural India, across States/UTs, digitally literate, reaching around 40% of rural households by covering one member from every eligible house-hold, including the marginalized sections of society.

.....

- Ministry of Information & Broadcasting, Government of India, announced a **90 per cent subsidy for the North-eastern States and a 75 per cent subsidy for other States in setting up community radio stations**. Further, the Indian Government approved the **Production Linked Incentive (PLI) Scheme for Telecom and Networking Products as a component of Atma Nirbhar Bharat** to make India a global hub for manufacturing telecom equipment, including core transmission equipment, 4G/5G next-generation Radio Access Network and wireless equipment, access & Customer Premises Equipment (CPE), Internet of Things (IoT) access devices, other wireless equipment and enterprise equipment like switches, routers etc. With the introduction of this scheme, the Government plans to reinforce the production and use of “Made in India” products both for domestic markets and exports.
.....
- In 2017, the Ministry of External Affairs introduced a **Film Visa (F-Visa)**, for film professionals. Having the provision of multiple entries, this visa allows a person to stay up to one year in India. In 2018, the film facilitation office portal was launched as a one-stop shop for all the details about shooting locations, facilities

available for animation, and online submission of applications. In addition to this, it maintains a database of talent available in the Indian film industry. This has been a major growth factor for the film industry.
.....

- The government has launched various schemes and updated policies to stimulate growth in the print media. Time-to-time updates and favourable policies help print media in India to grow. The recent approval of the **Print Media Advertisement Policy 2020** of the Government of India will act as a growth driver for the print media in India.
.....
- As a boost to the arts and culture industry, in Budget 2020, an allocation of INR 3,150 Crore was made to the Ministry of Culture. The amount allocated is proposed to help in the opening of a maritime museum in Lothal, Gujarat among other projects. The budget also proposed establishing an Indian Institute of Heritage and Conservation under the Ministry of Culture.
.....
- National Community Radio Sammelan was organized in 2019 by the Ministry of Information and Broadcasting, to nurture, promote and empower the community radio

sector so that it realizes its full potential in the country’s development journey. Also, the Ministry of Information & Broadcasting announced in 2019 the setting up of 118 new Community Radio Stations (CRS) in Left Wing Extremism-affected districts, Jammu and Kashmir, Northeast, etc.
.....

- In an initiative to provide 100,000 gram-panchayats (village councils) with high-speed broadband connectivity, the Government of India in its Union Budget has proposed to provide USD 845 million to the Bharatnet programme in 2020-21.
.....

- AVGC or Animation, Visual Effects, Gaming & Comics is a part of the M&E industry but is identified as one of the high-growth areas. The AVGC sector shall serve as a major growth driver for the M&E industry in India and to realize the same, the Government of India has designated audio-visual services as one of the 12 Champion Service Sectors.

Strengthening India’s AVGC sector requires a set of focused interventions, beyond just policy making. To realize the real growth opportunity for India in terms of industry potential and

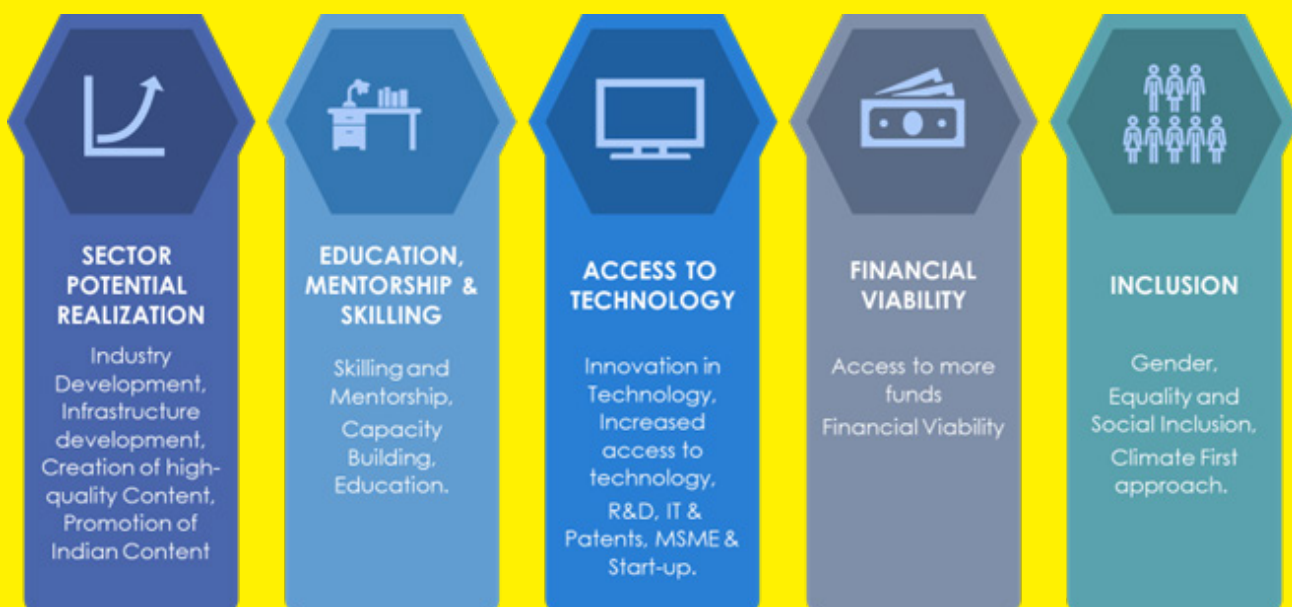
job opportunities, in the Budget speech for the fiscal year 2022-2023, Hon'ble Finance Minister Smt. Nirmala Sitharaman announced the formation of an **AVGC Promotion Task Force** that would drive the institutional efforts to guide the policies of growth for this sector, establish standards for AVGC education in India, actively collaborate with industry and international AVGC institutes, and enhance the global positioning of the Indian AVGC industry. Moreover, the larger idea behind the formation of the Task Force was to unleash the scope and reach of the AVGC sector for it to become a torchbearer of "Create in India" and "Brand India". The Task Force had representation from the following:

- **Central Ministries:** Ministry of Information & Broadcasting, Ministry of Education, Ministry of Skill Development & Entrepreneurship, Ministry of Electronics and Information Technology, Department for Promotion of Industry, and Internal Trade
- **Various Indian States:** Telangana, Karnataka, Maharashtra
- **Nodal Agencies:** CBSE, NCERT, AICTE, MES
- **Industry Bodies:** CII, FICCI
- **Industry Leaders:** Technicolor, Punaryug, Anibrain, Red Chillies, Whistling Woods, Hungama, Zynga, etc.

The guiding principles were evident to enable greater collaboration between the Central - State, Public-Private, and Inter-Ministerial.

In April 2022, the order was issued for the formation of the Task Force along with the Terms of Reference and Members. Soon after, the task force was divided into four sub task forces namely for, Education, Skilling, Gaming, and Industry & Policy. From May to July 2022, consultations were held with 75+ industry experts, Ministries and States across education, skilling, industry development and policies. After several presentations and discussions by the subtask forces and review by the task force, the Final Task Force Report 'Realising AVGC-XR Sector Potential in India' was released in December 2022 along with the National draft AVGC Policy, and model State AVGC Policy.

The main recommendations of the Task Force for the growth of AVGC sector in India can be categorized broadly under 5 pillars:



The sub-task force on Skill Development was chaired by the Secretary of the Ministry of Skill Development and Entrepreneurship, having representation from the Industry Leaders, Industry Bodies, States, and MESC. Like other task forces, a set of Terms of Reference were given basis on which stakeholder consultations were conducted with the sub-task force members. The key discussion points were carried forward to subsequent stakeholder consultations as action items. Post the deliberations and consultations amongst sub-task force members, each of the sub-task forces prepared detailed reports with a set of recommendations, to be considered for incorporation in the core sub-task force action report. The recommendations received were further categorized across the identified levers. The recommendations related to skill development and Education are summarized below:

AVGC Taskforce Recommendations: Skilling and Mentorships

- Defining AVGC related Job Roles, Qualification packs & strong integration with the Education framework:
- Enhanced role of Industry in AVGC sector related Skilling & Mentorship
- Focus on lifelong learning for professionals in AVGC Sector
- Expanding Geographic & content reach of Skilling, improving quality of content created
- Focused attention for development of Train the Trainer models
- AVGC related skilling courses in schools
- Recognition of Prior Learning (RPL) in the AVGC sector
- Identifying, encouraging and skilling individuals, groups and cultural organizations engaged in performing, visual and literary arts etc.
- Capacity Building of professionals working in the AVGC Sector for future readiness of the sector

AVGC Taskforce Recommendations: Education

- Standardization of Education focussed on AVGC sector.
- Promoting Creative Thinking in Schools
- Promoting high quality and well-structured AVGC education across Under Graduation and Post-Graduation
- Developing course content and delivering courses at par with International Standards

The Union Government will soon launch the National AVGC, Animation, VFX, Gaming and Comic Policy and AVGC Mission. The Government has also announced a National Centre of Excellence for the AVGC Industry in Mumbai.



- Acknowledging that training imparted in institutions is not sufficient for the acquisition of employable skills and needs to be supplemented by training at the workplace, the Apprentices Act, 1961 and Apprenticeship Rules, 1962 enacted with the prime objective to utilize fully the facilities available in industries for imparting practical training and thus developing skilled manpower for industries. Initially, the Act covered the apprenticeship training for trade Apprentices. Subsequently, the Act was amended in 1973, 1986 and 2014 to bring the Graduates, technicians, technicians (Vocational) and Optional Trade Apprentices respectively under its purview and Apprenticeship Rules, 1992 were revised in year 2015.

Currently, two apprenticeship schemes are in implementation, namely, National Apprenticeship Training Scheme (NATS) by the Department of Higher Education, Ministry of Education (MoE) and National Apprenticeship Promotion Scheme (NAPS) by MSDE. While NATS implements apprenticeship training for engineering graduates, diploma holders and general steam graduates; NAPS is for the rest of the categories of apprentices.

An apprenticeship portal (<https://www.apprenticeshipindia.gov.in>) has been specially developed to execute the apprenticeship program digitally. The portal is facilitating the registration of establishments/candidates, and the generation of contracts and reimbursements under the National Apprenticeship Promotion Scheme (NAPS). It is providing a wide variety of opportunities to work with industries in various sectors, including Media and Entertainment. All the above schemes and programme focus on specific target group of candidates with intent to bridge the skill gap by imparting on-the-job training and make them Industry-ready and employable.

.....

- The MIB is working on the **National Cinematograph Act**, which will be introduced in the parliament soon.





1.5.4 Technological advancements opening new doors for the M&E Industry

The development of new technologies, such as augmented reality (AR), virtual reality (VR), and artificial intelligence (AI), has enabled the creation of new content and delivery mechanisms, leading to an increase in the sector's overall revenue. The production, distribution, and consumption of material have all changed because of recent significant technological breakthroughs in the Media and Entertainment (M&E) sector. The following are some significant technological developments in the M&E sector:

Digital Platforms

The rise of online distribution channels like streaming services has changed how people consume media. Consumers may now more easily access a wide variety of material whenever and wherever they choose thanks to digital platforms.

Artificial Intelligence

AI is being used in the Media and Entertainment sector to improve production and produce more individualised content. Users' data is analysed by AI algorithms to recommend content that is pertinent to them.

Blockchain

In the M&E sector, blockchain technology is being leveraged to provide more open and secure methods for handling rights and

royalties. This innovation could do away with middlemen and lessen the threat of piracy.

Virtual and Augmented Reality (VR / AR)

Consumers can have immersive experiences thanks to VR and AR technology. While AR is utilised in advertising and marketing to create interactive experiences for customers, VR is employed in the game industry to create immersive settings.

Cloud Computing

The storage, management, and distribution of content have become simpler for M&E businesses thanks to cloud computing. Processes for producing content are now more effective, and content is being distributed to customers more quickly.

1.5.5 Rising Investments aiding growth in the Industry

The M&E sector has seen a significant increase in investments from both domestic and foreign investors, which has helped fuel its growth.

- The Indian Media and Entertainment (M&E) sector has seen a significant rise in investments over the past few years. According to a report by FICCI-EY, the M&E sector in India saw a growth of 13.4% in 2019 to reach a size of INR 1.82 trillion (USD 25.4 billion), with investments totalling INR 385 billion (USD 5.4 billion) during the year.
- As per data published by Invest India, FDI inflows during April 2000 – December 2022 for Information & Broadcasting (Including Print Media), accounted for 1.6% of the total FDI investment in India.

13.4%
Growth of the M&E sector in India in 2019, as per FICCI-EY report

INR 1.82 Trillion
Size of the M&E sector in India in 2019, as per FICCI-EY report

INR 385 billion
Investments into the M&E sector in India during 2019, as per FICCI-EY report

1.6%
Share of FDI inflows in Information and Broadcasting, out of the total FDI investment in India during April 2000 to December 2022, as per Invest India.



1.5.6 Indian Content Resonating with Global Audiences

A country with as much culture, diversity, and history as ours ought to be a storyteller's paradise. Indian cinema is made up of not just one but multiple content and entertainment sectors. In the past, we have avoided or resisted utilising the benefits of variety in the Indian content and storytelling.

The tides have turned today. Consider the outstanding documentary - *The Elephant Whisperers*, which made history by being the first Indian production to ever win the Oscars, the world's most prestigious film award. In the past, we might have refrained from telling a story like this to a general audience because we anticipated the difficulty of finding an audience.

Also, when the song "Naatu Naatu" from India won the Oscars, it announced the diversity of Indian Media and Entertainment Industry being a separate entity from Bollywood. It indicates that it is time for the narrative to shift and for India to create stories that can travel across the world by harnessing the collective strength of the Indian film industry.

Tales from the heartlands, folklore, or even mythology are finding a proud home on the global stage today. These tales are primarily of Indian provenance. The world is eager to learn more about India, its distinctive characteristics, and what sets us apart from other nations.



PROF. SANDEEP SHAHARE

Director, Film and Television
Institute of India (FTII)

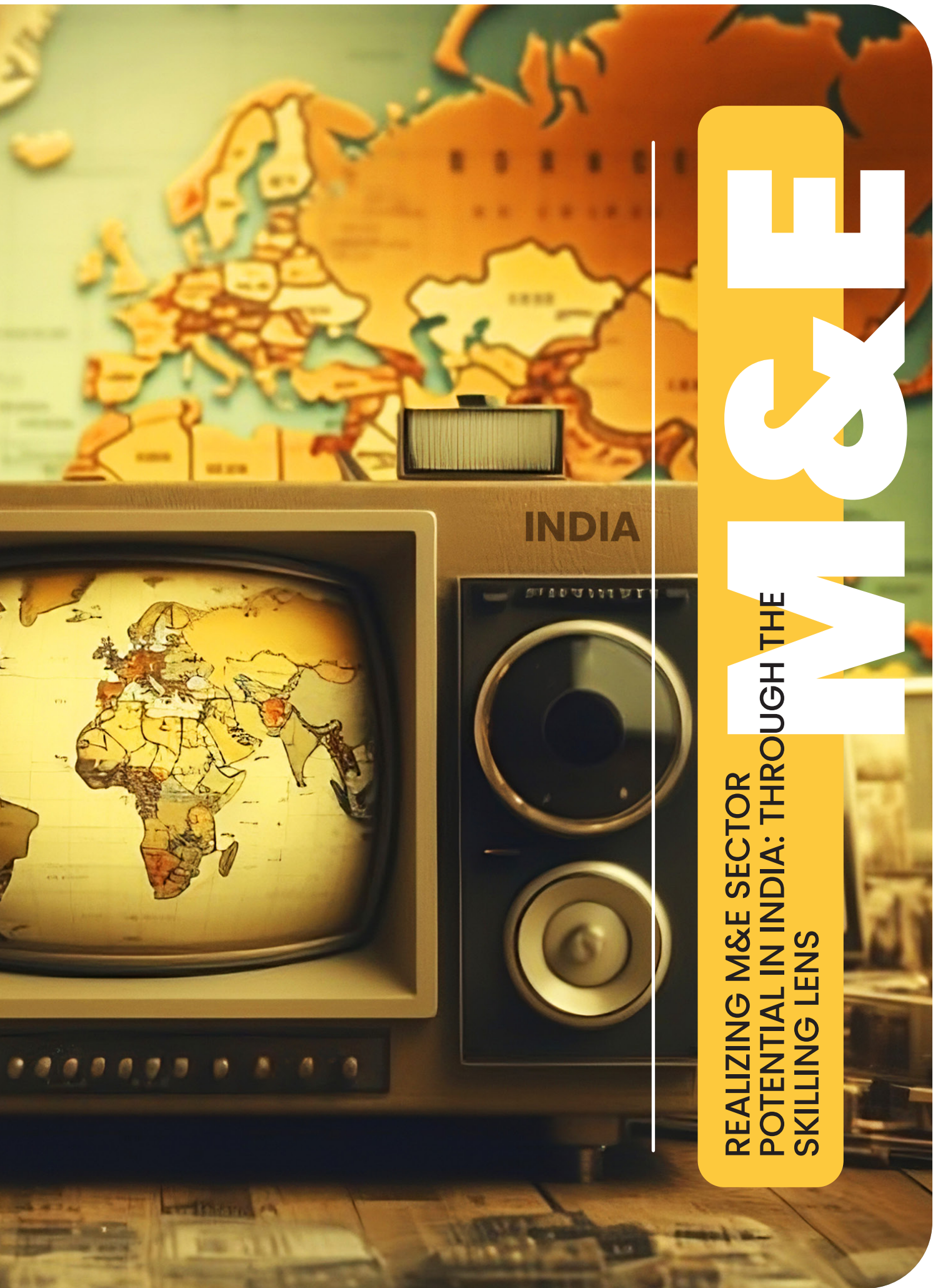
EXPERT'S OPINION

"The Media and Entertainment Skills Council has done a commendable job in bringing out this report, which provides a comprehensive overview of the Indian M&E industry. The report highlights the importance of skilling in the M&E sector and provides valuable insights into the growth drivers of the industry, the global positioning of the Indian M&E sector and the skill gaps that need to be addressed. The report will be an enabler in unlocking the true potential of the sector which requires a strategic focus on skilling."

02

Positioning Indian M&E Industry on Global Map





**REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS**

M&E

2.1 GLOBAL MEDIA AND ENTERTAINMENT MARKET: AN OVERVIEW

0.9%

Contribution of India's M&E sector to Indian GDP very less compared to other nations

13%

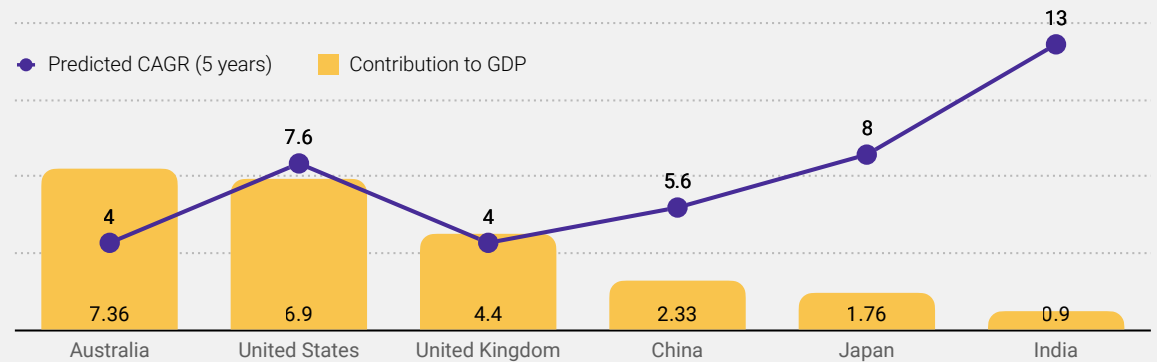
Predicted growth of M&E sector for the next 5 years, one of the highest in India

The US

Biggest M&E market, but estimated growth rates are lower than those of India

Figure 11:
Growth Trends of Global M&E Markets

Comparison of M&E Markets around the globe



Source:

- <https://www.pwc.co.uk/industries/technology-media-and-telecommunications/insights/entertainment-media-outlook.html>
- <https://www.statista.com/topics/3795/gdp-of-the-uk/#topicOverview>
- <https://www.statista.com/statistics/237772/value-of-the-chinese-entertainment-and-media-market/>
- <https://www.statista.com/statistics/263770/gross-domestic-product-gdp-of-china/#:~:text=In%202022%2C%20the%20gross%20domestic,reached%20around%2012%2C814%20U.S.%20dollars.>
- <https://www.zippia.com/advice/media-and-entertainment-industry-statistics/>
- <https://www.statista.com/outlook/dmo/app/entertainment/japan>
- <https://www.statista.com/topics/7407/media-industry-in-japan/>
- <https://www.pwc.com.au/industry/entertainment-and-media-trends-analysis/outlook.html>

2.2

POSITIONING OF INDIAN M&E INDUSTRY IN COMPARISON TO GLOBAL INDUSTRY

The Indian Media and Entertainment (M&E) industry is one of the fastest-growing industries globally. It is positioned as a significant player and is comparable to its counterparts in terms of market size, content production, and technological advancements.

2.1%

Share of India in the global M&E industry, making it the 7th largest M&E market in the world

US and China

Have around 50% market share of the Global M&E Industry

Largest Media & Entertainment Markets in the World

Rank	Country
1	United States
2	China
3	Japan
4	Germany
5	United Kingdom
6	France
7	India
8	Brazil
9	Mexico
10	Indonesia

Table 2: Top Global M&E Markets

2.2.1 SWOT Analysis of Indian M&E Industry



Figure 12: SWOT Analysis of M&E Industry in India



Strengths

The Media & Entertainment Industry in India is ever evolving and has its own set of unique strengths. While the market for entertainment consumption is constantly expanding (both domestically and internationally), India has a very strong talent pool that can cater to these demands. There are umpteen creative stories that are waiting to be told and taken to the world stage from the land of India. The workforce possesses all the needed skills to accomplish this task as they are technologically equipped, self-driven, motivated and knows the art of telling intriguing and captivating stories despite budget constraints and other limitations.

Threats

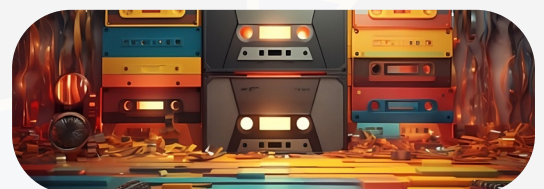
To ensure that the full potential of the M&E industry is realized, the following threats need to be addressed going forward. The foremost challenge in that aspect is the frequent technological disruptions which pose a threat to the business-as-usual approach. Industry players which fail to adapt as per the changing consumer expectations risk becoming irrelevant in this domain. Also, the circulation of pirated content and copyright infringement needs to be controlled so that the loss of revenues can be minimized. Further, the competition from foreign markets threatens the established players and patterns. Creators need to constantly reimagine their plan of action and creative choices to stay relevant in the times to come.

Weaknesses

The Media and Entertainment Industry is vast, and its various sub-sectors function in a fragmented way. Due to this, there is a lack of coordination, knowledge-sharing and thus underutilization of collaborative opportunities. The risk-taking ability of creators and experimentation with innovative storyline is also dwindling given the massive resources that are put at stake. New creators also struggle with funding and investment opportunities to tell their stories and often they end up compromising on their vision or project.

Opportunities

Today, there are a boundless list of opportunities that are present in the Media and Entertainment world. While the advent of digital and OTT platforms has created the space and acceptance for unconventional stories, the easy accessibility to audience has opened many doors. Disruptive technologies like augmented/virtual reality, metaverse have opened a new era of immersive entertainment for consumers. In addition to this, the popularity of regional and niche content has signalled that audiences are looking forward to more real and relatable stories thereby creating space for 'people of the grassroots' to emerge and claim their space.



2.3

OVERCOMING KEY CHALLENGES TO UNLOCK THE POTENTIAL

Lack of authentic data for the M&E Industry

Non availability of data such as employment, industry size, education intuitions, etc., for M&E industry, makes decision making tougher for entities.

Lesser Focus on Research Development

There is also a need to develop research related narrative for the M&E industry, so that dedicated focus can be given to it.

Content Piracy

Piracy poses a serious problem for the industry since it reduces income and stunts the development of legitimate platforms. Content that has been downloaded or streamed illegally deprives its producers and distributors of their due compensation.



Regulatory Complexities

The industry operates under complex and evolving regulatory frameworks, including censorship rules and intellectual property rights. Adhering to these regulations while maintaining creative freedom and commercial viability can be challenging.

Changing Consumer Patterns

Consumer behaviour is shifting towards personalised and on-demand content consumption, which presents problems for traditional media companies. It's crucial to adjust to these shifting consumption habits and discover fresh approaches to draw in and hold consumers.

Content Piracy

Piracy poses a serious problem for the industry since it reduces income and stunts the development of legitimate platforms. Content that has been downloaded or streamed illegally deprives its producers and distributors of their due compensation.

Need for Holistic Academic Curriculum

As the market dynamics are changing, the academic curriculums for already established industries like Print, TV, Films, etc., need review and upgradation owing to the latest international standards. At the same time, certain subsectors like AVGC, Digital Media & OTT, Event & Live Performances, etc., require a formal academic curriculum designed as per industry requirements.

Need to explore the Startup Ecosystem of India

Promotion of innovative ideas and entrepreneurship in the M&E Industry in India will act as an enabler for the entire industry. The National Design Business Incubator of NID or Centre for Innovation, Incubation & Entrepreneurship (CIIE) of IIM A has provided the necessary impetus in the field of design and numerous functional areas respectively. Aspiring entrepreneurs not only create various job opportunities but also foster economic growth of the industry. New inventions and disruptive innovations will enable the Indian M&E industry to grow at a faster pace, matching international standards. Hence, there is a need to promote an ecosystem of start-ups in the industry through incubation facilities.

Skill Gap in the Media & Entertainment Sector

It is one of the challenges of M&E industry, if harnessed properly, has the potential to be one of the greatest strengths. The industry is still evolving and so are the required skillsets. 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. In the following sections, we will deep dive into the skilling ecosystem and skill gaps in the industry.

03

Skilling in M&E Industry: An opportunity for India to build competitive advantage



Media & Entertainment Skills Council



**REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS**

M&E

3.1 INTRODUCTION TO SKILLING IN THE MEDIA AND ENTERTAINMENT INDUSTRY



The skillset demand in the Media and Entertainment industry is constantly evolving given the rapid technological advancements, upgradation of business models and evolution of storytelling formats. Owing to these changes, the demand for skills is also evolving in the global M&E Industry. Digital Literacy, Content Creation and Strategy have become very critical skill sets. This requires an individual to know things like video production, photography, graphic designing, and social media management. Developing a content strategy that aligns with the goals of the company and the needs of the audience is essential for success.

Data Analytics is another important tool to possess. As the industry becomes more data-driven, the

ability to analyse data and extract insights is becoming increasingly important. This includes skills such as data mining, data visualization, and data interpretation. To succeed in the Media and Entertainment industry, it's crucial to engage with your audience and thus skills such as audience research, community management, and digital media marketing are becoming highly valued. Further, with the industry becoming more globalized, cross-cultural communication skills are becoming increasingly important. Thus, the relevancy of skills such as language proficiency, cultural awareness, knowledge of global industry trends and global media literacy.

While the above general skillset is needed to make an impact in the present landscape of M&E, the Indian Industry is also on the lookout for specialized skills such as filmmaking & production, animation & visual effects, advertising, journalism, event management, sound engineering and music production.

In addition to this, business-driven skills, the ability to handle pressure and crisis management have become more relevant than ever. Recruiters also look for a proactive approach in the candidate and soft skills such as out-of-the-box thinking, self-motivation, agility and flexibility are preferable traits. It's important to stay up to date with the latest trends and technologies to remain competitive and succeed in this dynamic field.

To create a thriving ecosystem where the required skillset and support can be imparted to aspiring

professionals, collaborative efforts of relevant stakeholders such as industry players, academic institutions, government, thought leaders, etc., is highly paramount. At an educational level, there is a need for curriculum development and upgradation for M&E courses as per the latest technological trends and in-demand market skills. Industry-academia partnerships need to be promoted so that there are sufficient opportunities for knowledge transfer and young professionals get the required insight as to what is needed to succeed in a particular domain. Also, to enable an individual to gain practical experience in the industry, it is helpful if they are provided with apprenticeships/internships based on their merit. At present the system of apprenticeship is highly network-driven, which demotivates outsiders.

Industries & governments should also invest in organizations and training institutes where focus on niche and special skills can be given. Certification programs are also a good way to impart industry-relevant skills and knowledge to aspiring professionals. The government should support all these initiatives through financial incentives, enabling policy environments and appropriate regulatory frameworks. All these measures are important for the industry to adapt to the changing times and continue providing quality entertainment to audiences.

3.2 THE SKILLING ECOSYSTEM

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 13: The Skilling Ecosystem

3.2.1 Education and Skilling Institutions

Institutes for education and skill development are essential in equipping people with the necessary skills and preparing them for the workforce. These institutions offer formal education and training courses that give students the knowledge, abilities, and attitudes they need to succeed in their chosen field. The following are some ways that education and skill-building institutions should better fulfil their role in the ecosystem:

- **Providing Quality Education:** Education and skilling institutes need collaboration with the industry, thought leaders, industry leaders, and the private sector to provide quality education essential for developing the skills and knowledge required for a particular profession.
- **Developing Soft Skills:** Soft skills such as communication, problem-solving, teamwork, leadership, and time management are essential for career success. Education and skilling institutes should not only provide technical skills but also focus on developing soft skills necessary for effective communication and working in a team.
- **Bridging the Skills Gap:** Education and skilling institutes should play an active role in bridging the skills gap in the job market. They should enhance their capacity to provide training and education programs aligned with the industry's needs and ensure that the graduates are equipped with the right skills.
- **Improving Employability:** Education and skilling institutes should focus to improve employability by providing training programs that are designed to meet the demands of the job market.

3.2.2 Industry

The industry plays a crucial role in skilling the workforce. The industry decides the demand for skills and the required job roles. It will require collaboration with education and skilling institutes to upskill or reskill their existing workforce while providing the gap assessment data to prepare the future workforce. The industry can also help prepare training programmes to cater to specific needs. Thought leaders, allied industries, and skills councils help the industry estimate the demand, assess skill gaps, identify job roles and skills for the future, and keep the employees up to date with the latest trends and technologies.

3.2.3 Government

The Government can provide the right institutional support to enable smooth coordination and facilitation between the different stakeholders. It monitors and supports the system while protecting the rights of the labour market and employees. Overall, the Government should play a critical role in the skilling ecosystem by providing funding, setting standards, facilitating partnerships, monitoring outcomes, and providing support services to individuals. By doing so, the government can help ensure that individuals have the skills they need to succeed in the workforce and that the economy has a steady supply of skilled workers to meet the demands of the labour market.

Various government initiatives are listed in sector 1.5.3. The Indian government is supporting the skilling initiatives in the sector through different schemes like PMKVY, SANKALP and STRIVE schemes, apprentice schemes, etc.

EXPERT'S OPINION



MR. BIREN GHOSHE

Chairman - CII National AVGC Committee and
Country Head - Technicolor India

“ As industry professionals, we have a responsibility to collaborate with educational institutions and training bodies to bridge the skill gap. The MESG’s skill gap report serves as a valuable resource for identifying areas of improvement. ”



MR. CHAITANYA CHINCHLIKAR

Vice President & Business Head, CTO and Head of Emerging Media, Whistling Woods International



“ Regular training sessions conducted by industry experts should be implemented for teachers and trainers of Media and Entertainment courses. This will ensure that they stay updated with the latest industry practices and trends. Currently, there is minimal exposure for teachers and trainers to the real working environment in the industry. Additionally, short-term refresher courses aligned with National Qualification Framework (NSQF) would greatly assist professionals in upgrading their knowledge base. ”

DR. VINAY SWARUP MEHROTRA

Professor & Head, Curriculum Development & Evaluation Centre (CDEC) PSS Central Institute of Vocational Education (PSSCIVE), NCERT



“ Skill gaps in Media and Entertainment sector can arise due to rapid technological advancements, changing audience preferences, and the ever-evolving nature of creative content. The aim of this Skill Gap Report is to help organizations, educational institutions, and policymakers understand the areas where investments in Vocational Education and Training (VET) or Skill Development programmes are most needed. By identifying skill gaps, VET providers can address the issues related to job placements, and retention of the vocational pass-outs and also ensure a talent pool that meets the industry’s evolving needs. I am sure the report will be very useful in reducing the disparity between the skills an employer expects their employees to have and the actual skills employees possess in the Media and Entertainment sector. MESG’s skill gap report stands out for its comprehensive coverage of all aspects of Vocational Education & Trainings, reflecting a job well done.”

3.3

EVOLVING SKILL REQUIREMENTS

The Media and Entertainment sector is constantly evolving, and so are the required skillset for the workforce. In this changing environment, many job roles will become obsolete, and many more will emerge as per the requirements of the industry.

Currently, due to disruption in technologies, new subsectors have emerged at a fast pace, including Online Gaming and Animation & VFX. There are no formal educational courses available for these newly emerged subsectors. The industry primarily relies on certification courses for its manpower needs.

Other subsectors like Sound & Music, Art & Culture, and Live Events don't even have courses and curricula for education and skilling. People learn these out of their passion. As technology is disrupting this space, this space also needs upgradation to meet global standards.

There are a few subsectors - Print, TV, Radio, and Digital, where Journalism and Mass Communication are regarded as the most preferred course. However, there are no specific courses available for them to provide specialisation in the subsector. Additionally, the curriculums are not in sync with the changing market realities where the share of Digital is increasing at a much faster pace than that of TV and Print.

Due to the unorganised skill mapping, huge demand-supply gaps are creating problems for the industry. A few subsectors are in dearth of talent, while others cannot employ the huge supply of human resources. Additionally, self-employment and entrepreneurship possibilities should be realised and encouraged for the holistic development of the industry.



3.4

THE IMPORTANCE OF UPSKILLING AND RESKILLING

In today's quickly changing employment market, upskilling and reskilling are becoming more and more crucial. Many jobs are becoming obsolete due to technology advancements and shifting market demands, while new jobs that call for new skill sets are also developing. Employees who do not adapt to the changes run the risk of losing their relevance and their jobs.

Upskilling is the process of learning new skills or honing ones you already have that apply to your present position. This can involve taking courses, picking up new software or tools, going to workshops or seminars, or going after advanced degrees.

Reskilling, on the other hand, entails picking up whole new abilities to change careers. Although it could necessitate more intensive training and education, this might be an excellent investment in your future.

Both upskilling and reskilling can be advantageous for employees because they make them more valuable to their current company or more marketable to potential employers. These abilities can also increase job satisfaction and open better employment prospects.

Upskilling and reskilling are crucial for remaining relevant and competitive in the competitive work market of today.



“What you have learnt today will surely become the base of your future, but you have to upgrade your capabilities according to the future. So, when it comes to skill, your mantra should be skilling, reskilling, and upskilling. Do keep an eye on what new is taking place in whatever field you are in.”

- Hon' Prime Minister Shri Narendra Modi

3.5

NEED FOR TRAINERS

For the success of any skilling ecosystem, skilled and quality trainers are essential. For a diverse industry like Media and Entertainment, the need for trainers is even more crucial. The M&E industry is growing at a fast pace, and so is the demand for skilled professionals.

To meet the growing demand for skilled professionals in this sector, there is a need for qualified trainers who can provide quality training and education to aspiring candidates. Trainers play a crucial role in shaping the skills and knowledge of the workforce and can contribute to the growth and development of the industry. Due to rapid technological advancements, there is a growing need to reskill/upskill the trainers. The Train the Trainers module is the need of the hour for the Media and Entertainment Industry.

To facilitate the training of trainers, the M&E Industry can collaborate to develop a Trainer's portal. The portal may have the following features:

1

Availability of latest learning material at subsidized rates.

2

Training Courses to promote cross-sectoral learnings.

3

Courses having joint certification by global companies like Adobe, Autodesk etc.

4

Facilitation of a trainer exchange programme.

5

The portal should facilitate knowledge sharing sessions with stakeholders in the Indian IT Industry to learn about arrangements for technology transfer, co-production, and outsourcing of work between Indian and foreign companies.

6

Facilitate train the trainer courses to ensure trainers are up to date with real time demand in the industry as per international standards.



3.6

CHANGES IN TRAINING METHODS POST-COVID

The COVID-19 epidemic has had a big impact on how training is carried out across all professions and companies. The implementation of traditional training methods that relied on in-person instruction has become difficult or impossible as a result of the transition to remote work and social distancing practices.

As a result, many organisations were forced to change their training practices and embrace new ones that were more appropriate for remote and virtual environments. Here are a few modifications made to training procedures following COVID:

Remote Training

A lot of businesses now use this method to train staff members from anywhere in the world by utilising technology. Remote training can be accessed by a range of devices, including computers, tablets, and smartphones, and may entail webinars, virtual classrooms, and online courses.

Video-Based Learning

As a result of COVID-19, video-based learning has grown in popularity. Videos are an efficient and interesting way to communicate instructional material, making them perfect for distance learning.

Microlearning

Providing learners with brief, easily digestible material is known as micro-learning. Given that it can be delivered in brief spurts, this method is perfect for distance learning because it helps students retain information.

Gamification

It is the use of game mechanics and design components in settings other than games, such as training. Organisations can boost student engagement and motivation by incorporating gaming into their training programmes.

Mobile Learning

As more individuals work from home, mobile learning is becoming more and more crucial. Learners can access training materials on their smartphones or tablets thanks to mobile learning, which makes it learn easier on the go.



04 International Alliances to strengthen skilling initiatives





REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS

M&E

India is currently the 7th largest M&E market in the world with a relatively small share compared to US and China. One way to fuel rapid growth in human resource potential in India is alliances with global industry leaders. Below are a few ways of potential international alliances in Media and Entertainment sector that can support skill development in India:

Co-Production Contracts

India can sign co-production contracts with other nations, enabling the co-production of films, TV shows, and other forms of media. These partnerships encourage cultural diversity and the sharing of knowledge and skills. For instance, India has contracts for co-production with nations like the UK, France, and Germany.

Training Programmes

International media organisations and entertainment businesses might collaborate with their Indian counterparts to organise training programmes and workshops. These efforts might concentrate on things like storytelling, digital media, visual effects, animation, & filmmaking. Such programmes expose Indian professionals to international norms and practises, improving their skills.



Scholarships and exchange programs

These can be made available to Indian students and professionals through international alliances, giving them the chance to experience and interact with the world's media markets. These opportunities, which promote cross-cultural learning and skill development, may include internships, study abroad programmes, and academic partnerships.



Technical Co-operation

To give Indian Media and Entertainment organisations access to cutting-edge software, hardware, and infrastructure, international technology businesses can partner with them. Such partnerships can help with technical skill development and give Indian experts the chance to produce high-quality content.



Content Partnerships

Indian Media and Entertainment organisations can work with foreign production companies and streaming services to create content partnerships. These partnerships may entail co-production, distribution, or licencing arrangements, allowing the sharing of abilities, assets, and creative know-how.



High-quality content. International film festivals and industry events

These can be held in India, bringing in producers, directors, and other industry experts from all over the world. These gatherings offer a setting for cooperation, knowledge exchange, and networking. They can also feature masterclasses, panel discussions, and workshops that concentrate on professional growth and market trends.



Governmental Initiatives

By developing benevolent structures and policies, the Indian government may assist international coalitions. This may entail providing financial incentives for foreign partnerships, lowering coproduction requirements, and fostering cross-cultural understanding through Media and Entertainment efforts.

The Media and Entertainment industries have several worldwide alliances and partnerships that promote cooperation, content exchange, and cross-cultural understanding. Here are some noteworthy examples:



The Motion Picture Association (MPA) is an international trade organisation that speaks for the majority of the world's leading motion picture studios. Companies including Disney, Warner Bros., and Universal Pictures are among its members. The MPA addresses issues including copyright protection, piracy, and market access in its efforts to advance and safeguard the interests of the film industry on a global scale.



The European Broadcasting Union (EBU) is the largest association of public service media organisations in the world, with members predominantly from Europe but also from other continents. It promotes communication and collaboration among its participants, fostering the sharing of knowledge, skills, and technical resources. The EBU promotes cross-cultural interaction through music * television by organising events like the Eurovision Song Contest.



The International Federation of the Phonographic Industry (IFPI) is a group that speaks for the music business globally. It works together with record labels, musicians, and national organisations to advance the value of recorded music, protect copyright, and support benevolent legislative and policy frameworks.



International Academy of Television Arts and Sciences International Council (International NATAS) globally encourages the best television production and programming. In addition to organising the international Emmy Awards to honour great television shows from around the world, it promotes information, idea, and content exchange between television professionals from other nations.



Despite not being specifically related to media & entertainment, the World Intellectual Property Organisation (WIPO) is vital to the global protection of intellectual property rights. It manages international agreements and gives member nations a venue to discuss and formulate laws governing copyright, patents, and trademarks - essential components of the Media and Entertainment sector.



05

MESC spearheading the skilling initiatives in the Industry





REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS

M&E



Founded in 2012, Media & Entertainment Skills Council (MESC) is a Not-for-Profit Organization, registered under the Societies Registration Act, of 1860. The Council has been promoted by the Federation of Indian Chambers of Commerce & Industry (FICCI) with financial support from National Skill Development Corporation (NSDC).

Figure 14: About MESC

5,64,195+
Trainings conducted under MESC



850+
Affiliated
Training
Partners



2000+
Certified
Trainers



350+
Affiliated
Colleges &
Universities



100+
Qualification
Packs



Objectives

The key objective of MESC is to work as a bridge between industry and academia and create a robust and vibrant eco-system for the overall skill development in Media & Entertainment Space.

1

Develop National Occupational Standards matching benchmarks in line with Industry requirements and consumers.

2

Standardization of affiliation accreditation, assessment, and certification process in accordance with NSQF as determined by NSQC.

3

Conduct transparent and fair assessment through technology enabled platform & certify candidates on successful completion.

4

Making high quality content available to aspirants at a very economical cost.

5

Integrating continuous professional development programs for upskilling and re-skilling of trainers & Industry professionals.

6

Develop state of the art infrastructure across the Country to offer Industry aligned skilling programs offering exciting career opportunities for graduating aspirants.

7

Setting up of Centre of Excellence and Creative Entrepreneurship to facilitate research, innovation, incubation and nurturing startups.

8

Promote skill India mission and benefits under various govt. initiatives across the country.

9

Identify, nurture and skill the candidates for national and international competition and ensure we bring pride and glory to the country thus promote the importance of skill enabled programs.

10

Develop opportunities in collaboration with Industry partners for Internship, Apprenticeship, placements, and entrepreneurship.



5.1 SKILLING INITIATIVES IN M&E

The Media and Entertainment Skills Council is supporting various industry-aligned initiatives for skills development in the sector. These initiatives include:

- Identification of Skill Development Needs by preparing a catalogue of skill types
- Developing Qualification Pack and NOS based on industry know-how.
- Developing Quality Assurance Framework to ensure outcome-based learning.
- Deploying and maintaining a platform to support employability – Labour Market Information System
- Process Standardization – Accreditation, Affiliation, & Certification
- Training of Trainers for Building Industry-Academia Connect



**CREATIVE
WARRIORS**

SKILLS@PATHSHALA

Other unique Skill Development Programs & Initiatives by MESCS include:

No.	Subsector	Initiative	Details
1	Training Ecosystem	Creative Warriors - University, College, & Schools	Customised exclusive programmes National & International Exposure Experts & Celebrity Talk Live Projects Interactive Online Content NSQF Aligned Certificate
2	Online Training Programs	Vidyadaan & Creative Warriors	Free and paid workshops, webinars and training programs for the candidates getting trained in partnered Institutions by bringing the experts from the industry.
3	RPL	Recognition to Prior Learning	RPL is a platform to provide recognition to the informal learning or learning through practice to get equal acceptance as the formal level of education.
4	Skill Development Training Programs	Govt. Reward Money Program	PMKVY (Govt Reward Money) DDIJGKY NIJLM Special Projects
5	Training Ecosystem	Affiliation and Accreditation - Training Partners	Any Education Body / Vocational Training provider (TP) can seek affiliation from Media and Entertainment Skills Council in delivering the requisite elements of a NOS based vocational training.
6	Industry Linked Initiatives	NAPS	National Apprenticeship Promotion Scheme (NAPS) is a new scheme of Govt. of India to promote apprenticeship. It was launched on 19th August 2016. Apprenticeship Training consists of Basic Training and On-the-Job Training/Practical Training at workplace in the industry.
7	Competitions	Worldskills	WorldSkills competitions are organized once every two years in one of the 86 member countries. These competitions take place for 50+ skills and participants are under the age of 23.
		AWSITC	MESC established 15 Authorized WorldSkills India Training Centres to train and groom the future WorldSkills Competitors.
8	Industry Linked Initiatives	Job Fair & Placements	Bridging the gap between students and Industry so that we can ensure and provide more opportunities to students and great placement options for future talents.
9	Awareness Programs	Participation in MECAT	MESC is extending its support to fill the skilled manpower gap in M&E industry by conducting a national level "Media & Entertainment Creative Aptitude Test (MECAT)".

Table 3: Skilling Initiatives by MESCS

No.	Subsector	Initiative	Details
11	Training Ecosystem	Creative Warriors - University, College, & Schools	“Media TalkBack” formulated in 2017 is an innovative new age initiative by MESC. Media TalkBack is the Showcase of Industry Expertise, Opportunities, Possibilities, and Real-Life Stories.
12	Online Training Programs	Vidyadaan & Creative Warriors	MESC continued with its Series of Industry Academia interactions by hosting 23 virtual Training partner meets where industry and training partners were collaborated and brought on a single platform to understand exact skill requirement which the employer has presently and in the coming future so that training centres can start preparing candidates accordingly
13	RPL	Recognition to Prior Learning	This is another initiative by MESC which has been continuing with over years now, was given virtual shape during COVID by conducting 12 industry round tables. The core objective was to understand the future requirement of the industry and also understand typically what the industry’s major requirements.

Table 3: Skilling Initiatives by MESC (contd.)





06 Skill Gap Study of M&E Industry: Key Observations





REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS

M&E

6.1

KEY TRENDS FROM THE STUDY

After the analysis, below are the key findings regarding the skill gaps in Media and Entertainment Industry:

1

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.

2

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.

3

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.

4

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 skills gap analysis also suggests the need for content creation skills to provide the necessary boost with the industry.

5

There is a need to develop business and management skills within the industry to provide the industry with the right support to maximise the content reach as well as acceptability.

6

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

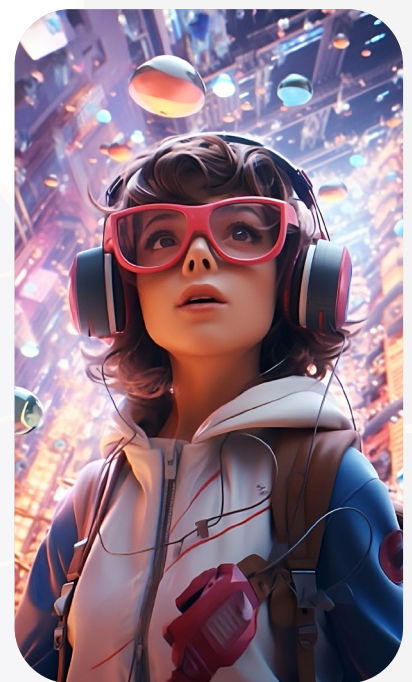


6.2 ONLINE GAMING, ANIMATION & VFX, AND DIGITAL & OTT TO LEAD HUMAN RESOURCE DEMAND IN THE INDUSTRY

6.2.1 Direct Employment

Employment generated in the core activities of the Media & Entertainment sector is known as direct employment. This includes both the formal & informal sectors. Media and Entertainment Industry with INR 260,035 Crore revenue contribution during FY 2019 directly employs ~15,11,610 personnel.

Further, this industry is expected to employ ~ 22,90,686 by FY 2025, with further incremental demand of ~7,79,075 people to be employed in the industry with an employment elasticity of 7.2%. Let's explore sub-sector wise direct employment projections:



Subsector-wise Employment in M&E [2019 - FY 2027E]

Source: AVGC Promotion Task Force Report

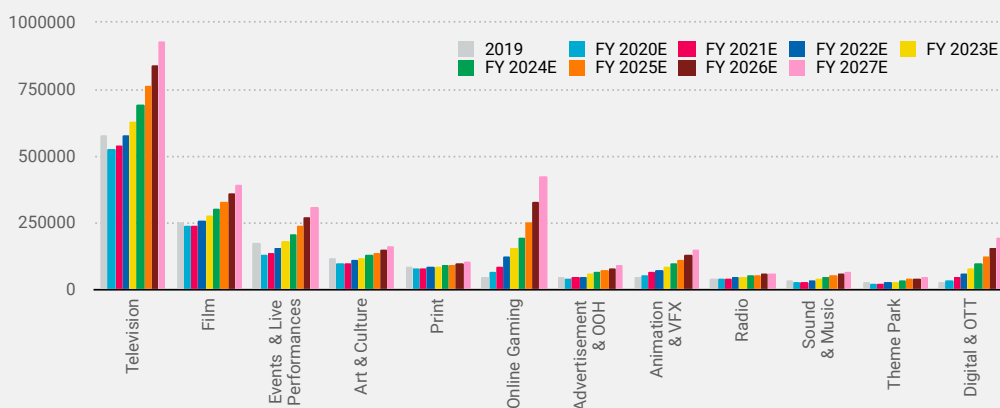


Figure 15: Employment Projections

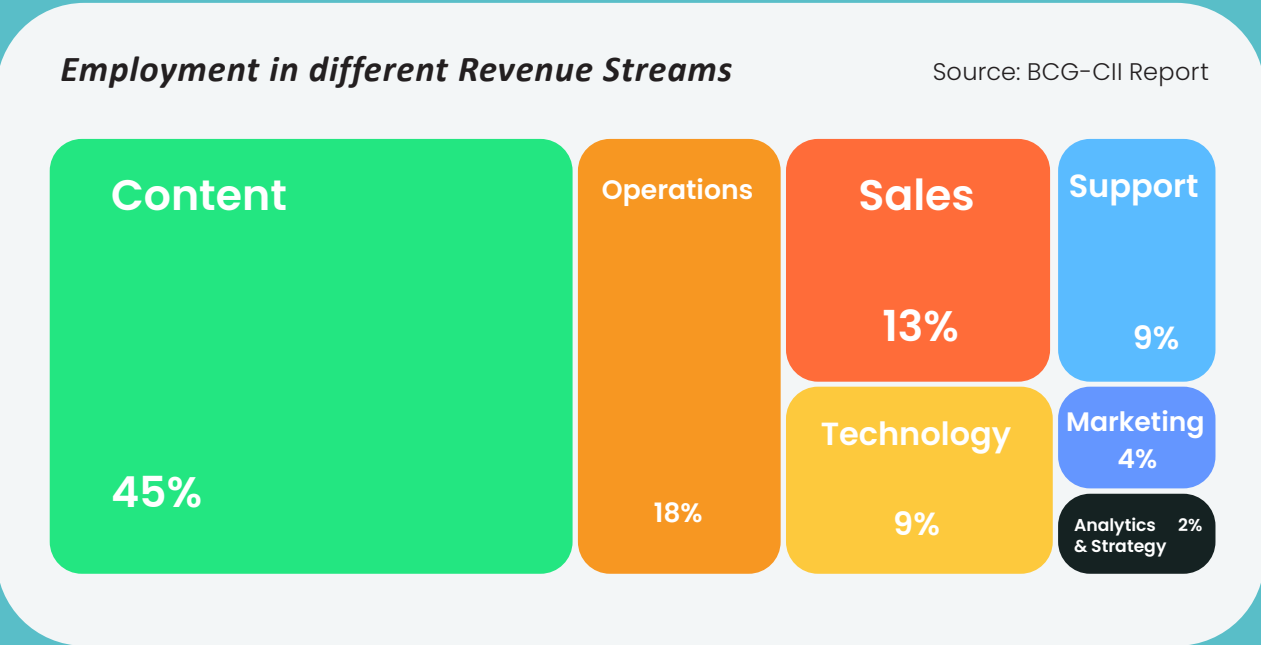
Employment Sub-sector wise	2019	FY 2020E	FY 2021E	FY 2022E	FY 2023E	FY 2024E	FY 2025E	FY 2026E	FY 2027E	Growth
Television	580000	527510	541858	578813	630906	694565	764646	8,41,799	9,26,736	6.03%
Film	256000	238080	242842	257412	278005	303026	330298	3,60,025	3,92,427	5.48%
Events & Live Performances	176998	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%

- 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 31.27%, 27.27%, and 15.43% respectively.
- Television and Films will remain the sectors with the highest number of employees, but the growth rates will be lower (CAGR<5%)
- Print and Art & Culture subsectors are expected to witness the lowest growth in terms of direct employment potential.



The core activities of the Media & Entertainment Industry can be segregated into Content, Operations, Sales, Technology, Support, Marketing, and Analytics & Strategy. The employment share within these core activities is described below:

Figure 16: Revenue stream-wise employment



6.2.2 Indirect Employment

Indirect employment includes employment in upstream industries that supply and support the core activities of the M&E sector. In the Media & Entertainment Industry, the main drivers of indirect employment opportunities will be communication and electronic equipment (TV, Mobile phones, PC, headsets, etc.). Additionally, financial services, infrastructure services, and transportation are significant indirect contributors to the industry.

As per the BCG-CII ME report 2017 and Primus Estimates, the indirect employment opportunities within the ME sector will comprise around 50 Lakh opportunities by 2027 in India, signalling a much greater economic impact.

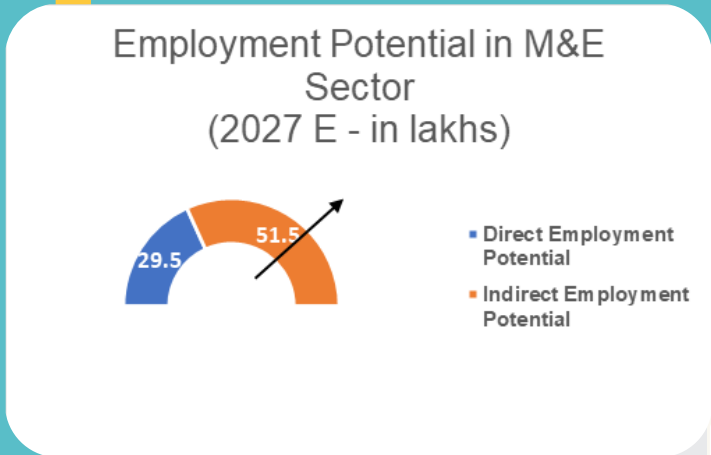


Figure 17: Employment Potential

6.3

SKILL GAPS IN THE MEDIA & ENTERTAINMENT INDUSTRY

We have also identified a few skills, which according to experts, will be relevant in future, and hence makes sense to invest in learning those skills. These skills include the following:

High Demand Job Roles in M&E

No.	Qualification Pack Name	QP ID	NSQF Level	Job Role Training Duration
1	Actor	MES/Q0208	4	465
2	Advertising Operations Coordinator (Digital) - TV	MES/Q0206	4	280
3	Animator	MES/Q0701	4	280
4	Assistant Cameraman	MES/Q0903	4	280
5	Camera Operator	MES/Q0902	5	520
6	Character Designer	MES/Q0502	4	280
7	Clean Up Artist	MES/Q0506	3	160
8	Colour Key Artist	MES/Q0505	3	160
9	Compositor - TV	MES/Q3505	4	280
10	Community Journalist	MES/Q1904	4	430
11	Dancer	MES/Q1201	3	440
12	Editor	MES/Q1404	4	280
13	Graphic Designer	MES/Q0601	4	470
14	Hairdresser	MES/Q1802	4	280

Table 5: Job roles in high demand

No.	Qualification Pack Name	QP ID	NSQF Level	Job Role Training Duration
15	Lighting Artist	MES/Q0504	4	280
16	Live Action Director	MES/Q1301	7	550
17	Location Manager	MES/Q2804	6	550
18	Make-Up Artist	MES/Q1801	4	280
19	Modeller	MES/Q2501	4	280
20	Music Programmer - Sound	MES/Q1503	5	590
21	Production Assistant	MES/Q2805	4	280
22	Rigging Artist	MES/Q2502	4	280
23	Roto Artist	MES/Q3504	4	280
24	Sales Coordinator (Media Organization)	MES/Q0204	4	280
25	Sales Executive (Media Org)	MES/Q0203	4	280
26	Sales Manager (Media Organization) - TV	MES/Q0202	6	760
27	Search Engine Optimization Executive	MES/Q0704	44	330
28	Search Engine Marketing Executive	MES/Q0705	4	365
29	Set Carpenter	MES/Q3103	3	160
30	Set Decorator	MES/Q3109	5	520
31	Set Painter	MES/Q3104	3	160
32	Set Plasterer	MES/Q3106	3	160
33	Social Media Executive	MES/Q0702	4	340
34	Social Media Manager	MES/Q0703	5	365
35	Sound Assistant	MES/Q3403	3	160
36	Sound Designer	MES/Q3401	5	520
37	Sound Editor	MES/Q3404	4	280
38	Sound Engineer	MES/Q3402	4	280
39	Unit Production Manager	MES/Q2803	6	550
40	Voice-Over Artist	MES/Q0101	4	280

Table 4: Job roles in high demand (contd.)

Medium Demand Job Roles in M&E

No.	Qualification Pack Name	QP ID	NSQF Level	Job Role Training Duration
1	Account Executive (Advertising Agency)	MES/Q0207	5	520
2	Advertising Operations Coordinator (Digital) - Print	MES/Q0206	4	280
3	Animation Director	MES/Q1302	6	550
4	Art Director (Animation and Gaming)	MES/Q0501	5	520
5	Composer - Film	MES/Q3505	4	280
6	Digital Marketing Manager	MES/Q0706	7	345
7	Layout Designer	MES/Q0503	4	280
8	Line Producer	MES/Q2802	6	640
9	Music Producer - Sound	MES/Q1502	6	640
10	Music Composer/Director - Sound	MES/Q1501	7	790
11	Props Master	MES/Q3108	5	520
12	Sale Director Media Organization - Films	MES/Q0201	7	1480
13	Sales Manager (Media Organization) - Print	MES/Q0202	6	760
14	Script Editor	MES/Q3001	7	550
15	Script Writer	MES/Q3002	6	500
16	Script Researcher	MES/Q3003	5	520
17	Storyboard Artist	MES/Q0507	3	160
18	Texturing Artist	MES/Q2503	4	280
19	Traffic Coordinator (Media Org.)	MES/Q2505	4	280
20	VFX Editor	MES/Q3501	4	280

Table 5: Job roles in Medium demand

While there is a supply surplus in the job market of the M&E industry, still the above-identified skills and related job roles and very much in market demand. The skilling ecosystem must balance the requirements of skilled individuals in the above skill sets for even faster growth.

6.4

EMERGENCE OF FUTURISTIC SKILLS

We have also identified a few skills, which according to experts, will be relevant in future, and hence makes sense to invest in learning those skills. These skills include the following:

Futuristic Job Roles in M&E

No.	Job Roles	Subsector	Description
1	Programmatic Display Advertising Manager	Advertisement & OOH	This role is all about designing programmatic display campaigns and assisting the manager to create marketing materials to support channel adoption, develop advanced advertising strategies and providing those strategies to clients.
2	Programmatic Coordinator	Advertisement & OOH	The coordinator assists the team with executional aspects of campaign management processes, develops and delivers performance updates and assists with day-to-day management of digital media plans
3	Digital Advertising Specialist	Advertisement & OOH	The specialist's role is to execute the building, testing, and optimizing of campaigns on major social media platforms and monitor and analyse the performance of digital marketing campaigns.
4	Insights Manager	Advertisement & OOH	This job role would be to ensure full utilization of solutions and satisfaction of users, research/understanding customer needs, enable actionable insights via platform, drive the end-to-end process for ad measurement solutions.
5	Design Architect	Animation & VFX	This job entails designing the interior and exterior of the devices used in AR/VR like helmets and goggles.
6	System Validation Engineer	Animation & VFX	This role requires fixing the bugs/issues that might arise in the software that goes into the applications. Job requires inspection, calibration and testing the equipment/device to ensure smooth functioning and improve workflow efficiency.
7	3D Artist	Animation & VFX	With the demand for animated content increasing at a rapid rate, 3D artist is one of the main job roles that is already in high demand and expected to remain so in the near future. This involves creating special effects using combination of software and hand drawn techniques.

Table 6: Futuristic Skills

No.	Job Roles	Subsector	Description
8	Technology fabricator	Art & Culture	The technology fabricator is responsible for assisting in the design, fabrication and implementation of electronics hardware and software for better visitor experience.
9	Patron Information Data Analyst	Art & Culture	The Patron Information Data Analyst (PIDA) will be the museum's technical specialist for visitor, donor and member data and related business processes. Their job role involves supporting the specialized application needs of museum staff members by providing support, reporting, and specifications for enhancements of museum's CRM and ticketing system.
10	Drama therapist	Art & Culture	They use drama or theatrical processes in order in to achieve therapeutic goals. Drama therapists perform controlled sessions where theatre and drama-based activities are used to observe and explore the behaviour, attitudes and emotions of individuals experiencing physical, psychological, emotional or mental health problems.
11	Email marketer	Digital Media & OTT	Role is essentially about emails campaigns, developing new and attractive content for emails and acquiring customers via emails.
12	Pay per click/Search engine marketer	Digital Media & OTT	The role of search engine marketers is to enable a company to get their website on the very first page of search with investment. Pay per click is a way to get maximum return and reach many people with minimum investment.
13	Social Media Marketer	Digital Media & OTT	It includes marketing by creating and developing vibrant and engaging content and thereby attracting customers for the social media platform.
14	Digital Media Specialist	Digital Media & OTT	Role is to develop content that would be used for various digital media platforms. These knowledgeable digital specialists would have the skills to create content, use special effects, animation etc. for different applications from websites to video games and even commercials.
15	Digital Media Planner	Digital Media & OTT	Digital Media planners' role is key to future's fast-paced digital world. They orchestrate the placement of marketing content into different digital media like social media or display media or podcasts, to amplify a campaign's efforts. They are the go-to people for strategizing content, executing campaigns across various outlets, and reporting on the return on-investment (ROI) of the campaign.
16	Digital Researcher	Digital Media & OTT	The digital Researchers is essentially responsible for organizing, collecting, and analysing opinions and data to solve various digital-related website problems of the company. They specifically work with data related to an organization's digital media, and research information from online advertising, social media, digital marketing and see to it that all function well.

Table 6: Futuristic Skills (contd.)

No.	Job Roles	Subsector	Description
17	Showrunner	Digital Media & OTT/Film	With increase in demand for movies related to specialised subjects viz. history, sports, biographies, children, animal etc, domain experts in movie making in several themes would be in high demand in the OTT industry. They would act as a catalyst to keep the audience engaged to the movies.
18	Domain theme Experts	Digital Media & OTT/Film	Sports management is an upcoming field in India. The sports managers with knowledge and interests about sports and trained for management of sporting activities manages all aspects of the sports events at all stages before, during and after the events.
19	Sports event manager (Sports manager)	Event & Live Performance	Agents and business managers of artists, performers, athletes, or other celebrities who represent and promote them with current or prospective procurers of their services. They may also handle contract negotiation and other business matters for their clients.
20	Celebrity managers	Event & Live Performance	A technology manager coordinates an events' technology operations including hardware, software and networking & communication requirements, procurement, and operations; technology enablement of event, provision or procuring of a customised tech platform etc. It may also include social media management for the event.
21	Event technology manager	Event & Live Performance	Responsible for delivering video promos, digital content, and video. Further they control the viewership of advertisement
22	Audio Visual (AV) production specialists	Film	They play a very important role in today's era of social media marketing by way of designing appropriate strategy to increase the user base and by spreading the word as much as possible through innovative ideas.
23	Social media specialists	Film	Their role is to apply machine learning with cross functional teams. They help in designing and developing of machine learning algorithms and models
24	Machine Learning Architect	Online Gaming	They use statistical and data mining techniques to solve and model complex problems and identify opportunities. Their responsibilities include designing experiments and testing hypothesis to optimize operations along with solving analytical problems. This helps in creating personalised content by allowing real time interaction. They use performance analytics to identify weakness, track improvements and observe trends.
25	Data Scientist	Online Gaming	They help in creating ML products and should possess statistical and programming knowledge. They are responsible for developing data science prototypes, running machine learning tests and experiments and performing statistical analysis using test results. They use the strength of algorithms to make predictive models to predict the actions of a player in a game.

Table 6: Futuristic Skills (contd.)

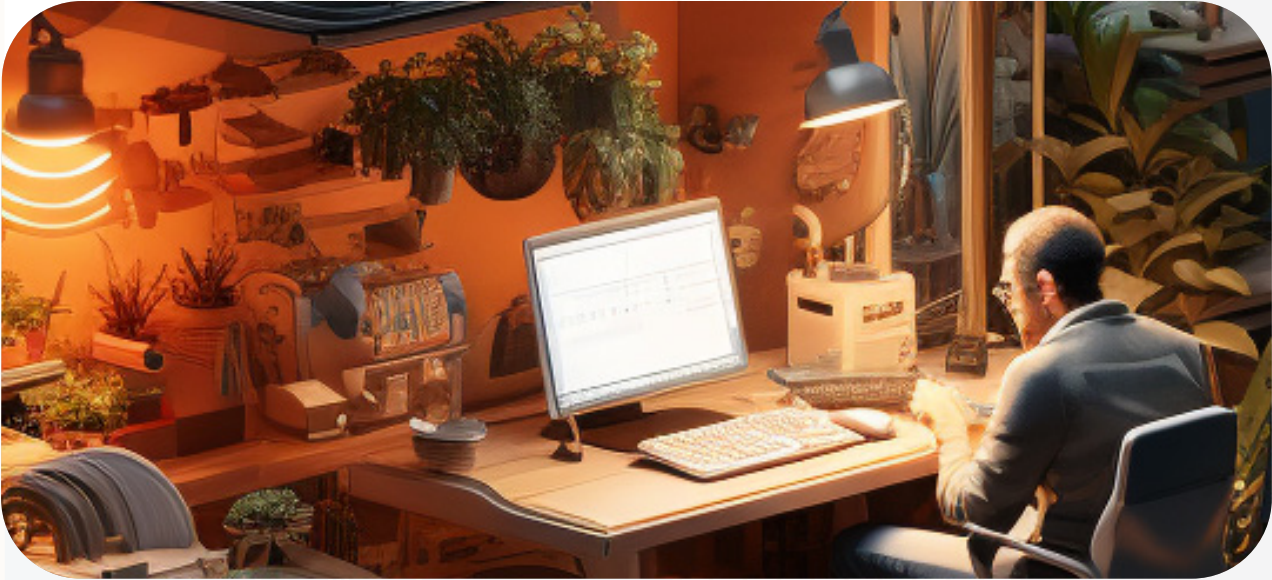
No.	Job Roles	Subsector	Description
26	Machine Learning Engineer	Online Gaming	Since cloud gaming is still in its infancy in India, this role can create excitement and enthusiasm for cloud services for game developers. Their role will be to help game developers learn how to leverage cloud services successfully.
27	Cloud Developer for Gaming	Online Gaming	Their role will include using 3D models, visualization of various gaming scenarios and providing technical expertise to ensure proper integration of G&V products.
28	Gaming and Visualization(G&V) Development and Integration System Engineer	Online Gaming	Fact checkers are the professionals who check the authenticity of the news. This job role will be in demand because of the blooming of fake news and diminishing credibility of journalism.
29	Fact Checker	Print	This is going to evolve as one of the demanded job roles because of the paucity of time by the readers. Readers would assign a limited time on contents. So, the custom packagers would devise ways to include as much content on a particular subject for its reader to be satisfied and engaged. This job role would be more for the digital e-newspaper segment.
30	Custom or Theme Packagers	Print	with general reporting getting spread out on digital and social media platforms, Domain expert journalist would be in high demand in the print media. They would act as a catalyst to keep the readers hooked to the print media. Domain journalists could be in the area of business, crime, technology, sports, development etc.
31	Domain Journalists	Print	They are responsible for a variety of aspects like the tone of the radio podcast, the content discussed, the audience which would be targeted and for marketing.
32	Podcast Producers	Radio	Their role is to make sure that the content of the podcast is finely tuned with the audience it is targeting and that the story/ message of the podcast is disseminated in its right essence. They help in structuring stories with the podcast writers.
33	Content Curators	Radio	With no boundaries per se in the music world and technology playing a major role in connecting fans all around the world with their favourite artists, bilingual (or even multi-lingual) vocal coach is expected to become a new job title with artists being trained to sing in other languages than their own.
34	Bilingual Vocal Coach	Sound & Music	In order to keep differentiating themselves from other run of the mill shows, and especially in the wake of the pandemic, hologram of artists is a unique way of connecting with the audience. This also helps in fans being able to connect with artists who are no more with us, for example a concert with a hologram of Michael Jackson is bound to create a full house, given his status and legacy. This is a new specialisation and hologram developers will be in demand in the future.

Table 6: Futuristic Skills (contd.)

No.	Job Roles	Subsector	Description
35	Music Hologram Developer	Sound & Music	Playlist scientists are a major attraction for all streaming services and a new job role is expected to arise in the future whose responsibility will be to cover all major platforms and curate the playlists accordingly.
36	Playlist Scientist	Sound & Music	With music being loved all over the world, it is very critical for a band/artist to connect with international audience. Their role will be to work in a record label company and make sure that the artist is introduced and recognised by audiences in other countries or regions.
37	Crossover ambassador	Sound & Music	Many jobs which involve the manpower today, might be eliminated through use of artificial intelligence in future. Hence, the resources proficient in the relevant software's may see the rise in demand in future.
38	Artificial Intelligence experts	Television	Script writers who could write out of box stories for Channels would be in demand. This becomes more important as channels would be in competition with OTT platforms to get more eyeballs.
39	New age Content/ Script writer	Television/Film	Emphasis should be on including the VFX skills, social media & digital marketing course in the curriculum as the television sector requires these added skills for better employment.
40	Technology artists/ personnel	Television/Film	As the use of VR increases, it can be used as a marketing tool for theme park previews. The role would be to help potential visitors to check out rides virtually before going to the theme park. Such immersive options are bound to increase the number of people visiting a theme park.
41	VR Marketing operator	Theme Park	Use of AR will require specialist positions like projection mapping specialist which can be used to entertain guests while waiting in queues
42	Projection mapping specialist	Theme Park	Extending AR interaction by incorporating guests' preferences with theme park's environment will bring a new dimension to theme park experience. The role will require creation of AR apps which the guests will have to download and follow directions enhance their experience.
43	AR app developers	Theme Park	Their job will be to propose creative experiences to partner organisations, which will attract guests through digital distribution and streaming technologies.

Table 6: Futuristic Skills (contd.)

By focusing on the above skills, the skilling ecosystem can ensure enhanced employment opportunities, and aspiring individuals can improve their chances of getting employment in the industry.



Comparison of Futuristic Roles across Subsectors

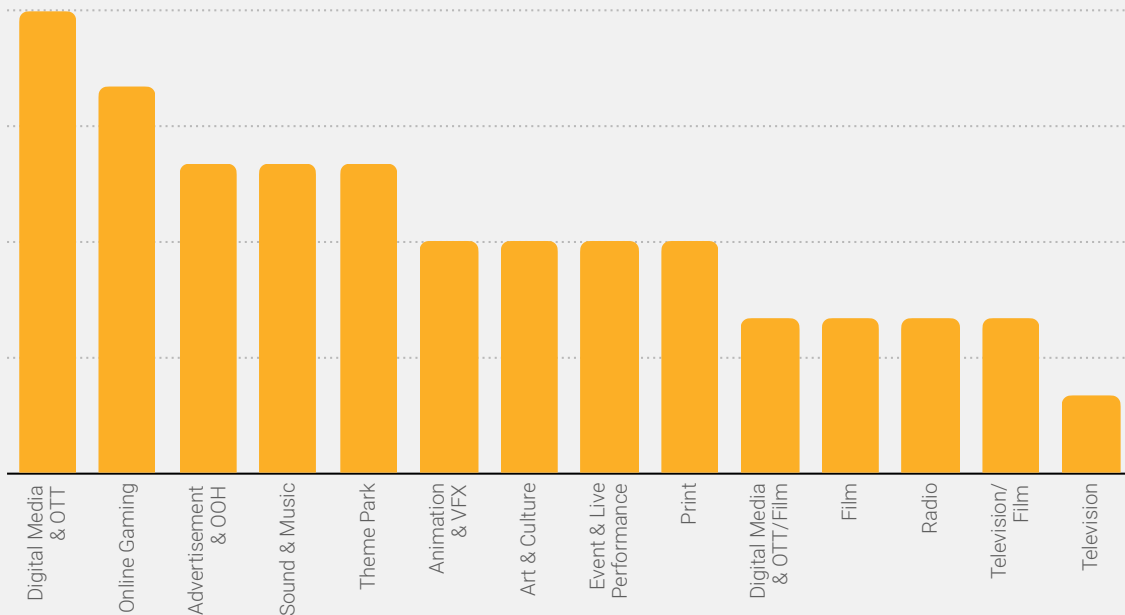


Figure 18: Subsector-wise Futuristic Roles

EXPERT'S OPINION



MS. LEENA JAISANI

Assistant Secretary General, FICCI and Head
Media and Entertainment Division, FICCI

“ FICCI firmly believes that the Media and Entertainment Sector is currently witnessing a remarkable transformation. We have observed a notable shift in the landscape, with traditional media platforms, such as television, print, films, Out of Home Advertising, Live Events and performances, Music, Radio, and Art & Culture, gradually diminishing in comparison to the emergence of new age media, which encompasses digital and OTT platforms & Animation, VFX, gaming and Comics. FICCI recognizes that addressing the existing skill gap in the industry demands a collaborative effort between industry stakeholders and training providers. We are happy to witness the launch of the MESC’s skill gap report, as it serves as a significant milestone in laying the foundation for such collaboration.

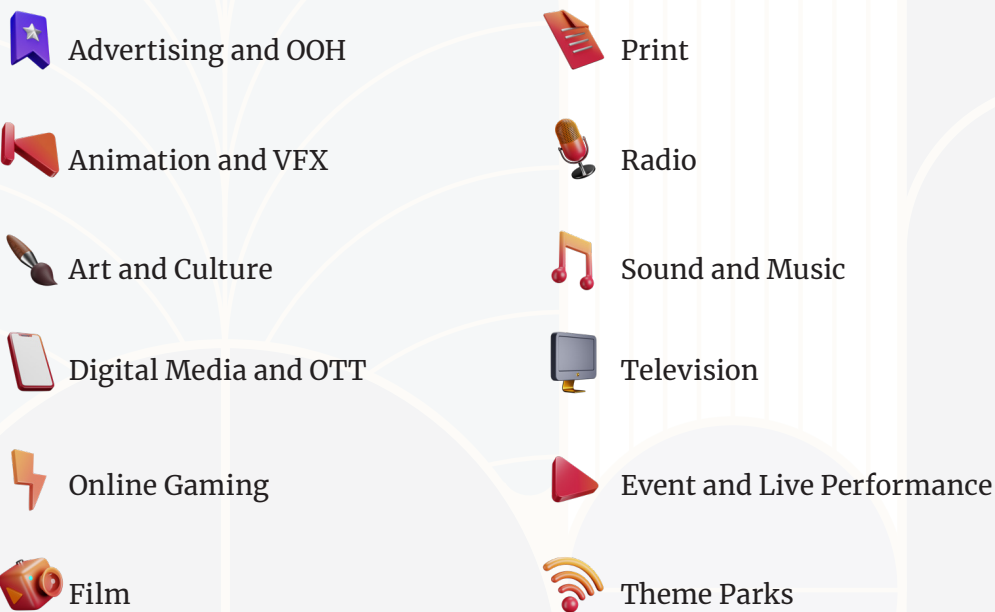
And FICCI acknowledges the need for continuous adaptation and upskilling to meet the evolving demands of the industry. By embracing this transformation and working hand in hand with various stakeholders, we can foster a dynamic environment that nurtures talent, harnesses innovation, and drives the growth and success of the Media and Entertainment sector. ”

6.5

M&E

SUBSECTORS

The M&E Sector in India is making significant strides and is standing at the cusp of transformation. As has been mentioned previously, the M&E Industry in India can be categorized into 12 subsectors:



The growth of each of these sectors contributes to the growth of overall M&E sector in the country. Among various drivers of sectoral growth, availability of skilled and trained workforce is a crucial factor.

This chapter therefore aims to present a summary of each subsector, with focus on employment opportunities and demand for skilled professionals in the respective subsectors. The total estimated employment presented for each subsector takes into account various external factors such as technological environment, changes and/or updates in policy landscape, political factors, as well as the impact of COVID-19.

The chapter also highlights state level industry trends and various futuristic and emerging roles in each subsector, that require focus from skilling perspective.



6.5.1 Advertising and OOH



Subsector in Focus: Advertising and OOH

The Advertising and Out-of-Home (OOH) subsector holds immense significance within India's M&E sector. In the ever-evolving landscape of Media and Entertainment, advertising plays a vital role in driving revenue and sustaining the industry.

The OOH subsector, specifically, provides an effective platform for brands to engage with the audience in a visually compelling manner. With the rise in digital technologies, OOH advertising has evolved to incorporate innovative and interactive elements, enhancing the overall consumer experience.



The advertising segment had, however, witnessed negative growth during the COVID-19 pandemic, which led to a decline in advertising spends. However, according to industry estimates, the subsector is envisaged to grow at a CAGR of ~8.35%, clocking an increase in revenue from INR 71,880 crore in FY 2019 to ~INR 1,36,559 crore in FY 2027, as depicted in the graph below. Further, nearly 95% of revenue comes from advertisement while OOH contributes ~5%.⁶

This growth will be driven by various factors such as increasing digitization, infrastructure, rapidly evolving technologies, increased spending by the Government on communications, among others. Besides these factors, availability of future-ready skilled workforce will also serve as a key growth driver for this subsector.

Revenue Trends - Advertising and OOH (In INR Crores)

Source:
MESC Report, 2021

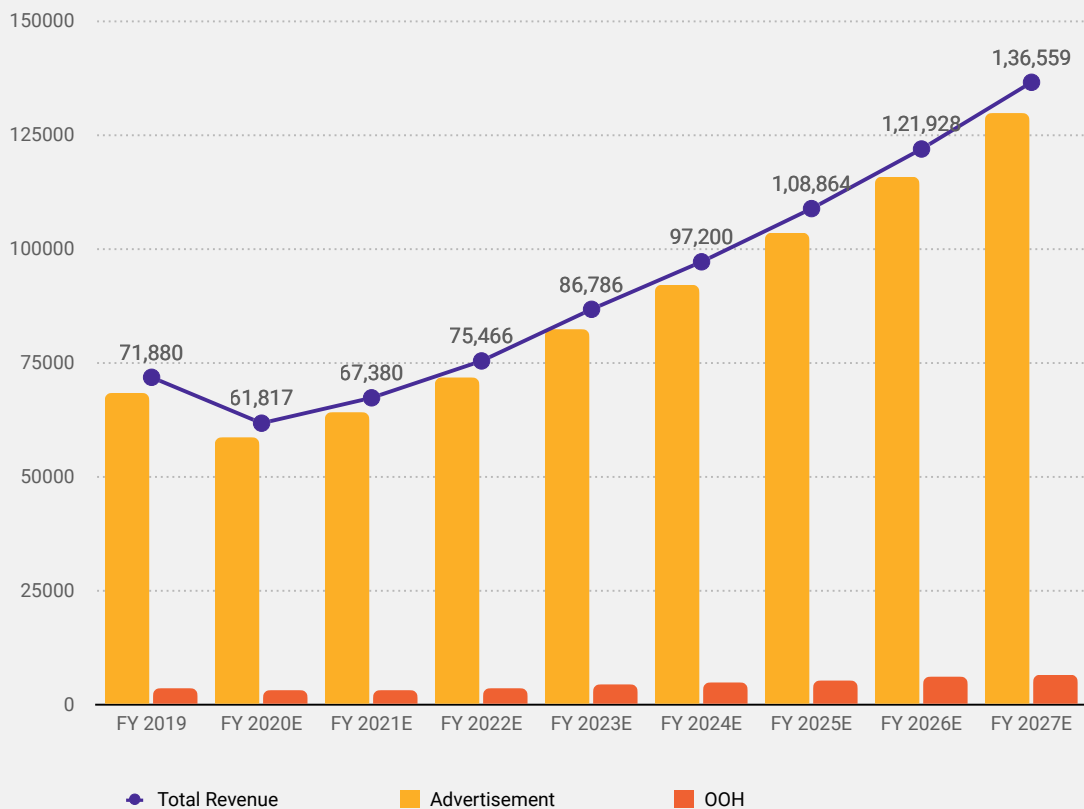


Figure 19: Revenue Trends of Advertising and OOH Subsector

Source :

- [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Advertising and OOH

As has been mentioned above, advertising and OOH will play a vital role in the growth of the M&E industry in the country.

In this context, the subsector is projected to generate employment opportunities in the M&E ecosystem, as depicted in the table and graph below:

Employment Potential - Advertising and OOH (2019 - 2027E)

Source:
MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated no. of people employed in the subsector	46,715	48,817	41,983	45,761	51,253	58,940	66,013	73,935	82,807
Total Estimated Employment	48,817	41983	45761	51,253	58,940	66,013	73,935	82,807	92,744
Incremental Demand	3,547	(6834)	3,778	5,491	7,688	7,073	7,922	8,872	9,937

Table 8: Employment Potential of Advertising and OOH Subsector



Employment Growth Projection - Advertising and OOH
 (2019 - FY 2027E)

Source:
 MESG Report, 2021

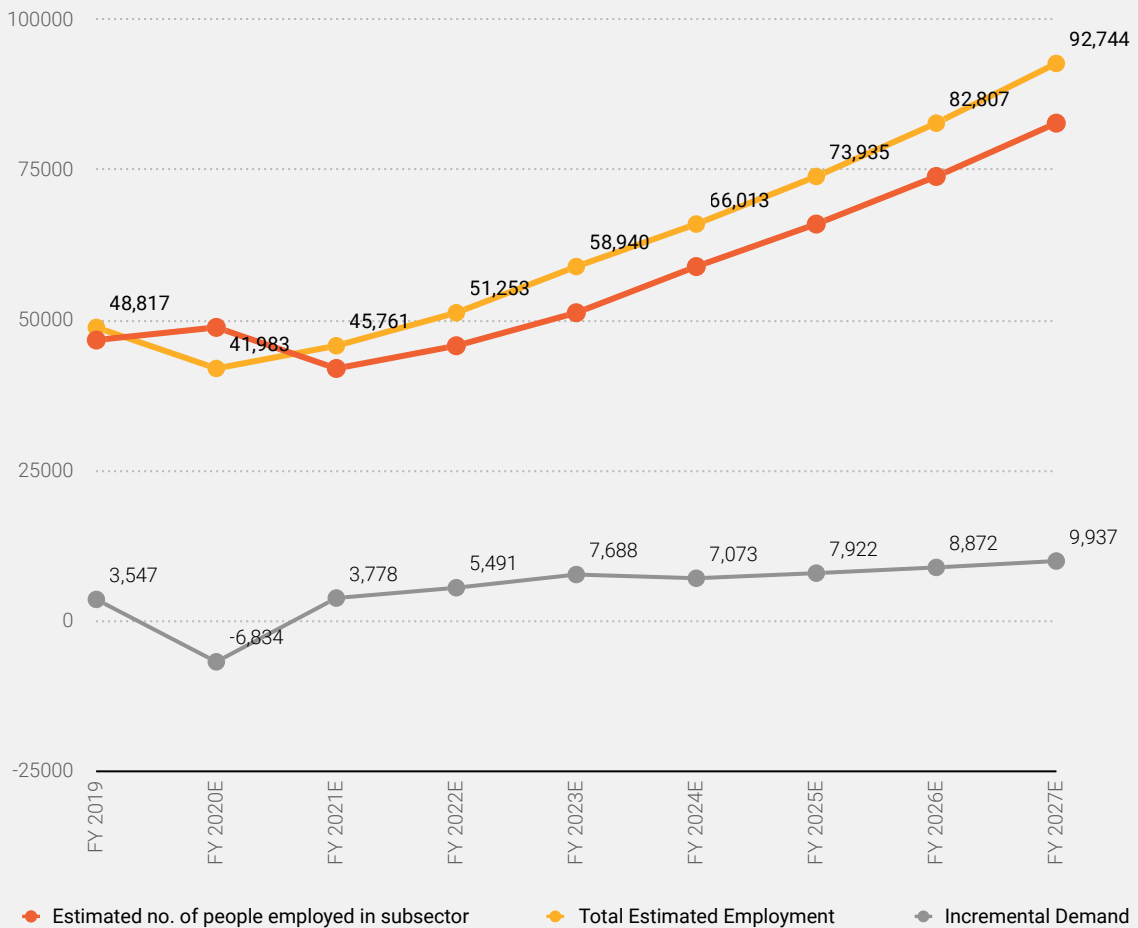


Figure 19: Revenue Trends of Advertising and OOH Subsector

The employment opportunities highlighted above are an indicator of growing demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.

Skill Development in Emerging Futuristic Job Roles

The analysis of demand supply gap with regard to human resources, as well as the overall employment landscape for the subsector, reveals that various new and emerging roles are likely to gain greater significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide

upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.

Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:



Futuristic Job Roles	Description
Creative Staffers	Creative staffers' will be one of the important roles in advertising. They would produce slogans, themes and, at times, company logos and branding campaigns. They would be critical part of the behind-the-scenes team.
Online Advertising Purchase Manager	The duties of an Online Advertising Purchase Manager would be in ensuring cost effective purchase of services as required by the procurement plan whilst ensuring compliance with the Company's policies and procedures.
Programmatic Display Advertising Manager	This role would be all about designing programmatic display campaigns and assisting the manager to create marketing materials to support channel adoption, develop advanced advertising strategies and providing those strategies to clients.
Programmatic Coordinator	The coordinator assists the team with executional aspects of campaign management processes, develops and delivers performance updates and assists with day-to-day management of digital media plans.
Digital Advertising Specialist	The specialist's role is to execute the building, testing, and optimizing of campaigns on major social media platforms and monitor and analyse the performance of digital marketing campaigns.
Ad Tech Manager	The role of an Ad Tech Manager is to oversee the marketing tech stack and strategies, manage the implementation of new technologies in the ad tech stack, and identify scalable tracking solutions.
Display Advertising Product Strategist	Display Advertising Product Strategist is responsible for developing effective advertising campaigns efficiently.
Insights Manager	This job role would be to ensure full utilization of solutions/satisfaction of users, research/understand customer needs, enable actionable insights via platform, drive the end-to-end process for ad measurement solutions.
Digital Campaign Manager	This role is for implementing online advertising campaigns collaborating with teams on production timelines.
Ad Optimizer	Ad Optimiser analyses and optimizes ad data for marketing and lead generation.

Table 9: Classification of futuristic job roles in Advertising and OOH Subsector

State level trends in Advertising and OHH

States across India have been taking active measures to promote the advertising and OOH subsector. While some states have introduced policies and incentives to attract investments in the subsector, others have supported infrastructural development and innovation by easing regulatory compliance, all with the objective of fostering the growth of Advertising

- Mumbai, Delhi, Bengaluru, Kolkata, and Chennai, have been among the top players in terms of generating employment in advertising.
- While Mumbai has been a leader in the space of advertising, the rapidly growing business prospects in Delhi have ensured that it is not far behind.
- While Bengaluru's advertising related business ecosystem is still in the process of expansion, one cannot discount the city's creative energy.
- Kolkata and Chennai are two other places where the advertising industry is generating employment opportunities.

and OOH segments and promoting employment in their respective states and regions.

As per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- As has been mentioned above, the subsector is envisaged to witness the emergence of new job roles. Some of the trending job roles in the above-mentioned cities are Account Manager, Advertising Manager, Copywriter, Advertisement Operations Specialist, Ad Analyst, Media Planners and Accounts Planner.
- With the increasing popularity & proliferation of online advertisements, a significant portion of advertising budget is being used towards this purpose. As programmatic advertising companies establish head-quarters in these cities, locations like Bengaluru, Mysore, Mumbai, Pune, New Delhi, Gurgaon and Hyderabad are likely to gain prominence in the next five years and emerge as key employment generating area.

Details of Courses Available

The courses available in the Advertisement and OOH sub-sector are majorly divided into:



Undergraduate (UG) / Postgraduate (PG) Courses



Vocational Courses

The advertisement and OOH subsector hire talent from other subsectors. It has been discovered that people with training in fields like film technology, mass communication, animation technology, fine arts, etc. are also ideal for careers in advertising and out-of-home (OOH). Additionally, India has several courses that focus solely on teaching advertising. There are currently 40 institutions offering advertising courses all over India. Only 20% of students who complete the aforementioned courses, according to experts, choose to work in advertising or outdoor advertising.

EXPERT'S OPINION

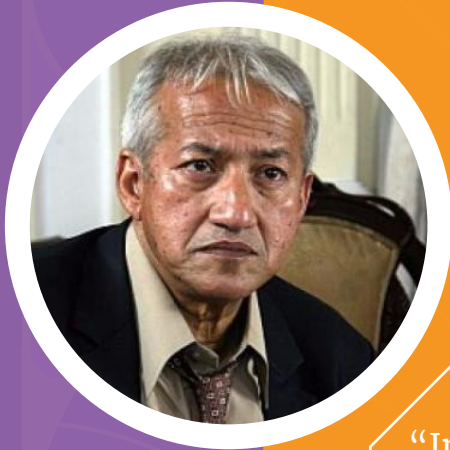


MR. A.R. SREEDHAR

General Manager,
Indian Outdoor Advertising Association
(IOAA)

“ Our out-of-home industry has been seeing radical positive transformation over years. From the rather primitive static format, it has now become a dynamic audio-visual one, with all kinds of creativity made possible through technology. ”

EXPERT'S OPINION



MR. AVIJIT DUTT

Indian filmmaker, actor, theater director and communications consultant.

“In recent years, the advertising industry in India has experienced significant growth, with ADEX expanding by 22% in 2022. Looking ahead to 2023, estimates suggest a 16% growth rate, with Digital advertising leading the charge at 25%, outstripping Traditional Media at 10%. Notably, Digital has already surpassed TV, doubling in size from Rs. 16,974 crores to Rs. 34,405 crores in 2022, now commanding 38% of the market share. Real Estate, FMCG, and Online Shopping are the top spenders, driven by a massive online shopping user base of 200 million out of the 700 million Internet users. As the largest medium in Indian ADEX, Digital is projected to further rise to 41% in the coming years, adding Rs. 8,600 crores to reach Rs. 43,000 crores. Despite economic shocks, the industry’s general trend has shown high growth rates year-on-year, with specialists predicting a 16% growth for the future.”



MR. PRATEEK VIMAL

Founder & CEO,
In front Technology, Sweden



“In a relatively short span of time, digital marketing has transformed the marketing landscape, offering cost-effective, time-saving, and highly targeted opportunities to connect with customers. With India embracing the digital revolution through initiatives like ‘Digital India,’ the country has witnessed a rapid surge in internet users, creating immense employment opportunities, even in rural areas. The pandemic further accelerated the scope of digital marketing, leading to exponential growth in the industry. As per the Direct Marketing Association, the Indian digital marketing market is currently valued at 12046 crores and projected to reach a staggering USD 19,268.7 million by 2028, reflecting the soaring demand for skilled marketers in this dynamic field”

6.5.2 Animation and VFX

Subsector in Focus: Animation and VFX

The Indian animation sector is growing at a rapid pace and with an increasing number of animated series and features being produced in India, it has also attracted global audiences. Many of India's works are getting distributed globally. The demand for animation expanded with the increase in children's broadcasting viewership, availability of low-cost internet access, and growing popularity of OTT platforms.

The Indian VFX industry has been gradually making progress with adaptation of world-class techniques and innovative technology. The content creators are experimenting with storytelling with high-quality VFX advancements. Indian film makers

have also increased the number of VFX shots in their high-budget films from a few hundred to 1,500 – 2,000.⁷

According to estimates by NITI Aayog, the animation and VFX sector in India was valued at USD 1.131 Bn.⁸



Source :

7. https://www.ey.com/en_in/news/2023/05/indian-m-e-sector-grew-20-percent-in-2022-touching-the-highest-ever-mark-of-inr-2-trillion
8. As per NITI Aayog estimates

Further, the growth in the animation and VFX segment has been driven by factors such as:

- The growth of children's channels' viewership led to an increased demand for animated content.
- OTT platforms, too, continued to invest in Indian animated IP.
- Increased demand spurred investments into India.
- Converging production pipelines opened new avenues.

The segment experienced a surge in demand for 3D animated contents especially from the education sector, during the COVID-19 pandemic. According to industry estimates, the Animation and VFX subsector is envisaged to grow at a CAGR of 16.26%, resulting in an increase in revenue from INR 9,060 crore in FY 2019 to INR 30,232 crore in FY 2027, as depicted in the graph below. Further, VFX will contribute ~46% to the total revenue, followed by animation (~30%), and post production (~24%).⁹

Revenue Trends - Animation and VFX
(In INR Crores)

Source:
MESC Report, 2021

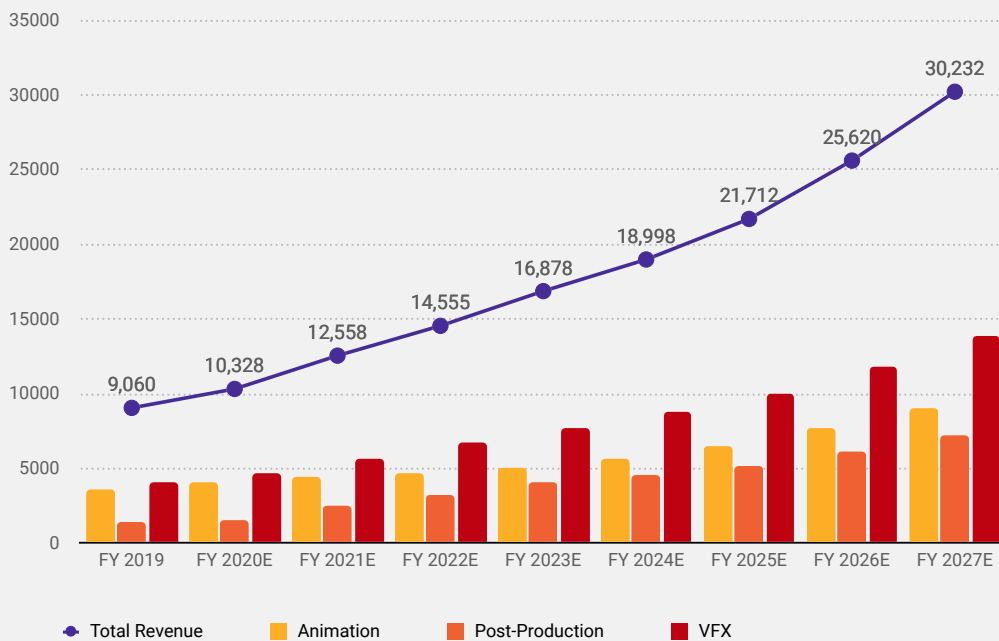


Figure 21: Revenue Trends of Animation and VFX Subsector

Source :

9. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

EXPERT'S OPINION



MR. MUNJAL SHROFF

Founder, Graphiti
Co-chair, FICCI AVGC Forum

“Skilled Manpower is the most crucial resource for achieving the projected multi-fold growth in the Media and Entertainment Sector to fuel ‘Create in India’ vision. The MESC Skill gap study provides the most definitive sector wise in-depth analysis of the availability of talent, projected demand and capacity deficit. The emerging job profiles listed for each sector captures the rapid change that is required to be done in the skilling ecosystem to upskill and train the workforce. MESC continues to do path breaking in the Skilling Ecosystem and thereby playing a crucial role in the growth story of the Media and Entertainment Sector.”



MR. PRAFULL GADE

COO & MD, Deluxe
Entertainment Services India Pvt Ltd



“What is accelerating the growth of VFX & Animation industry in India, is not only the competency (of Indian Artists) to adopt ever changing technologies or Creative aptitude, but also to cope up with ever changing global market needs, factors like Corona Pandemic, Oscillating Global Economy, and constant disruption by one or other factors for M&E sector.

Our learning enthusiasm has taught us to build innovative pipelines during Corona phase. It wasn't about WFH (Work From Home) we learned then, but we got opportunity to train our thinking skills to attain uncommon results even in such tough situations.

India is enjoying every bit of this journey toward Strong & Steady growth by honing, sharing right skills, and building a strong skill force to be the leaders in global markets.

MESC's unconditional efforts to support M&E sector by producing such a valuable information like “Skill Gap Report”, helps industry to Share their knowledge and grow together. Thanks to MESC team. ”

MR. VIKAS KUMAR

CEO, Digitoonz



“Media and Entertainment Skills Council (MESC) has been instrumental in shaping the M&E industry. MESC has been a catalyst in nurturing talent, driving skill development, and bridging the gap between industry requirements and the aspirations of our workforce. With its unwavering commitment to excellence, MESC has played a pivotal role in empowering individuals, fostering innovation, and elevating the standards of the M&E industry. MESC is on a mission to build a skilled workforce that will propel our industry to even greater heights, solidifying India's position as a global leader in Media and Entertainment.”

EXPERT'S OPINION



MR. RAMESH SHANKAR PUDALE

Head India Education - Autodesk

“In the vast canvas of India’s Media and Entertainment sector, the brushstrokes of growth potential are vividly visible. The global animation and VFX market size, valued at USD 167.9 billion in 2021, further accentuates the immense possibilities this sector holds. However, to paint a masterpiece of success, we must acknowledge and address the skill gap that colors this landscape. As the industry evolves and expands towards an estimated worth of USD 401.0 billion by 2030, the demand for specialized skill sets becomes more pronounced. Embracing continuous learning and nurturing talent will illuminate the path towards unprecedented industry growth and excellence.

The Media & Entertainment Skills Council (MESC). With its visionary approach, MESC plays a pivotal role in shaping a skilled and talented workforce that can propel the industry towards new heights and fostering excellence in skill development” please rephrase as per context”



MR. KETAN YADAV

COO - VFX Producer, Redchillies.vfx
Red Chilies Entertainments Pvt. Ltd.



“The exponential growth of India’s Media and Entertainment industry necessitates collaborative efforts and robust skilling programs to empower the workforce, meet industry demands, and seize global opportunities. Integrating emerging specializations in schools and colleges ignites passion, incentivizing qualifications elevates expertise, and a practical approach to problem-solving drives meaningful contribution. Furthermore, Government support through policy frameworks, infrastructure investments, and funding initiatives fosters innovation, entrepreneurship, and sustainable growth. It has to be a 360° skill based development. Right from the grassroots to the absolute pinnacle.

MESC has done a good job in creating this skill gap report as it cover all the aspects”

MR. SHAIK KHAJA VALI

COO - Telangana VFX, Animation and Gaming Association, Program Director - VFX Summit, Indiajoy



“As a significant industry voice, TVAGA firmly advocates for initiatives that address the critical issue of skill gaps in our industry. We commend MESC for their forthcoming ‘Skill Gap Study’, recognizing its importance in fostering a skilled and competitive workforce. TVAGA is committed to supporting this endeavor by providing our industry insights and expertise. Together, we can drive meaningful change and ensure a thriving ecosystem that meets the evolving needs of our industry.”

Employment Potential in Animation and VFX

The Animation and VFX subsector is poised to grow rapidly in the coming years and will contribute significantly to the growth of India’s M&E sector. Further, global companies are also increasingly tapping into the Indian talent market and outsourcing their businesses to India.

In this context, the subsector is projected to generate employment opportunities in the M&E ecosystem, as depicted in the table and graph below:

Employment Potential - Animation and VFX (2019 - 2027E)

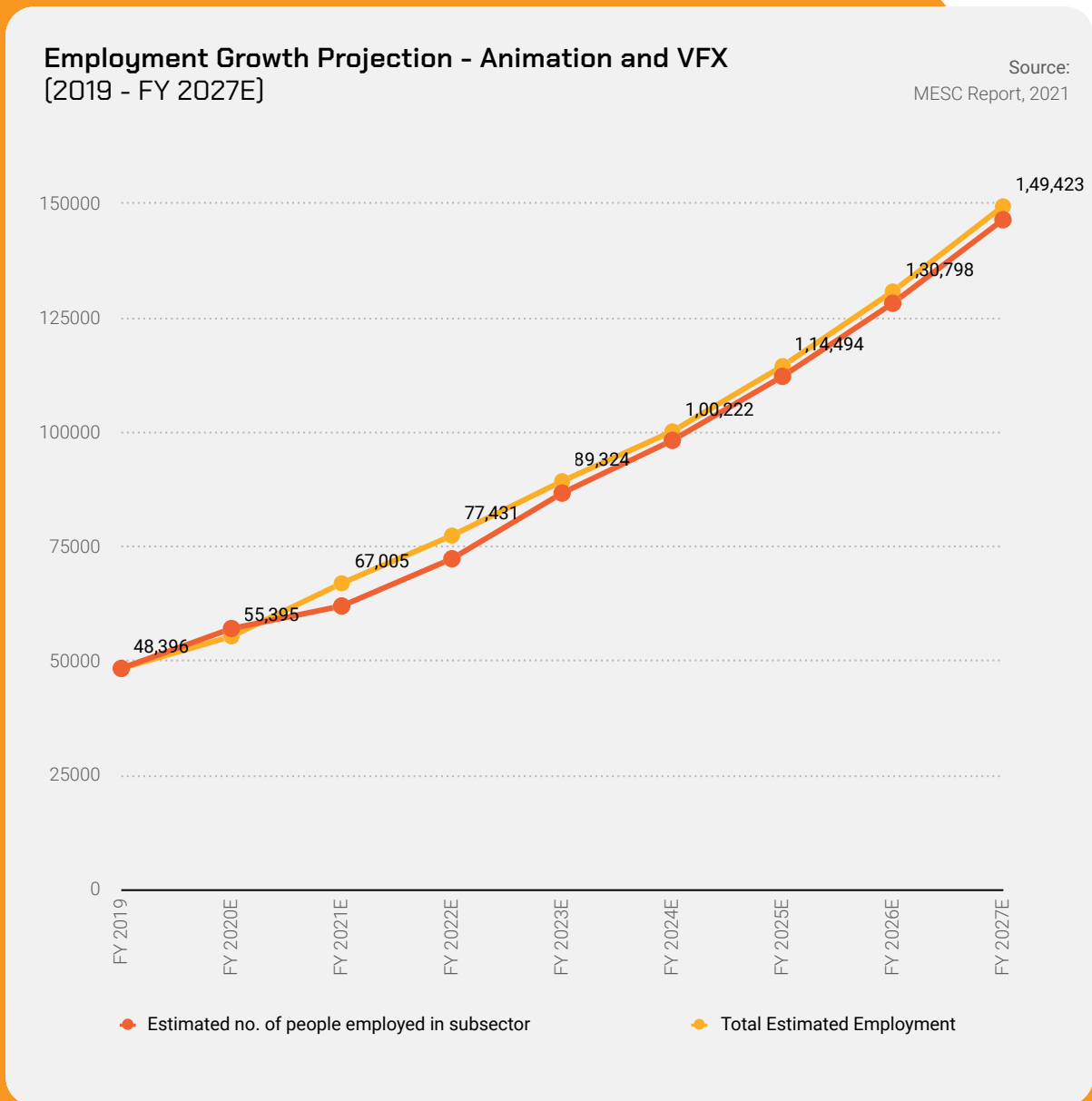
Source: MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	48,396	57,108	62,042	72,365	86,723	98,256	1,12,250	128,233	146,493
Total Estimated Employment	48,396	55,395	67,005	77,431	89,324	1,00,222	1,14,494	130,798	149,423

Table 10: Employment Potential of Advertising and OOH Subsector



Figure 22: Employment Potential of Animation and VFX Subsector



The employment opportunities highlighted above are an indicator of growing demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.

EXPERT'S OPINION



MR. JESH KRISHNA MURTHY

Founder Anibrain

“With India becoming a hub for global digital content creation, times ahead are extremely exciting. With a strong emphasis on training and also research and development we expect India to have a great run over the coming decades and if we are able to harness AI intelligently during this time specially in skill development and content creation that the sheer volume of work India can produce for the global market shall be mind boggling. It’s paramount now that all concerned stakeholders focus on our skills and ability to deliver and with MESC driving the skills and training agenda, which is the most crucial element in the equation, India has an extremely bright future.”



MR. MERZIN TAVARIA

President, Global Production and
Operations, DNEG



“India’s Media and Entertainment sector holds immense potential for growth, and through a skilling lens, we have the power to unlock its true potential. By investing in the development of skilled professionals, we ignite innovation, fuel creativity, and elevate the very essence of visual effects (VFX) in the industry. Empowering the next generation with essential skills and knowledge becomes paramount in propelling India’s M&E sector to unprecedented heights and cementing its position as a global leader. The MESC’s skill gap report is both a guiding light and a blueprint for crafting comprehensive skilling initiatives tailored to the industry’s precise needs. As a leading VFX and Animation studio, we are committed to supporting the growth and development of the industry in India and providing opportunities for Indian artists in the global market. Let us unite to unleash this potential, bridge the skill gap, and shape the future of the Media and Entertainment industry together.”

MR. P JAYAKUMAR

Chief Executive Officer, Toonz
Media Group



“The Indian Media and Entertainment sector presents significant opportunities for all players. To realise the huge potential in this sector and tap the hidden talents, special focus on skilling and upskilling at all levels including at school and universities is essential. All the stakeholders including the government, industry and academia are now aligned in identifying and addressing the skill gaps to raise the bar of Indian Media and Entertainment sector.”

Skill Development in Emerging Futuristic Job Roles

Advancement in technology and job roles has created a major skill gap as evolution in technology (such as AR/VR) requires continuous upgradation of skill sets. As job roles evolve, already engaged resources need to be upskilled and new resources need to be trained. This increase in demand for the number of skilled workers has ensured that the skilling ecosystem has larger participation from all stakeholders, including decision making bodies, enablers, executive bodies, and various beneficiaries.¹⁰

Further, the analysis of demand supply gap with regard to human resources, as well as the overall employment landscape for the subsector, reveals that various new and emerging roles are likely to gain greater significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.



Source :

10. <https://mib.gov.in/sites/default/files/AVGC-XR%20Promotion%20Taskforce%20Report%20-%202022.pdf>



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Design Architect	Designing the interior and exterior of the devices used in AR/VR like helmets and goggles.
System Validation Engineer	Requires fixing the bugs/issues that might arise in the software that goes into the applications. Job requires inspection, calibration and testing the equipment/device to ensure smooth functioning and
3D Artist	Improve workflow efficiency.
Animator	With the demand for animated content increasing at a rapid rate, 3D artist is one of the main job roles that is already in high demand and expected to be in the near future. This involves creating special effects using combination of software and hand drawn techniques.
Compositors	This is one of the most sought-after job roles in this industry. Animator can be a 2D, 3D or a keyframe animator, and the role involves animating objects
Roto artists	Their role is to create a final image of a shot or a sequence and ensure continuity of a shot. It involves blending of different layers of animation, graphics and visual effects to produce a final picture.
3D Modellers	Roto artists manually draw around and cut out objects from movie frames so that the required parts of the image can be used, a process known as rotoscoping. They trace areas within live-action frames where the CGI will be inserted or interact with live images. They create silhouettes known as roto mattes within the frame to allow the scene to be layered by the compositor.
UX-UI Designers	A 3D modeller is required to create visual characters and backgrounds by interpreting concept art and sketches. They are responsible for determining the physical dimensions of a shot.
VFX Artist	UX-UI Designers are generally responsible for collecting, researching, investigating and evaluating user requirements. Their responsibility is to deliver an outstanding user experience providing an exceptional and intuitive application design. Illustrating design ideas using storyboards, process flows and sitemaps, designing graphic user interface elements, like menus, tabs and widgets.
Concept Artists	VFX artists create photoreal, digitally-generated imagery. The role requires the seamless integration of these effects into live action in feature films, television and, increasingly, online and console gaming. VFX artists use the latest technology to produce computer-generated creatures, crowds and stunt doubles.
Layout Artists	Their role is to modify the templates provided by the graphic designers to provide the final product in terms of design. They are also responsible for the positioning of characters and camera angle

Table 11: Classification of futuristic job roles in Animation and VFX Subsector

EXPERT'S OPINION



MR. MIKE YATHAM (MADHAV REDDY)

Founder Rotomaker

“As a VFX industry leader bridging the Media and Entertainment skill gap through AVGCI and Rotomaker Institute, I’ve witnessed the transformative power of skill training in empowering Media and Entertainment industry. Embracing technology and nurturing creativity are vital for skilling. My vision entails a collaborative ecosystem of industry, academia, and government, propelling India’s M&E sector to global eminence. In the ‘Realizing M&E Sector Potential in India: Through the Skilling Lens’ report, I recommend an integrated approach, empowering our skilled workforce to shape a thriving future for the industry. I appreciate the effort of MESC for releasing this important dialogue that sheds light on current M&E industry landscape.”



MR. SURESH ERIYAT

Animation Film Maker and Director
Eksaurus Studios



“In the past few years I have witnessed tremendous growth in the M&E industry despite Covid and other obstacles. For that growth I would definitely attribute a lot to MESC’s dedicated efforts to enhancing the skilling ecosystem. Being in the industry for the last 25 years this sort of attention to such fields were never visible before. Today we are shining at the Oscars and many other prestigious global platforms for our work that too which are locally inspired and generated with indigenous skills. We have a long way to go. But I think we are taking firm and right steps towards that future with MESC’s initiatives and efforts.”

DR. ANUJ KACKER

Chief Executive Officer (Interim), Aptech Limited



“The AVGC Industry in India (and M&E in general) is at the inflexion point in its growth, which is reminiscent of where Indian Software Industry was in the 1990s. The foundation of the Indian IT Industry was laid mainly on the back of labour arbitrage of trainable workforce, catering to external demand. The AVGC sector today enjoys these advantages too - but it also has multiple other tailwinds which are even stronger - Existing training backbone with proven track records, strong domestic demand, traditional content repertoire, technological expertise, and a young population willing to explore non-traditional career paths. These factors will combine to fuel its exponential growth.

This Skill Gap Report by MESC, does a commendable job of analysing and presenting the opportunities that lie ahead for the youth who choose to skill themselves for this industry.”

EXPERT'S OPINION



MR. RAJAN E

Vice President
Phantom Digital Effects Limited(PhantomFX)

“India’s Media and Entertainment industries are flourishing, and their work is recognized worldwide. The growing demand for film and television production may be attributed to several factors, including rapid technological improvements, shifting audience tastes, novel material, and high production values. This expansion has, however, drawn attention to the pressing need for more qualified workers. The MESC Skill Gap Report aids in pinpointing the most urgent need for training and education initiatives. I congratulate the MESC team for publishing the Skill Gap Report and applaud the organization’s persistent commitment to the M&E sector’s skilling environment.”



MR. DORABABU ACHANTA

Co-Founder & Creative Head,
Metavfx Creations



“For centuries, Indian culture has incorporated storytelling into every aspect of daily life. India’s Media and Entertainment industry has proven to be resilient during challenging times, adapting to the digital landscape and catering to diverse audiences’ entertainment needs.

The Media and Entertainment sector, is expanding at an astonishing rate. Many successful studios credit their streamlined workflows to a well-implemented CGI Pipeline, allowing them to deliver high-quality visual effects on time and within budget. But now, VR, AR, and most importantly AI, have come together to create an intricate web of engaging and immersive experiences that will permanently change the way we perceive and consume art. In India, CGI growth has revolutionized the way films and television shows are produced, enhancing visual effects and storytelling to captivate audiences worldwide. Despite the setbacks caused by the Hollywood strike, the innovation and creativity within the CGI industry remain relentless, driving continuous advancements in visual effects and virtual experiences.

And as per my observation and experiences, In the CGI/VFX industry film making with CGI/VFX lot of things needs to be addressed, there are only a few filmmakers that are following it, but everyone needs to follow proper CGI Pipeline otherwise both productions & studio will be in trouble.

The industry is constantly proving its resilience to the world, it still faces a number of difficulties that need to be resolved as quickly as feasible. This can only be accomplished if smart work indulging fresh talents is put into overcoming obstacles in a clever way.

India, it is expected to see a substantial number of filmmakers owing to the art form’s development through AI, Unreal, and virtual production.

Having observed the remarkable impact of MESC’s work, I wholeheartedly endorse their mission and enthusiastically encourage others to rally behind Skill India Mission.”

State level trends in Animation and VFX

Animation and VFX can be the next IT-BPM boom for India and play a fundamental role in India becoming a USD 100 billion M&E industry by 2030.¹¹

States like Karnataka, Maharashtra, and Telangana, also known as lighthouse states in the AVGC sector, have been taking various innovative measures to encourage entrepreneurs & startups working in the sector.

Maharashtra is in the process of updating its IT/ITeS policy to meet the demands of the AVGC sector in 2023 and beyond. In the AVGC sector specifically, Joint Ventures are actively supported to allow for transferring capabilities. In addition, collaborations are encouraged to develop the key focus area of talent and employability where the Industries Department acts as a facilitator and the Govt. of Maharashtra Skills and Higher & Technical Education Department is given the mandate of agency tie ups.

Telangana was the first state to have a dedicated AVGC Policy called the IMAGE Policy (2016). Skill development is a critical component for growth of AVGC. In this regard, certain measures are being taken by the Telangana Academy for Skill and Knowledge (TASK), which is a unique skill development initiative from the ITE&C department aimed at improving the quality of graduates coming out of college.

Government of Karnataka and ABAI, have established the COE for AVGC industry in the state, an initiative that is envisaged to facilitate the creation of a vibrant ecosystem and attract new companies to set up their base in the state.

Further, as per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

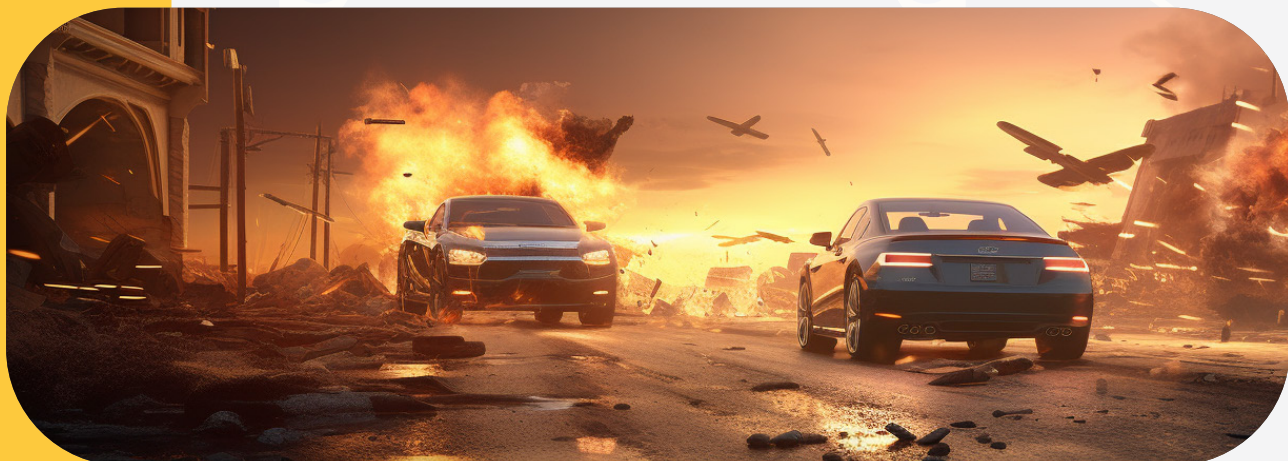
- Mumbai has the maximum number of animation and VFX studios in the country, followed by Hyderabad, Chennai, Bangalore, and Delhi. The number of studios is said to be directly linked to the number of people employed in the subsector in the city/state.
- Government of Maharashtra is also in the process of establishing a Centre for Excellence for AVGC, in collaboration with IIT Bombay to provide a boost to the entrepreneurship ecosystem in the state's AVGC industry.
- The next few years will see the rise of states such as Tamil Nadu and Kerala with regard to animation and VFX studios. There are various AVGC related companies operating in the state of Tamil Nadu, and incentives are being provided to encourage startups working in the sector. Additionally, recognising the benefits of skilling, the state is facilitating industry-institution dialogue to promote skill development in this sector.

Details of Courses Available

The courses available in the Animation and VFX sub-sector are as follows:

Type of Program	Program
Under-Graduate	Bachelor of Design: Animation and Interactive Media Bachelor of Design-Games B.F.A in Digital Art and Animation B.F.A in Animation B.A (Hons.) Computer Animation Arts B.Sc. (Hons) Games Technology B.A. Computer Animation & Visual Effects B.Sc. Computer Animation B.Sc. Game Development
Post-Graduate	Master of Animation, Game, Interactivity M.Sc. Computer Animation and Visual Effects M.A in Digital Effects M.A. in Games Design and Development M.A Concept Art for Games & Animation M.A Character Animation and Animated Filmmaking M.B.A in Media and Entertainment

Table 12: Courses in Animation & VFX



EXPERT'S OPINION



MR. VINEET RAJ KAPOOR

Founder & CEO, VirtualSoft Technologies

“According to a report by Statista, the global demand for UX/UI designers is expected to grow by 25% between 2021 and 2028. In India, the demand for UX/UI designers is growing even faster. According to a report by NASSCOM, the Indian IT industry is expected to create 1.2 million new jobs in the next 5 years, and a significant number of these jobs will be in UX/UI design. The salaries for UX/UI designers in India are also very competitive. As mentioned earlier, the average salary for a UX/UI designer in India is ₹5.6 lakhs per year. This number is expected to continue to grow in the coming years as the demand for UX/UI designers increases.

The initiatives by MESC towards collaborating with stakeholders, would help India address the widening skill gap in the UXUI sector and helping youth with employment”



MR. RAJIV CHILAKA

Founder & CEO,
Green Gold Animation Pvt Ltd



“The power of storytelling coupled with the advancements in technology has fueled an unprecedented era of creativity and innovation. It is through the collective efforts of talented artists, visionary leaders, and passionate audiences that the M&E sector has thrived, captivating hearts and minds worldwide. As we continue to emphasize this remarkable growth, let us embrace the endless possibilities, push boundaries, and shape a future where storytelling transcends boundaries, inspires generations, and leaves an indelible mark on our world. MESC’s remarkable initiative in creating a comprehensive Skill Gap report is truly impressive. Undoubtedly, this report will serve as a valuable resource for the entire M&E industry”

EXPERT'S OPINION



MR. ASHISH J THAPAR

CEO, Hi-Tech Animation

“I firmly believe that innovation and technology are the heartbeat of the Media and Entertainment industry. Embracing cutting-edge technologies and creative advancements is not just an option; it’s an imperative for our growth and success. To thrive in this ever-evolving landscape, upskilling is the key. Our team must continuously hone their skills and stay at the forefront of emerging trends, allowing us to craft captivating stories that mesmerize audiences worldwide.

Stay ahead of the competition and fuel your success with the actionable intelligence provided by the MESC’s Skill Gap Report – a must-have resource for every forward-thinking person”



MR. RANJIT MOHANTY

Director of Contents and festival affairs,
AAO NXT OTT, Filmmaker, Graphic
Novelist, Animation Mentor & Skill course
Writer, CII Summit FX Speaker



“India is magic. But it lies beyond the metros and big cities. The key to India’s Media & Entertainment sector’s zooming success in coming times lies in skilling, up skilling to offering ample opportunities setting up online job marketplaces for huge untapped human resources, talents who are scattered in remote areas, tier II & III cities, small towns and villages. Such models already started working in some places of Odisha and I am sure other states too would be acting in the same direction to make it successful and generating huge employment opportunities for many. MESC here plays a vital role to diversify its focus from only metros and big cities to such places for a panoramic and multi folded growth.”

6.5.3 Art and Culture

Subsector in Focus: Art and Culture

India occupies one of the top spots globally with regard to collections of music, dance, theatre, folk traditions, performing arts, rituals, paintings, and writings—also known as the ‘Intangible Cultural Heritage’ of humanity.

The diversity of India’s culture and the global attention received by its art forms have played a crucial role in strengthening the country’s soft power. India is considered a melting pot of religions, languages, and cultures. Therefore, various initiatives have been taken by the government to disseminate and promote Indian culture across the world.

The growth of this subsector has been driven by rising art sales, increased involvement of corporate sector, implementation of several schemes by Ministry of Culture, and steady supply of skilled artists, among others. As per industry estimates, there are more than 1500 arts colleges in India that offer full-time, part-time, distance-learning, virtual learning/ online programmes.

The COVID-19 pandemic had widespread impact on the art and culture industry. Art exhibitions, live performances, theatre productions, and music concerts were either cancelled or postponed indefinitely, causing significant financial losses to artists, performers, and event organizers.

Many artists, particularly those who rely on live performances and exhibitions as their primary source of income, faced immense challenges and financial hardship. Additionally, art and cultural institutions, such as museums, galleries, and theatres, suffered substantial revenue losses, and some even faced permanent closures.

Despite these challenges, the Art and Culture industry has shown resilience and adaptability by embracing digital platforms and virtual performances to reach audiences and continue artistic expression.



According to industry estimates, the Art and Culture subsector is envisaged to grow at a CAGR of ~4.22% and witness an increase in revenue from INR 1,703 crore in FY 2019 to INR 2,370 crore in FY 2027, as depicted in the graph below. Further, art galleries contribute ~54.6% to the total revenue, followed by auction house (~29.7%), and online sales (~15.7%). 13

Revenue Trends - Art and Culture
[In INR Crores]

Source:
MESC Report, 2021

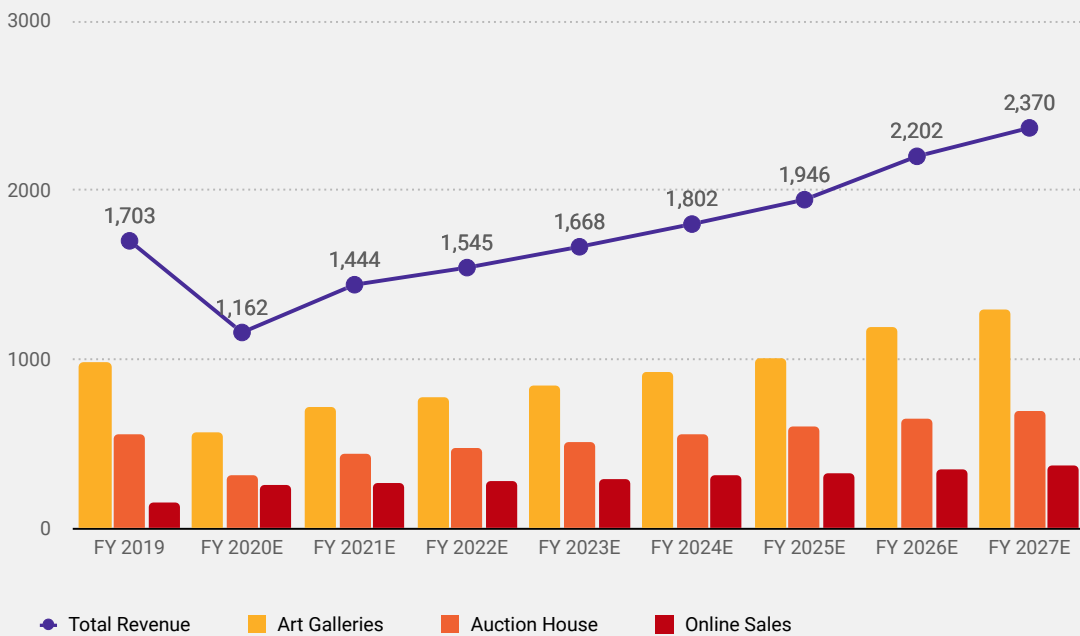


Figure 23: Revenue Trends of Art and Culture Subsector



Source :

13.

[https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)



Employment Potential in Art and Culture

As per MESC's Report, only ~1% to 2% of artists access online platforms to sell their products. Further, only a small percentage of employees working in the subsector are engaged as permanent or regular staff. The rest of the artists either get paid on an hourly basis or depending on the art created/performed by them.

The report also highlights that the Art and Culture subsector will generate about 1,63,431 direct employment opportunities by 2027. It is expected to witness an annual incremental demand of people in the industry to be employed till 2027, as depicted in the table and graph below:

Employment Potential - Art and Culture (2019 - 2027E)

Source:
MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	1,19,655	1,21,450	97,160	1,02,989	1,11,229	1,20,127	1,29,737	140,116	151,325
Total Estimated Employment	1,21,450	97,160	1,02,989	1,11,229	1,20,127	1,29,737	1,40,116	151,325	163,431
Incremental Demand	8,998	(24,290)	5,830	8,239	8,898	9,610	10,379	11,209	12,106

Table 13: Employment Potential of Art and Culture Subsector

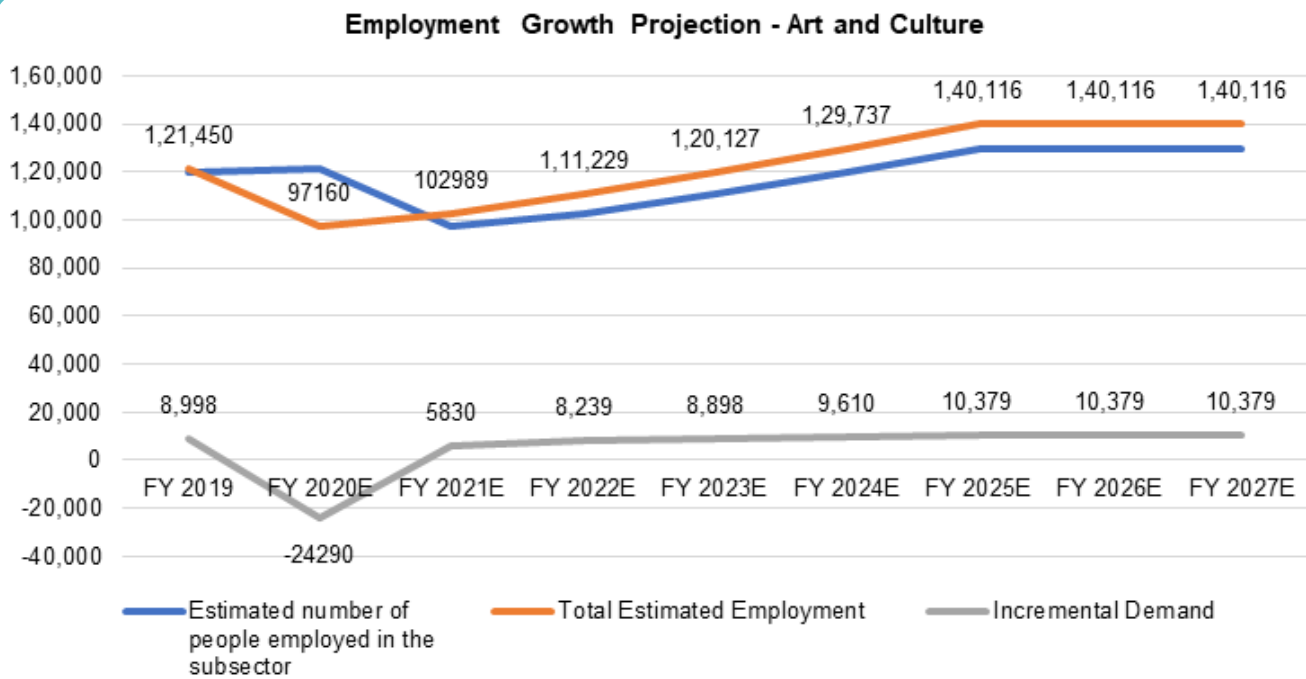


Figure 24: Employment Potential of Art and Culture Subsector

The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

Art and Culture is a crucial pillar of the M&E sector. For the same reason, skill development in the subsector is crucial for several reasons. Provision of skilling and training opportunities enables artists to enhance their technical expertise and hone their creative skills. Skill development provides a platform for artists to explore new techniques, medium and style of work and expand their creative boundaries, thereby contributing to innovation and growth within the subsector. It also helps artists to enhance their employability and job prospects, while staying relevant in a competitive and rapidly evolving landscape.

The analysis of demand supply gap with regard to human resources, as well as the overall employment landscape for the subsector, reveals that new and emerging roles are likely to gain greater significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.

Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Table 14: Classification of futuristic job roles in Art and Culture Subsector

Futuristic Job Role	Description
Data analyst for museum services team	Their responsibility will be to leverage analytics to improve visitor experience.
Technology Fabricator	The technology fabricator is responsible for assisting in the design, fabrication and implementation of electronics hardware and software for better visitor experience.
Patron Information Data Analyst	The Patron Information Data Analyst (PIDA) will be the museum's technical specialist for visitor, donor and member data and related business processes. Their job role involves supporting the specialized application needs of museum staff members by providing support, reporting, and specifications for enhancements of museum's CRM and ticketing system.
Drama Therapist	They will use drama or theatrical processes in order in to achieve therapeutic goals. Drama therapists would perform controlled sessions where theatre and drama-based activities would be used to observe and explore the behaviour, attitudes and emotions of individuals experiencing physical, psychological, emotional or mental health problems.
Arts Administrators	They would organize arts activities and services. They would work for various organizations such as theatres or museums.

Details of Courses Available

There are more than 1,500 arts colleges in India that offer full-time, part-time, distance-learning, virtual learning/ online programmes. These colleges provide degree, diploma, and certificate courses.

Maharashtra (294), Uttar Pradesh (203), Delhi/NCR (187), Karnataka (122), West Bengal (108) are the top 5 states with large number of arts colleges.

A large share of training in Art and Culture sub-sector is informal/unorganized. Many of the people learn arts out of their passion. Further, there are several courses available in India which are majorly UG/PG/ diploma/ certificate courses. Experts believe that ~50% of the students graduating in fine and performing arts opt for career in the industry.



EXPERT'S OPINION



MR. ROBIN BHATT

Indian Screenwriter & President Screen Writers Association of India

“Screenwriting is the heartbeat of the television and film industry, fueling a dynamic era of storytelling and creative expression. As the demand for captivating content surges, talented screenwriters are at the forefront, crafting narratives that resonate with audiences across the globe. Their artistry, coupled with technological advancements, will ushered in a golden age of television and film, captivating hearts and captivating imaginations. SWA appreciates the efforts of MESC to take M&E industry to next level in the country and abroad.”



MR. SHIVANK ARORA

COO- Mayapuri Group



“From colorful pages to digital platforms, magazines and comics have adapted and thrived, redefining the art of storytelling. As these mediums continue to evolve, they captivate audiences with immersive narratives, thought-provoking content, and artistic brilliance. This remarkable potential has unlocked new avenues for creators, empowering them to connect with global readers and inspire minds with every turn of the page. We appreciate MESC for their continuous good work and covering the industry needs so we’ll in this Skill Gap Report.”

MR. B.S.SRINIVAS

Secretary-ABAI (Association for Animation, VFX, Gaming & Comics, Karnataka), AVGC Centre of Excellence, Bengaluru, CEO-VedAtma Animation Studios, Educationist I Mediapreneur I Film Producer I Actor, Director-Arena Animation, Malleswaram & Rajajinagar Centres, Bengaluru



“It has become very important to build an unique ‘M& E business platform’ in our country designed to connect IP owners and developers; content creators and production houses interested in producing and co-producing creative content. The growth of the M & E ecosystem has to be driven by strategic offerings to collaborate and build world-class infrastructure, drive talent, and mentoring skills to world class standards. It’s time to focus on creating finishing schools across the country to bridge the industry-academia divide to train & provide highly skilled technicians, incubation studios to provide the latest infrastructure & technology support to startups at subsidised prices”

EXPERT'S OPINION



MS. PREETI VYAS

President of Amar Chitra Katha Private Limited, publishers of the iconic Amar Chitra Katha comics and Tinkle magazine, Founder Director, FunOKPlease

“Creating comics is not a singular skill. It’s an amalgamation of numerous skill sets which include research, scripting, inking, colours, layout, editing, and proofing, among others. The creation of comics fuels the imagination and creativity of youth, and also nurtures vital skills such as critical thinking, visual storytelling, problem-solving, and communication. It empowers them to create and share their unique perspectives, fostering personal growth and self-expression. We take pride in nurturing talents for generations by helping our team members learn on the job and also upskill through courses and workshops. MESC skill gap report is helping unlock the huge potential in the comics industry, both from a perspective of livelihood and also creative satisfaction.”



MR. SATHISH NARAYANAN

Founder Director
Design Media & Edutainment Solutions Pvt Ltd



“The design industry, a tapestry of creativity and innovation, has evolved into a powerful force that shapes our world with every stroke of genius. The number of designers are probably going to grow even faster. From graphic design to fashion, architecture, product designer, UX UI, etc has transcended boundaries, an average 11.5% (CARG) since 2014, embracing technology and new perspectives that redefine aesthetics. This evolution mirrors the changing needs of society, with the penetration of AI, the designers timing is concise in finding the solutions and prototypes. However, the industry is always on the look out for a good designer to weave functionality and beauty into the fabric of our lives creating a legacy that leaves an incredible mark on culture, business, and the very essence of human expression.”

6.5.4 Digital Media and OTT

Subsector in Focus: Digital Media and OTT

Digital media and over-the-top (OTT) platforms have gained immense significance in India, transforming the entertainment landscape, and offering unprecedented opportunities.

Digital Media has democratized content creation, enabling anyone with a creative idea and access to technology to produce and distribute their work. This has opened doors for diverse voices and narratives that were previously underrepresented in traditional media.

OTT platforms have played a crucial role in this democratization by providing a space for independent filmmakers, content creators, and artists to showcase their talent and reach a global audience.

India has witnessed a rapid growth in the adoption of digital media. The growth of this subsector has been due to various factors such as:

- Availability of high-speed internet connectivity, and access to affordable data services.
- Proliferation of low-cost smartphones has been instrumental in broadening the user base in India.

- Increase in the number of social networking sites and e-commerce platforms.
- Increase in original content with flexible monetisation strategies by OTT platforms.
- With almost 50% internet users worldwide watching OTT, the scope of increased viewership is high.

The pandemic spurred an increase in adoption of digital medium worldwide, with OTT becoming a new alternative to watch films from the comfort of our home. There has also been a shift in processes to online mode, which in turn has given a boost to the subsector's growth.

According to industry estimates, the Digital sector is envisaged to grow at a CAGR of ~26.85%, resulting in an increase in revenue from INR 20,162 crore in FY 2019 to INR 135,148 crore in FY 2027, as depicted in the graph below. Further, advertisement's share in total revenue is ~87%, followed by subscription that contributes ~13%.¹⁴



Revenue Trends - Digital Media and OTT
(In INR Crores)

Source: MESC Report, 2021

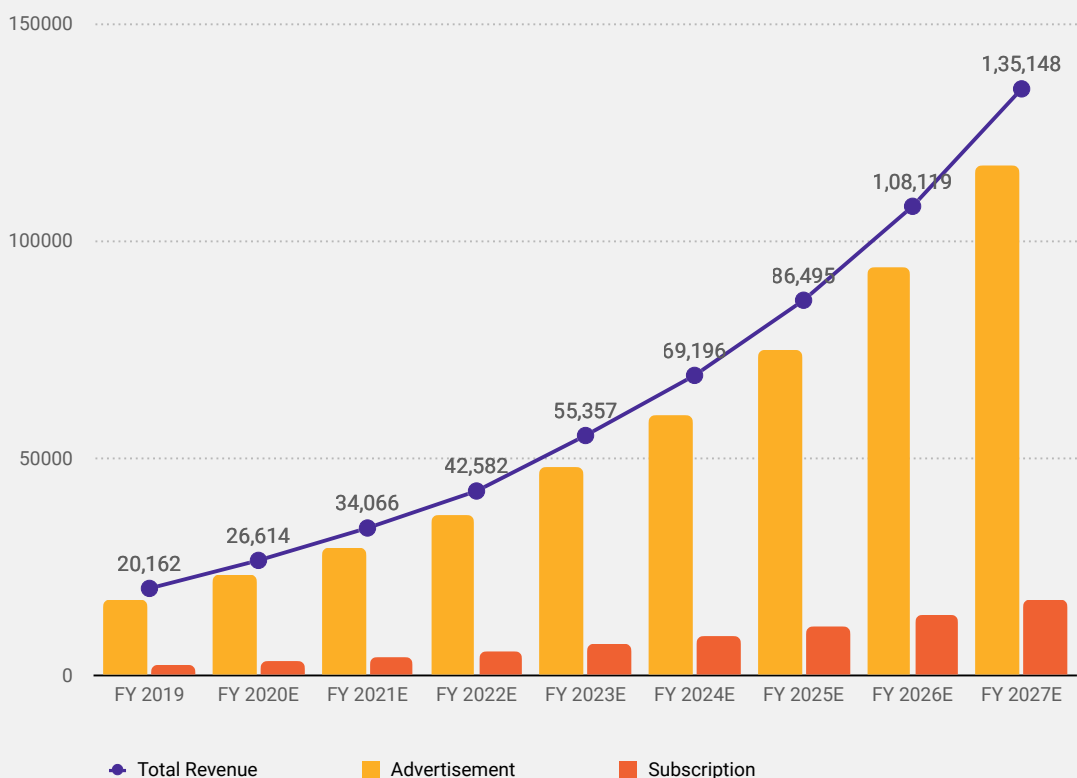


Figure 25: Revenue Trends of Digital Media and OTT Subsector



Source :

- [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)



Employment Potential in Digital Media and OTT

Digital Media and OTT, being a major subsector of the M&E Industry, will generate employment opportunities across various domains and contribute to the overall growth of the sector.

As per industry estimates, the video OTT market in India is expected to grow at an aggressive pace driven by factors such as access to better networks, digital connectivity and increase in the number of

smartphone users. The next wave of OTT growth is also envisaged to come from Tier II, III and IV cities and regional language speaking population.¹⁵ Digital Media also grew 30% in 2022.¹⁶

The growth prospects of the subsector will therefore aid in the generation of employment opportunities in the M&E ecosystem, as depicted in the table and graph below:

Employment Potential - Digital Media and OTT (2019 - 2027E)

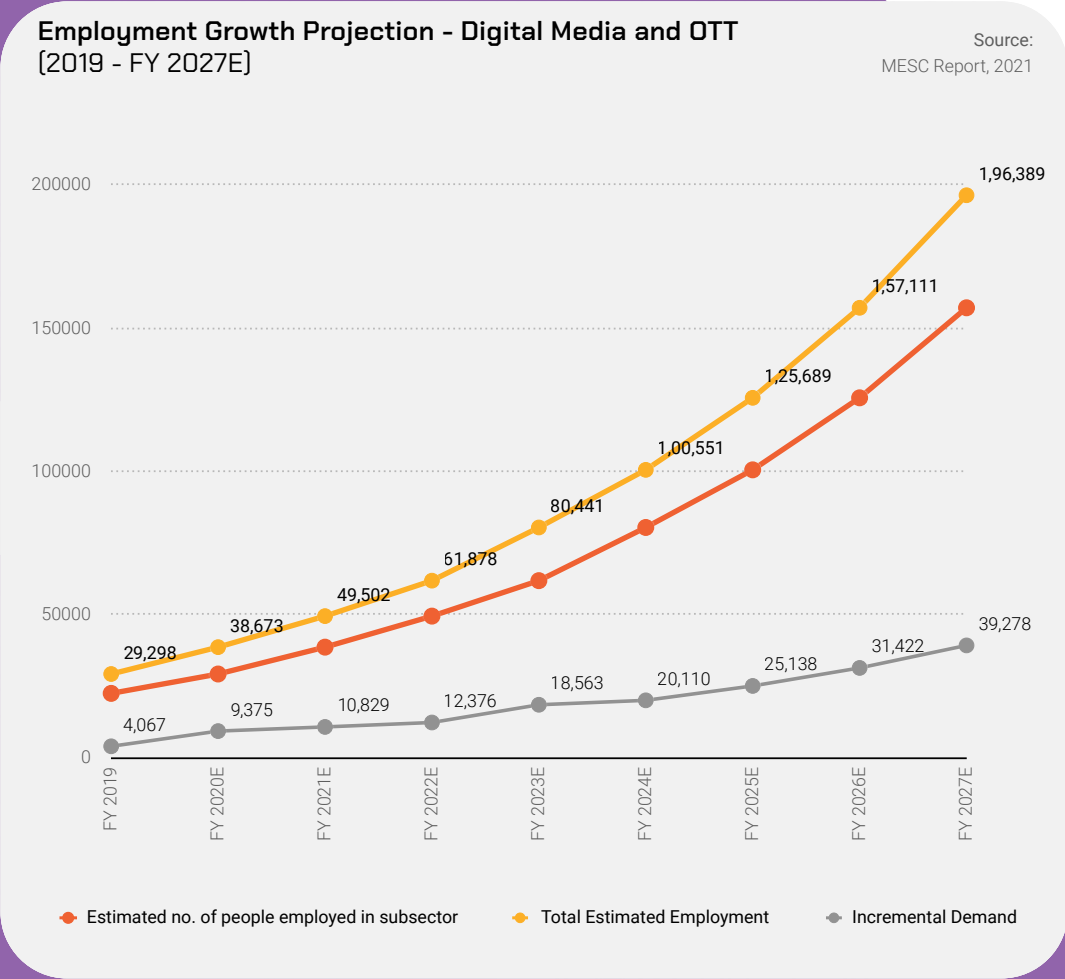
Source:
MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	22,537	29,298	38,673	49,502	61,878	80,441	1,00,551	125,689	157,111
Total Estimated Employment	29,298	38,673	49,502	61,878	80,441	1,00,551	1,25,689	157,111	196,389
Incremental Demand	4,067	9,375	10,829	12,376	18,563	20,110	25,138	31,422	39,278

Table 15: Employment Potential of Digital Media and OTT Subsector



Figure 26: Employment Potential of Digital Media and OTT Subsector



The employment opportunities highlighted above are an indicator of growing demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Source :

15. <https://economictimes.indiatimes.com/industry/media/entertainment/indias-video-ott-market-to-touch-12-5-billion-by-2030-report/articleshow/84517655.cms>
16. https://www.ey.com/en_in/news/2023/05/indian-m-e-sector-grew-20-percent-in-2022-touching-the-highest-ever-mark-of-inr-2-trillion

Skill Development in Emerging Futuristic Job Roles

The field of digital media offers significant scope for employment opportunities. The emergence and rapid growth of digital media has created a multitude of exciting job opportunities across the subsector. A steady rise in jobs has been witnessed across areas such as digital content writing & editing, content production, marketing and communications, digital analytics, among others.

As the digital landscape continues to evolve, job opportunities in areas such as Augmented Reality (AR), Virtual Reality (VR), and Artificial Intelligence (AI) are also on the rise, offering exciting prospects for those with a passion for innovation and technology. The growing reliance on digital media ensures a diverse

range of career options for individuals with expertise in this field, making it a promising and dynamic sector for job seekers.

Moreover, the overall employment landscape for the subsector, shows that various new and emerging roles are likely to gain greater significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.

Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Analytics Manager	Analytics managers would emerge as a futuristic job and their main role would be to track progress with various Analytics software, provide suggestions for growth of business.
Email marketer	Email marketer role would essentially be about emails campaigns, developing new and attractive content for emails and acquiring customers via emails.
Content Manager	It is a very important job role as the content on the website or any other digital media platform essentially decides the success of a business. A company's content must be refreshing, engaging and informative. Content managers will be in charge of the voice, tone and message of the content that a customer will be able to see on the platform as it will help in increasing traffic and ensuring that quality content is being written and displayed.

Table 16: Classification of futuristic job roles in Digital Media and OTT Subsector

Futuristic Job Role	Description
Pay per click/Search engine marketer	The role of search engine marketers in the future would be to enable a company to get their website on the very first page of search with investment. Pay per click is a way to get maximum return and reach many people with minimum investment.
Social Media Marketer	It would include marketing by creating and developing vibrant and engaging content and thereby attracting customers for the social media platform.
Digital Media Specialist	Role will be to develop content that would be used for various digital media platforms. These knowledgeable digital specialists would have the skills to create content, use special effects, animation etc. for different applications from websites to video games and even commercials.
Digital Media Planner	Digital Media planners' role would be a key to future's fast-paced digital world. They would orchestrate the placement of marketing content into different digital media like social media or display media or podcasts, to amplify a campaign's efforts. They would be the go-to people for strategizing content, executing campaigns across various outlets, and reporting on the return-on-investment (ROI) of the campaign.
Digital Researcher	The digital Researchers would essentially be responsible for organizing, collecting, and analysing opinions and data to solve various digital-related website problems of the company. They would specifically work with data related to an organization's digital media, and research information from online advertising, social media, digital marketing and see to it that all function well.
Media Operations Manager/ Analyst	A Media Operation Analyst's role would be to help media companies solve their internal problems and implement various goal-oriented strategies. They would analyse the company's data to evaluate the core problems related to media and its website and provide solutions and operate the department by suggesting better ways to improve the company.
Showrunner	A Media Operation Analyst's role would be to help media companies solve their internal problems and implement various goal-oriented strategies. They would analyse the company's data to evaluate the core problems related to media and its website and provide solutions and operate the department by suggesting better ways to improve the company.

Futuristic Job Role	Description
<p>Domain theme Experts</p>	<p>With increase in demand for movies related to specialised subjects viz. history, sports, biographies, children, animal etc, domain experts in movie making in several themes would be in high demand in the OTT industry. They would act as a catalyst to keep the audience engaged to the movies.</p>
<p>Written Communications Manager</p>	<p>They will be responsible for increasing the publicity of the platform by highlighting the content along with other differentiating factors and will help in creating new strategies around the content to be showcased on the platforms.</p>

Table 16: Classification of futuristic job roles in Digital Media and OTT Subsector (contd.)



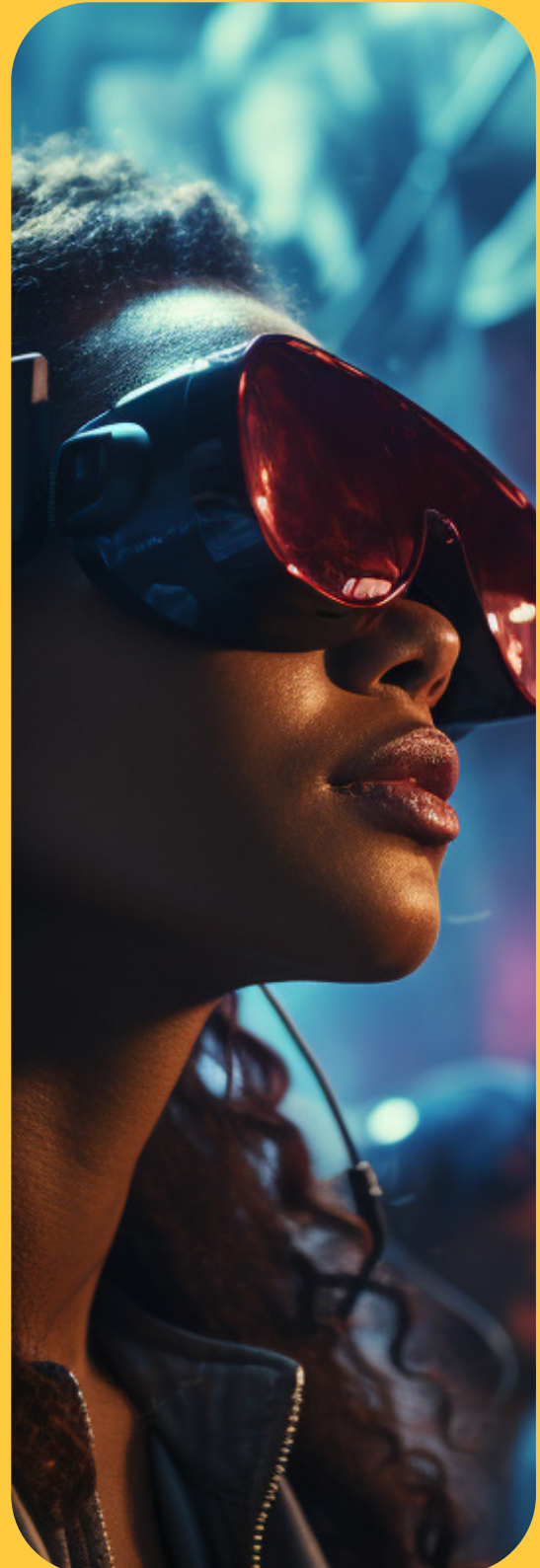
State level trends in Digital Media and OTT

The growth and development of M&E industry has been aided by the Government's policy initiatives aimed at increasing digitization, development of digital communication infrastructure, digitization of the cable distribution sector to attract substantial institutional funding, and 5G spectrum auctions, among others.

As per FICCI's April 2023 Report, top six metros contribute 33% to total paid subscriptions in India. Government tenders for smartphones will also drive demand in 2023. For instance, the government of Rajasthan has floated a tender to acquire smartphones that will be distributed among women.

Further, as per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- Bengaluru, Mumbai, Pune, Gurgaon, New Delhi, Hyderabad, Chennai, Noida, Ahmedabad, Kolkata, and Kochi, are among the key cities that offer substantial employment opportunities in the subsector.
- The above cities have demonstrated high demand for job roles across profiles such as Sales Coordinator (Media Organisation), Sales Executive (Media Organisation), Sales Manager (Media Organisation), Search Engine Optimization Executive, Search Engine Marketing Executive, Social Media Executive and Social Media Manager.
- The next 5 years are likely to see the rise of Chandigarh, Bhubaneshwar, Raipur, and Indore, as hubs for good quality job opportunities in the subsector.



Details of Courses Available

The courses available in the Digital Media and OTT sub-sector are majorly divided into:



Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

There are several courses available in India which teach Digital Technology Media. Currently, there are over 70 institutes across India which provide PG courses in Digital Marketing Management. As experts believe that only ~20% of the graduating people from above mentioned courses opt for career in Digital Media.





EXPERT'S OPINION



MR. TEJONIDHI BHANDARE

CEO, Reliance Animation Studios

“India is fast emerging as the prospective global giant in the field of animation, gaming, VFX & comics, and to be successful, one needs to be prepared in every manner to handle the challenges. Awareness and building skills at early ages are the key factors that define the growth journey and creating both factors from early ages is the key to the growth and development of the sector. At the same time it is important for the aspiring talent to understand that 3 P’s are key to success in this sector viz. Patience, Passion and Perseverance. Also it is important to create the awareness that the Industry is story-telling/Film-making and Entertainment and Animation/VFX is a medium of story-telling.

According to the latest Reports the demand for animated content and kids’ OTT platforms has grown since pre-pandemic, with more options in regional languages. India has become one of the leading providers of end-to-end services, from pre-visualization to final rendering, resulting in a rise in work volume and value. There has been a 100% increase in high-budget films in India in 2022, leading to a higher demand for domestic VFX services. Tent pole movies and VFX-heavy episodic content remain popular, with over 50 such movies set to release globally in 2023-2024. Top 10 OTT platforms are expected to commission 1,000+ original titles in the coming years. Anime viewership among millennials has increased, creating opportunities for adult-focused animated content and home-grown IPs. Gaming has also experienced significant growth, presenting new avenues for monetization. The rise of the metaverse will increase the demand for 3D modelling and real-time rendering, leading to more job opportunities and new companies entering the space.

MESC continues to demonstrate leadership with yet another report on the M&E sector. While AVGC would continue to be a sector for growth in India and an opportunity for ‘skilled Indians’ to lead the world. New areas that would greatly transform the M&E sector such as AR, VR, and Web 3 present a new set of opportunities. If nurtured well and with the skill sets identified the sector could create an entirely new generation of creators who could find innovative ways to monetize their content.”

EXPERT'S OPINION



MR. SUNIL PRABHAKAR

Consultant Online
Mathrubhumi, Kochi

“The Media and Entertainment industry in India is on a steady upward trajectory and is expected to reach USD 35 billion by 2025. In particular, there is a significant demand for digital content in various regional languages. To effectively capitalise on this trend, publishers and content creators in the sector can capitalise on three key elements: Artificial Intelligence (AI), Audience and Accountability.

Adopting an AI-first approach holds great promise as it enables content creators to achieve their goals more seamlessly. Consequently, the focus should now shift to upskilling individuals in the use of AI and other related technologies to produce compelling content. By improving their skills in AI-driven content creation, professionals can maximise their impact and relevance in an increasingly competitive landscape. By embracing this transformation, the industry is poised to make further strides in delighting audiences with innovative and culturally relevant content tailored to their preferences.”



MS. MEGHNA GHAI-PURI

President – Whistling Woods International



“Films have undergone a mesmerizing evolution in recent years, emerging as a dynamic force that redefines storytelling and captivates global audiences. With advancements in technology, innovative storytelling techniques, and a surge of creative talents, film production has unlocked new dimensions of artistic expression. This dynamic landscape transcends genres, empowers diverse voices, and celebrates the magic of cinema in all its forms. We at Whistling Woods continue to invest time, money, energy & effort to make sure that the skills needed by Media & Entertainment professionals of today and tomorrow are taught to them.

MESC is playing a pivotal role in shaping the future of filmmaking and inspiring the next generation of storytellers to make a positive and lasting impact on society.”

6.5.5 Events and Live Performance

Subsector in Focus: Events and Live Performance

The Event and Live Performance subsector is a prominent pillar of India's M&E Industry. Besides the M&E industry, the subsector has immense significance in our society, as it provides a platform to individuals and communities to create and share distinctive experiences.

Live events, such as music concerts, theatre performances, sporting events, and cultural festivals, have the power to bring people together, fostering a sense of unity, joy, and shared connection. These events also serve as avenues for artists and performers to demonstrate their artistic skills and talent, providing them with opportunities for personal growth and career development.

The growth of this subsector has been driven by various factors, prominent among which are digital activation and expansion, technological advancements, rural expansion, launch of products, personal events, large scale

Government events, rise of social media and digital platforms that have amplified the reach of events and live performances.

The pandemic induced restrictions caused widespread disruption in the subsector, leading to cancellation of events and performance worldwide. As per estimates, the Indian events and exhibition sector had been estimated to bear a loss of INR 1000 crore in 2020, triggered by postponement and cancellation of almost all large-scale events.

The subsector has, however, bounced back after the pandemic. According to estimates, the Events and Live Performance sector is envisaged to grow at a CAGR of ~7.31%, clocking an increase in revenue from INR 8,300 crore in FY 2019 to INR 14,590 crore in FY 2027, as depicted in the graph below. Further, admission fee contributes ~60% to the total revenue, followed by sponsorships (~30%), and other revenue streams such as parking fee, food, and beverages (~10%).



Revenue Trends - Events and Live Performance (In INR Crores)

Source: MESC Report, 2021

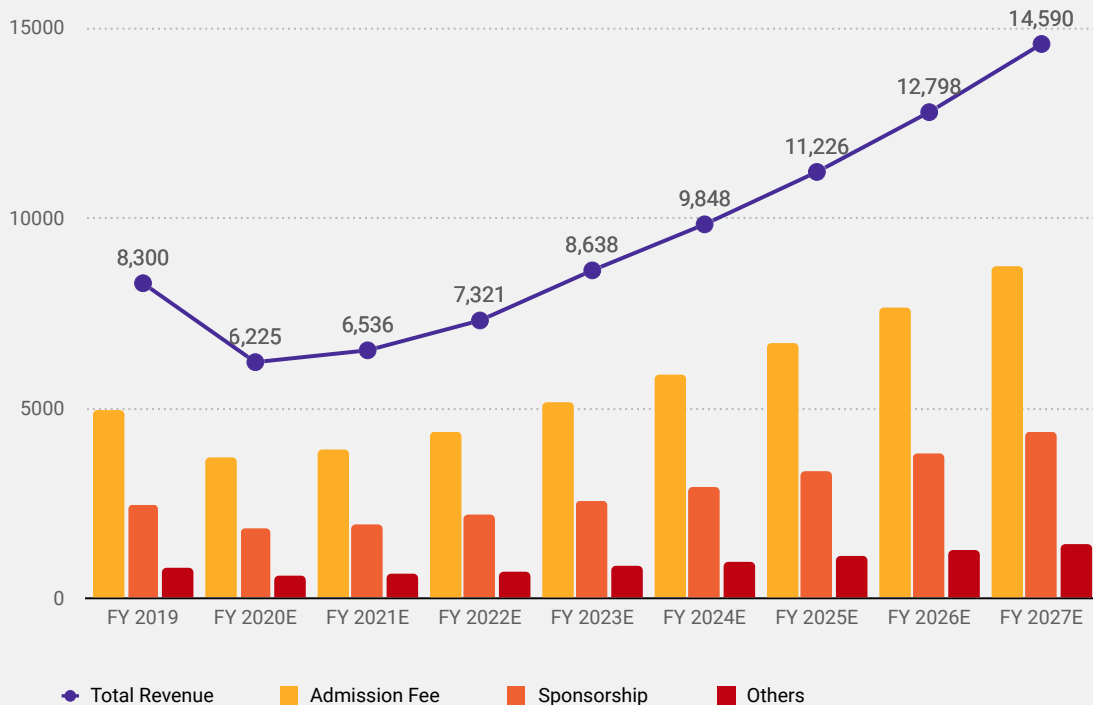


Figure 27: Revenue Trends of Events and Live Performance Subsector



Employment Potential in Events and Live Performance

As per FICCI's April 2023 Report, the Government has been increasingly spending on large scale events such as Pravasi Diwas, G20, International Yoga Day, state investor summits, among others. The subsector was also the fastest growing segment in 2022, with various events such as weddings, corporate events, government events, international shows, taking place after a gap of nearly two years.¹⁷

The continued growth of the subsector is linked to generation of employment opportunities, as depicted in the table and graph below. As per experts, a major share of jobs in the segment are seasonal in nature and are undertaken by contractual staff.

Employment Potential - Events and Live Performance (2019 - FY 2027E)

Source:
MESIC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	1,72,010	1,76,998	1,32,749	1,39,386	1,56,112	1,84,213	2,10,003	239,403	272,919
Total Estimated Employment	1,76,998	1,32,749	1,39,386	1,56,112	1,84,213	2,10,003	2,39,403	272,919	311,128
Incremental Demand	17,068	-44,250	6,637	16,726	28,100	25,790	29,400	33,516	38,209

Table 17: Employment Potential of Events and Live Performance Subsector



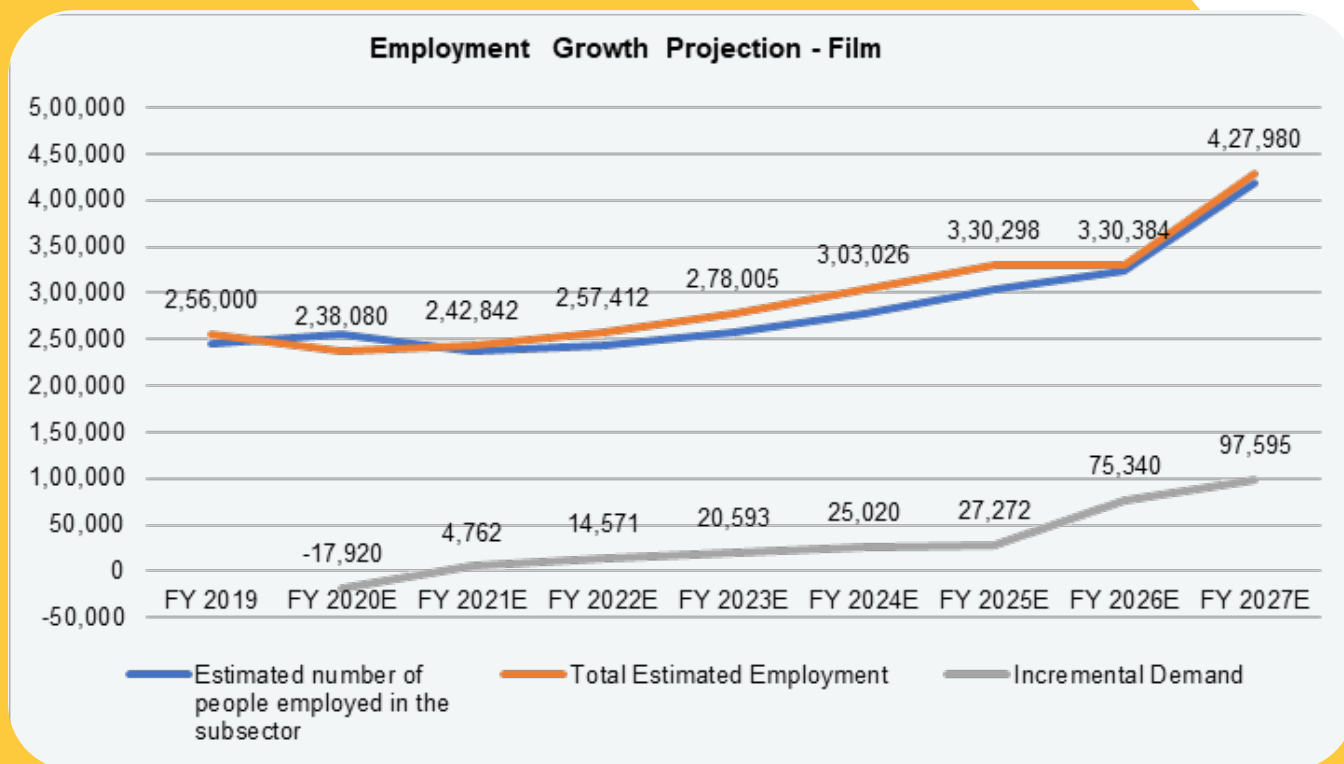


Figure 28: Employment Potential of Events and Live Performance Subsector

The employment opportunities highlighted above are an indicator of growing demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Source :

17. https://www.ey.com/en_in/news/2023/05/indian-m-e-sector-grew-20-percent-in-2022-touching-the-highest-ever-mark-of-inr-2-trillion

Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Sports event manager (Sports manager)	The sports managers with knowledge and interests about sports and trained for management of sporting activities will be in demand. With the rise of various sports leagues in India, there is also a need to introduce more sports management courses.
Celebrity managers	Agents and Business Managers of Artists, Performers, Athletes or other celebrities who represent and promote them with current or prospective procurers of their services. They may also handle contract negotiation and other business matters for their clients.
Talent managers	The industry experts suggest that talent managers are responsible for ensuring that their artists are taken care of. They help hire and manage any staff for a client. Talent managers handle public relations and media exposure, such as appearances on TV shows, interviews with journalists, and social media presence.
Public relation managers	They are responsible for handling all aspects of publicity campaigns and create and maintain a favourable public image for their clients by communicating programs, accomplishments and/or points of view.
Campaign manager	A campaign manager coordinates an events' campaigns' operations including fundraising, advertising and other activities supporting the effort. Their activities involve brainstorming and implementing event plans and concepts, handling budgeting and invoicing, liaising, and negotiating with vendors, negotiating sponsorship deals, handling logistics, updating senior management, managing branding and communication and developing event feedback surveys and analysing them.
Event technology manager	A technology manager coordinates an events' technology operations including hardware, software and networking & communication requirements, procurement and operations; technology enablement of event, provision or procuring of a customised tech platform etc. It may also include social media management for the event.

Table 18: Classification of futuristic job roles in Events and Live Performance Subsector

State level trends in Events and Live Performance

Several states in India have taken initiatives to promote the events and live performance sector, recognizing its importance in driving cultural, social, and economic growth.

For instance, the Jaipur Literature Festival, hosted by Rajasthan, is one of the largest literary events in the world, and attracts renowned authors, poets, and intellectuals from across the globe, promoting literature, art, and intellectual discourse.

West Bengal supports the annual festival “Durga Puja,” where thousands of elaborately decorated temporary pandals are created, showcasing artistic creativity and cultural traditions.

Similarly, the Sunburn Festival, a commercial EDM festival in India and among the largest dance festivals in the world, is associated with the state of Goa.

Further, as per the MESC Report ‘Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)’, the following trends have been observed across different cities in India:

- New Delhi, Gurugram, Noida, Bengaluru, Hyderabad, Mumbai and Pune, Goa, Chennai, Kolkata, are among the key cities that offer substantial employment opportunities for individuals interested in event management and coordination.
- The above cities and various states have demonstrated high demand for job roles across profiles such as Event Planner, Event Space or Venue Managers, Catering Services Manager, Wedding Planner, Staff Coordinator, Event Social Media Coordinator, Sponsorship Coordinator, among others.
- The next 5 years are likely to see the rise of off-beat locations for events. For instance, places like Alwar, Jodhpur, Udaipur in Rajasthan, Alibag in Maharashtra, Puri in Odisha, and Kerala are being increasingly preferred for their aesthetic landscape and natural beauty.



Details of Courses Available

The trained manpower available for events and live performance sub-sector is mainly from UG/PG event management courses. Further, the subsector also onboards talents from hotel management courses who are found to be suitable as majority of the tasks in events and live performances are related to guest handling. Apart from these courses, people with large crowd handling skills such as unarmed security guards are also employed in large events.

Experts believe that only ~80 percent of the candidates graduating from mentioned courses opt for careers in Live Events.

EXPERT'S OPINION



MS. NILOUFER SAGAR

Former COO, Terence Lewis Academy

“ In training for a performing art like dance, one of the crucial aspect is breaking down the content of the dance form so that the skill can be communicated to the students. Training institutes need to build this competence. ”

EXPERT'S OPINION



MS. SUSHMA GAIKWAD

Co-founder Ice Global & Wizcraft MIME

“The event and entertainment industry in India is growing at a phenomenal pace and leaving its indelible mark on the global stage. In fact, the Indian entertainment and event industry is being recognized for its creative innovation, larger than life production value and technological process. Talent, especially skilled talent is the foundation of this industry. Keeping pace with industry growth is the urgent need for a skilled work force. I recommend the skill gap report as it provides insight to meet the evolving industry needs in order to provide requisite skilling opportunities.”



MR. SABBAS JOSEPH

Founder-Director, WIZCRAFT Group, Former Secretary-MESC; President EEMA (2014-18)



“The experiences and event management industry stands tall as a testament to the power of creativity and the power of live experiences.

As demand soars for spectacular experiences that leave lasting impressions, this vibrant industry calls for skilled professionals to weave magic in every detail. Be it extravagant weddings, corporate extravaganzas, mega government-led events, public rallies or brand activations in small towns and rural India, event management professionals orchestrate moments that transcend the ordinary and create memories that last a lifetime.

This high demand reflects the industry’s potential to captivate hearts, drive economic growth and redefine the art of celebration and brand experiences.

MESC’s commendable commitment to standardizing and advancing the M&E industry is evident in their persistent efforts.

The skill gap report effectively addresses the future requirements of the M&E industry and points clear directions in which future action is needed.”

MR. RAJEEV GOLDY

Comedy



“The comedy industry has evolved into a platform where artists can express their unique perspectives, challenge societal norms, and spread laughter in a world that needs it now more than ever. With the rise of digital platforms and live performances, comedians have found new avenues to reach diverse audiences, transcending geographical boundaries.”

6.5.6 Films

Subsector in Focus: Film

The Indian film industry occupies a prominent position in global cinema. Renowned for its scale, diverse genres, and rich storytelling, the film industry has made significant contributions to the cultural, social, and economic fabric of the country.

The industry has traversed a long journey from traditional film reels to digital filmmaking, incorporation of animation and VFX, and advanced post-production processes. The widespread adoption of digital platforms for distribution of films, rise of OTTs, and online streaming has provided a plethora of new avenues for filmmakers to expand their reach among the audience.

The growth of this subsector has been driven by various factors, prominent among which are

increase in disposable income, average prices of tickets, increase in movies that incorporate VFX to enhance the storytelling, increase in number of movies released, among others. The subsector is envisaged to grow further on account of these growth drivers. The Regional Film Industry has also played a crucial role in the growth of India's film industry.

The pandemic had severely impacted the industry and resulted in significant loss of revenue due to closure of theatres across the world. According to estimates, the Film subsector is envisaged to grow at a CAGR of 5.5%, clocking an increase in revenue from INR 18,600 crore in FY 2019 to INR 28,500 crore in FY 2027,¹⁸ as depicted in the graph below.



Revenue Trends - Films
(In INR Crores)

Source:
MESC Report, 2021

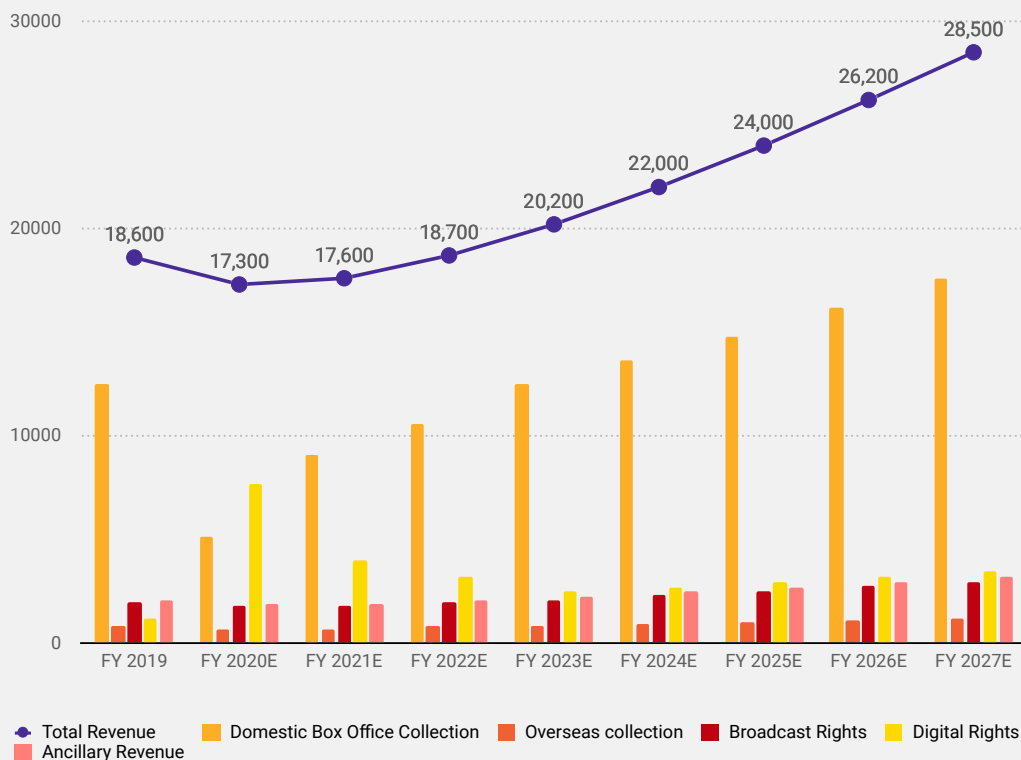


Figure 29: Revenue Trends of the Film Subsector



Source :

18. https://www.ey.com/en_in/news/2023/05/indian-m-e-sector-grew-20-percent-in-2022-touching-the-highest-ever-mark-of-inr-2-trillion



Employment Potential in Film

The film subsector is an integral part of the broader creative industry and is one of the most important segments of M&E sector. The growth and development of the film industry can spur innovation and creativity, leading to the emergence of significant employment as well as entrepreneurial opportunities.

The continued growth of the subsector is linked to generation of job opportunities, as depicted in the table and graph below.

Employment Potential - Films (2019 - 2027E)

Source:
MESIC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	2,46,154	2,56,000	2,38,080	2,42,842	2,57,412	2,78,005	3,03,026	330,298	392,427
Total Estimated Employment	2,56,000	2,38,080	2,42,842	2,57,412	2,78,005	3,03,026	3,30,298	360,025	392,427
Incremental Demand		-17,920	4,762	14,571	20,593	25,020	27,272	29,727	32,402

Table 19: Employment Potential of the Film Subsector



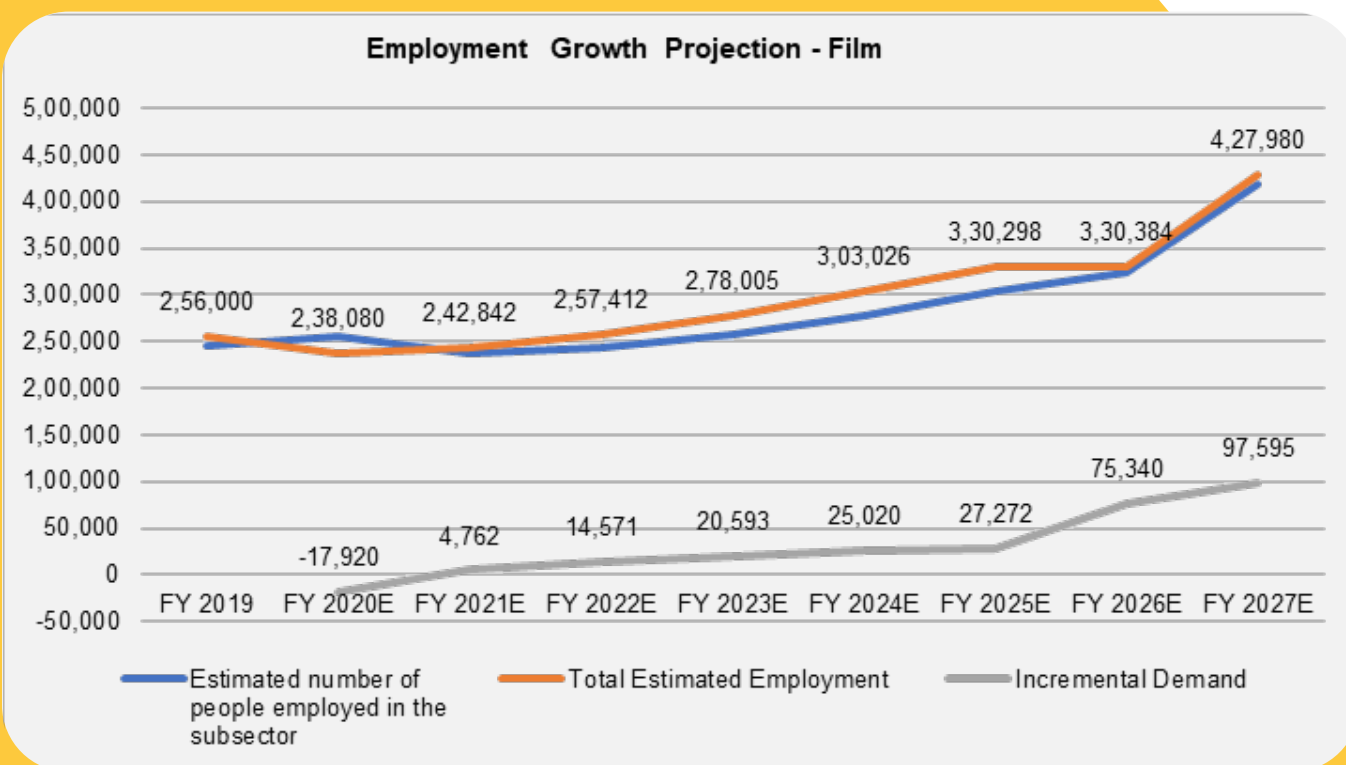


Figure 30: Employment Potential of the Film Subsector

The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



EXPERT'S OPINION



MR. RADHAKRISHNAN CHAKYAT

Photographer,
Founder of Pixel Viilage

“With the rise of smartphones and advanced digital cameras, photography has become accessible to all, empowering individuals to capture and share their unique perspectives with the world. This democratization of photography has ignited a spark of creativity, inspiring artists and enthusiasts to explore new techniques, experiment with visual storytelling, and push the boundaries of their art. As photography continues to evolve, it fosters a vibrant community of passionate creators who use their lenses to capture the beauty of life, preserve memories, and share narratives that resonate with hearts across the globe.

The comprehensive approach and details on creative and technical requirements are well covered in the Skill Gap report of MESC. God job team MESC.”

MR. SANDEP MARWAH

Indian Film Maker, Chairman, ICMEI
Chancellor, AAFT University, President, AEG



“The increasing demand for film production and the emergence of film cities across the country are testaments to the power of storytelling in shaping our nation’s cultural landscape. As the demand for diverse content soars, film cities have become the vibrant hubs that fuel creativity, foster collaborations, and drive economic growth. These epicenters of cinematic brilliance not only provide state-of-the-art facilities for filmmakers but also generate employment, boost tourism, and empower local industries. By nurturing the dreams of aspiring talents, film cities empower our nation to share its rich cultural heritage with the world, elevating India’s soft power on the global stage. MESC’s continuous efforts for the skilling ecosystem in M&E sector is remarkable and I congratulate team MESC on release of Skill Gap Report”

MR. DABOO RATNANI

Indian fashion and commercial photographer



“Photography, with its timeless charm and evolutionary journey, has captured the world’s imagination, creating a thriving demand for skilled professionals in the market. As the art of capturing moments evolves, so does the scope of photography careers. From traditional landscapes to dynamic portraits, the demand for talented photographers is at an all-time high, as businesses, media, and individuals seek to visually narrate their stories. This growing demand has transformed photography into a rewarding and versatile career path, where creativity knows no bounds, and the lens becomes a powerful tool for shaping the narrative of our times.”

EXPERT'S OPINION



MR. SUBHASH GHAI

Indian Film maker & Educationist

“Our nation’s rich cultural heritage, diverse storytelling, and artistic brilliance have propelled Indian cinema onto the global stage. With each passing year, our filmmakers, actors, and technicians continue to break barriers, challenge stereotypes, and redefine cinematic excellence. The advent of new technologies, coupled with the rise of digital platforms, has democratized filmmaking, empowering aspiring talents to tell their stories. It is absolutely critical that we track the skills needed for modern-day filmmaking and storytelling and make sure that India’s next generation is equipped with those skills.

MESC’s transformative initiatives pave the way for a more vibrant and inclusive creative landscape, nurturing a talented workforce that will continue to elevate Indian cinema on the global stage.”



MR. NEERAJ KALYAN

President T-Series



“The potential of the Indian M&E in terms of generation of revenues and employment is huge provided that we tap it. The time I feel is ripe with the global industry now realising the potential of Indian artists and creators. The recent Oscar and Golden Globe awards are only the start. It is the need of the hour that we lay a strong foundation to bridge the skill gap by providing more infrastructural facilities and educating our youth so that we can grow and develop systems that can keep up with the technological advancements be it AI, metaverse, VFX etc and emerge as a nation which is looked at as a leader in these spheres.”

MR. RAHUL PURI

MD, Mukta Arts



“Skill development and training in Film making nurtures the dreams of aspiring filmmakers, empowering them with the knowledge, expertise, and hands-on experience needed to bring their visions to life. In the dynamic world of storytelling, students are equipped with the tools to create impactful narratives that resonate with audiences across borders. Through our commitment to fostering creativity, innovation, and technical proficiency, we empower the next generation of storytellers to shape the future of filmmaking and make a positive impact on society.

MESC’s initiative to track and bridge the skill gap is a much-needed and commendable stride in the right direction.”

Skill Development in Emerging Futuristic Job Roles

The film subsector plays a significant role in driving economic growth and creating job opportunities in the country. The subsector not only generates direct employment opportunities for individuals but is also responsible for multitude of jobs in supporting industries, including but not limited to equipment rental, transportation, set construction, post-production, and marketing.

Being a niche sector, the industry requires skilled workforce with prior experience, resulting in significant demand for professionals with hands-on experience. As per experts, there are over 180 colleges in India that offer courses in film technology. However, as pointed out by these experts, there is also a huge skill gap that exists between the education imparted at academic institutions and

actual industry requirements. This reinforces the need for practical trainings, particularly for freshers who seek entry level positions in the industry with no relevant prior work experience.

Also, the overall employment landscape for the subsector, shows that new and emerging roles are likely to gain significance in the coming years. With the rise of OTT platforms, there has been a change in the way people create and consume content. This brings to the fore the need to develop specific skill trainings catering to the changed scenario. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Showrunners	Essentially, they are interface between the OTT platforms and the team responsible for making a show. They possess the combined qualities of a producer and a director. Their role is to ensure that there is no gap between the content visualised by the team and what is presented on the platforms.
Audio Visual (AV) production specialists	Responsible for delivering video promos, digital content, and video. Further they control the viewership of advertisement
Written Communications Managers	Responsible for increasing the publicity of the particular platform and help in creating new strategies around the content to be showcased in the platforms.
Social media specialists	Play a very important role in today's era of social media marketing by way of designing appropriate strategy to increase the user base and by spreading the word as much as possible through innovative ideas.
Tagger/Original creatives analysts	Their role is to watch the content on a platform and tag film/shows with relevant data like release year, language, director, cast, etc.
Domain theme Experts	With increase in demand for movies related to specialised subject matter viz. history, sports, biography of renowned personalities, children, animal etc. Domain experts, in movie based on those themes, would be in high demand in the film industry. They would act as a catalyst to keep the audience hooked to the movies.

Table 20: Classification of futuristic job roles in the Film Subsector

State level trends in Film

The above cities and various states have demonstrated high demand for job roles across profiles such as Actor, Assistant Cameraman, Camera Operator, Live Action Director, Set Carpenter, Set Decorator, Set Painter, Set Plasterer, Dancer, Voice-over Artist, Hair Dresser, Lighting Artist, Make-up Artist, Production Assistant, Location Manager, Unit Production Manager, among others.

As per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- Mumbai, which is regarded as India's movie capital, is producing most feature films. It hosts the Hindi film industry that has a pan-India footprint.
- Chennai, Kolkata, Hyderabad, Thiruvananthapuram, Bengaluru, Bhubaneswar & Guwahati are other major Indian cities where films are produced and are employing significant number of people.
- The above cities and various states have demonstrated high demand for job roles across profiles such as- Actor, Assistant Cameraman, Camera Operator, Set Carpenter, Set Decorator, Voice-over Artist, Set Painter, Set Plasterer, Live Action Director, Hair Dresser, Lighting Artist, Make-up Artist, Dancer, Production Assistant, Location Manager, Unit Production Manager, among others.
- The next 5 years are likely to see the rise of various states for the work being undertaken for development of film cities. Taking into consideration future demand, various film cities are being developed across states such as Uttar Pradesh, Punjab, Madhya Pradesh, Chhattisgarh, Odisha, and Bihar, by respective State Governments and private players. This will also increase the employment prospects in these states, under the film subsector.



Details of Courses Available

The courses available in the Advertisement and OOH sub-sector are majorly divided into:



Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

Employers in film industry prefer degree in Film Technology, Performing Arts, Cinematography, Editing, and Directing. Experts believe that 20% of the students graduating from above mentioned courses opt for career in film industry. Further merely ~10-15% students trained in the vocational courses find placement in the sub sector.

EXPERT'S OPINION



MR. DILIP CHENOY

Secretary General, Federation of Indian
Chambers of Commerce & Industry (FICCI)

“MESC continues to demonstrate leadership with yet another report on the MESC sector. While AVGC would continue to be a sector for growth in India and an opportunity for ‘skilled Indians ‘ to lead the world. New areas that would greatly transform the M&E sector such as AR, VR, and Web 3 present a new set of opportunities. If nurtured well and with the skill sets identified the sector could create a entirely new generation of creators who could find innovative ways to monetise their content.”

EXPERT'S OPINION



MR. SANTANU BOSE

Dean Academic Affairs and Associate Professor, World Drama, National School of Drama

“ There is a need for a chain of training and performing centres. Success stories already exist in Australia and UK for local cinema and American cinema and in the US for American cinema. Some of them have extended operations to China where they train on western films. There is a societal need in India for getting into acting and we need to broad base the options to enable that. ”



MR. SHRIKANT SINHA

Chief Executive Officer, Telangana Academy for Skill and Knowledge (TASK)

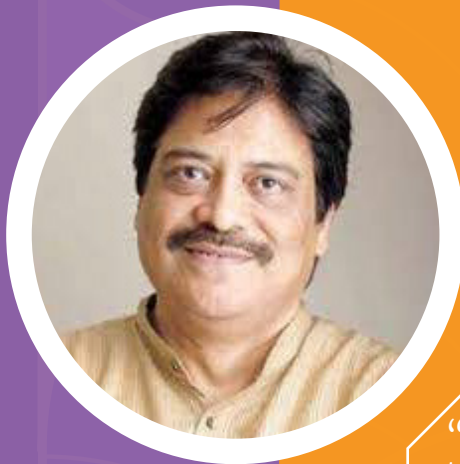


“With a growth rate of approx 30%, the Indian Media and Entertainment (M&E) industry is experiencing remarkable growth and recognition on the global stage.

With its profound cultural heritage coupled with native skills, diverse talent pool, and relentless pursuit of excellence, India has emerged as a true powerhouse of creativity and innovation. Our industry has carved out a distinct identity, continually pushing boundaries, and setting new standards that resonate worldwide. Through nurturing our talent, fostering collaborations, and harnessing cutting-edge technologies, we are solidifying the Indian M&E industry’s position as a formidable force.

Central to this progress is the unwavering dedication and ongoing initiatives of the Media and Entertainment Skills Council (MESCC) in enhancing the skilling ecosystem. We at TASK are collaborating and working closely with MESCC to create skills in the Youth of Telangana. These efforts are driving India towards becoming the global skill capital for the Media and Entertainment sector. Together, let us continue to shine brightly, captivating the world, and leaving an indelible mark on the global stage.”

EXPERT'S OPINION



MR. SALIM ARIF

Indian Theatre Artist

“Skilling in M&E industry in India is essential to ensure that a majority of our workforce in areas of technical knowhow is certified with a formal knowledge base. These skilled workers and technicians will be able to handle the increasing variety of M&E industry’s demands with ease and success.

MESC needs to evolve a template for endorsement of these certifications so that there is a standardization of technicians and skilled workers across various linguistic regions in India”



MR. SANDEEP A VARMA

CEO, Filmboard (myfilmapp.com),
Filmmaker (Web series, Manjunath(Viacom))



“The Media and Entertainment sector in India has been on the verge of exploding onto the world market for a number of years. For a society where there are stories every way you look, and a culture deeply seeped in the storytelling culture, one has to say that it has not fulfilled its potential. Let us remember that this is the land where the great epics like Ramayana and Mahabharata were not written down for many centuries, and were ‘told’ down generation in story narrative format. Most of the great ancient texts are composed in metre, so that they are easier to memorise and speak. Even now, wherever we look, people have a story to tell which is now getting expressed in Reels and tiktok videos.

It’s about time the Indian storytelling tradition fulfills its true potential and becomes the world beater it deserves to be. For this to happen, the M&E sector needs to get organised and remove blockages. In- depth reports, such as this, go a long way in looking at the industry from a bird’s eye view, and to be able to spot and work to remove the blockages. For inspiration, we only have to look a few thousand miles east at South Korea, and how its content retains the flavour of its culture and yet tells universal stories in a manner that is world class. India already produces a large amount of content, probably the largest in the world in terms of volume, but since most of the content is focussed on the huge domestic market alone, it currently lacks world class standards. The quality of Indian talent is top notch and needs the right platform to reach across to the rest of the world. Far more collaborations between Indian production houses and talent with international production houses, platforms and talent will provide the cutting edge. As a world pioneer, facilitating this has been our grand vision.

That one day, a part time talented writer working possibly in a bank in a small town in India is writing the script of a Marvel film headed for a big global release.”

6.5.7 Online Gaming

Subsector in Focus: Online Gaming

The online gaming segment in the country grew by 28% in 2021¹⁹ and 35% in 2022²⁰. This exceptional growth is fuelled by improved digital connectivity, demographic factors, change in media consumption habits, increase in number of gamers, as well as innovations by the industry during the last few years.

As per estimates by Accenture for 2021, there are 2.7 billion gamers across the world with China, Japan, US, and UK combined representing 47% of all gamers globally and 64% of all direct consumer spend on gaming.²¹ Asia-Pacific is anticipated to hold the largest market share in the gaming industry, with India, Japan, China, and South Korea showing high potential for market growth.²²

The gaming industry is at the core of the AVGC sector and drives growth across its entire ecosystem. The subsector has been growing steadily for the last five years. Further, the COVID-19 has led to a long-lasting shift towards digital means of entertainment, which has resulted in exponential growth of the gaming industry during the pandemic.²³

According to industry estimates, the Online Gaming subsector is envisaged to grow at a CAGR of 31.12%, with an increase in revenue from INR 6,286 crore in FY 2019 to INR 54,925 crore in FY 2027, as depicted in the graph below.²⁴



Revenue Trends - Online Gaming
(In INR Crores)

Source:
MESC Report, 2021

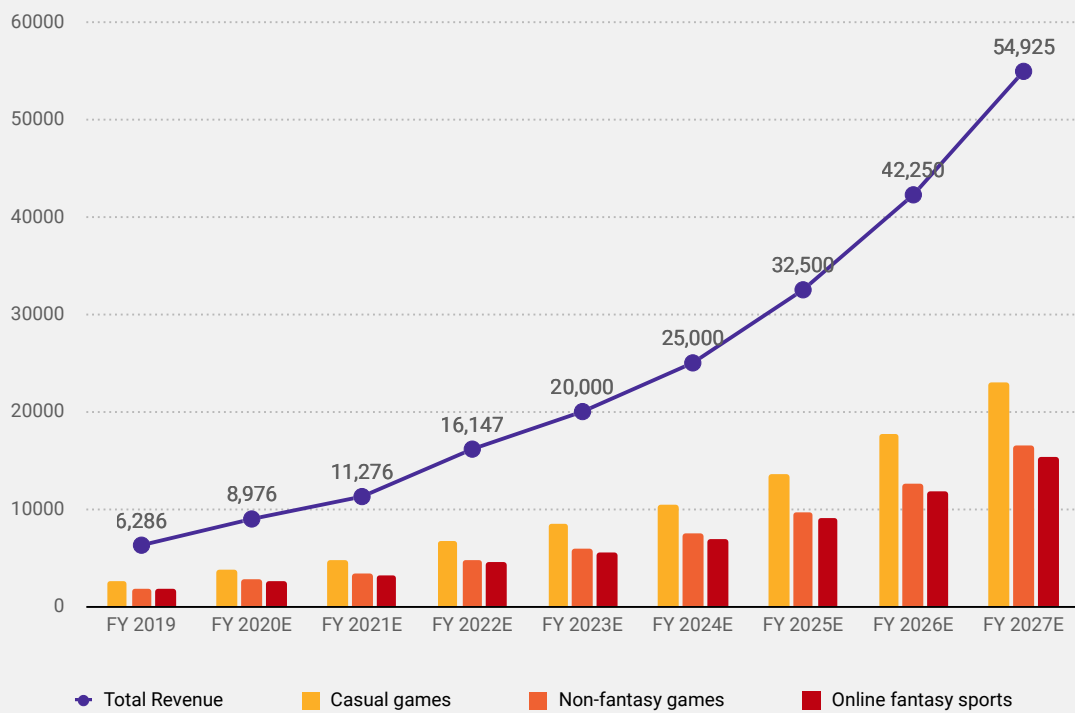


Figure 31: Revenue Trends of Online Gaming Subsector



Source :

19. As per NITI Aayog estimates
20. Windows of Opportunity: India's media & entertainment sector - maximizing across segments, FICCI 2023
21. https://www.accenture.com/_acnmedia/PDF-152/Accenture-Gaming-Article.pdf#zoom=40
22. <https://www.statista.com/topics/2196/video-game-industry-in-asia/#dossierKeyfigures>
23. <https://mib.gov.in/sites/default/files/AVGC-XR%20Promotion%20Taskforce%20Report%20-%202022.pdf>
24. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Online Gaming

India is one of the top five markets in the world for mobile gaming. The gaming industry drives growth across the entire AVGC ecosystem and is an important part of the M&E Industry.

As per FICCI's April 2023 Report, the online gaming subsector is the

fourth largest segment of Indian M&E sector and grew by 35% in 2022.²⁵

In this context, the subsector is projected to generate employment opportunities in the M&E ecosystem, as depicted in the table and graph below:

Employment Potential - Online Gaming (2019 - 2027E)

Source:
MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	49,844	73,271	82,445	1,19,047	1,52,856	1,93,024	2,50,043	323,906	419,588
Total Estimated Employment	49,844	71,073	89,040	1,27,380	1,57,442	1,96,884	2,55,044	330,384	427,980
Incremental Demand	8,203	21,229	17,967	38,340	30,062	39,442	58,160	75,340	97,595

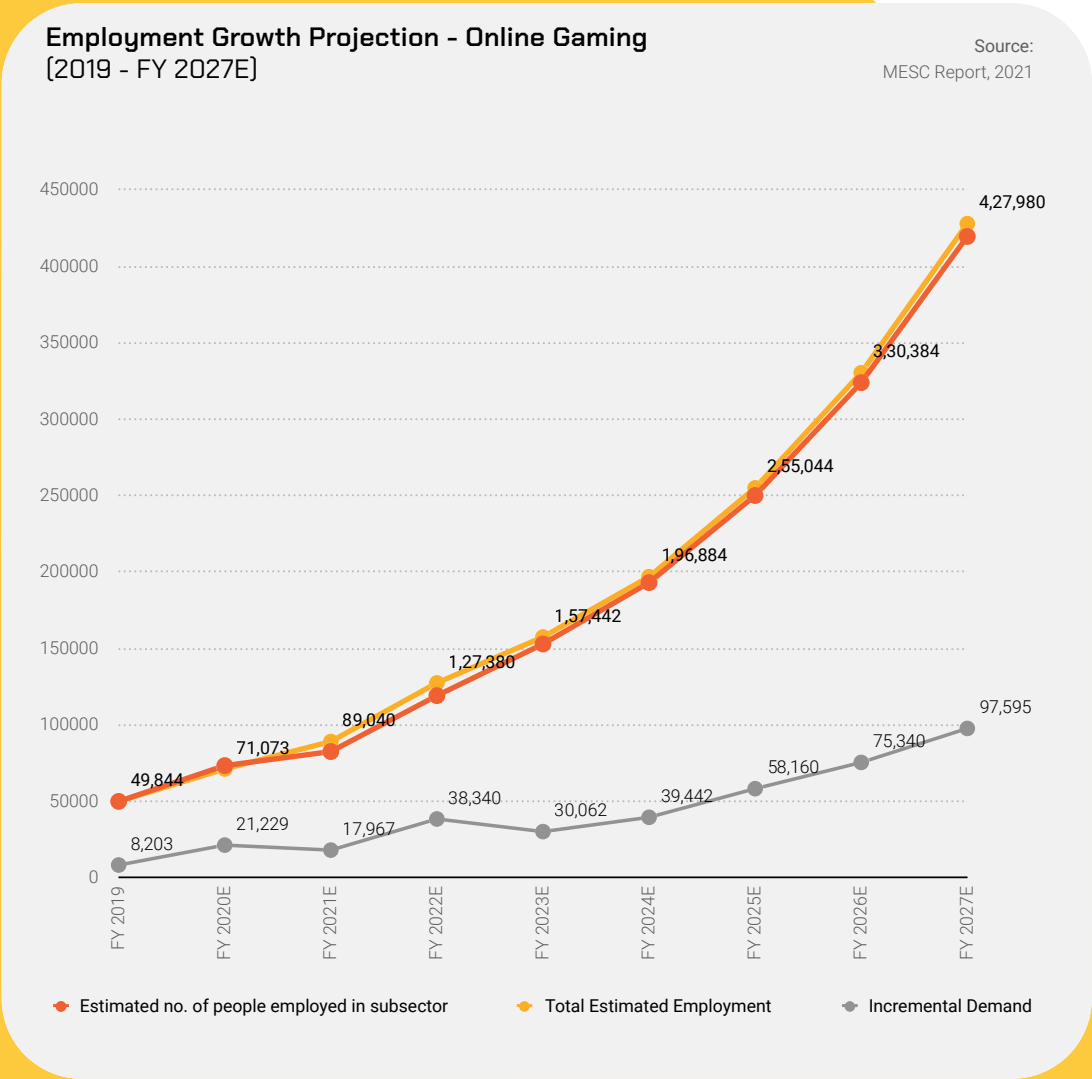
Table 21: Employment Potential of Online Gaming Subsector

Source :

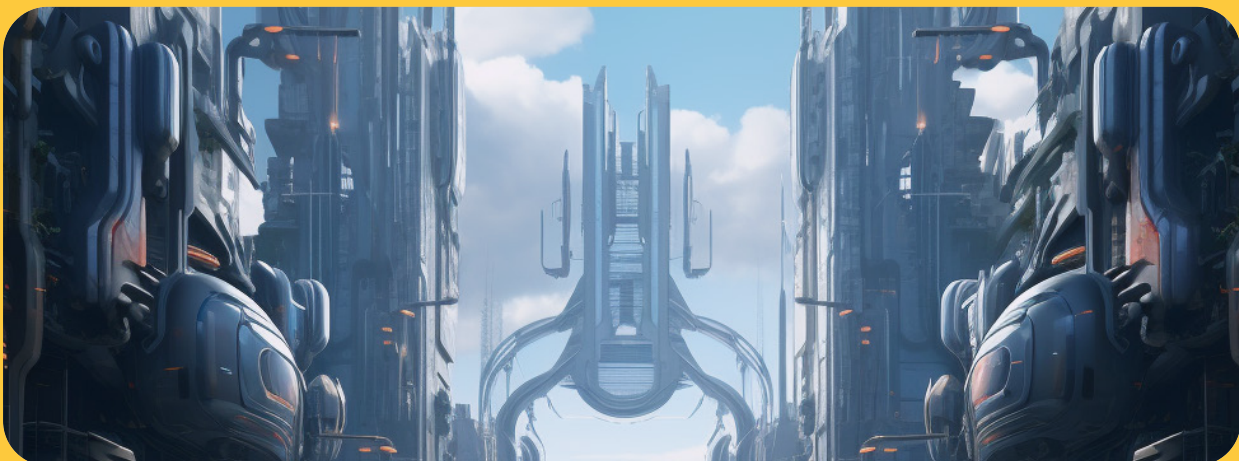
25. https://www.ey.com/en_in/news/2023/05/indian-m-e-sector-grew-20-percent-in-2022-touching-the-highest-ever-mark-of-inr-2-trillion



Figure 32: Employment Potential of Online Gaming Subsector



The employment opportunities highlighted above are an indicator of growing demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and trained human resources. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

India is expected to become one of the world's leading markets in the gaming industry. The gaming segment has been undergoing significant changes and is expanding rapidly on account of various growth drivers.

Advancement in technology and job roles has created a major skill gap as evolution in technology requires continuous upgradation of skill sets. As job roles evolve, already engaged resources need to be upskilled and new resources need to be trained.²⁶

As per experts, the emergence of Cloud Gaming, Artificial Intelligence, and Data Science will play a key role in online

gaming in India. These areas are also expected to serve as potential sources of revenue and employment in the sector.

Further, the analysis of demand supply gap with regard to human resources, as well as the overall employment landscape for the subsector, reveals that various new and emerging roles are likely to gain greater significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.

Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Machine Learning Architect	Their role is to apply machine learning with cross functional teams. They help in designing and developing of machine learning algorithms and models
Data Scientist	They use statistical and data mining techniques to solve and model complex problems and identify opportunities. Their responsibilities include designing experiments and testing hypothesis to optimize operations along with solving analytical problems. This helps in creating personalised content by allowing real time interaction. They use performance analytics to identify weakness, track improvements and observe trends.
Machine Learning Engineer	They help in creating ML products and should possess statistical and programming knowledge. They are responsible for developing data science prototypes, running machine learning tests and experiments and performing statistical analysis using test results. They use the strength of algorithms to make predictive models to predict the actions of a player in a game

Table 22: Classification of futuristic job roles in Online Gaming Subsector

Futuristic Job Role	Description
Cloud Developer for Gaming	Since cloud gaming is still in its infancy in India, this role can create excitement and enthusiasm for cloud services for game developers. Their role will be to help game developers learn how to leverage cloud services successfully.
Gaming and Visualization (G&V) Development and Integration System Engineer	Their role will include using 3D models, visualization of various gaming scenarios and providing technical expertise to ensure proper integration of G&V products
Esports Admin	An eSports tournament referee or admin monitors the tournament and ensures that the team players are adhering to all the rules and settles disputes. He should have good interpersonal skills and vigilant to resolve disputes and come to a suitable decision.
Esports Influencer	Those who make a name for themselves in these places can be highly effective influencers – eSports fans would trust their views over anything they saw published in a more traditional location. This loyalty follows through to the brands that influencers promote. Their followers are likely to take a genuine interest in what their influencers support.
Community Admin	Community administrators manage the access, review processes, and change management integration for communities. While repository administrators oversee high-level repository maintenance and organization, community administrators manage assets, roles, privileges, and review processes to ensure that users can work with the repository effectively.



Source :

26. <https://mib.gov.in/sites/default/files/AVGC-XR%20Promotion%20Taskforce%20Report%20-%202022.pdf>

State level trends in Online Gaming

As per India Mobile Gaming Report 2022, Uttar Pradesh has emerged as the top destination for mobile gamers, followed by Maharashtra, Rajasthan, Bihar & West Bengal.²⁷

States like Karnataka, Maharashtra, and Telangana, also known as lighthouse states in the AVGC sector, have been taking various innovative measures to encourage entrepreneurs & startups working in the sector.

Maharashtra is in the process of updating its IT/ITeS policy to meet demands of the AVGC sector in 2023 and beyond. In addition, collaborations are encouraged to develop key focus areas of talent & employability where the Industries Department acts as a facilitator and the Govt. of Maharashtra Skills and Higher and Technical Education Department is given the mandate of agency tie ups.

Telangana was the first state to have a dedicated AVGC Policy called the IMAGE Policy (2016). Skill development is a critical component for growth of AVGC. In this regard, certain measures are being taken by the Telangana Academy for Skill and Knowledge (TASK), a unique skill development initiative from the ITE&C department aimed at improving quality of graduates coming out of college.

Government of Karnataka and ABAI, have established the COE for AVGC industry in the state, an initiative envisaged to facilitate the creation of a vibrant ecosystem and attract new companies to set up base in the state.

Various AVGC companies are operating in **Tamil Nadu**, and incentives are being provided to encourage startups working in the sector. Additionally, recognising benefits of skilling, the state is facilitating industry-institution dialogue to promote skill development in this sector.



Source :

25. UP emerges top gaming destination; tier 2-3 towns outpacing metros: Report ([business-standard.com](https://www.business-standard.com))

Further, as per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- Further, as per the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:
- The number of online gaming businesses and number of persons working in the related industry in a given state are directly correlated. Out of the top 30 gaming companies in India, Bengaluru with 10 studios makes Karnataka the highest employer. Maharashtra has 9 (Mumbai - 8, Pune -1), Noida has 5, followed by Delhi with 1.
- The above cities and various states have demonstrated high demand for job roles across profiles such as Rigging Artist, Modeller, Voice Over Artists, Game Tester, Game developer & Texturing Artists, among others.
- The contribution of online gamers in tier 2 and tier 3 cities is anticipated to rise in the near future due to the increasing use of smart-phones and high-speed internet in these locations. Already 30-60% of major company's gaming segment is contributed by such cities. Eight out of ten cities with mobile gaming expertise are in tier 2 and 3 cities.



Details of Courses Available

There are over 275 private and public institutes in India in 2020 which provide gaming-related courses with over 175 certificate courses, over 50 UG Diplomas, over 25 B. Sc. courses, over 5 M. Sc and 10 PG Diploma courses.

With an average number of 100 seats in the institutes providing gaming-related courses, the total enrolment is about 30,000. Despite the increase in the number of courses offered in the last few years, there is still a demand-supply gap in the gaming subsector. There is a need for a one-stop Gaming institute like a National Centre for Excellence which will provide relevant courses at par with industry expectations and international standards. Out of the institutes, around 200 are private institutes.

With online gaming on the rise in India, there has been a steady increase in the demand for gaming-related courses and hence the consequent increase in supply.

Although there has been a significant rise in the number of institutes and the number of courses offered, India is in its nascent stage when it comes to education and courses in upcoming sub-sectors like cloud gaming, machine learning, data analytics, etc. There is a dearth of personnel who have relevant knowledge in these areas. This contrasts with the global scenario, where countries like US, UK, Japan, and Korea have embraced Artificial Intelligence and Augmented Reality in the gaming sector and the sector over there employs a large number of people.



EXPERT'S OPINION



MR. MANVENDRA SHUKUL

CEO, Lakshya Digital

“ Skilled Manpower is the most crucial resource for achieving the projected multi-fold growth in the Media and Entertainment Sector to fuel ‘Create in India’ vision. The MESC Skill gap study provides the most definitive sector wise in-depth analysis of the availability of talent, projected demand and capacity deficit. The emerging job profiles listed for each sector captures the rapid change that is required to be done in the skilling ecosystem to upskill and train the workforce. MESC continues to do path breaking in the Skilling Ecosystem and thereby playing a crucial role in the growth story of the Media and Entertainment Sector. ”

MR. MANISH AGARWAL

Founder and Custodian, IndiGG DAO



“India has over 500 million plus active gamers with india topping the charts in terms of global game downloads . The passion for gaming of young Indians creates An amazing opportunity for indians to earn income by leveraging their disposal time and skill and earn forex for the country. Gaming sector can be a very strong driver for youth development and apprenticeship program of Govt of india and with Right skilling, gaming has the potential of becoming massive employment creator like IT services or BpO on this decade.”

EXPERT'S OPINION



MR. DEEPAK JACOB

President Corporate Affairs, Dream Sports (Dream11)

“Online gaming has emerged as a key driver of the Media and Entertainment sector in India. Powered by cutting-edge tech and highly engaging formats, it serves as a powerful platform for entertainment, socialising, and skill-building. This digital revolution has ignited a surge in homegrown talent, innovative game development, highly skilled tech talent and a thriving community of passionate gamers. Special thanks to MESC for their constant endeavour to upskill the Indian workforce.”



MR. RANBEER SINGH HORA

Managing Director, GodSpeed Games



“It is difficult to get skilled resources, especially on the programming and development front.

Gaming has been a booming industry during COVID, and this growth is continuing. A lot of new companies and investments are taking place. So, the impetus COVID provided will be carried on for further growth.

Universities need to focus more on giving the people practical knowledge. For future growth in this subsector, we need to provide our students live projects. Further, assignments will help them to learn and complement their text knowledge.

In terms of global opportunities available in the foreseeable future, since people can work from home, global companies are now hiring resources in India. We have seen increase in demand particularly for AI, Machine Learning, Programming, Full Stack Developer skills. The demand for these skills will continue to grow in the coming years.”

EXPERT'S OPINION



MR. HARSHA KIKKERI

CEO HoloWorld

“The Skill Development Ministry, especially the Media and Entertainment Skill council and their leadership, have been doing a phenomenal job in involving the academia, the industry, and the government to bridge the skill gap and ensure that young talent has 3Ds of skilling: skill discovery, skill development and skill demonstration. HoloWorld is ready to support in bridging the skill gap with its technology products that can facilitate the Media and Entertainment industry like HoloSuit, HoloFace, HoloCapture and AI avatars.”





6.5.8 Print

Subsector in Focus: Print

Print is one of the oldest medium of public communication in India, with Bengal Gazette being the first ever print media started in 1780. India's print subsector mainly comprises newspapers and publishing of periodicals, with advertising and circulation generating revenue.

The newspaper segment has continued to demonstrate growth largely due to strong vernacular markets. This growth is driven by various factors associated with Indian newspapers, such as low cost,

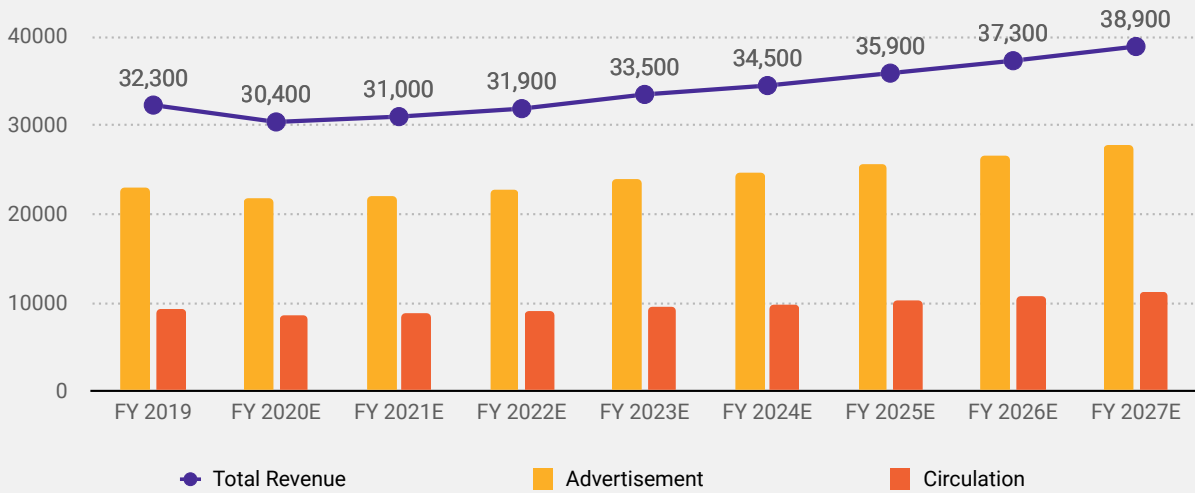
home delivery facility, and habit of reading the newspaper daily among individuals as well as families. The growth of digital media is not likely to make the print media redundant in the coming years.

The pandemic had adversely impacted the subsector. However, according to estimates, the print subsector is envisaged to grow at a CAGR of ~1.8%, with an increase in revenue to approximately INR 38,900 crore by FY 2027,²⁸ as depicted in the graphs below.



Revenue Trends by Stream - Print (In INR Crores)

Source:
MESC Report, 2021



Revenue Trends by Publication Type - Print (In INR Crores)

Source:
MESC Report, 2021

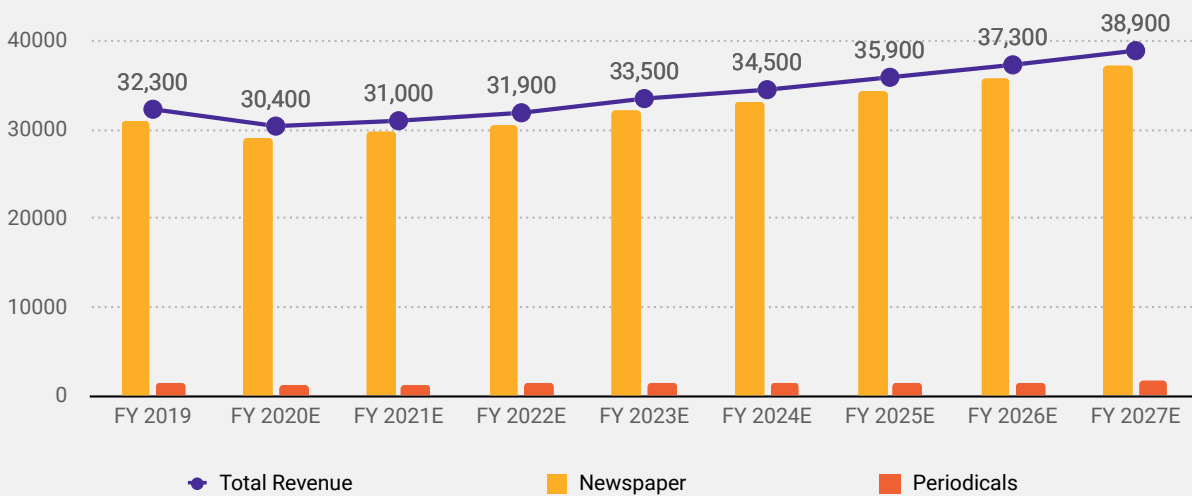


Figure 33: Revenue Trends of Print Subsector



Source :

28. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Print

The print subsector is an integral part of the of M&E industry. Besides contributing to employment generation, the subsector also catalyses economic growth, education, advertising, cultural preservation, and communications.

The continued growth of the subsector is linked to generation of job opportunities, as depicted in the table and graph below.

Employment Potential - Print (2019 - 2027E)

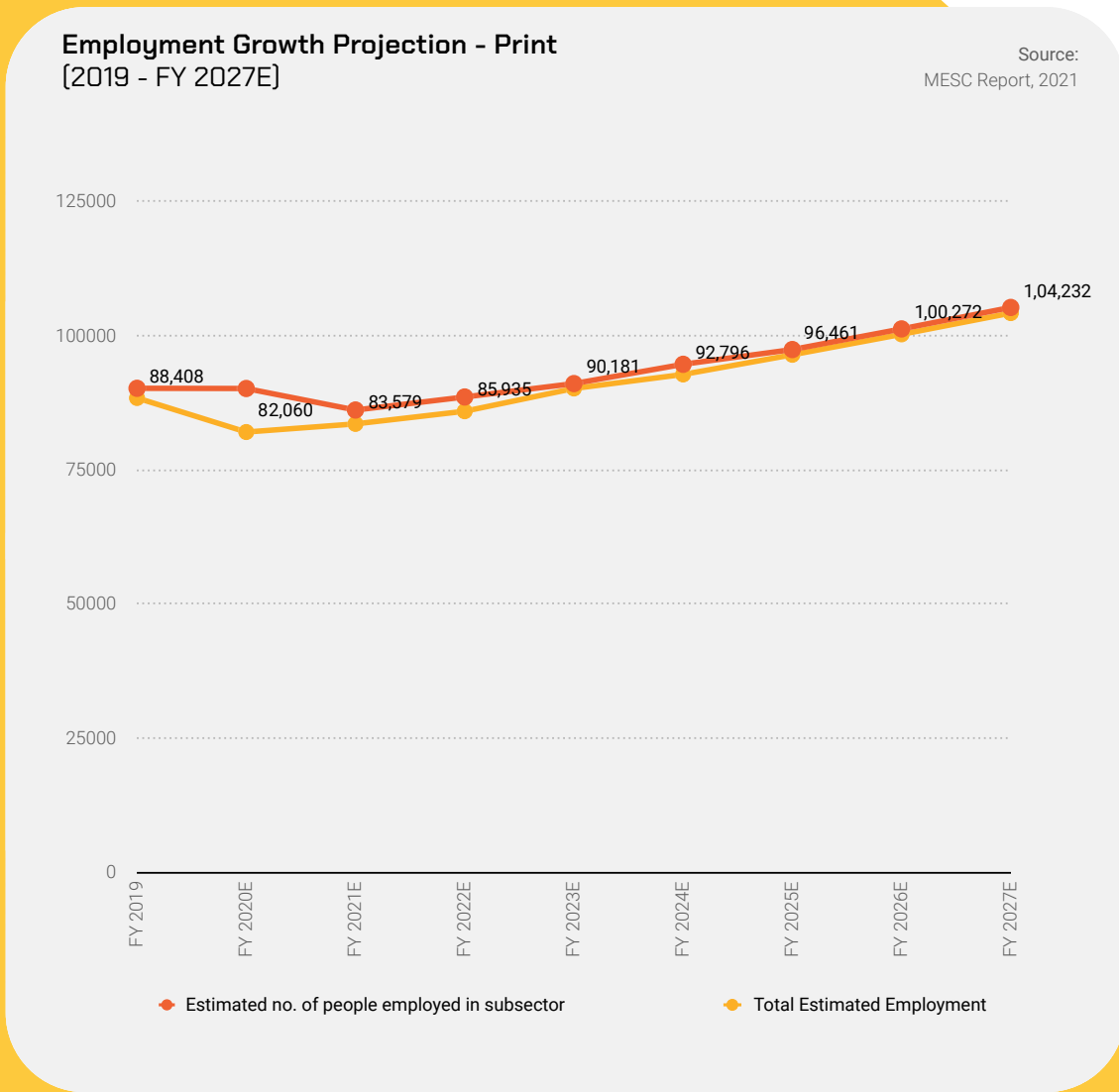
Source: MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	90,212	90,176	86,163	88,593	91,092	94,690	97,436	101,284	105,285
Total Estimated Employment	88,408	82,060	83,579	85,935	90,181	92,796	96,461	100,272	104,232

Table 23: Employment Potential of Print Subsector



Figure 34: Employment Potential of Print Subsector



The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and adequately trained professionals. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

The print subsector provides employment opportunities to a large number of people. It encompasses a wide range of roles, including printing technicians, graphic designers, sales representatives, marketing professionals, bindery and finishing technicians, customer service personnel, and administrative staff.

Being the oldest form of media, print subsector attracts young professionals who enter the space with an aspiration to work in the reporting function. However, for young talent with requisite skills and qualifications, newspaper and magazines also offer tremendous scope for engagement as photographers, page designers, desk editors, computer experts, cartoonists, among others.

As per experts, a huge skill gap exists between the education imparted at academic institutions and actual industry requirements. This reinforces the need for practical trainings, particularly for freshers who seek entry level positions in the industry with no relevant prior work experience.

The overall employment landscape for the subsector, shows that new and emerging roles are likely to gain significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Social Media Experts	Social media has evolved as a strong medium of communication across the globe. Hence, print journalists with social media expertise would emerge as a futuristic job role in print media. These professionals would be well versed with social media tools and would know how to market their reports and articles.
Fact Checker	Fact checkers are the professionals who check the authenticity of the news. This job role will be in demand because of the blooming of fake news and diminishing credibility of journalism.
Innovative content writer	with flourishing digital media content, the print media has to reinvent itself to keep itself relevant. Innovative content writers/ journalists would have to devise and design their content to keep themselves relevant in competition to their digital rivals and engage their loyal readers.
Custom or Theme Packagers	This is going to evolve as one of the demanded job role because of the paucity of time by the readers. Readers would assign a limited time on contents. So, the custom packagers would devise ways to include as much content on a particular subject for its reader to be satisfied and engaged too. This job role would be more for the digital e-newspaper segment.
Domain Journalists	with general reporting getting spread out on digital and social media platforms, Domain expert journalist would be in high demand in the print media. They would act as a catalyst to keep the readers hooked to the print media. Domain journalists would be in the area of business, crime, technology, sports, development etc.

Table 24: Classification of futuristic job roles in Print Subsector

State level trends in Print

As per FICCI's April 2023 Report, five states contributed more than 50% of newspaper ad volumes viz, Maharashtra (15%), Uttar Pradesh (11%), Tamil Nadu (9%), Karnataka (8%), and Andhra Pradesh (7%).

According to the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- The highest number of people in print subsector are from the state of Uttar Pradesh, followed by Maharashtra, Madhya Pradesh, Gujarat, and Delhi. The number of copies circulated in print media and the number of people employed in the industry in the state are directly linked.
- In the next five years, these states will continue to be prominent in terms of employment. The above cities and various states have demonstrated high demand for job roles across profiles such as- Community Journalist and Graphic Designer, as per existing QP-NOS.
- Metropolitan cities such as Mumbai, Bangalore, and Delhi, have most of the preferred training institutes. Therefore, it is essential to focus on Tier-II cities in order to establish the necessary infrastructure to nurture talent present in small towns and cities.



Details of Courses Available

The courses available in the Print sub-sector are majorly divided into:



Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

A degree in Journalism & Mass Communication and Degree in Print Technology is the most sought-after qualification by employers in the print sub-sector. Experts believe that 20% of the graduating Journalism & Mass Communication and Print Technology students opt for print media careers. Male to female employment ratio in the print sub-sector is 80:20. Further only 34% of students trained in sector-related vocational courses are placed into the Print Sub-sector.



EXPERT'S OPINION



MR. ANJUM RAJABALI

Veteran screenwriter, Head of Screenwriting at Whistling Woods International

“The spectrum of storytelling entertainment on offer has broadened in leaps and bounds after the advent of OTT platforms. Additionally, this has opened up a breakthrough opportunity for our writers and filmmakers to tell Indian stories with our narrative styles to the world via collaboration with their international counterparts, to begin with.

The need of the hour now is two-fold: 1. To increase training opportunities for writers and filmmakers. 2. To ensure good business practices in our industry, with equity for all stakeholders.

MESC has been formed to address the skill gap in the industry, and their latest skill gap report seeks to offer a roadmap for further progress.”



MR.UJJAWAL TRIVEDI

Senior Journalist



“There is a possibility that traditional journalism - both print and electronic may increasingly become predictable. It may remain stuck in time-warp with its burden of the past and past formats, practices, compulsions and affiliations. It may become monotonous too. It may also increasingly lose its objectivity, move away from pursuit of truth and end up becoming populist or ‘advertisement’ or mouthpiece for some views, people or entities.

Social media is emerging, albeit slowly, as an alternative with some people willing to get their information from it. While the trend is still small, it may democratize journalism since it allows everyone to share their point of view. But to be able to become an effective alternative, or at least a commentary on the TV and print media, it would need to remain honest to the core. Social Media Journalism will require a different set of skills from traditional media.”

EXPERT'S OPINION



DR. SURBHI DAHIYA (NÉE BHALLA)

IAMCR- Faculty Ambassador, Professor and Course Director, Deptt. of English Journalism, Indian Institute of Mass Communication

“India is known for its largest democracy and robust media. Indian Journalism has come a long way and has played a very significant role in the nation’s journey Pre-Independence, Post-Independence, Post- Liberalisation, Post- Millennium and Post Digitization. Indian M&E sector grew 20% in 2022 to reach INR 2.1 trillion. The complex relationship between editorial values and business dynamics is evolving and witnessing change. Further, the paradigmatic changes in the journalistic landscape is triggered by technological breakthroughs and management practices.

People have gone medium agnostic and consumers want content from various platforms. Where on one hand the legacy media houses have diversified into electronic and growing with their digital siblings, on the other hand one can witness many digital platforms evolving independently and becoming the new news economy.

Indian Journalism is steadily heading towards a multitude of opportunities to innovate, restructure and transform their mass relevance to serve societies and capture new markets with strategies that stem from sustainable business models.”



6.5.9 Radio

Subsector in Focus: Radio

Radio is one of the earliest forms of electronic medium used to disseminate information and news via Short Waves, Medium Waves and Frequency Modulation (FM) channels.²⁹

The radio subsector in India has been serving as a medium of communication, information, entertainment, and cultural preservation. Despite the emergence of new media platforms, radio continues to have a wide reach and plays a crucial role in connecting people across diverse backgrounds, languages, and regions. It also acts as a medium of communication for people residing in remote areas, with limited access to television or internet.

The last few years have witnessed low to negative growth of India's radio subsector. The pandemic had a negative

impact on the radio industry, which was already struggling, causing the market share to fall by almost 16% in FY 2020 over FY 2019.³⁰ The country-wide lockdown in March 2020 caused a number of private sector advertisers to either scale back their campaigns or cut their spending on advertising, which combined with reduced government advertising led to a sharp decline in advertising revenue.

According to estimates, the radio subsector is envisaged to grow at a CAGR of ~4.58%, witnessing an increase in revenue from INR 2,922 crore in FY 2019 to INR 4,180 crore in FY 2027,³¹ as depicted in the graph below.



Revenue Trends - Radio
[In INR Crores]

Source:
MESIC Report, 2021

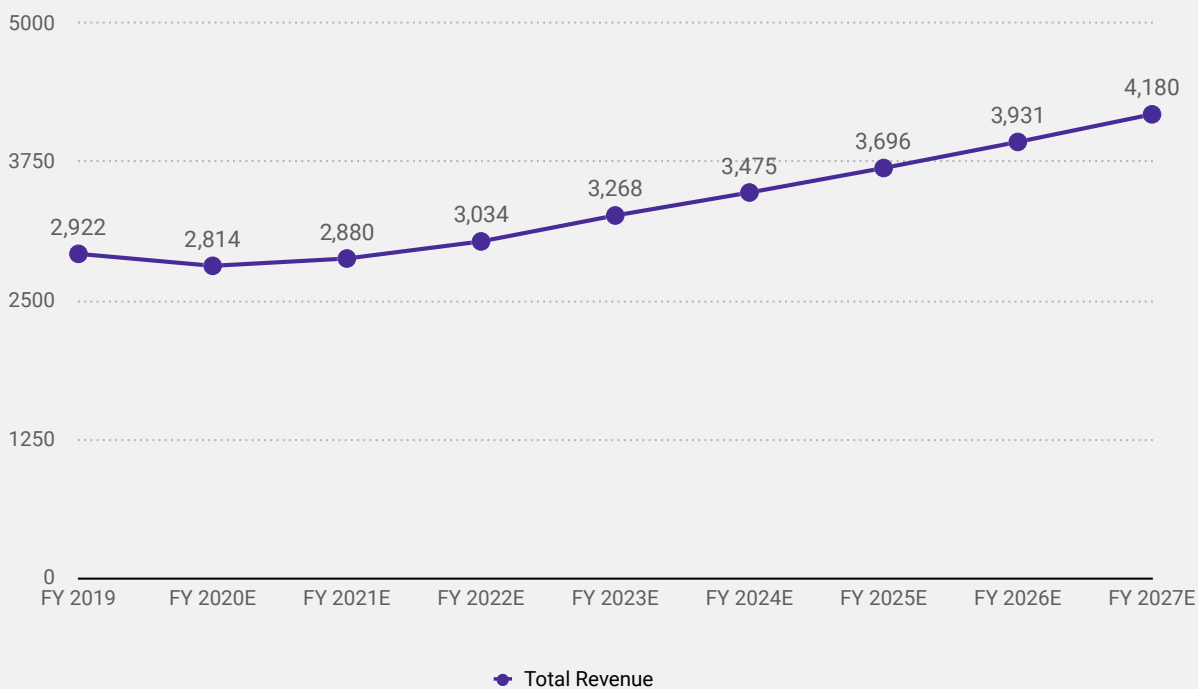


Figure 35: Revenue Trends of the Radio Subsector

Source :

- 29. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)
- 30. FICCI 2020 Report
- 31. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Radio

The radio subsector is an integral part of the M&E sector. The medium serves as a valuable platform for information, entertainment, and community engagement.

The continued growth of the subsector is therefore, linked to generation of job opportunities, as depicted in the table and graph below.

Employment Potential - Radio (2019 - 2027E)

Source: MESG Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	44,848	44,848	43,188	44,203	46,568	50,154	53,339	56,726	60,328
Total Estimated Employment	44,848	43,188	44,203	46,568	50,154	53,339	56,726	60,328	64,158
Incremental Demand	0	-1,659	1,015	2,365	3,586	3,185	3,387	3,602	3,831

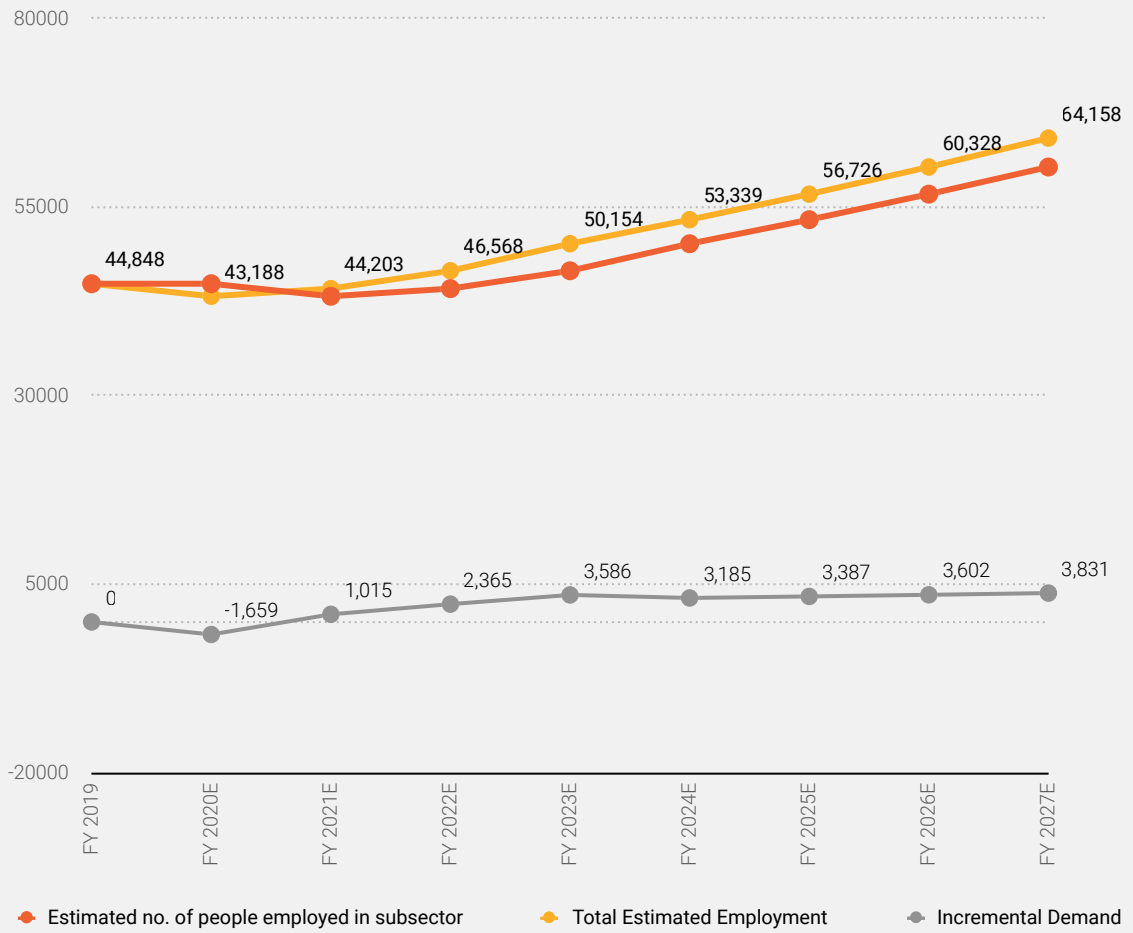
Table 25: Employment Potential of Radio Subsector



Figure 36: Employment Potential of Radio Subsector

Employment Growth Projection - Radio
[2019 - FY 2027E]

Source:
MESC Report, 2021



The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and adequately trained professionals. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

Radio has continued to play a crucial role in the Indian M&E landscape, despite the advent of television and internet that have brought about changes in media consumption habits.

Besides generating employment, the subsector contributes significantly to the country's economic growth. Radio stations serve as an effective platform for advertisers to reach their target audience. The sector generates revenue through advertisements, sponsorships, and partnerships, contributing to the overall economy.

Also, the overall employment landscape for the sub-sector, shows that new and emerging roles are likely to gain significance in the coming years. With the rise in popularity of podcasts among young audiences, there has been a change in the way people consume content. This brings to the fore the need to develop specific skill trainings catering to the changed scenario. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Sound Engineers	Their job is to eliminate background noise and to ensure that the sound quality is as clear as possible. Since podcasts rely entirely on sound, a seamless sound editing is required.
Podcast Producers	They are responsible for a variety of aspects like the tone of the radio podcast, the content discussed, the audience which would be targeted and marketing.
Content Curators	Their role is to make sure that the content of the podcast is finely tuned with the audience it is targeting and that the story/message of the podcast is disseminated in its right essence. They help in structuring stories with the podcast writers.
Videographer	Experts believe that webcams and digital video recorders are now common gear for radio broadcasters as they launch additional multimedia channels. Some radio stations are now training personnel as videographers and purchasing programs like Sony Vegas Pro, Final Cut Pro, MediaShout, Logic Pro and ProPresenter to edit video.
Social Media Content Developer	With user moving to more digital platform, and Radio stations promoting their content through social media platforms to attract more listeners, there is a need for social media content developers and this job role has become even more relevant in recent times.

Table 26: Classification of futuristic job roles in Radio Subsector



State level trends in Radio

Radio is undergoing a transition. The demand for local news, music, and connections is driving a boom in the number of community radio stations (CRS), which is doubling. One notable example of community radio in India is the “Radio Namaskar” initiative in Odisha. The initiative has demonstrated how a localized, community-driven radio station can empower marginalized communities, preserve local culture, disseminate information, and contribute to social development.³²

As per FICCI’s April 2023 Report, top five states in India contributed 62% of ad volumes in radio viz, Gujarat (18.2%), Maharashtra (17.8%), Uttar Pradesh (9.2%), Andhra Pradesh (8.8%), and Rajasthan (8.4%).

According to the MESC Report ‘Human Resource and Skill Requirement in the Media and Entertainment Sector (2020–25)’, the following trends have been observed across different cities in India:

- Radio stations such as All India Radio, Radio Mirchi, 92.7 BIG FM, RED FM, Radio One, Fever 104 FM, have studios all over the country, with major ones located in New Delhi, Noida, Mumbai, Chennai, Kolkata.
- Delhi held the top spot with regard to radio listeners (42.9 lakhs), followed by Mumbai (34.6 lakhs) and Pune (16.3 lakhs).
- In the next five years, Haryana, Karnataka, Madhya Pradesh, Maharashtra, Tamil Nadu, and Uttar Pradesh, with the highest operational community radio stations, are expected to generate significant employment opportunities.

Source :

32. <https://radionamaskar.in/about-us/>



Details of Courses Available

The courses available in the Radio sub-sector are majorly divided into:

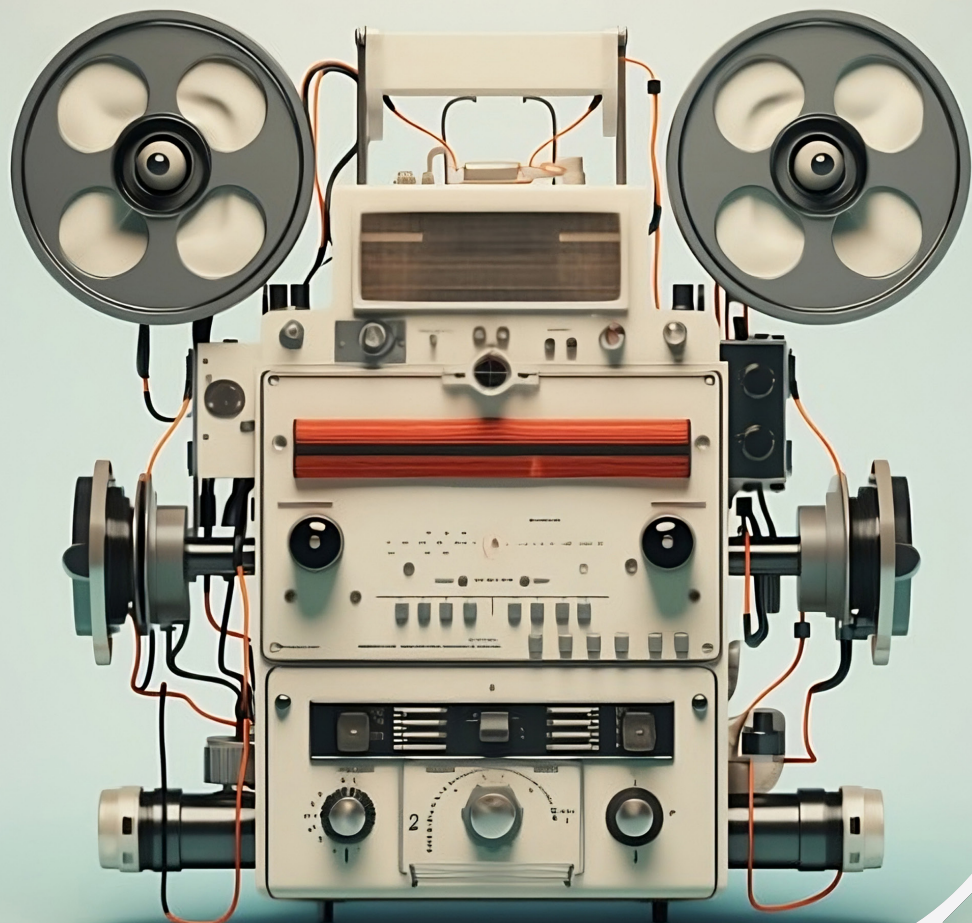


Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

A degree in Journalism & Mass communication and a degree in Radio is regarded as the most suitable qualifications for employer in the Radio industry. Experts believe that only ~10% of the students graduating in Journalism & Mass Communication, radio broadcasting & vocational courses opt for a career in Radio.



6.5.10 Sound and Music

Subsector in Focus: Sound and Music

India has a diverse and vibrant music industry, that encompasses various genres, languages, and cultural traditions. From classical Hindustani and Carnatic music to Bollywood film songs, regional folk music, and popular music genres like pop, rock, and hip-hop, India offers a diverse array of musical expressions. Indian music has a major impact both domestically and abroad, and its fusion with Western music has given rise to innovation in the sound and music landscape.

The growth of the subsector is driven by various factors such as increase in streaming services, live events

and performances, diversification and experimentation with different genres, Government initiatives, among others.

The pandemic-induced restrictions caused widespread disruption in the subsector, leading to cancellation of events and performance worldwide, which caused revenue losses in the music subsector.

According to estimates, the sound and music subsector is envisaged to grow at a CAGR of ~7.2%, witnessing an increase in revenue to INR 2,895 crore by FY 2027,³² as depicted in the graph below



Revenue Trends - Sound and Music
 (In INR Crores)

Source:
 MESIC Report, 2021

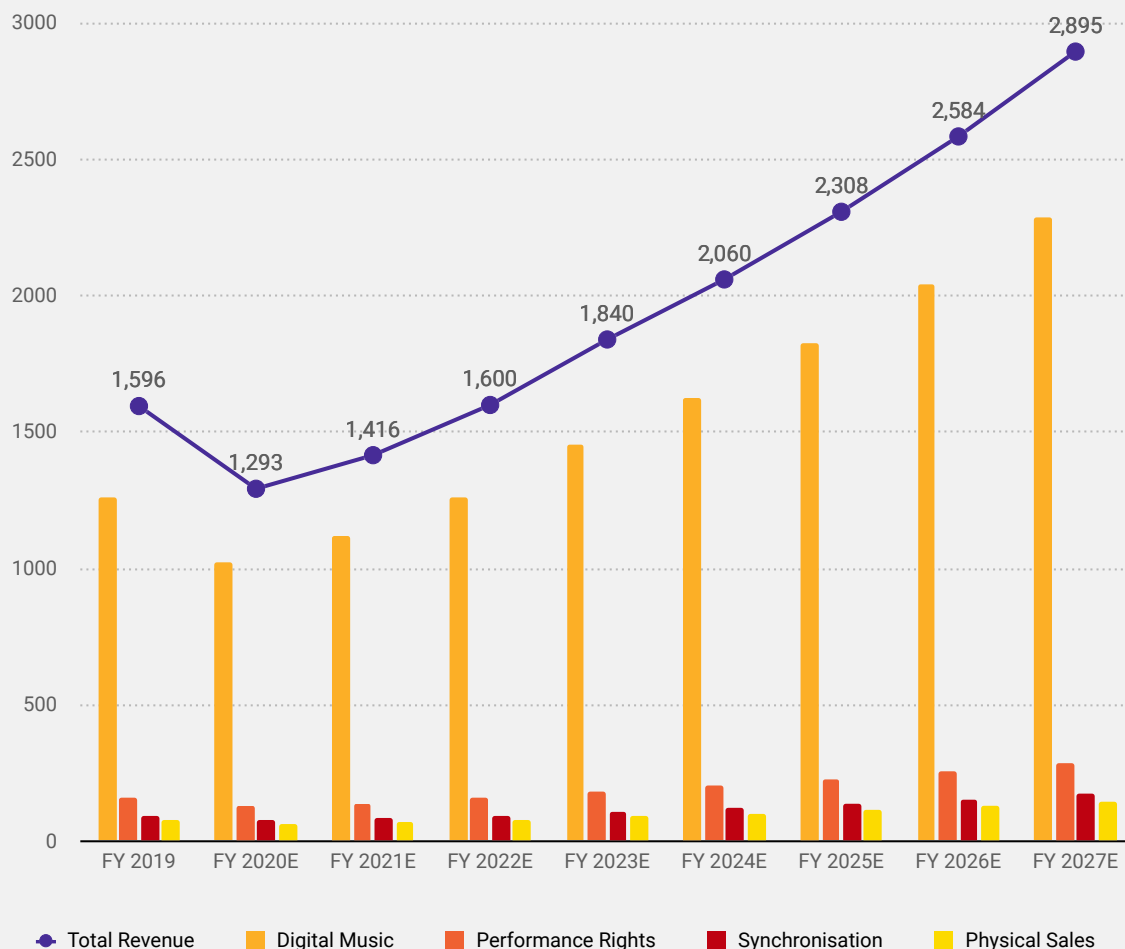


Figure 37: Revenue Trends of Sound and Music Subsector



Source :

- 33. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Sound and Music

The music sector’s contribution to the country’s economy in general and M&E Industry in particular, extends beyond its artistic and cultural significance, making it a vital driver of economic activity and employment opportunities.

The continued growth of the subsector is therefore, linked to generation of job opportunities, as depicted in the table and graph below.

Employment Potential – Sound and Music (2019 – 2027E)

Source: MESC Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	35,763	36,800	30,147	32,860	37,247	42,722	48,019	53,782	60,236
Total Estimated Employment	36,800	30,147	32,860	37,247	42,722	48,019	53,782	60,236	67,464
Incremental Demand	1037	-6,653	2,713	4,387	5,475	5,298	5,762	6,454	7,228

Table 27: Employment Potential of Sound and Music Subsector

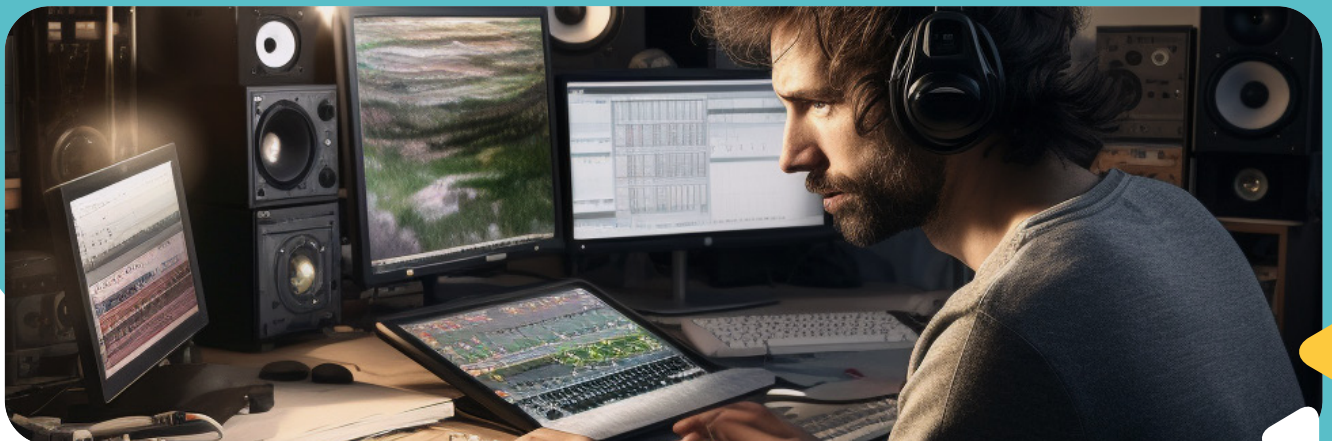
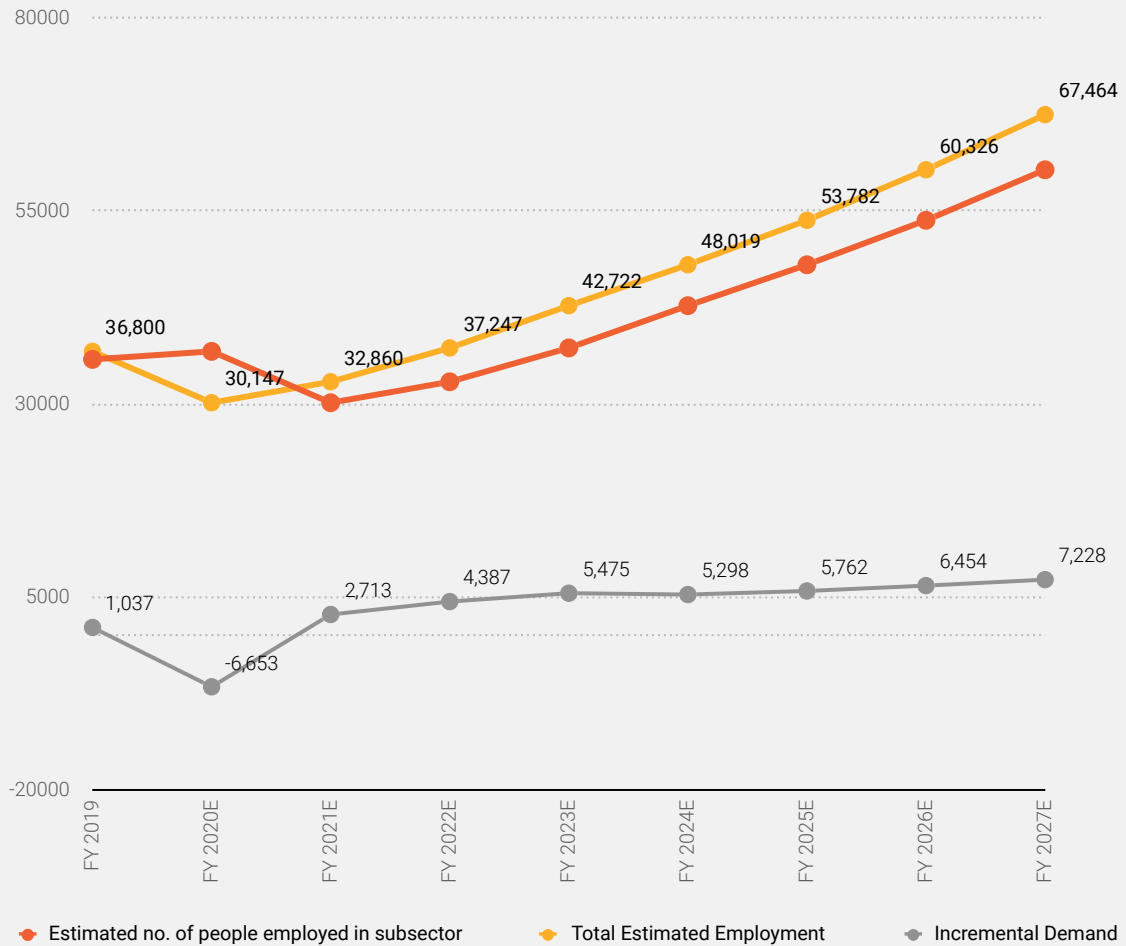


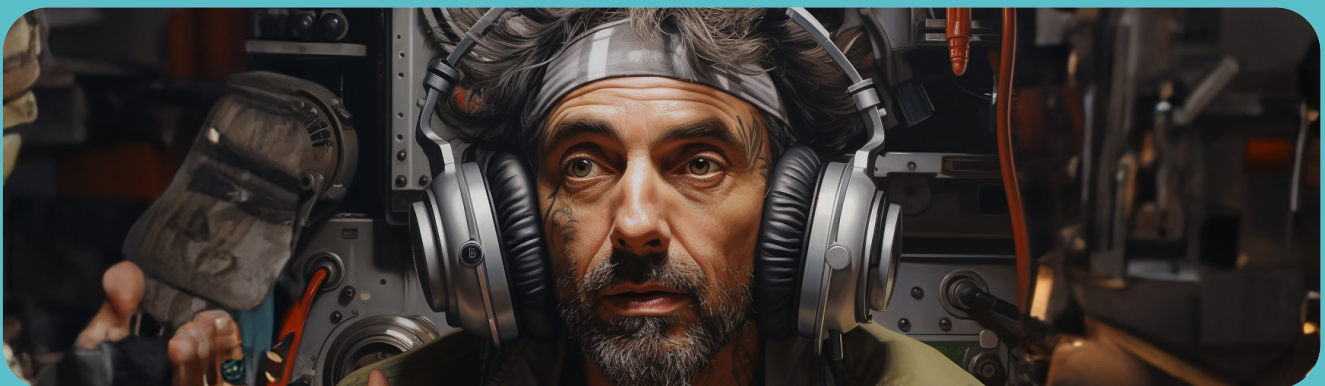
Figure 38: Employment Potential of Sound and Music Subsector

Employment Growth Projection - Sound and Music
[2019 - FY 2027E]

Source:
MESG Report, 2021



The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and adequately trained professionals. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

The activities associated with the sound and music industry, encompass various facets such as music production, distribution, live events and performances, streaming services, merchandise sales, among others. These activities tend to have a multiplier effect on the economy, via creation of direct employment prospects for artists, technicians, music producers, event organizers. Various indirect jobs are also generated spanning across areas such as marketing, venue management, hospitality, advertising.

An analysis of the employment landscape for the subsector, shows that new and emerging roles are likely to gain significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Bilingual Vocal Coach	With no boundaries per se in the music world and technology playing a major role in connecting fans all around the world with their favourite artists, bilingual (or even multi-lingual) vocal coach is expected to become a new job title with artists being trained to sing in other languages than their own.
Music Hologram Developer	In order to keep differentiating themselves from other run of the mill shows, and especially in the wake of the pandemic, hologram of artists is a unique way of connecting with the audience. This also helps in fans being able to connect with artists who are no more with us, for example a concert with a hologram of Michael Jackson is bound to create a full house, given his status and legacy. This is a new specialisation and hologram developers will be in demand in the future.
Playlist Scientist	Playlist scientists are a major attraction for all streaming services and a new job role is expected to arise in the future whose responsibility will be to cover all major platforms and curate the playlists accordingly.
Social Media Amplifier	With social media being the biggest influencer these days, especially among millennials, the role of social media will become even more important in the coming years. Role of amplifiers will be to monitor trends in different countries and play songs of particular artists on playlists and increase their visibility.
Crossover Ambassador	With music being loved all over the world, it is very critical for a band/artist to connect with international audience. Their role will be to work in a record label company and make sure that the artist is introduced and recognised by audiences in other countries or regions.

Table 28: Classification of futuristic job roles in Sound and Music Subsector

State level trends in Sound and Music

The post pandemic scenario has witnessed a shift in preferences of consumers with regard to the kind and genre of music, they listen to. Some industry leaders are of the opinion that consumers have been experimenting with different music.

As per FICCI's April 2023 Report, the consumption of regional music remained robust in 2022, driven by successful films in South India, as well as music in languages like Bhojpuri, Haryanvi, etc.

According to the MESCC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- There are various prominent music companies with recording studios in Mumbai, Hyderabad, New Delhi, Chennai, and Kolkata, that employ significant number of technicians and artists.
- The above cities and various states have demonstrated high demand for job roles across profiles such as - Sound Assistant, Sound Designer, Sound Editor, Sound Engineer, and Music Programmer, among others.
- Punjab is emerging as key state in the music industry, supported by the state's tradition of music/live performances, massive diaspora, as well as digital distribution. Haryana's music industry has also been envisaged to assume a more prominent role in the next five years.



Details of Courses Available

Many of the courses available in the sound and music sub-sector are very much unorganized. People learn music out of their passion and generally from the teachers in their neighbourhoods.

In the formal sector, courses available in India are majorly divided into two types:



Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

Experts believe that 70% of graduating students opt for a career in the sound and music industry. Considering the previous trends of enrolments into sector-aligned UG/PG courses and vocational Courses and the impact of COVID-19, it is estimated that ~20,000 students will graduate or get trained in 2025 and be ready to be employed in the sound and music industry.



EXPERT'S OPINION



MR. RESUL POOKUTTY

Sound engineer, sound editor & Academy Award for Best Sound Mixing,

“The fast-growing industry of sound designing and its engineering is a testament to the power of audio in shaping our sensory experiences. Behind every mesmerizing film, captivating TV show and immersive gaming experience, lies the artistry and technical expertise of sound designers and mixing professionals. Their meticulous attention to detail and innovative use of sound bring stories to life, creating a world of emotions for all around us and enhancing our engagement. As this industry continues to expand at a rapid pace, it opens new avenues for creativity, pushing the boundaries of what is possible.”



MRS. SUNITA BHUYAN

Violinist and HR professional on Wellbeing,
Creativity and Leadership



“Creating a balance of health and wealth for M & E As we work together to create an efficient and employable workforce in India, it’s very heartening to see the laudable initiatives undertaken by the MESC for a structured and training based skill building approach for the Media and Entertainment industry. The M& E industry has been the back-bone of Indian society and cultural. With the huge surge in OTT content, film production, beauty and wellness industry , sustainable fashion what MESC is doing is crucial in addressing the skills gap, pay parity , and sustainable livelihoods for this dynamic industry. I would also urge the experts to give equal focus to mental health, well-being and the environment to develop a healthy and conscious professional community within M & E who are always role models and icons for the young generation A circular life with a focus on people, planet , and purpose will surely lead to a circular economy . Another focus area needs to be inclusive policies and practices to encourage more women and creative professionals to join the M& E industry. ”

EXPERT'S OPINION



MR. NEERAJ ROY

Founder & CEO
Hungama Digital Media
Entertainment Ltd.

“To unlock the industry’s full potential, we must focus on strategic skill development and reskilling initiatives to meet its ever-evolving demands. With the rapid advancement of technology, areas like Online Gaming, Animation & VFX, Digital Media, and OTT are becoming key foundations for a thriving industry. While the skill gap presents a challenge, but it also offers an opportunity for growth. By investing in targeted training and empowering our workforce with the right expertise, we bridge the gap and pave the way for a brighter future, captivating audiences worldwide with innovation and creativity. The AVGC-XR sector has the potential to add 2 million new jobs by 2032. MESC’s initiative is empowering the industry with targeted training, bridging the skill gap and unlocking the full potential of the M & E sector, igniting a brighter future of innovation and creativity.”





6.5.11 Television

Subsector in Focus: Television

India's journey in the television sector has been noteworthy, demonstrating significant growth and transformation over the years. With the advent of cable and satellite television, the sector experienced a massive boost in viewership and advertising revenue.

Accessibility and choice for viewers has been enhanced by technological advancements in the subsector, such as the digitalization of cable TV and increase in direct-to-home (DTH) services. India's television industry boasts numerous channels, content in regional languages, reality shows, soap operas, among others. The evolution of the sector is a continuous process driven

by digital connectivity, digital consumption, and rise of streaming services, among others.

During the pandemic, the sector witnessed an unprecedented 37% growth owing to restrictions and lockdowns. However, the revenues from advertising were very less due to cost cutting and layoffs in the industry.

According to estimates, the television subsector is envisaged to grow at a CAGR of 6.76%, witnessing an increase in revenue from INR 75,750 crore in FY 2019 to INR 1,27,809 crore in FY 2027, as depicted in the graph below.



Revenue Trends - Television (In INR Crores)

Source:
MESC Report, 2021

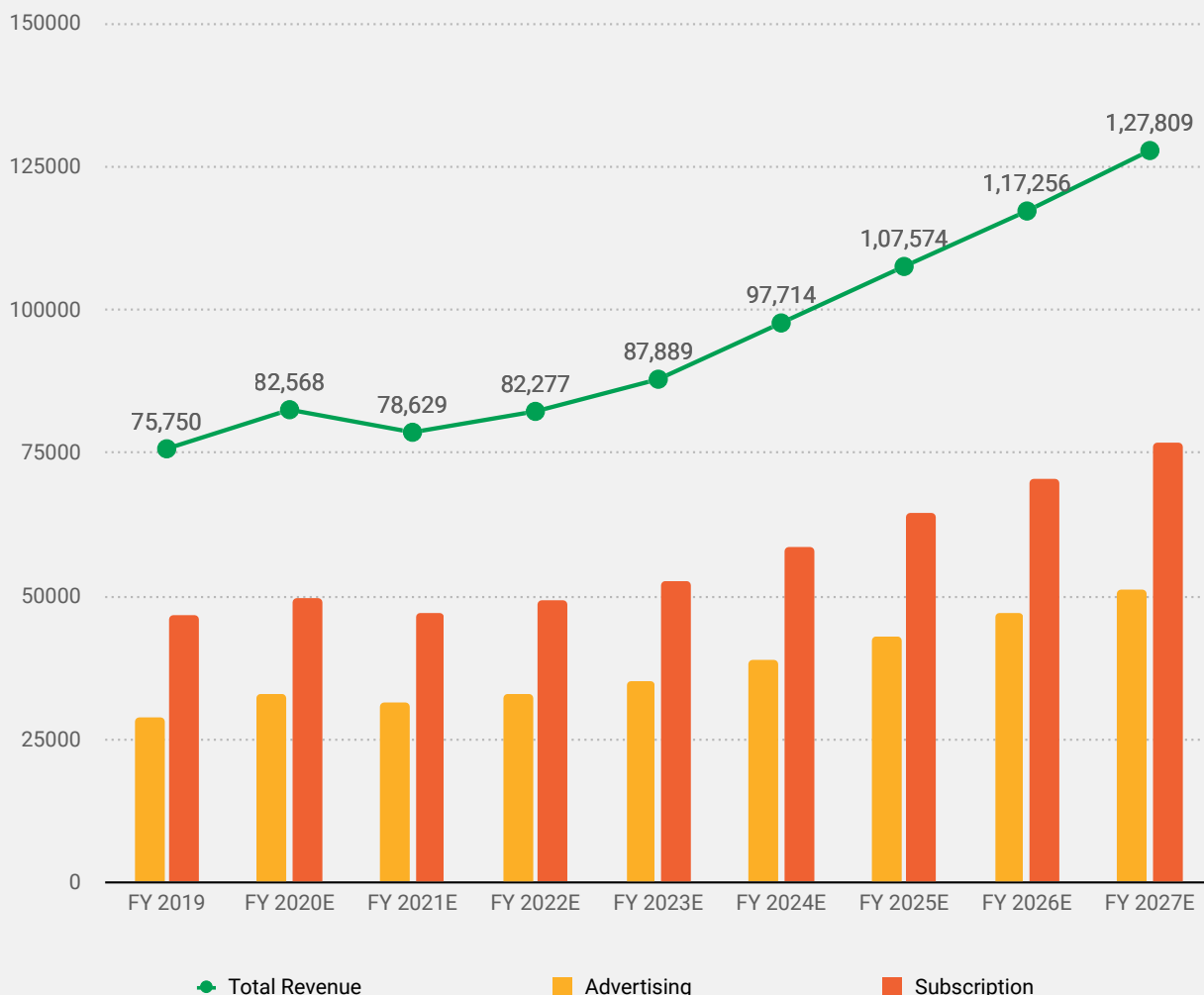


Figure 39: Revenue Trends of Television Subsector

Source :

- 34. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Television

Television is the largest sub-sector within India’s broader M&E landscape and one of the dominant modes of media consumption.

The continued growth of the subsector is therefore linked to generation of job opportunities, as depicted in the table and graph below :

Employment Potential - Television (2019 - 2027E)

Source: MESG Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	5,85,536	6,20,600	5,64,436	5,90,626	6,30,906	6,87,688	7,57,075	8,33,464	9,17,561
Total Estimated Employment	5,80,000	5,27,510	5,41,858	5,78,813	6,30,906	6,94,565	7,64,646	8,41,799	9,26,736
Incremental Demand	-5,536	-52,490	14,348	36,955	52,093	63,658	70,082	77,153	84,938

Table 29: Employment Potential of Television Subsector

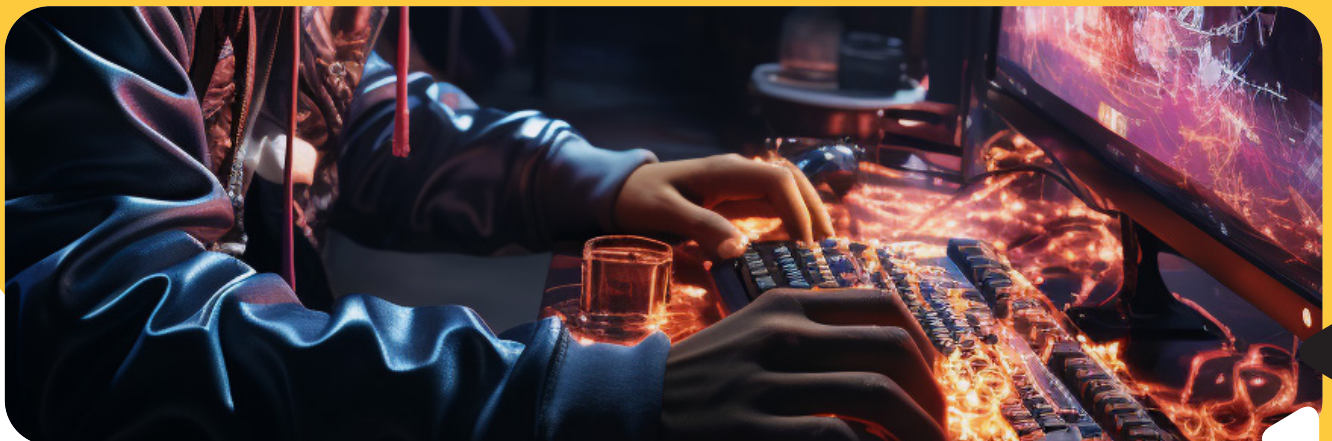
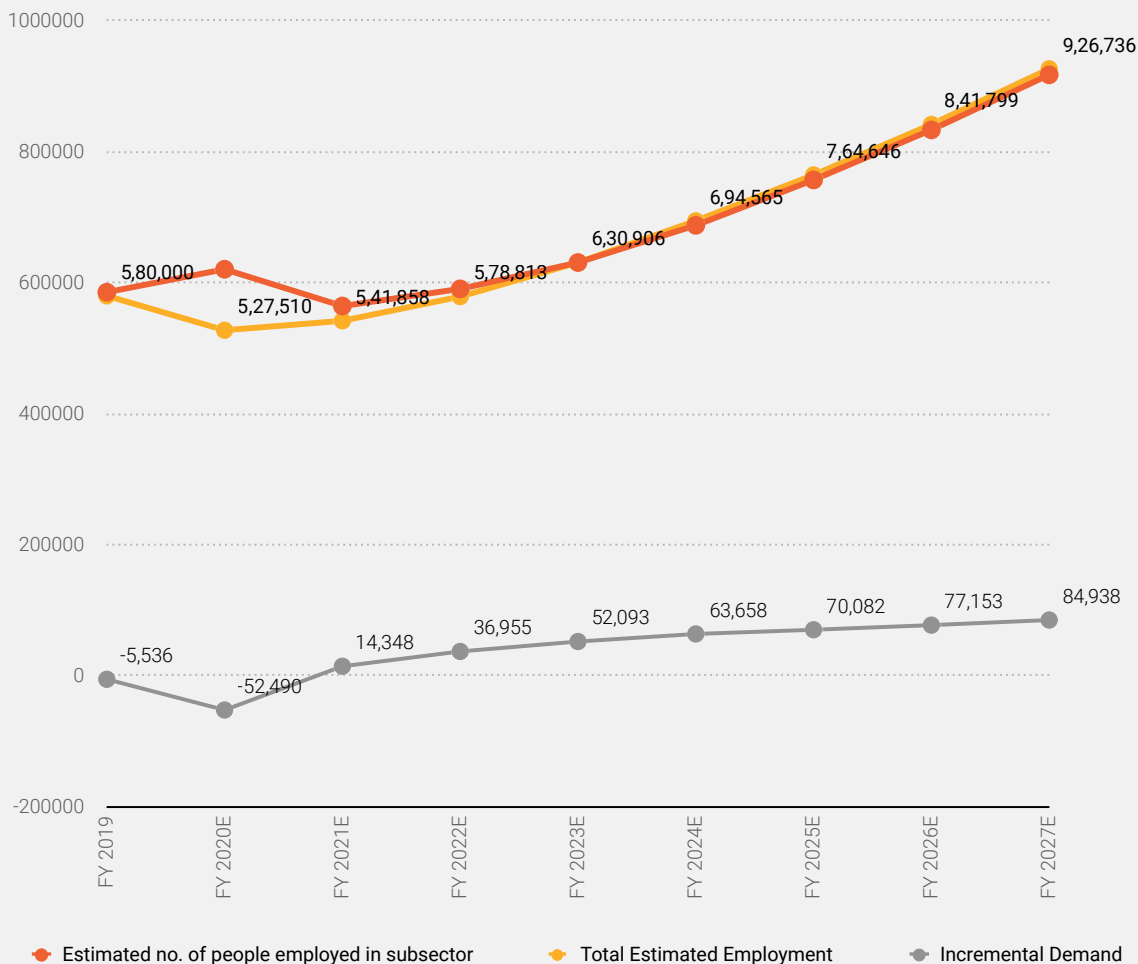


Figure 40: Employment Potential of Television Subsector

Employment Growth Projection - Television [2019 - FY 2027E]

Source:
MESIC Report, 2021



The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and adequately trained professionals. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.



Skill Development in Emerging Futuristic Job Roles

The television subsector plays a crucial role in driving economic growth and creating job opportunities in the country. The subsector not only generates direct employment opportunities for individuals but is also responsible for a multitude of jobs in supporting industries, including but not limited to equipment rental, transportation, set construction, postproduction, and marketing. An analysis of the employment landscape

for the subsector, shows that new and emerging roles are likely to gain significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities for individuals, in futuristic job roles that are likely to be in higher demand in the course of next few years. There is also a need for vocational skilling in emerging job roles that are in high demand in the sector.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
Analytics to understand audience behaviour	The industry experts suggest that analytics and use of big data, is one of the indispensable skills set in the television segment to form the content strategy and analyse the audience sentiment.
Artificial Intelligence Experts	Many petty jobs which involve the manpower today, might be eliminated through use of artificial intelligence in future. Hence, the resources proficient in the relevant software may see the rise in demand in future
Mobile Journalist	Due to ever changing and advancing technology, everything from professional shooting to editing can take place on mobile phones these days with relatively lesser investment. The people with multiple skills who are proficient with the latest mobile applications for editing, graphics etc. will be the future of the industry.
New age Content/ Script writers	Script writers who could write out of box stories for GE Channels would be in demand. This becomes all the more important as GE channels would be in competition with OTT platforms to get more eyeballs.
Video Editors	Video editors would be in much demand who are well versed with new editing software.
Multi skilled professionals	The industry experts have suggested that in future, the existing departments such as camera, reporting etc. may gradually decline. The people who are multi-skilled and are capable of performing various tasks such as recording, editing and transmitting will be sought after. These multi-skilled professionals would have to be proficient in television as well on digital platforms.
Sports Journalism and Sports Management	The journalist with appropriate knowledge and interest about varied sports and who will be trained for reporting on sports which shall not be limited to cricket will be in demand. Relevant courses will enable students to be employable internationally in this area.
Technology artists/ personnel	Emphasis should be on including the VFX skills, social media & digital marketing course in the curriculum as the television sector requires these added skills for better employment.

Table 30: Classification of futuristic job roles in Television Subsector

EXPERT'S OPINION



MR. KOJI YANO

VP Branded Business Japan, Taiwan and
JPAP Marketing

“As a technology leadership company, Wacom will continue to work closely with artists and their artworks created throughout their lives. We will continue to support everyone’s journey of ‘writing and drawing’ through its digital pen and ink technology and pass it on to future generations.

MESC’s work is truly impressive, and we wholeheartedly endorse their mission. We eagerly anticipate a long and fruitful collaboration with MESC.”



MR. SURESH GAUR

World Record Holder, Doctor of Letters (HC) D. Litt. in PR, Certified Banker, Public Relations Consultant, Motivational Speaker, Author, Blogger, StoryTeller, Influencer



“The Global PR market will grow from \$100.39 billion in 2022 to \$107.05 billion in 2023 (CAGR: 6.6%), reaching \$133.82 billion by 2027 (CAGR: 5.7%).

India’s PR industry is valued at \$260 million, accounting for 8.5% of the Asia-Pacific and 1% of the global PR industry. It witnessed 13% growth in 2022, driven by unicorns and start-ups recognizing the importance of PR.

The future of PR is promising with technological advancements. Big data and AI will transform the industry, enabling data-driven decisions in data analysis, media monitoring, and sentiment analysis.

Web 2.0 (digital/social media) significantly impacted global PR and will continue to influence India’s PR. Online PR - Digital PR, including platforms like Meta, Twitter, Instagram, etc., demands engaging content to drive traffic to digital platforms.

Congratulations to MESC for successfully compiling a detailed skill gap report. We wish you all the best for your outstanding initiatives.”

EXPERT'S OPINION



MR. KANHAIYA JEE KRISHNA KUMAR

VP Branded Business Japan, Taiwan and
JPAP Marketing

“News channels stand as the dynamic witnesses to the growth and evolution of our world. From humble beginnings to the vast digital landscape, they have transformed into the conduits that deliver real-time information, bridging gaps and shaping perspectives. With each passing day, news channels redefine their role as the voice of truth, accountability, and social change, adapting to new technologies and global shifts. This growth mirrors the progress of society itself, as we navigate challenges, celebrate achievements, and stay informed about the world around us.”





State level trends in Television

The television subsector in India has witnessed transformation with advancements in technology. The Government has taken several measures and initiatives to boost the growth of this sector. TV shows are produced across various cities in the country, and the sector's multifaceted impact on employment, advertising, ancillary industries, and infrastructure contributes significantly to economic growth.

According to the MESC Report, 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- Mumbai, Chennai, Kolkata, Hyderabad, Thiruvananthapuram, Bengaluru, Bhubaneswar, and Guwahati, are some of the key areas in the country that have generated employment in the television subsector.
- The above cities and various states have demonstrated high demand for job roles across profiles such as - Assistant Cameraman, Camera Operator, Actor, Set Carpenter, Set Decorator, Voice-over Artist, Set Painter, Set Plasterer, Live Action Director, Hair Dresser, Lighting Artist, Make-up Artist, Dancer, Production Assistant, Location Manager, Unit Production Manager and Voice-Over Artists, among others.
- The demand for shooting in real locations, instead of constructing a set is also gaining relevance. In this context, Gujarat, Rajasthan, Madhya Pradesh, Uttar Pradesh, Delhi, Jammu and Kashmir, and Haryana are gaining prominence.
- The above trend is also envisaged to create industry demand for local skilled technicians and workers in these states, instead of hiring people from outside and incurring expenditure on their travel and accommodation.



Details of Courses Available

The courses available in the Television subsector are majorly divided into two types:



Undergraduate (UG)
/ Postgraduate (PG)
Courses



Vocational Courses

Courses that train students in Content writing, editing, and Community Journalism have gained popularity as they are in demand. Experts believe that ~30% of the students graduating from the above-mentioned courses opt for a career in the television industry.



Name of the Institute	Courses offered	Location
Film and Television Institute of India	<p>1 Year Courses:</p> <ul style="list-style-type: none"> • Feature film Screenplay writing • Certificate Course in Video Editing • Certificate Course in TV Direction • Sound Recording and TV Engineering • Certificate Course in Electronic Cinematography <p>2 Year Courses:</p> <ul style="list-style-type: none"> • Diploma in Acting <p>3 Year Courses:</p> <ul style="list-style-type: none"> • PGD in Editing • Diploma in Art Direction and Production Design • Diploma in Sound Recording and Sound Design • Diploma in Direction & Screenplay Writing • Diploma in Cinematography 	Pune
Satyajit Ray Film and Television Institute (SRFTI)	<p>3 Year Courses:</p> <ul style="list-style-type: none"> • Producing for Film & Television • Sound Recording & Design • Direction & Screenplay Writing • Animation Cinema • Cinematography • Editing <p>2 Year Courses:</p> <ul style="list-style-type: none"> • Writing for Electronic & Digital Media • Direction & Producing for Electronic & Digital Media • Sound for Electronic & Digital Media • Editing for Electronic & Digital Media • Cinematography for Electronic & Digital Media • Electronic & Digital Media Management 	Kolkata
Whistling Woods International	<ul style="list-style-type: none"> • Certificate Programme in Screenwriting for Web & TV Series • Advanced Diploma in Acting • Advanced Diploma in Filmmaking with Cinematography • P.G.D. in Media & Entertainment • B. Sc. in Filmmaking with Direction • B. Sc. in Filmmaking with Cinematography • B.A in Acting 	Mumbai
Asian Academy of Film and Television	<ul style="list-style-type: none"> • M. Sc. Cinema + PGD in Cinema (2 Years) • B. Sc. Cinema + Diploma in Cinema (3 Years) 	Noida
Center for Research in Art of Film And Television (CRAFT)	<ul style="list-style-type: none"> • Cinematography • Sound Recording and Editing • Acting and Modeling • Editing • Documentary Film Making • PGD in Youtube Film Making • Film Direction 	Delhi

Table 31: List of Institutes and Courses in India – Television

EXPERT'S OPINION

MR. AMIT BEHL

Theatre, films & Television Actor,
General Secretary CINTAA



“The employability of graduates from training institutes poses a significant challenge, especially for those not attending top-tier institutions. Many students struggle to find employment even in the production houses associated with these institutes. To address this issue, the institutes must focus on enhancing their visibility through associations, publications, and industry directories. Additionally, the industry itself should consider hiring local artists, which can benefit both parties.

Furthermore, there is a crucial need to foster a culture of giving back to the training eco-system among professionals. Encouraging experienced individuals to contribute their knowledge and expertise can greatly enrich the learning experience for aspiring graduates.

One promising development is the standardization of the skilling ecosystem by the Media and Entertainment Skills Council (MESCC). This initiative is expected to make a significant impact by streamlining and improving the overall skill development process.

MESCC deserves commendation for its comprehensive skill gap report, which not only addresses technical requirements but also recognizes the importance of creative skills. By identifying and addressing these gaps, MESCC can contribute to a more robust and competent workforce in the Media and Entertainment industry.”

EXPERT'S OPINION



MR. SANJAY KHIMESARA

President-Asifa India & Founder- Horizon Institute of Design

“The growing consumption of content in various forms has created wider opportunities for a large number of creators. With current focus from various stakeholders on the Sunrise Sector of AVGC under Media & Entertainment, It is a great opportunity to review the findings and bridge the gaps in line with the comprehensive skill gaps report presented by MESG. Let’s develop India has hub to create for the world, and use our heritage to ‘Create for India’. AVGC Sector is already providing immense employment, freelance & self-employment opportunities to the youth and could contribute significantly towards the progress of our country.”



MR. VAIBHAV KUMARESH

Founder, Creative Director - Vaibhav Studios
Hon Secretary, The Animation Society of India (TASI)



“ ‘Create in India’ & ‘Create for the world’ are indeed great initiatives. In India we have a large industry that provides animation content for the entire world and successfully generates a lot of revenue and employment. While we boost this sector and invest further into it, it is extremely important for a nation to create indigenous content exclusively for its local audiences. Animation is an artform and storytelling via animated films is a great way to capture our culture and present it to our future generations. The Indian audience is all over the globe. It is a huge market with a severe dearth of good quality Indian animation content created for them. I strongly propose ‘Create FOR India’. Not only will it give talented Indian animation film makers a platform to express themselves but also provide our audiences and future generations with indigenous stories. ”

MS. LEENA LELE DUTTA

Business Head Sony YAY



“The growth and evolution of the Media and Entertainment sector in India has been remarkable. With newer avenues for entertainment consumption, viewers now have a plethora of options to choose from basis their ease and convenience thereby opening even more avenues for storytelling like never before. With its vast population and increasing internet penetration, our country has embraced digital platforms wholeheartedly, revolutionizing the way content is consumed. For instance, we have seen tremendous success in the digital release of Sudha Murthy – Stories of Wit and Magic on Netflix, with the title ranking amongst the top 10 kids’ content on the platform within just few weeks of its launch. Moreover, our YouTube channels have a phenomenal traction of over 150 Million+ viewers per month. With innovative technologies, diverse content offerings, and an unwavering focus on delivering immersive experiences, the growth of digital Media and Entertainment in India is unstoppable.”

6.5.12 Theme Park

Subsector in Focus: Theme Park

Theme parks provide a unique platform for children, families, and tourists to enjoy a wide range of attractions, thrilling rides, live shows, and interactive experiences. The theme park industry is in a nascent stage in India and is smaller as compared to that in US and Europe.

There are currently around 150 theme and amusement parks located throughout India's major cities, including tier-2 and tier-3 cities. Numerous indoor attractions, easy accessibility, a wide range of food and beverage options, and various entertainment options are just a few of the elements that contribute to this subsector's

growth. The benefit of theme parks and amusement parks over other forms of entertainment is that they provide an avenue for the entire family to come together and enjoy a fun-filled day of activities.³⁵

The pandemic caused significant revenue loss to the subsector, along with layoffs and shutting down of some of the smaller theme parks.

According to estimates, the theme park subsector is envisaged to grow at a CAGR of ~6.29%, clocking an increase in revenue from INR 11,475 crore in FY 2019 to INR 18.686 crore in FY 2027,³⁶ as depicted in the graph below:



Revenue Trends - Theme Park
(In INR Crores)

Source:
MESIC Report, 2021

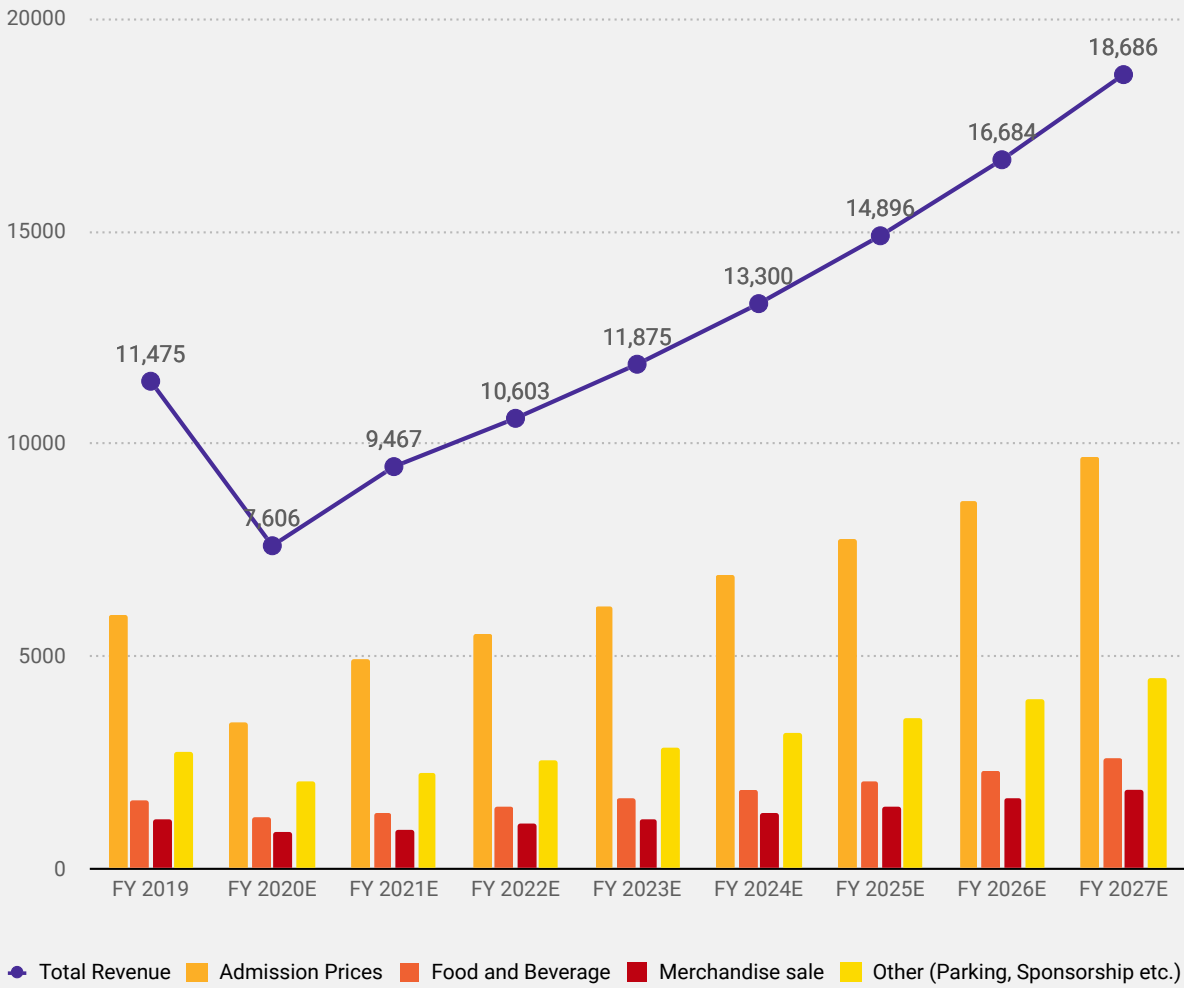


Figure 41: Revenue Trends of Theme Park Subsector



Source :

35. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)
36. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Employment Potential in Theme Park

Theme and amusement parks in India are still at a nascent stage. Majority of the parks in India are small sized and only about 15% of the parks are considered large.³⁷

The growth of the subsector will generate job opportunities, as depicted in the table and graph below. Therefore, there is a need for more active intervention by the Government to provide a boost to this subsector.

Employment Potential - Theme Park (2019 - 2027E)

Source:
MESG Report, 2021

Particulars	2019	2020E	2021E	2022E	2023E	2024E	2025E	2026E	2027E
Estimated number of people employed in the subsector	27,955	30,751	23,063	25,369	28,413	32,249	36,119	40,092	44,502
Total Estimated Employment	30,751	23,063	25,369	28,413	32,249	36,119	40,092	44,502	49,398
Incremental Demand	2,067	-7,688	2,306	3,044	3,836	3,870	3,973	4,410	4,895

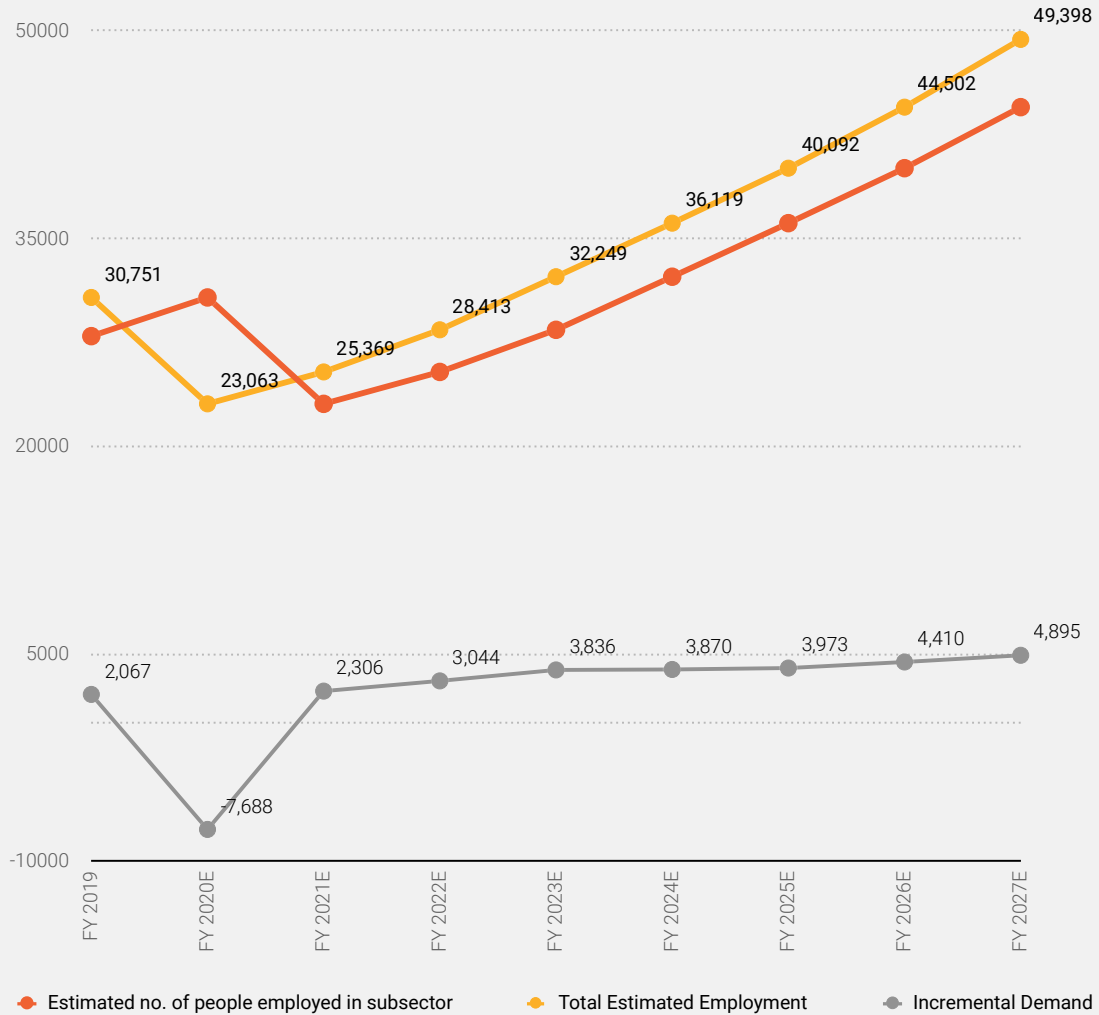
Table 32: Employment Potential of Theme Park Subsector



Figure 4.2: Employment Potential of Theme Park Subsector

Employment Growth Projection - Theme Park [2019 - FY 2027E]

Source:
MESC Report, 2021



The employment opportunities highlighted above are an indicator of demand for skilled professionals in the subsector. This also highlights the need to bridge the gap between industry demand and adequately trained professionals. This can only be carried out by identifying future job roles and providing relevant skilling opportunities to individuals who are interested in pursuing a career in the industry.

Source :

- [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Skill Development in Emerging Futuristic Job Roles

As mentioned above, theme parks in India are in a nascent stage as compared to those in US or Europe. The best theme parks of the world are adopting and implementing latest technologies such as AR/VR, in rides and theatre-based attractions. As per MESC's 2021 Report, India needs to work towards adoption of these latest solutions and technologies, as has been done abroad.

Integration of theme parks with latest and emerging technologies has implications for employment opportunities as well. An

analysis of the employment landscape for the subsector, shows that new and emerging roles are likely to gain significance in the coming years. While it is essential to ensure skill development in the areas that are currently in trend, it is also important to provide upskilling and reskilling opportunities to individuals, in futuristic job roles (for instance, roles requiring skills pertaining to AR/VR) that are likely to be in higher demand in the course of next few years. There is also need for vocational skilling in emerging job roles that are in high demand in the sector.



Some of the identified roles in the subsector for which skilling and training opportunities should be prioritized are as follows:

Futuristic Job Role	Description
VR Marketing Operator	As the use of VR increases, it can be used as a marketing tool for theme park previews. The role would be to help potential visitors to check out rides virtually before going to the theme park. Such immersive options are bound to increase the number of people visiting a theme park.
Projection Mapping Specialist	Use of AR will require specialist positions like projection mapping specialist which can be used to entertain guests while waiting in queues.
AR App Developers	Extending AR interaction by incorporating guests' preferences with theme park's environment will bring a new dimension to theme park experience. The role will require creation of AR apps which the guests will have to download and follow directions enhance their experience.
Creative Producer (AR/VR)	Their job will be to propose creative experiences to partner organisations, which will attract guests through digital distribution and streaming technologies

Table 33: Classification of futuristic job roles in Theme Park Subsector



State level trends in Theme Park

Theme Parks are not only a source of entertainment but also a contributor to the tourism industry. Besides offering direct employment opportunities, this subsector also facilitates ancillary businesses around the park.

The first amusement park in India, Appu Ghar, opened in New Delhi in 1984. During the 1980s and 1990s, Appu Ghar rose to prominence as one of India's most well-known amusement parks. Essel World in Mumbai and Nicco Park in Kolkata both opened after this. With a significant portion of visitors coming from other states, these two parks significantly contribute to the promotion of state tourism.³⁸

According to the MESC Report 'Human Resource and Skill Requirement in the Media and Entertainment Sector (2020-25)', the following trends have been observed across different cities in India:

- Hyderabad, Bengaluru, Mumbai, Lonavala, Kolkata, Kochi, Noida and Gurugram, are some of the key locations in the country that are generating employment in this subsector.
- The above cities and various states have demonstrated high demand for job roles across profiles such as- Sales Executive, Operations Manager, Business Development Executive, Ride operators, Engineer (Facilities), Senior Assistant (Guest Relations), among others.
- The next five years will see the growing prominence of key cities such as Bhopal, Indore, Lucknow, Surat, Pune, Chennai, and Shimla.



Source :

38. [https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20\(2020-25\)%20Jan%202022%20v7.pdf](https://www.mescindia.org/images/skill-gap-report/Human%20Resource%20and%20Skill%20Requirement%20in%20the%20Media%20%20Entertainment%20Sector%20(2020-25)%20Jan%202022%20v7.pdf)

Details of Courses Available

The manpower available for the theme park sub-sector is majorly from hotel, hospitality, and tourism management courses.

Hotel and tourism management courses are found to be suitable for theme parks as the majority of the task is related to guest handling and ensuring time is well spent in theme parks. Security courses provide personnel from the unarmed Guards courses.

Experts believe that only ~10% of the people from courses opt for careers in theme parks.



EXPERT'S OPINION



MR. RAJEEV JALNAPURKAR

DIRECTOR- IAAP & FORMER DIRECTOR
-RAMOJI FILM CITY, HYDERABAD

“The entertainment sector, a symphony of joy and wonder, is rising from the challenges of the pandemic to orchestrate a resounding business growth. As the world embraces a new normal, themeparks, amusementparks, water parks, museums, and visitor attractions like Disney, Universal studios, warna Brothers, madam Tussauds museum have become beacons of hope, fostering togetherness and cherished memories once again. The need for fresh concepts and innovative business plans has never been greater, as the sector adapts to evolving demands and emerging trends. This transformation not only revitalizes the industry but also contributes significantly to the GDP growth of our nation, empowering economic prosperity and inspiring dreams for generations to come. IAAP, in collaboration with MES, is dedicated to extending the benefits of Skill India to all professionals engaged in Theme and Amusement Parks. Their collective goal is to enhance the experience of both professionals and the audience they cater to.”



EXPERT'S OPINION



MR. SUPRAN SEN

Executive Director, Indian Chamber of
Content Owners

“The evolution of the film industry is a reflection of our society’s growth, aspirations, and shared dreams. From production to distribution and exhibition, Indian cinema has traversed an incredible journey, mirroring the complexities and triumphs of our nation. As filmmakers embrace bold narratives, diverse characters, and cutting-edge technology, they captivate audiences with stories that transcend borders and ignite conversations that shape our culture. This transformative journey not only entertains but also sparks introspection, promoting social change, and celebrating our rich cultural heritage. Films have given employment to millions in India, a country where employment is a precious word. It has inspired people’s lives, inspired fashions, inspired a common national language. It gave remunerative some crafts who were not so well off before the advent of cinema. Gave respect and honors to singers, dancers and poets who were often shunned and avoided by the elite in the earlier days. Helped the economy in many fascinating ways.

MESC’s Skill Gap report is unlocking Potential to Bridge the gaps, while envisioning the Future.”



MR. KIREET KHURANA

6 presidency award winner, Indian filmmaker, animator,
and ad-film director,



“What is exciting about the AVGC XR space right now is not just that it is experiencing a robust growth each year, but now there are a lot of wonderful evangelists who are working to change the trajectory. In that, Mohit Soni and MESC has been dynamically spearheading efforts for skill development across the country in this sector. This is a much needed impetus. More power to those who are working to build a robust eco-system which is sure to propel India in the orbit of original IP creators.”

MR. V.L.V.S.S. SUBBA RAO

Former Principal Economic Adviser,
Government of India



“The world of media & entertainment is undergoing a phase of phenomenal transformation with technology and capital following human creativity at a furious pace. The segments of animation, gaming, ARVR are shifting perceptions of entertainment into exciting and ever evolving domains. It is providing scope for creative impulses to be unleashed in an infinite manner. Such fast expanding changes place a huge demand for skill sets and mind sets that can carry visions to reality.

This Skill Gap report by MESC is a much-needed document that throws light on the levels of multi-sectoral skill sets required by this industry and will serve as a precious guide for manpower capacity building and enterprise generation in the gigantic & versatile industry that M&E has become. ”

EXPERT'S OPINION



DR. NISHITH KL BHANDARKAR

Business head wizcraft india

“India, with its rich tapestry of over 30 prominent languages spoken across the nation, boasts a diverse Media and Entertainment industry. The sector is currently undergoing a massive transformation, with both traditional & modern coexisting. The landscape has been reshaped over the past decade by many factors of increasing interactivity, digitization, multiple platforms, various devices, and globalization of services. Also, government initiatives, FDI in flows, mergers & acquisitions, the availability of affordable internet plans, and the rising popularity of OTT platforms have contributed to its expansion.

However, the true potential and sustained growth of the Media and Entertainment sector hinge on the development of skills.

The inclusive skill gap report by MESIC is a praiseworthy undertaking that truly inspires awe. This report will undeniably serve as a guiding friend for the M&E industry.”



6.6

SUMMARY OF THE SKILL GAP

Synthesising the information above, we have compiled a list of skills that will be relevant to the industry. Moreover, the scope of adding this section is more relevant due to the inclusion of creative skills and various support skills, such as business management and soft skills, which often get overlooked considering the fast-changing technology in the industry. These skills are fundamental to the industry and essential to support its growth. Hence, it is relevant to call out the need for the same.

Historically, Indian stories have flourished not only because of excellent content but also due to excellent narration and delivery. Such advanced artistic forms of dance, music, puppetry, etc already exist in India, suggesting the excellent creative skills developed over time. As an output of the expert interviews, these skills will stay relevant in the modern context as well.

Building technical capabilities is the need of the hour but, creative aspects, like storyboarding, direction skills, Imaginative Thinking, etc, will still be relevant. Therefore it is crucial to call out these skills in this report and emphasize their importance. The process of developing these skills takes much more significant time, therefore later in the report, it is recommended to nurture talent for these skills right from the schools. A need for a strong education framework is emphasised for the same.

Therefore, this section is not only a synthesis of the skills identified in the subsectors but includes other skills identified that we expect to be in demand in the industry.



Table 34: Summary of Skills Gap

Areas	Skills
Digital Media Skills	<ul style="list-style-type: none"> • Digital Marketing • Social Media Management • Content Creation and Curation • Search Engine Optimization
Technical Skills	<ul style="list-style-type: none"> • Video Editing • Graphic Design • Sound Engineering • Sound Editing • Sound Designing • Voiceover • Gaming Expert • Animation • Sound Design • Camera Operations • 3D Modelling • Character Rigging • Rotoscoping • Virtual Reality
Content Creation and Management	<ul style="list-style-type: none"> • Innovation • Creative Thinking • Character Designing • Colour key Art • Colour Schemes • Music Programming • Script Writing • Research • Lighting Expert
Business and Management Skills	<ul style="list-style-type: none"> • Innovation • Creative Thinking • Character Designing • Colour key Art • Colour Schemes • Music Programming • Script Writing • Research • Lighting Expert
Creative Skills	<ul style="list-style-type: none"> • Drawing skills • Acting Skills • Dancing Skills • Singing Skills • Painting Skills • Storyboarding • Imaginative Thinking • Verbal and written communication
Soft Skills	<ul style="list-style-type: none"> • Attention to detail • Flexibility and versatility • Adaptability • Interpersonal Skills • Entrepreneurship • Leadership • Work Ethic
Others	<ul style="list-style-type: none"> • Hairstyling • Make-up • Set Management

We have also synthesized the futuristic skills, which according to experts, will be relevant in future, and hence makes sense to invest in learning those skills. It is aligned with the futuristic job roles defined in the sections above. These skills include the following:

No.	Skills	Subsector
1	Programmatic Display Advertising	Advertisement & OOH
2	Digital Advertising	Advertisement & OOH
3	Consumer Insights	Advertisement & OOH
4	Designing Architect	Animation & VFX
5	System Validation Engineering	Animation & VFX
6	3D Artist	Animation & VFX
7	Technology Fabrication	Art & Culture
8	Data Analyst	Digital Media , Art & Culture
9	Email Marketer	Digital Media and OTT
10	Social Media Marketing	Digital Media and OTT
11	Digital Media Specialization	Digital Media and OTT
12	Digital Media Planning	Digital Media and OTT
13	Digital Research	Digital Media and OTT
14	Domain theme expert	Digital Media and OTT
15	Sports Event Management	Event & Live Performance
16	Celebrity Management	Event & Live Performance
17	Event technology Management	Event & Live Performance
18	AV Production	Films
19	Social Media Specialists	Films
20	Machine Learning	Online Gaming
21	Data Science	Online Gaming
22	Cloud Development	Online Gaming
23	Gaming and Visualization Development	Online Gaming
24	Fact Checking	Print
25	Custom or Theme Packaging	Print
26	Niche domain journalism	Print

Table 35: Summary of Futuristic Skills

No.	Skills	Subsector
27	Podcast specialists	Radio
28	Multilingual vocal coach	Sound & Music
29	Playlist Science	Sound & Music
30	Crossover specialist	Sound & Music
31	AI Experts	TV
32	Technology Experts	Tv, Film
33	VR Marketing Expert	Theme Park
34	AR app development	Theme Park
35	Creative AR/VR Production	Theme Park



07

Building unique edge for India: Doing it the “Desi Filmy Way”





M&E

REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS

The Indian M&E industry is only around 2% of the global size. However, India has the potential to become the leader in the M&E industry. The evidence is the higher growth rates compared to other markets. The competitive advantage of India over other markets needs to be identified. India can lead the Media & Entertainment Industry by utilising its core strengths accumulated over the years and passed on from our ancestors. India needs to adopt the “Desi way” to put itself on the global map as a front runner in the Media & Entertainment Industry.



“We have a long tradition of storytelling in India. We have probably the oldest and most colourful stories.”

– RRR Director
Mr SS Rajamouli

Innovative Quality and Content

In the media & entertainment sector, content quality is vital. In terms of storytelling, technical factors, and production quality, Indian content must meet international standards. It will help draw in a larger audience from both India and abroad.

India was known from ancient times for storytelling, poetry, and songs. It has one of the longest histories of storytelling in the world. Many original stories, passed down to generations, are yet to witness a larger audience. With the help of the newest technologies, these stories can be narrated livelier than ever before, on the global stage. However, one must keep a check on the quality of the content, which should exceed or at least meet global standards. The most successful content from India, recognised on the global stage, was inspired from its heritage and culture. We must go back to our roots as they have too much to offer.



Talent

The potential lies in the large talent pool that never shies away from doing hard work. India is one of the youngest nations in the world, with over 60% of the population in the working age group and about 46% of the population below 25 years of age. India should invest in nurturing this talent into a skilled workforce for the evolving industry. The new technologies should be embraced quickly, and India should become a global hub for affordable & quality service providers for new technologies.

Currently, around 1.6 million people are directly employed, and another 4-5 million people needs to attract and retain top talent. Welfare of the people is crucial to keep them motivated. It can be achieved by offering competitive salaries, good working conditions, and opportunities for growth & development.

Marketing

A strong marketing strategy is key to the success of any entertainment product. Indian Media & Entertainment companies need to invest in effective marketing campaigns that reach a global audience. To penetrate global markets, collaborations can be a good strategy to popularise Indian content. The US film industry spending on advertising in 2021 was USD 571 million ³⁹ against an estimated 12 million by the Indian counterpart. ⁴⁰

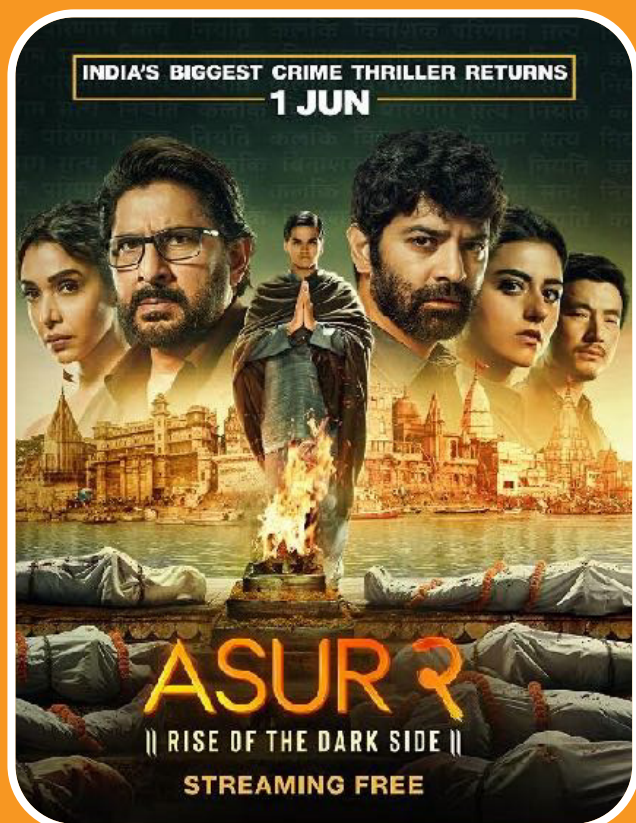
Source :

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Mythological Stories gaining popularity

Asur is a Hindu mythological thriller series gaining much popularity. It is already rated 8.5 on IMDB, and more and more people are appreciating the amalgamation of mythological stories and characters with modern world realities. The distinctive feature of Asur is the realistic portrayal of the possibility of the dark sides of the mythology decides taking control of the modern world. The story revolves around good and evil as depicted in the mythological scripts while keeping in check the realities of the modern world.

The series is already getting exceptional reviews and viewership. It has been the most-watched Indian show since its launch. According to Ormax Media, a media consulting firm, “Asur 2” topped the Indian streaming chart in June 2023.



Invest in Technology

India should invest in advanced technologies such as virtual reality, augmented reality, and artificial intelligence to enhance the Media and Entertainment experience for its audience. This will also help in creating innovative content and increasing efficiency in production. India already has a competitive edge in the IT service industry and has the capacity to build expertise in M&E related technologies. It will require intervention from public and private sectors.

Strong Educational Framework

To nurture the Indian talent pool, a strong educational framework will aid in developing more world-class professionals. There is therefore a requirement for standardization of education, promoting creative thinking in schools, promoting well-structured education across under-graduation & post-graduation, and developing course contents at par with international standards.

Improve Market Access

India is such a large market having a lot of growth potential as already established. Therefore, holistic efforts to improve access to the market can provide the necessary boost to the industry, especially the emerging subsectors like AVGC, Digital Media & OTT, etc. Developing robust infrastructure, an institutional push to realise the sector's potential, and IEC activities can help in the same.



VFX of 'Thor: The Dark World' were partially done in a studio in Mumbai.



08

States will play a key role in shaping the Indian M&E Industry





REALIZING M&E SECTOR
POTENTIAL IN INDIA: THROUGH THE
SKILLING LENS

M&E

The top 10 states in terms of employing the most number human resources in the Media & Entertainment Industry include Maharashtra, Karnataka, Delhi, Tamil Nadu, Andhra Pradesh, Uttarakhand, West Bengal, Telangana, Gujarat and Kerala. The chart below depicts the Human Resource Employment Forecast in various Indian states by 2025:

Human Resource Demand Forecast - State Wise [2027 E]

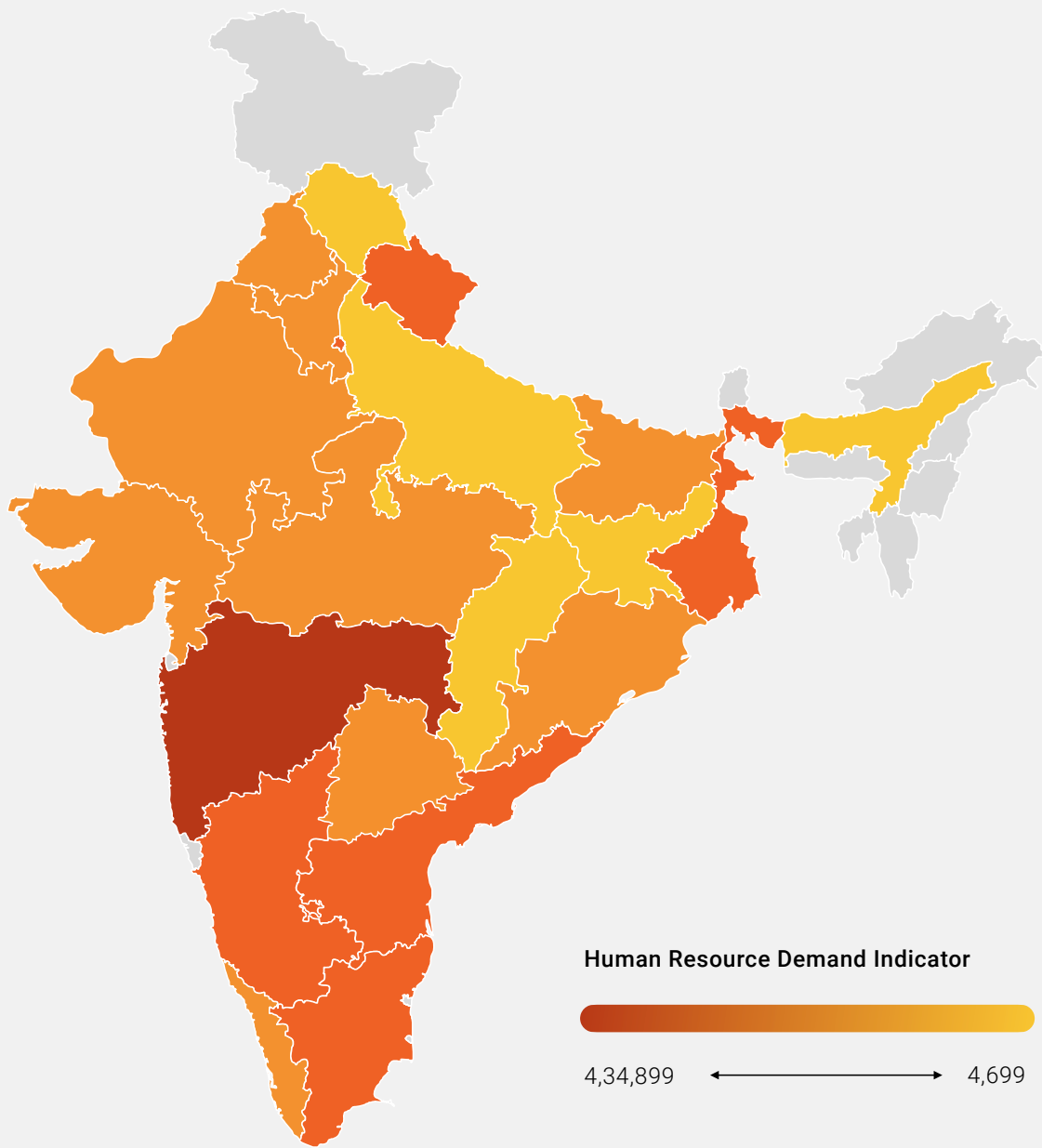


Figure 43: State-wise M&E Human Resource Demand

States	Human Resource Demand (2019)	Human Resource Demand (2027 E)
Maharashtra	2,23,187	4,34,899
Karnataka	1,46,197	2,84,878
Delhi	1,43,449	2,79,523
Tamil Nadu	1,37,216	2,67,379
Andhra Pradesh	1,34,860	2,62,787
Uttarakhand	1,23,588	2,40,822
West Bengal	1,09,049	2,12,492
Telangana	92,523	1,80,289
Gujarat	65,319	1,27,281
Kerala	58,991	1,14,949
Madhya Pradesh	44,881	87,455
Rajasthan	43,828	85,404
Bihar	36,848	71,802
Haryana	35,359	69,096
Odisha	26,424	51,490
Punjab	19,015	37,053
Assam	15,367	29,945
Uttar Pradesh	15,105	29,433
Jharkhand	13,410	26,131
Chhattisgarh	7,892	15,378
Himachal Pradesh	2,411	4,699

Table 36: State-wise demand forecast

While there are many states yet to realize the potential of the M&E sector, others require specific interventions to witness unprecedented growth. Therefore, we have compiled state-specific reports of select states to understand the state-wise M&E sectors and recommendations for them.

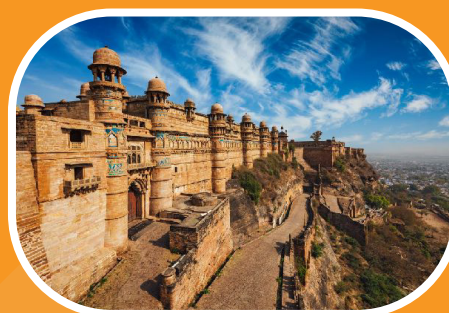
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STATE-SPECIFIC SNAPSHOTS

We are releasing the sectoral snapshots of a few states. MESC will soon release detailed analysis and recommendations to bolster Media and Entertainment sector in its state-specific reports. The following sections contain state-specific snapshots of the following states:



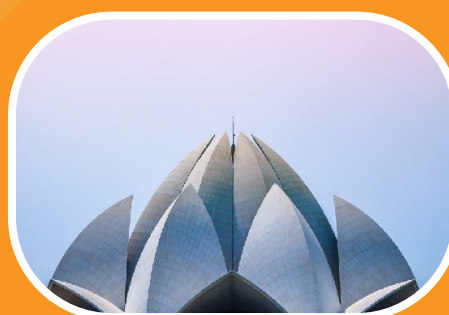
Karnataka



Madhya Pradesh



Assam



Delhi



Rajasthan



INDIA

M&E Industry KARNATAKA



Population
61,095,297



Total Working Population
4,53,69,921



Business Hubs
**Bengaluru, Bagalkot,
Mysuru**



M&E Employment Rank
#2

Key Sub-Sectors in the State

Film, Television, Print, Animation & VFX, Online Gaming, Digital Media & OTT, OOH & Advertising, Event & Live Performance, Theme Parks

Emerging Sub-sectors in the State

Radio

Human Resource Demand (2019)

1,46,197

Key Observations

- Bengaluru is the leading contributor of human resources in online gaming sector. Out of top 30 gaming companies in India, Bengaluru with 10 studios makes the State of Karnataka, the largest employer.
- Karnataka contributed to nearly 8% of the newspaper ad volumes in 2022 ranked fourth among all the states.
- The State is expected to be the state with one of the highest operational community radio stations by 2025.
- Karnataka is one of the main employment centres for all the Media and Entertainment subsectors including Advertising & OOH, Digital Media & OTT, Animation & VFX, Events & Live Performances, Films, Print, Theme Parks, & Television.
- Karnataka has already identified subsectors under M&E as focus sectors for the Champions Services Sector Scheme – Animation and VFX, Gaming, Digital Advertising, and OTT Media.

Key Government Initiatives

- Karnataka was the first state government to announce a separate policy for Animation, Visual Effects, Gaming and Comics in 2012 and extended it for another 5 more years in 2017 due to its success.
- Since Bengaluru is the IT hub of India, the Karnataka government is formulating a policy to support the development of creative personnel in the AVGC sub-sector, through incentives in patent registration, PF, international marketing, along with production grants for visual effects, etc. The policy aims to focus on skill development through the building of more than 100 institutes pertaining to this sub-sector, encourage start-ups and promote market & ecosystem development. Digital Art Centre (DAC) colleges and AVGC finishing schools were set up (as pilot projects) to bridge the skill gap and introduce industry-accepted skills and curricula to students.

Suggested Interventions

1. Identification of Skill Development needs in the state in consultations with various stakeholders.
2. Developing an esports ecosystem in the state to provide training support to players in collaboration with the industry.
3. Designing of formal educational courses for M&E emerging subsectors like Gaming, Digital Advertising, AVGC, and OTT.
4. Industry Workshops for Upskilling and Reskilling
5. Upgradation of training and skilling infrastructure especially for Gaming and AVGC.

M&E Industry MADHYA PRADESH



Population
72,626,809



Total Working Population
4,63,40,441



Business Hubs
Indore, Bhopal



M&E Employment Rank
#11

Key Sub-Sectors in the State

-

Emerging Sub-sectors in the State

Television, Digital Media & OTT, Radio, Theme Park, Film

Human Resource Demand (2019)

44,881

Human Resource Demand (2027E)

87,455

Key Observations

- Madhya Pradesh is currently third in print copies circulation with 2.48 crore copies per publishing day.
- Madhya Pradesh will emerge as a state with one of the highest operational community radio stations by 2025.
- Madhya Pradesh is becoming one of the preferred destinations for real locations in Film and Television Industry with many films and OTT content being filmed in the state.
- We expect Digital Media & OTT subsector to flourish in the state and will add substantial workforce.
- Madhya Pradesh has a rich cultural heritage and is known for its traditional music and performing arts. The state hosts various festivals like the Tansen Music Festival in Gwalior, which attracts renowned artists and music enthusiasts. Folk music and dance forms like Bundeli, Malwi, and Nimari are also prevalent.

Key Government Initiatives

- Madhya Pradesh Film Tourism Policy-2020 and the push towards establishing film cities in the state will aid in developing Film sub-sector in the state.

Suggested Interventions

1. With exciting locations of historical, spiritual, and cultural significance, MP should extensively focus on Film tourism and should provide a trained human resource pool for the same.
2. Madhya Pradesh has the potential of becoming a leader in Digital Media & OTT platforms, which is showing promising growth rates. With the availability of a trained workforce at a relatively low cost, Madhya Pradesh can lure industries and entrepreneurs to set up their camps in the state.
3. A state with such large print copies distribution and high growth potential of the Radio subsector, Madhya Pradesh should invest in upskilling and reskilling the workforce with the newest technologies and techniques to establish supremacy in these subsectors.

M&E Industry

ASSAM



Population
31,205,576



Total Working Population
2,03,01,848



Business Hubs
**Guwahati,
Shivsagar**



M&E Employment Rank
#17

Key Sub-Sectors in the State

Film and Television

Human Resource Demand (2019)

15,367

Human Resource Demand (2027E)

29,945

Key Observations

- Assamese television shows have witnessed the largest growth of 24% in 2022 as compared to 2021.
- Acceptance of regional content is rising, and Assamese is gaining popularity across all the M&E platforms.
- To provide boost to the art and culture of the state, archaeological site has been announced in Shivsagar, Assam.
- Guwahati is one of the major regional centres for film production and generating employment.

Key Government Initiatives

- The Assam Government is extending support to revive Assamese film industry. They are providing support to finance production of Assamese films by advancing loans, subsidies, grants, etc., or by the extending financial assistance in any other matter.

Suggested Interventions

1. Nurturing local talent in film and television industry to localise international content.
2. Establish training programs and workshops to enhance the skills of local talent in various aspects of Media and Entertainment, such as acting, filmmaking, direction, scriptwriting, and technical roles.
3. Foster partnerships with universities and colleges to offer courses in Media and Entertainment related disciplines. This can help create a skilled workforce and provide networking opportunities for students.
4. Engage with industry associations, production companies, and professionals to understand their needs and concerns. This collaboration can help in creating a favourable ecosystem for the growth of the Media and Entertainment industry in Assam.
5. Explore partnerships and collaborations with international film industries, film commissions, and production houses to facilitate co-productions, exchange programs, and international distribution of Assamese films and content.

M&E Industry

DELHI



Population
16,787,941



Total Working Population
1,15,10,261



Business Hubs
**Bengaluru, Bagalkot,
Mysuru**



M&E Employment Rank
#3

Key employment generating Sub-Sectors in the State

**Print, Radio, Animation & VFX, Online Gaming, Digital Media & OTT,
Advertising & OOH, Event & Live Performance, Sound & Music**

Emerging Sub-sectors in the State to generate more employment

Television

Human Resource Demand (2019)

1,43,449

Human Resource Demand (2027E)

2,79,523

Key Observations

- Being the capital of the country and a major business hub, Advertising and OOH is one of the major employment-generating subsectors.
- Delhi is the fifth city after Mumbai, Hyderabad, Chennai and Bengaluru to have the most number of Animation & VFX studios.
- Delhi is one of major cities providing employment in the field of event management and coordination.
- Delhi with 9% of total ad volumes in Radio is ranked fourth among all the states and UTs. Delhi houses all the major FM studios and has the most listeners of FM radio.
- Print is one of the significant subsectors generating employment in Delhi. Delhi has an estimated 1.69 crore circulation copies per publishing day.
- Delhi is one of the major cities hosting most music recording studios.

Key Government Initiatives

- The Delhi government approved Delhi Film Policy, 2022 to promote the city as a hub of shooting and other production activities through subsidy up to Rs 3 crore and hosting of an international film festival.

Suggested Interventions

1. Promoting creative thinking in schools with changes in curriculum and enabling infrastructure.
2. Promoting high-quality and well-structured formal education across graduation and post-graduation specially in emerging subsectors.
3. Developing course content and delivering courses par at international standards.
4. Engage with industry associations, production companies, and professionals to understand their needs and concerns. This collaboration can help in creating a favourable ecosystem for the growth of the Media and Entertainment industry.
5. Explore partnerships and collaborations with international film industries, film commissions, and production houses to facilitate co-productions, exchange programs, and international distribution of films and content.

M&E Industry RAJASTHAN



Population
68,548,437



Total Working Population
4,34,07,532



Business Hubs
Jaipur, Udaipur



M&E Employment Rank
#12

Emerging Sub-sectors in the State to generate more employment

Television and Events and Live Performances

Key Subsectors In the State

Film, Television, Print, Animation & VFX, Online Gaming, Digital Media & OTT, OOH & Advertising, Event & Live Performance, Theme Parks

Human Resource Demand (2019)

43,828

Human Resource Demand (2027E)

85,404

Key Observations

- Rajasthan is ranked 6th with a share of 7% of overall newspaper ad volumes in 2022.
- Rajasthan is ranked 5th with a share of 8.4% of overall radio ad volumes in 2022.
- Rajasthan's scenic beauty and historical architecture make it a popular destination for historic events, including weddings.
- Print is an established subsector employing significant number of people in the state. Rajasthan is currently 7th in print copies circulation with 1.33 crore copies per publishing day.
- Television shows and Films are increasingly choosing real locations over erecting a set in Mumbai. Rajasthan has the potential to offer these locations in its diverse landscape.
- Rajasthan has a rich folk music tradition, and its music forms, such as Rajasthani folk songs, Bhajans, and Ghoomar, have gained popularity.
- The state is renowned for its folk dances like Ghoomar, Kalbeliya, and Kathputli. These traditional dance forms are regularly performed at cultural events, weddings, and tourist destinations, attracting both domestic and international audiences.

Key Government Initiatives

- The State of Rajasthan published a draft of Rajasthan Virtual Online Sports (Regulation) Bill proposing a licensing regime to regulate pay-to-participate fantasy and esports.

Suggested Interventions

1. Highlight the rich cultural heritage, picturesque landscapes, and historical sites of Rajasthan to attract filmmakers and encourage them to utilize local talent, locations, and resources.
2. Collaborate with educational institutions and industry experts to offer specialized courses and training programs in filmmaking, acting, and related fields. This will nurture local talent and create a skilled workforce for the Media and Entertainment sector.
3. Identification of Skill Development needs in the state in consultations with various stakeholders.
4. Promote Rajasthani music at a global scale by nurturing talent with latest technologies and trends in the industry.

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NOTES

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