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KAUSHAL BHARAT, KUSHAL BHARAT!



Released 3rd Edition of MESC Magazine

3rd edition of Media Talk Back released by Mr Jayant Krishna, COO - NSDC. This special edition covers the Hair, Make-Up & Prosthetics Industry in India with a special focus on career opportunities in the Film, Television and Theatre Sector.



A business delegation from Canada, headed by Hon'ble Minister of Trade, Canada, François Philippe Champagne along with Minister for IT Mr Kalvakunta Taraka Rama Tao in Hyderabad. VFS launching its campuses in India to provide opportunities to aspiring students in Media & Entertainment Sector.

MESSAGE FROM THE **CHAIRMAN**



Dr Kamal Haasan Chairman (MESC) Film Actor, Producer, Director & Screenwriter

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The National Award winning actor, director and producer Dr. Kamal Haasan, identifies the real need to enhance the skill sets in professionals of Media industry. As Chairman of MESC (Media and Entertainment Skills Council) he intends to work on the future of the country as well as it comes to showing the art of India Media & Entertainment Industry. He Intended to offer programs for training the students and also the trainers in such a way that the skill gap between academia and industry is minimized to the lowest possible limit.

MESSAGE FROM THE EDITOR IN CHIEF



Ashish S K Founding Governing Member

I extend my thanks and regards for supporting and contributing the information and insights required during the creation of our 4th monthly magazine highlighting about Media & entertainment Skills sector. I'm sure the subscribers will get a much better understanding of the industry, the focus today and plans for tomorrow. For budding aspirants, this magazine shall provide the direction to accomplish success in their careers. I congratulate, MESC for this initiative and request all stakeholders to come forward and support the 'Skill India' mission by contributing not just to the magazine but also to uplift the entire skilling ecosystem. Jai Hind!



Technology and creativity are continuously improving and becoming a vehicle that drive the use of computergenerated imagery in live-action films. The year 2016 and 2017 saw the Indian Animation and VFX industry touching new

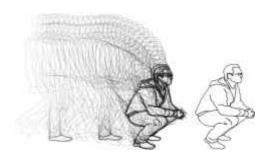
heights and extending it's reach to formats other than Films.

The Animation and VFX industry continues to steadily gain acceptance with Indian Talent poised to rub shoulders with global counterparts. According to the KPMG India-FICCI, Indian Media and Entertainment Industry Report 2017, the Indian Animation and VFX industry grew at 16.4 per cent in 2016, driven majorly by a 31 per cent growth in VFX, with Animation remaining steady at a growth rate of 9 percent. VFX industry is estimated to be of INR 43.5 Billion and will get a significant increase by 2020 and is estimated to grow up to INR 87.1 Billion.



The industry is fast emerging as an indispensable part of Filmmaking, and the Roto, Matte Painting, Color Keying, 3D Conversion, etc work carried out by Indian studios had catapulted the country on the global VFX scene. The post production saw a robust growth of 13 percent in 2016 for Indian projects. International projects continue to account for a lion's share of the VFX industry revenues at over 70 percent, with Hollywood studios leveraging the skill set and cost advantages of Indian talent. Today India have nearly 300+ animation, 50+ VFX and 85+ game development studios with

more than 20,000 professionals working for them. Also, a significant number of artists are trying to break the monotony of their work in the studio by turning part time freelancers.



GIVING WAY TO TECHNOLOGY

Work Done in Indian Cinema

Thanks to the huge demand of entertainment, Indian cinema industru is transforming rapidly. Filmmaking in India is beginning to acknowledge and accept how technology can support and enhance their story telling, giving rise to a culture shift in perception of the process. Many movies and televisions series now have on-board VFX studios right from the pre-production stage itself and this trend is only going to increase. The use of highend work is no longer limited to main stream Hindi films, in fact South Indian films are torch bearers in making VFX centric films. Importantly, many Indian VFX studios such as Prime Focus are taking center stage globally. Finally, the entire eco-system is evolving, be it theatres, televisions, mobiles or viewing preference of the audiences, which has given the sector the much needed impetus.

Prime Focus VFX team continues to push the envelope for visual effects in the Indian Film Industry by delivering top-flight VFX services for some of the major Bollywood projects in 2016, including four of the top ten highest-grossing Bollywood films (M S Dhoni: The Untold Story, Ae Dil Hai Mushkil, Housefull 3 and Baaghi). The team's impressive work continued in 2017, with big budget projects like Gautamiputra Satakarni, Tubelight, Raabta, Raees, A Gentleman, Baadshaho, Kaabil and the recent superhit Judwaa 2. Prime Focus VFX also raked in tremendous acclaim for its work on M S Dhoni – which was featured as a case study in the FICCI KPMG Report 2017, Housefull 3 and Telegu film Gautamiputra Satakarni.

The VFX team at Prime Focus employed innovative visual techniques to realize some of the most jaw-dropping effects for their recent projects last year. In a first-of-its kind, CG ants were created using Miarmy for Housefull 3 while proprietary head-replacement technology was used to digitally replace Dhoni with Sushant in to original broadcast footage of cricket matches and to create teenage Dhoni. For Gautamiputra Satakarni, Prime Focus conceptualised and created fully CG ships, soldiers and siege engines for the battle sequences. For Raabta, Prime Focus delivered close to 800 visual effects shots for the film with scope of work entailing green screen, matte painting, crowd simulation, projection matte paintings, rig removal, CG army, CG boats and digital environment. For A Gentleman, Prime Focus delivered close to 1200 effect shots including CGI, chroma keying, matte painting, rig removal and digital environment.

That Prime Focus' DI facility remains the top choice among leading filmmakers can be best judged from the fact that 8 out of Top 10 highest grossing film this year were color graded by Prime Focus. Prime Focus is the DI specialist for Bollywood films, with work including Dangal, Bajirao Mastani, Dilwale, Fan, Prem Ratan Dhan Payo, Brothers, Fitoor, Udta Punjab, Agent Vinod, Black, Mersal, My Name is Khan, New York, Ajab Prem Ki Ghazab Kahani, Wake Up Sid, Dhoom 3, Kochadaiiyaan, Happy New Year. For TV projects they have delivered DI services for projects such as Satyamev Jayate, 24, Nat Geo Mission Cover Shot and Master Chef India.

Prime Focus EQR Division has provided services for movies like Mohenjo-Daro, Housefull 3, Ae Dil Hai Mushkil, M S Dhoni: The Untold Story, Kahaani 2: Durga Rani Singh, Happy BhaagJaayegi, Phillauri, Rock on 2.

EXCLUSIVE COVERAGE

102 THE UPCOMING RELEASE



Mark Troy - VFX Director/Producer & Pranil Mahajan - Partner & VFX Supervisor



Q. India is become an important player in the Global Media & Entertainment Industry, how do you see it?

A. We look at our country India as the future of Media and Broadcasting. Also a lot of major global studios are opening up setups and branching into India which is a good sign. We are off course excited on the progress and look forward to a Digital India.

Q. How do you see India retain its position as a preferred outsourcing destination against its competing countries like China, Japan, Thailand, Singapore and others?

A. Well we do have a lot of competition with countries like China, Japan etc. but India has been proving itself to outsourcers with quality of the work which is a very important factor in this field. And we are getting better by the day. So we hope to achieve the position very soon.

Q. We congratulate you for your new movie "102 Not Out". How was it working for the film and how technically it was different from others?

A. First of all thanks a lot for the wishes. Technically it was not a challenge working on the movie but working with

superstars like Mr Amitabh Bachchan and Mr Rishi Kapoor was an honour.

Q. What all softwares and techniques you have used for the VFX roto, matte painting, color keying, in the movie?

A. We have used softwares like Nuke, Maya and PF Track for the VFX of this film.

Q. Which are the major projects your studio is working upon?

A. Apart from 102 Not Out, we are working on the 3rd season of award winning web series "A.I.S.H.A My Virtual Girl Friend" and a few other projects whose names i won't be able to mention now. We are also working on a music video which is purely VFX and CGI based. Its something no one has attempted in India and we are super excited to share it to the world shortly.







Mark Troy - VFX Director/Producer & Pranil Mahajan - Partner & VFX Supervisor





Q. A.I.SHA is India's first award wining web series to have VFX. What level of VFX have been used and how different it is from others?

A. We are honoured and proud to be a part of the A.I.SHA Franchisee. The level of VFX done for the web series is new and different. This is the first time a series like this demanded this kind of VFX. We are happy to be a part of Season 3 and look forward to going a step higher this time.

Q. How different it was to create a VFX for web series then from a movie?

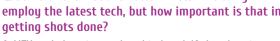
A. There is not much difference between a movie and a series. The technique and pipeline is exactly the same. Only of course for a movie the quantity increases but the quality remains the same.

Q. Can you tell us that how the things are shared among VFX facilities in this project? How the work distribution is planned and how like for a roto, color keying, matte artist?

A. In our field we have various departments. Its similar to a making a movie. We have a scripting stage, pre production stage, production and then post production. Once the locked edit comes to us, we then organise and divide the work based on the scope of work. Since we shot a lot of it on green screen, we would first get the shots cleaned and roto free and then get into the advanced stages like comping etc...

Q. Some of the visual effects in A.I.SHA clearly employ the latest tech, but how important is that in

A. VFX and shooting go hand in hand. If the planning and execution is not done right, then be ready for a lot of issues in post. For A.I.SHA, we were well planned and the results defineltly show you that.



Q. What are the challenges you faced in this web series?

A. This series was very challenging as it was something new for artists in India. And we as a company love deadlines and challenges so working on A.I.SHA was perfect for us. The most challenging VFX scenes in A.I.SHA were the ones where we were juggling with multiple layers of graphics moving in different directions and at the same time. The coordination and planning of on shoot and studio work is the most important part to execute and deliver such quality work.











TOOLS OF THE CRAFT

Improtance of Rotoscope, Color Keying & Matte painting

In Filmmaking, visual effects (abbreviated as VFX) are the processes by which Imagery is created and/or manipulated outside the context of a live action shot. Visual effects production is a combined effort of various departments such as Rotoscope, Matte Paint, Matchmove, FX, Modeling, Texturing, Animation, Lighting, Paint and Compositing of live action and Computer Generated Imagery (Abbreviated as CGI) in post production. A Compositor can start his career as a Junior Paint Artist where one can start digital painting and enhance compositing skills to become an expert Compositor.

Rotoscope

Rotoscoping is a VFX technique used by artists to trace over motion picture footage, frame by frame, when realistic action is required. Rotoscope (often abbreviated to "Roto") is used extensively in the stereo conversion & visual effects industries. Rotoscoping (often abbreviated as "roto") is used as a tool for visual effects in live-action movies. By tracing an object on live action movie we create a silhouette (called a matte) that can be used to extract that object from a scene for use on a different background.

Blue and Green screen techniques have made the process of layering subjects in scenes easier, rotoscoping still plays a large role in the production of visual effects.

Rotoscoping is often used in the preparation of garbage mattes for other matte pulling processes.

A thorough knowledge of rotoscoping and roto tools is vital to solving a vast amount of problem solving in VFX: rig removal, green screen compositing, holdout mattes, split screens, and even object or feature based color grading.

Matte Painting

Matte painting is a method of creating an art object (painting) digitally and/or a technique for making digital art in the computer.

As a technique, it refers to a computer graphics software program that uses a virtual canvas and virtual painting box of brushes, colors and other supplies. The virtual box contains many instruments that do not exist outside the computer, which give a digital artwork a different look and feel from an artwork that is made the traditional way.

There are many roles that a Matte Paint Artist can do based on interest, knowledge and practice in various aspects of digital painting. The two most demanding areas for Matte Paint Compositors are Painting and Compositing for one Visual effect ingestion in live action films and two Visual 2D to 3D stereo conversion of films. Almost 90% of painting and compositing techniques are same. Hence one can develop their practical job skills in both skill demands.

Some fundamental Matte/ Digital Painting and compositing requirements in visual effects are Wire and Rig removal, Set Extension/Replacement, Cleanup, Character Features Re-development, Color Grading or Color Correction and more.

Color Keying

A green screen is just that, a green screen, but without "Chroma Keying" it is not much use. Chroma Keying is the process by which a specific colour element (chroma) is removed from a video scene and replaced (keyed) with a different element. Essentially, it's the way video producers remove one background and replace it with another.



Use of Rotoscope in Stereo Conversion (The process of transforming 2D (flat) film to 3D)

Roto is used for:

- 1) Cutting objects and characters out from the image.
- 2) Sculpting in stereo
- 3) Edge Fighting is a way of cleaning up the stereo image.



Set Cleanup

Set Extensions / Replacement

Character Makeup / Redevelopment

Chroma Key Compositing

2D to Stereo 3D conversion

NEXT LEVEL 3D CONVERSION

The 3D conversion done for Gravity was a first of its kind setting multiple benchmarks and a new level for stereo conversion worldwide.

The critical reception for Gravity prior to its theatrical release was unprecedented. With many of the early reviews pointing to the 'outstanding post-production 3D conversion' (Variety) and the 'exemplary 3D work' (The Hollywood Reporter). As the exclusive 3D conversion partner on Gravity, industry is delivering this ground-breaking, gamechanging movie.

With the decision made to partner with Prime Focus World to convert all the live-action elements of the movie, the filmmakers were



free to shoot the film with mono cameras, allowing Cuarón and his team to stage the action with none of the technical restrictions or compromises of the bulky stereo rig. Normally on a conversion the team would take delivery of locked final shots whereas on Gravity, the assets were 'live', work-in-progress. In order to ensure that the stereo rendered CG elements matched the conversion exactly, in terms of their volumetric properties, highly accurate stereo cameras were created that we then passed back to VFX Partner – allowing them to render their stereo CG elements using our cameras. To create a stereo rig that was accurate for both our conversion and for the VFX partners stereo renders required a huge amount of mathematical effort – entirely new mathematical modeling that was unique.

The 'work-in-progress' nature of the shots had other technical implications – both in terms of asset tracking and maintaining flexibility in the unfinished shots. A second technical implication of the work remaining live through the conversion process was maintaining flexibility in the assets. The team had to keep all their work in a flexible manner, so that shots can be changed, amended or reverted as the cut comes together. On gravity the long, unbroken, floating camera shots work spectacularly well in space, and led to produce the longest continuous shot believed to have ever been converted – 15,531 frames, or 10 mins 47 sec. As the length of shot is a huge challenge in any VFX process. The size of the Maya files, the Nuke and Fusion scripts, the amount of roto, the amount of clean-plating required to remove the characters from the environment – for shots up to 11 minutes in length – these factors all add up to huge file sizes, unprecedented render times and new processes for both the completion and review of the shots.

In order to handle the longer shots, the Prime Focus World technical team not only augmented the pipeline with pre-comp techniques to make the work more manageable, but also broke these shots into shorter sections to parallelize the efforts of the artists, with a keen eye on the 'joins' where the artists' work met, to ensure consistency of depth and sculpting across the scenes. Making it a new form of collaboration for artists. It was essential that the out and in points of the sequences within the long shots matched seamlessly, in terms of sculpting and depth, and leads painstakingly ensured that the joins locked with no jarring moments for the viewer – even subconsciously.

PFW's job with the conversion was to help captivate the audience with the beauty of the 3D visuals; to support and enhance the emotion of the scenes using all the stereo techniques in their arsenal; and to help forge an intimate connection between the lead character and the audience keeping them involved.

Gravity was a project that pushed Prime Focus World's View-D conversion and pipeline teams to the limits of what was possible. It was a huge creative challenge – and an equally huge technical challenge. Many of the things PFW put in place for Gravity had never been done before, and they were dealing with unchartered territory and technical unknowns – with pressing deadlines. Solutions had to be created at a moment's notice, because PFW was a part of the chain – and if a single link in that chain had broken, it would have brought a whole series of dependencies crashing down.

Prime Focus World was an integral part of the creative filmmaking process on Gravity, delivering an extra level of emotion; an extra level of drama; an extra level of immersion; and an extra level of filmmaking control for the director.

Redchillies.vfx - KEITAN YADAV COO / VFX PRODUCER





Shah Rukh Khan's maiden venture 'Main Hoon Na.' Keitan has been honoured with the National Award in 2011 for 'Ra.One' as it set a benchmark in the realm of visual effects in Indian cinema. Other awards include 4 Filmfares, 5 IIFA and many more.

As the COO, Keitan currently helms $\,$ the Business $\,$ Development & Operations for Redchillies.vfx & Redchillies.color $\,$

Q. How do you ensure that in such a dynamic environment your skills are up-to date and you are better than your fellow members?

A. I keep myself updated by reading a lot via different platforms and media like websites, blogs, attending conferences which showcase new technology and help us keep updated and develop new skills. I won't say better, because everyone who is our immediate competitor has their forte, and their specialized skill set.

Q. What are the gap areas in present training structure? What are the steps that should be taken to contribute more effective and efficient work in this industry?

A. Don't get me wrong, the quality of education imparted in most training institutes is not up to the mark though there are some good schools now. We have to make the youth/interns unlearn and start the process all over again. The good part is that they have knowledge of the basic software. I personally believe the practical knowledge we gain when we work, is something that no Institute can teach.

We need to attract highly educated manpower like engineers, B Tech, M Tech, science graduates to take this industry to new heights.

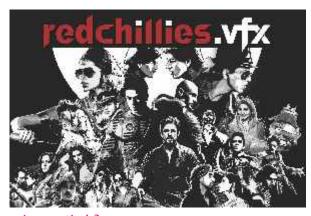
O. How do you see India become an important player in the Global M & E Industry?

A. Well as we all know, India is getting a lot of outsourced work, our movies are reaching not just the Oscars, but also various film festivals, our actors are globally recognized. So India has very much made its mark in the Global Media & Entertainment Industry. As for work, I think we need to build the trust factor, and then it's just a matter of time that we get even more work as the technology is all the same being used internationally as well as here.

Q. What is the use of matte painting and 3D Conversion in films?

A. Digital Paintings generally referred to as Matte paintings in the VFX industry has a very important role to play in the Visual Effects done for films.

There are these different types of requirements which arise while enhancing the visual appeal of some scenes in the film. The VFX team have to create these paintings which are used as set-extensions to show more depth or in a way increase the production value or beauty of the film. In some cases matte paintings are also used to add more/extra details over the already constructed practical set. At times, even some shots are shot completely against chroma screens and then the entire set or the backdrop is generated as matte paintings and placed behind the actors. 3D Conversion or also known as stereo conversion is a process in which a film or a part of film which is shot with a single film camera has to get converted into 3d by faking depth and making it look like its shot on the dual camera setup depth which can be seen wearing anaglyph or polarized glasses.



Q. What is the importance of Roto, matte painting and color keying across various verticals?

A. Rotoscopy, popularly known as roto is used to cut out mattes from the shot. It's basically frame-by-frame tracing the outline of a character or a prop or any other element throughout the shot. Generally used in case of shots which are not shot against chroma to replace/edit the background information. It is also used to tweak a particular selected area in the shot. Roto is used by the film vfx, television industry (commercials and channels) and also used to an extent by the multimedia industry. This particular feature in VFX helps to do a lot of selective changes on a shot which otherwise wont be possible to achieve.

Matte painting: As explained earlier, In some cases matte paintings are also used to add more/ extra details over the already constructed practical set. At times, even some shots are shot completely against chroma screens and then the entire set or the backdrop is generated as matte paintings and placed behind the actors. Matte painting comes as boon to these kind of projects as it immensely reduces the production cost yet does justice to the otherwise very expensive and production-heavy theme. Color keying helps extract a specific color from a shot, and use that same element to define alpha or mask for the same after which the color or background can be used.

Color-Keying: Normally called as chroma-keying is a most primary technique while working on VFX. Keying allows an artist to select a particular color in the shot and modify and remove the same. In most cases the green screen or blue screen in the shot is keyed and is replaced with the desired background as per the requirement of the project. The major benefits of this technique are that you can shoot within a limited budget and in a controlled environment, mostly the regular film studios which have the facility to shoot indoor or outdoor based upon the requirement. This technique facilitates a director to achieve many things which otherwise cannot be achieved.

Madhav Reddy Yatham (Mike)

FOUNDER & CEO (ROTOMAKER INDIA PVT LTD)





Q. How do you see Rotoscope as a career opportunity?

A. Opportunities for roto artists exist in the field of production houses and creative boutiques on projects that combine live action and computer graphics.

The fundamental duties of a rotoscope artist are to trace over live-action movements on film, to create more realistic and fluid animation. They create detailed digital mattes with 2-D image processing and drawing tools; the mattes are then used to remove wires, rigs, and other unwanted elements, as well as to make background fixes and extractions.

While working on big projects, they assist compositors, who are responsible for constructing the final image by combining layers of previously-created material.

Depending on the quality of work and level of commitment, a rotoscope artist can start off his/ her career with a pay scale between Rs. 10,000 to Rs. 15,000. With experience, they can take home anywhere between Rs. 20,000 to Rs. 40,000 within a short span of time. Depending on the scale of project and the production studio, more experienced persons can expect a lump sum amount between Rs. 50,000 - Rs 1 lakh or more.

Q. How is Stereo Roto different from VFX Roto, please elaborate?

A. Stereo roto, is a technique used to enable a three-dimensional effect, adding an illusion of depth to a flat image. Stereopsis, commonly known as depth perception, is the visual perception of differential distances among objects in one's line of sight. There are a number of visual cues that help us to see things that way. If one object partially hides another, for example, we understand the one in front to be closer. Objects and patterns grow smaller as they recede and vertical lines converge; objects in the distance are hazier and less deeply colored, with a shift towards the blue end of the spectrum.

The perspective difference between objects seen through the left and right eyes (binocular disparity) and our accommodation through focusing completes stereopsis for normal viewing. 3-D TV (and movies as well) typically work by presenting two separate images – one for the right eye and one for the left – that are incorporated through the use of specialized glasses.

VFX Roto is the process of manually altering film or video footage one frame at a time. The frames can be painted on arbitrarily to create custom animated effects like lightning or lightsabres or traced to create realistic traditional style animation or to produce hold-out mattes for compositing elements in a scene and more recently, to produce depth maps for stereo conversion.

The art of rotoscoping changed considerably with the introduction of digital tools such as Flame, Mocha, Silhouette, Digital Fusion, Nuke and After Effects (AE). With a thorough knowledge of rotoscoping, digital artists can create better live-action or CG composites as well as amazing visual effects. Various rotoscoping techniques are covered below, including matte creation, effects painting, paint touch-up, digital cloning, stereoscopic conversion and motion tracking, as well as a brief history of the craft and summary of the tools

Q. What category of the work is presently getting outsourced to India?

A. India has become the preferred choice for roto and paints outsourcing projects, VFX, and Stereo both. Gigantic box office figures of Bahubali franchise has been a booster for this outsourcing VFX work stream. India has established itself as one of the largest Media and Entertainment industry and getting bigger and better every passing year.

High currency conversion ratio is one of the biggest factors for outsourcing to India from various foreign countries. Major are USA, Europe, Australia and Canada. The said process helps to save them a lot of their financial resources.

Besides above, availability of creative and technical skilled artists, outstanding quality output, delivery of project in the stipulated time-line, strong support from the government, availability of necessary infrastructure, English Language as primary communication, quality training from institutions rooted in India as a world leader in VFX outsourcing of Roto (Rotoscopy), Prep (Paint) & Camera Matchmove.

Q. What kind of talent do you foresee shall be required over the coming years?

A. With rapidly updating technology and advanced process development in VFX production, there is an explicit requirement of the workforce who can adapt dynamic work environment, learn/update latest technologies, and invent methods to improve the production pipeline. The amount of work we are handling right now demands people from a multidisciplinary background who can handle complex tasks, lead teams and good at dealing with time and deadlines.

VFX studios are finding themselves a larger part of the creative process is that they are now made up more and more of talented concept artists, designers and visual effects supervisors who are good at problem-solving and have the tools to do it with. The client might only say, 'Just make it look cool', and suddenly the responsibility of meeting clients expectation is left up to VFX. So we are looking for proactive people.

Q. What skill sets do you consider while hiring a candidate? Are there any internal training programs you do to upgrade the skill sets of the existing team members?

A. Technical problem-solving skills, a good eye for detail, creative bent of mind, basic drawing skills (so a background in Fine Art would be great, although not necessary), a solid understanding of photography and the interplay of light, color and shadows are the fundamental skills we look for while hiring.

Our company has two verticals. Rotomaker Production and Rotomaker Academy. Any student joins VFX course in our academy will get 100% placement in our production with starting salary between 10k to 15k depending on their skill level. Students will learn practical based advanced Technologies and procedures used in VFX companies directly from the subject matter experts of the Industry, ensuring they are instantly ready to work on real-time projects once they complete their course. This strategy is beneficial for both our company and the individual who want to opt for VFX career.



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Sreyas Nair Director

Q. Where do you see India growing in Media & Entertainment industry globally?



A. Digitally, definitely! Every sector in the Media and Entertainment industry is bound to grow. But the pace at which the digital sector is growing and has the unexplored potential to its something that no other sector will be able to match upto. The massive population growth in our country (which is still unrestricted) gives us the chance and opportunity to grow more and create more than any other country. All we need to do is channel our efforts in the right direction. And well, Indians are born story tellers! Aren't we? We just need to make sure that our stories reach the right place at the right time.

Q. How do you see India retain its position as a preferred outsourcing destination against its competing countries like China, Japan, Thailand, Singapore and others?

A. With the outgrowing population, lower rates, premium quality and fast delivery with so many artists and studios working together, I don't think there'd be any problem for India to retain its position as the preferred outsourcing partner. But I don't understand why we should be disposed as preferred outsourcers instead of creators? Neither do we lack story tellers nor executors. I suppose, all we need is the right vision and guidance to realize that. I am sure Bahubali has inspired a lot of Indian story tellers to break their comfort zones and dream bigger. I just hope they reach the right place at the right time and make the right calls. Then, I suppose we'll have to look for a better outsource.

Q. What category of work have you done so far? What work of ours you inspire the most?

A. We've done quite a bit from 3D animation, roto, matte painting to Digital Intermediate as well in quite a few beautiful films, like Sanam Re, Commando 2, Bahubali and very recently in Sanjay Dutt's comeback, Bhoomi. We've got 1921 coming up next! Horrors are a terrifying scope of work but a beautiful challenge! Each and every project has been equally inspiring. Our work is irrespective of the film's box office collection. So we treat every film the same. With equal commitments and efforts. And yes, each one of them inspires us.

Q. As an organisation what all challenges you have faced and how did you overcome?

A. Every business, every organisation faces problems and ups and downs. Whether it be setting up the right equipments, getting the right kind of work or right amount of work, or acquiring skilled artists. Everything is a challenge. But we got it through always. One way or the other. Mostly by believing in each other, trusting the team, the technicians and the management. That's the only way we could have and can survive as an organization.

Q. Do you see automation or robotics a replacement to the creative resource in the coming time?

A. Well, if we are talking about a robot wishing Ivanka Trump on the press of a button, sure. But if we are expecting Jarvis to give us design solutions and creative graphic ideas and suggestions.... not so much. I believe there's a long long way to go for that. But nevertheless, a machine can never overpower or creative instinct and prowess. A machine can only give back what's fed to it. Not creatively recreate the same information to suit our requirements or needs. Nor does it have the capability to understand subtle emotions that we feel on seeing anything around us. I can share my thoughts with you, but for a robot it will just be another command.

Q. How is Stereo Roto different from VFX Roto, please elaborate?

A. Roto in VFX is the process of masking out a character or an object, frame by frame, in a live-action footage. This selected or masked portion can be set in foreground to the clients required background. When it comes to stereo, every character/primary object has multiple depth roto layers depending upon the stereo depth requirement (the budget and time allotted mostly). The depth is pre decided and the layered parts are segregated accordingly. (Example - Different body parts of a single character are separated in roto, or objects closer to the camera in a separate roto.) This always needs to be done in full pixels i.e. end to end pixel quality with 400% zoom check.

Q. What is your approach to a specific shot or scene given to you? How do you understand the client expectations or the required output?

A. It starts with analysing the shot and understanding the scope of work even before commencing the work. If there's a shot description which doesn't match the content received then we put it forward to the client to clear our queries so that it doesn't hamper the client's timeline nor our quality. Then we will proceed for the output on a predetermined.

Most of the expectations and requirements are cleared out with the client and understood by the supervisor or the head attending him/her. Understanding is never easy but constant push and pull and in depth discussion help us churn out the director's vision more or less just like he/she wanted.

Q. How many employees do you have presently and what are your hiring plans in the coming 2 Years?

A. We've got a team of about 80. India is producing over 1400 movies every year. And with this rapid growing awareness about VFX and Animation, we'll never have enough artists and technicians. We'll always be hunting for more and more! But looking at the next two years, I suppose we need to grow upto about 500-650 artists for VFX and animation! We're even planning to set up in a couple of more places, even outside Mumbai to suffice to the needs of artists and also the films made in those regions.

Jesh Krishna Murthy

Anibrain VFX India – Animation & Visual Effects Studio



O. 'ROAR – Tigers of Sunderbans' is your first Bollywood movie in terms of providing VFX and CG, how was it different from working on a Hollywood project? Was budget a constraint?



A. ROAR was perhaps the most ambitious VFX film to come out of India. There were many complexities, most facilities visited, said such work could not be done in India and the cost of getting it done abroad was not feasible for production. The film had over 30 minutes of CG tigers in screen time with a host of other photo-real creatures including crocodiles, snakes, flamingoes,

and chameleons to name a few. Additionally, the film required CG tigers to be switched with real tigers and vice versa. We had to ensure the audience would not find the CG tiger fake or different. It was a huge challenge that was accomplished. Technically the film also required a lot in terms of render power where one frame would take anywhere between 1-8 hours. To top it all the budget of the film was a fraction of similar work done overseas. To provide Hollywood level VFX in a Bollywood production made it a very proud moment for

all of us involved.

Q. What software and techniques you majorly use to create VFX?

A. Depending on the requirement of the scene or shot more than 10 types of software could be used including Nuke, Maya, Silhouette, Equalizer for Tracking, Mari, Z Brush, Photoshop, Speed Tree, Vue, Real Flow etc. Apart from this 3rd party plugins such as Arnold, Fume -FX, Yeti, Shave & Haircut, HDRI Shop, Agisoft Photoscan were used. However, we at Anibrain believe that VFX is all about



storytelling for films and bringing a director' vision to life. It adds to the experience rather than drawing attention. Our aim while creating a shot is to tell a great story, elicit an emotional response and connect with the audience. All software and techniques would be redundant without that.

Q. How is Stereo Roto different from VFX Roto, please elaborate?

A. There are 2 types in Stereo Roto. One is Native Stereo which is shot with 2 stereo cameras and has 2 lenses. The other is stereo conversion where single footage is converted to stereo. VFX roto implies the addition of any CG element into live action footage. For conversion roto, we need to roto whatever is visible in the frame to generate depth.



Q. What is the use of matte painting in today's scenario?

A. For changing any background in a shot, matte paint can be used. CG is expensive. Hence matte painting is more feasible to create an actual set is space and time consuming. A virtual set can be created for less using matte painting. There are no constraints on imagination as all surfaces such as air, water, earth can be transformed.

Q. What are the gap areas in present training structure? What are the steps that should be taken to contribute more effective and efficient work in this industry?

A. There are two aspects to training. One is technical skills and the other is an attitude. Anibrain runs a training institute called 'School of Media Design'.

The main difference between our candidates and others is the gap in knowledge and practical skills imparted. A lot of institutes are still teaching software which is irrelevant. Or new techniques are being taught by artists who have just completed the course themselves. Hence it is not of much use on the actual work floor. In our institute, the faculty is experienced. Apart from the latest software, the trainers have also worked in production. So, the transition from a classroom to a project is seamless. Hence the curriculum needs to be extremely relevant and practical for it to be of use. The most important quality, however, is the attitude. All the hiring at Anibrain is based on this as skills can be taught but a right attitude cannot be. This comprises qualities such as punctuality, commitment, dedication, passion etc. which ensures smooth delivery. Institutes need to focus on this too.







OPPORTUNITIES AROUND THE GLOBE

Employment opportunities in India and Globally

The film sector, with an expected growth of 12% over the 5-year period, is also expected to fuel workforce demand by 88,000+ employees. Demand from other sub-sectors is expected to be approximately 63,000 additional employees by 2017.

VFX industry's performance

Amount in INR Billion

Segments	2012	2013	2014	2015	2016	Growth in 2016	2017P	2015P	2019P	2020P	2021P	CAGR % 2016- 2021P
VFX	7.7	9.3	11.3	14.4	18.9	31%	24.8	30.2	37.6	46.7	57.8	25%
Post-production	15.5	17.7	20.4	22.8	25.7	13%	29.0	32.8	37.7	43.3	50.2	14%
Total VFX and post-production	23.2	27.0	31.7	37.2	44.5	20%	53.0	62.9	75.2	90.0	108.0	19%

Source: KPMS in India's analysis and estimates



The VFX industry in India has recorded an unprecedented growth over the years, majorly led by Hollywood studios tapping into the massive pool of VFX professionals in India to work on their projects. While cost arbitrage continues to be pivotal in attracting studios to frame out work to India, improving quality of VFX has also been paramount to the industry. The VFX and post-production industry grew around 19 percent in 2016, propelled by a 27 percent growth in the VFX industry. There has been a high demand for VFX in India from hordes of films across different genres.

India continues to be amongst the preferred outsourcing destinations for a number of significant film production houses around the world. A combination of factors, such as availability of exceptional talent at lower costs high-speed internet and

improvement in certain aspects of film production, such as special effects, have led to a surge in companies sub-contracting VFX works to India. Over the last few years, Indian VFX artists have been behind some of the world's highest grossing film productions.

With VFX making inroads into all the outlets of visual media, including films, TV and ads, studios in India would continue to grow, both in terms of numbers as well as their capacity to deliver projects that require a great deal of creative and technical expertise.

Low cost and expert skill set make India a preferred destination for all the CG requirements globally, creating demand for trained professionals in the country.

Prime Focus World has been the unrivalled leader in hiring professionals and freshers alike. Some of the other leading employers in India are Gener8 India,



Double Negative,





Deluxe India, Legend 3D, Rotomaker, Firefly VFX, Anibrain, The Mill, Digital Domain, Framestore, MPC, Technicolor, Red Chilles, NY VFXWaala, Drishyam, Prasad Labs, Pixstone, Bot VFX, Makuta VFX to name a few.

These companies may hire individuals ranging from Industrial trainees for Freshers to Supervisor Level for experienced candidates across all job roles.

The VFX and Stereo Conversion Industry in India is on a hiring spree from September to March, as its that time of the year when majority of Hollywood Studios start outsourcing their work here in India.

PROGRESSION THROUGH RANKS

What Level of Job is assigned to the Candidates and on what basis

The level of the job assigned is partly based on the program module he has enrolled in and also based on the trainer's evaluation. The whole idea is to give them a real experience matching the quality of the project they would be required to work on, and also make them aware of the timelines associated with deliveries.

Career Progression in various verticals-

- Jr Rotoscopy Artist > Rotoscopy Artist > Sr Rotoscopy Artist > Team leader > Supervisor.
- Jr Matchmove Artist > Matchmove Artist > Sr Matchmove Artist > Team Leader > Supervisor
- Modelling/ Rigging/ Jr Rotomation Artist > Rotomation Artist > Sr Rotomation Artist > Team Leader > Supervisor

Prime Focus World

Aniruddha Dasgupta - Sr Manager - Talent Acquisition - Stereoscopy Conversion, India Prime Focus World



Q. What were the challenges you faced in hiring candidates and how did you overcome?

A. The biggest challenge faced by any talent acquisition person in our Industry is the availability of skilled manpower. I do agree, that there is a plethora of

training organizations available across India who churn 100's if not 1000's of students every year. All these students come up to organizations like us with a hope for getting into a Job. They come with a CV which has a list of software and an overview of each and every skill sets needed in the entire Industry. Sadly, only 10% and less actually make it pass the evaluation process. We are constantly on lookout for our ever increasing manpower requirement in India and work closely with institutes and train candidates in-house in the absence of available manpower in the market.

Q. Can someone who has no background in Arts or Drawing take up rotoscope as a career option?

A. Absolutely! In fact, not just Rotoscopy, but most of the skills. (not all skills) however, having an inclination to art or having an artistic mind or coming from any form of Art background, certainly gives a candidate a really big advantage in succeeding in the industry.

Q. Can you share with us your success story and mantra behind it?

A. I am myself a Masters in Fine Arts and started my career 23 years ago as a classical animation artist. I had developed multiple skills over the years and kept growing. I had completed my commerce degree and left my CA on the last moment and went ahead to pursue my dream of making a career in M&E Industry. I started as an artist in classical animation, moved on to digital 2D, complete pipeline of CG animation, Gaming, VFX, Stereoscopy and finally in Management. My hands-on experience in this industry and knowledge of the business from both side of the table has given me the understanding to work closely with candidates and my peers.

Q. What kind of remuneration can someone expect as a starting salary and what is the growth possibility?

A. As a fresher, the candidates has to have her/his expectations set at the right way. Being a fresher a person should not look at a particular salary but rather getting her/himself to establish as a trainee and learn while working hands-on, in the Industry. Success, in terms of salary and position will come only to the people who perform. A very sad but rather bitter truth, is that 30% of people who do clear the assessments and join the companies as fresher, quit the industry before their first year. This is purely because of wrong expectations from the job or the industry as a whole. This needs to be rectified at the training level.

Q. What are the job roles you see will attract major employment over the next 2 years?

A. Rotoscopy (VFX/Stereo Conversion), Paint (BG Prep, Cleanup, Clean Plate, OSR), Compositing, Matchmove, 3D Animators, Modelers, Game Designers, Game Developers, Fython Developers, Game Level Designers, AR/VR Experts

Q. What skill sets do you consider while hiring a candidate? Are there any set parameters or mandates like communication skills, academic background, formal training from any institution?

A. As per labor laws of our country, any candidate can be taken as an employee only after they complete 18 years and should have completed 12th standard. As a practice we do take care to do all due diligence from our side while on boarding any candidate and ask for set of mandatory documents (PAN Card, Aadhar Card, Course Completion Certificates, Education Certificates etc.)

Q. What is the average age of candidates you hire as interns or employees?

A. As a norm set by the labor laws of our country, it is mandatory for any candidate to be of legal working age which is 18 years.

Maya Digital Studios Collin Cornelio, HR Manager



Maya Digital Studios is one of the leading animation studio in India offering competence in high-quality 3D Animation, 2D Animation as well as Stereoscopic 3D Conversion of content. Maya Digital Studio today is the largest original content creator of animation in India. MDS has demonstrated the capability to conceptualize and produce complex feature film length animated films like Ramayana: The Epic - the first Indian studio to self-produce this kind of intellectual property. Maya Digital Studios animated television series like The Adventures of Motu Patlu, VIR -The Robot Boy, Eena Meena Deeka and Kisna are major draws on prime kids channels like Nickeledean Discourt Vide and Humana drawing bish TDRs in the Indian



like Nickelodeon, Discovery Kids and Hungama, drawing high TRPs in the Indian children's TV space.

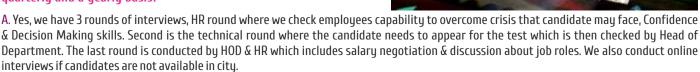
Q. What are the job roles you see will attract major employment over the next 4 Years?

A.Maya Digital studios, majorly working on 3D projects like Motu-Patlu, Chacha- Bhatija, Siva, Guru-Bhole, Bhjrangi. We also have 2D projects like Tik-tak-Tail & Ena Mina Dika. Coming up with Chingum – Cartoon majorly attracting kids. We are looking forward to make such shows in future

O. Being a leading employer, what is flow of job requirement and pattern you follow?

A. We want to encourage upcoming artists, who can visualize stories & our employees who have given us overwhelming support for last 20 years. We need employees with passion & interest who can imagine these characters. We want to maintain a hierarchy, where we give a chance to upcoming artists & new learning opportunities & experience to our existing employees.

O. Is there any screening test which you hold? If yes, what is the basis of selection? How many candidates are you considering hiring on a quarterly and a yearly basis?



Q. What are the benefits one can expect as incentives or perks while working with your organization?

A. Maya Digital Studios, Is one of the few studios who have their own shows. Motu-Patlu is one of the leading shows amongst the kids. Chingum, Tik-tak-Tail are the shows generated by our studio. We also work with International clients like Viacom 18 Disney & Sony. We have set up a pipeline to understand the flow in a better way. Wow Kidz is a YouTube channel which has crossed 2 million subscribers. Opportunity to Learn & explore the 3D world with Maya Digital Studios is one of the biggest perk for candidates.

Q. For which job role you hire the most?

A. We are expanding, two new branches one in Hyderabad & Mumbai. We have hired approximately 200 new employees last year. Our Leading projects are Computer Graphic (CG) projects. We are looking for all 3D & 2D artists, specially storyboard & concept artist. People who have good drawing skills are always welcome.









SMILE.JAIPAL

HEAD OF THE PRODUCTION AND RECRUITMENT (ROTOMAKER INDIA PVT LTD)



Q. What were the challenges you faced in hiring candidates and how did you overcome?

A. We could probably spend all day in hiring. Finding good candidates is always a task.. We face lot of challenges while hiring on urgent basis because just by looking at resume and pay slips/bank statements, we end up with fake candidates.

So, in my opinion screening and tests is a best practice in Media and Entertainment Industry.

O. Can someone who has no background in Arts or Drawing take up rotoscope as a career option?

A. Why not..... Interest and passion is the key factor for the success in Media and Entertainment Industry.

Q. Can you share with us your success story and mantra behind it?

A. I started my carrier as a production assistant, now I am the Head of Production and Recruitment. Around 10 years back I entered into this industry with no knowledge. With the time, I learnt about this industry and gained knowledge from my seniors. My success mantra is my strength and confidence.

Q. What kind of remuneration can someone expect as a starting salary and what is the growth possibilities?

A. As a fresher one can easily earn 10 to 15k per month. one can expect good growth based on experience and subject knowledge.

Q. What are the job roles you see will attract major employment over the next 2 years?

A. In my opinion stereoscopic and gaming is going to attract major employment in coming years. Keeping that in mind we are planning to start animation & gaming division in Hyderabad.

Q. What skill sets do you consider while hiring a candidate?

A. While hiring we only consider subject knowledge and confidence of the candidate not his/her educational background or dressing style.

Q. What is the average age of candidates you hire as intern or employee?

A. The age of candidates vary as per the requirement. Like for interns its 20 years and for employees its 21 years.

CHIRAG KANTHI

DEPUTY MANAGER - HUMAN RESOURCES (Deluxe Entertainment Services India Pvt Ltd)

O. What skill sets do you consider while hiring a candidate?

A. Depends on which position he/she is applying for...e.g. for Roto artist; candidate should know Nuke/Silhoutte. candidate should be proficient in the software depending on the domain.



A. The average age of a candidate, we hire as an intern or an employee is at least 22 years.



A. 40% have been the proposition of creative and technical skills required for rotoscope job roles are 60% and 40% respectively



A. We publish and post the job requirements on social media (Animation X'press/ LinkedIn/ Facebook/ WhatsApp) & Websites. We encourage referrals too.

O. What are the gap areas in present training structure? What are the steps that should be taken to contribute more effective and efficient work in this industry?

A. There should be more participation and not one sided. Employees should be abreast of the latest technology/ softwares etc; less number of working hours for more effectiveness & efficiency. HR/CSR activities a MUST in every studio in the country.











Vijayshree Girhe

HR RECRUITMENT HEAD (Anibrain VFX India – Animation & Visual Effects Studio)





Q. Is there any training offers in-house in your organization for fresher's who comes with no formal training?

A. We organize boot camps which is a 45-60 days training program for freshers to get them production ready. We also have a training institute known as 'School of Media Design' where formal training is given.

Q. Which are the major events, conferences or workshops, you suggest to aspiring students and professionals should participate to upgrade themselves?

A. We do not have defined platforms in India. However, there are small events and recruitment drives. Animation Express has a considerable reach. Hence that platform can be used.

O. What are the gap areas you see in the present training structure? What steps should be taken to have more efficient resources?

A. Technical Skills and attitude are the two aspects of training.

"Anibrain" is running a training institute called 'School of Media Design'. Difference between our candidates and others is the gap in knowledge and practical skills imparted. Lot of institutes are still teaching software which is not relevant. New techniques are being taught by artists who have just completed the course themselves. Hence, it is not of much use on the actual work floor.

In our institute, the faculty is experienced. Apart from the latest software, the trainers have also worked in production. So, the transition from a classroom to a project is seamless. Hence the curriculum needs to be extremely relevant and practical for it to be of use.

The most important quality, however, is the attitude. All the hiring at "Anibrain" is based on this as skills can be taught but a right attitude cannot be. This comprises qualities such as punctuality, commitment, dedication, passion etc. which ensures smooth delivery. Institutes need to focus on this too.

Q. What is the opportunity for professionals with 2-3 years experience in the Amination/ VFX job role in your organization?

A. Anibrain has great prospects for artists with 2-3 years' experience in Animation/ VFX. We are open to hiring exceptional talent throughout the year.

Q. What skill sets do you see before hiring a candidate? Also, what are the major job roles you hire for and how frequently?

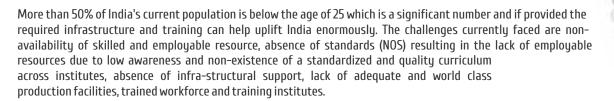
A. While hiring we not only look at a skill set but at the complete personality of an artist. Hence the right attitude is of paramount importance. We believe skills can be taught or polished but a wrong attitude is difficult to rectify.

As mentioned earlier, we are open to hiring exceptional talent in all VFX skill sets (2D as well 3D), AR, VR, Gaming, Art Direction etc. throughout the year.



GAP AREAS IN THE PRESENT TRAINING STRUCTURE

and how can that be worked upon



The training provided in India currently lacks at multiple points with the foremost being the absence of Skill Based Training with emphasis only on Software Skills. Individuals currently are introduced to all the branches within the industry in brief, whereas the requirement is for job specific talent with Industry exposure.

The industry is aiming to create an appropriate ecosystem that facilitates imparting employable skills to its growing workforce in the near future. Apart from meeting its own demand, India has the potential to provide skilled workforce to II the expected shortfall in the developed world. Industry aims at developing trained individuals meeting demand of the Industry worldwide.

Ankur Bhasin

MD (Media & Entertainment Association of India)



MEAI was formed with the objective of promotion of business of the media and entertainment industry of India. MEAI comprises of media houses, animation and vfx companies, apps and gaming companies, education institutes – amongst the gamut of organizations it represents. MEAI was formed by and for the Indian media and entertainment industry to bring together the industry and promote business at a national level. MEAI



TRAINING

facilitates networking, promotes businesses through delegations and B2B meetings and marketing support to Indian IP promoters/developers.

Q. What is the primary objective of Media & Entertainment Association of India?

A. MEAI was formed with the objective of promotion of business of the media and entertainment industry of India.

O. MEAI facilitates networking, promotes businesses through delegations and B2B meetings and marketing support to Indian IP promoters/developers. How it has change the industru so far in Amination and VFX?

A. MEAI has been taking delegations to various global events including MIP markets (MIPTV, MIPJR, MIPCOM), Annecy, HK Filmart, Gwangju ACE Fair, ATF, etc. MEAI has also formed Indian pavilions at various events to present a stronger front to the industry. Most event participation through MEAI are heavily subsidized which makes it easier for small and medium scale companies to participate and maintain their presence in multiple markets. There is also pre event briefing and guidance on how to approach each market. These have resulted in increased business to the members service oriented and IP producers alike.

Q. What are the networking strategies does MEAI use to showcase and promote business?

A. MEAI engages in direct B2B engagements, business visits and delegations, cross promotion through associations in other countries and works closely with various international embassies and consulates to increase the visibility and promotion of Indian businesses in the M & E space.

Q. How do you see India retain its position as a preferred outsourcing destination against its competing countries like China, Japan, Thailand, Singapore and others?

A. As the costs rise, India is no longer the destination of the cheapest labour. However, with fluent English literacy and higher quality of skilled workforce (especially in CGI) will continue to ensure that Indian will be an outsource destination of choice. Increasing co-production opportunities will further help bring reputed projects to India which can be spurred to faster growth through government policies and incentives centering around co-production.

Q. What all project/ business has MEAI represented to government and help in addressing the key issues related to the industry?

A. MEAI currently liaisons with multiple international government bodies to facilitate support towards delegations including visa assistance, B2B matchmaking, market survey and feasibility study support.

TRAINING TO BE INDUSTRY READY

A step forward industry linked training programs

Since India's Media and Entertainment Industry is expected to clock a strong double-digit growth in the range of 11-12 percent and poised to add another seven to eight lakh new jobs over the next five years, as per the report. Being Roto, Color Keying, Matte Painting, 3D conversion a part of Media and Entertainment industry would require a real life situations of industry and trade training. There has been a lack of match between skills required by industries and skill developed by existing programs. On which PFAMES step forward to work on the eco system. All the PFAMES courses are designed by recognized industry experts to make students industry-ready i.e. fully conversant with the latest hardware and software tools. Making them employable from day one after completing the courses with Job Specific Industry Linked Training Programs. Courses designed by PFAMES are all based on the 80:20 rule wherein 80% of its content is skill based training and only 20% is classroom training. Enabling students to gain exposure to the industry workings right from the beginning. PFAMES ensures that these all its courses are up-to-date with the latest technology trends prevalent in the industry, while ensuring a strong academic foundation. PFAMES also provides individuals with the opportunity to Earn while Learning along with Placement Assistance. With affordable fee payment structures anyone with a creative inclination or interest in learning the art of visual effects is eligible for enrolment in our courses as all the courses are based on the philosophy of 'Learning by Doing'.

Prime Focus Academy of Media & Entertainment Studies

STEPHEN MASCARENHAS - Sr Vice President - Operations Stereo Conversion, India Prime Focus World



A. Prime Focus World (PFW) is a film making partner to international studios and film production companies, providing world class creative services, pioneering technology services and intelligent financial solutions on a global scale.

VFX: In 2014, PFW merged its VFX business with Double Negative (Dneg), an Academy Award® winning VFX industry leader with facilities in London, Vancouver and Mumbai. Dneg's VFX credits include 'Star Trek Beyond', 'Batman v Superman: Dawn of Justice', 'Ex Machina' (Academy Award winner), 'Spectre', 'The Hunger Games: Mockingjay Part 2', 'Interstellar' (Academy Award / BAFTA winner), 'Avengers: Age of

Ultron', 'Godzilla' and 'Inception' (Academy Award / BAFTA winner).

- Stereo Conversion: PFW was the first company in the world to convert a full Hollywood film from 2D to 3D, and its award-winning stereo conversion process has been used on more blockbuster Hollywood films than any other. Stereo conversion credits include 'Warcraft', 'X-Men: Apocalypse', 'Captain America: Civil War', 'The Martian', 'Ant-Man', 'Avengers: Age of Ultron', 'Guardians of the Galaxy' (Advanced Imaging Society winner), 'Transformers: Age of Extinction', 'Star Wars: Episodes I-III' and 'Gravity' (International 3D Society winner).
- **Animation:** From script to screen, PFW partners with production companies and brands to develop and deliver beautifully animated CG content, offering the scale and experience to deal with projects of any size. Animation credits include a number of full length feature films and over forty episodes of a fully CG animated TV show for a major global toy brand.

Prime Focus World is the creative services division of Prime Focus Limited, the world's largest integrated media services company, delivering end-to-end creative services (VFX, stereo conversion, animation), technology products and services (Media ERP Suite and Cloud-enabled media services), production services (equipment rental) and post-production services (Digital Intermediate, digital lab, picture post) to Film Studios and the Advertising and Broadcast industries.

Q. What was the purpose and vision of stating PFAMES and collaborating with MESC?

A. Prime Focus has been training since quite some time now. The foundation of the company has been built on its capability of training and creating some of the best talent in the Industry. We have been training artists for years especially for visual effects and 3D stereo conversion. Formal academic operations were initiated on June 2016 leading to the establishment of PFAMES as an independent Academic Institution, a subsidiary of Prime Focus World Creative Services Pvt Ltd. (Prime Focus World or PFW).

The initial aim was to enrol industrial trainees as it was noticed that there were many artists with degrees and vocational training fluent with software and theoretical knowledge, but when brought on board weren't ready for the job functions demanded by production. Taking matters in our hands followed by decisions to skill these artists basis the job roles they would be assigned. For over a period of seven to eight months we on-boarded 750+ artists as industrial trainees. Put them through formal skill-based on the job training right from the scratch thus leading to the creation of world class teaching modules. We then introduced skill based & industry level orientation and training courses along with introduction of the specialised classroom training modules for fresh entrants. And so commenced the journey of PFAMES to create an appropriate ecosystem that facilitates imparting employable skills.

With MESC's mission to create a robust and vibrant ecosystem for quality vocational education and skill development in Media & Entertainment Space in India their values align with ours making it a worthwhile collaboration.



Q. How differently PFAMES is going to work?

A. Here at PFAMES all of our programs are based on the philosophy of 'Learning by Doing'. We use an intensive approach to training along with an introduction to the theoretical and critical thinking behind current digital and creative technologies. The PFAMES teaching programs simulate a real-world industry environment as closely as possible. Our students study in a studio-like environment using state-of-the-art, industry standard software and technology. Our students are encouraged to push the boundaries in new and emerging digital technologies through project-based learning and live briefs. Upon successful completion of the course students are awarded a PFAMES certification as well as a certificate offered by the Media & Entertainment Skills Council (MESC) post independent assessments conducted as per the National Occupational Standards (NOS) under the National Skill Qualification Framework (NSQF), designed by National Skill Development Council (NSDC).

Q. What all courses will PFAMES launch? What are the parameters on which these courses have been structured and designed?

A. Having worked on numerous projects over the decades Prime Focus aims to leverage the expertise of its production workflow exposing the students to its production pipeline for VFX as well as Stereo Conversion. The courses are designed and structured as per the standards of the production workflow followed by major studios worldwide.

Initially PFAMES will launch three courses forming the basis for students to get into many of the streams within the industry. The courses initially launched are mentioned below.

MatchMove: A full time course designed to cover all aspects of Camera Tracking, from understanding cameras and lenses to building 3D scenes. The curriculum is designed to industry standards and follows an actual production pipeline in order to ensure that every skill learnt has a practical application in the real world. Multiple practical assignments in Maya and PF-Track run throughout the classroom training program.

RotoMation: The key determining factors for quality RotoMation are object depth accuracy, movement accuracy and complete geo coverage of objects. The main goal of the RotoMation department is to create the correct spatial relationships between objects in the three dimensional scene while matching the two dimensional content of the shot plate. This full time course is designed to further develop the production and design skills of the students through both project base and problem base learning.

Career Prospects: MatchMove Artist, RotoMation Artist

Digital Painting: Digital Painting/Clean Plate/Paint: With an emphasis on animation backgrounds, asset designing and 3D textures and surfaces, painting in 3D is one of the most sought after skills in the visual effects industry and students will work on industry standard computer graphics software like Adobe Photoshop, Silhouette FX, Fusion and Nuke-X.

Career Prospects: Digital Paint Artist, Clean-Up Artist

RotoScopy: Often abbreviated to 'Roto' is used extensively in visual effects and stereo conversion projects. By tracing an object in various software packages available for RotoScopy, Roto artists create mattes that can be used to extract that object from a scene to perform various tasks. Students will learn to RotoScope production shots by using SilhouetteFX and Fusion.

Career Prospects: RotoScopy Artist

Q. How do you feel about the industry requirements of these courses?

A. Being the World's Largest Integrated and Independent Media Services Power house Prime Focus has access to Industry Insights giving it an edge over others. All the courses by PFAMES are designed, keeping in mind the Industry requirements and hence the students are exposed to the Industry operations, making them employable from day one, following their successful completion of the courses.

Q. What will be the fee that a student has to pay? Also, there any loan facilities?

A. The course fees range INR 1.25 lakhs and upwards based on the training programs enrolled for. Loan facility is available through our student loan partner Neev.

Q. Are there any eligibility criteria, parameters or process that a student need to undergo for the admission or anyone can join?

A. Anyone with a creative inclination or interest in learning the art of visual effects is eligible for enrolment in our courses as all the courses are based on the philosophy of 'Learning by Doing'.

Q. What will be the benefits that a student would get if they join PFAMES?

A. All the PFAMES courses are designed by recognized industry experts to make students ready for industry i.e. fully conversant with the latest hardware and software tools. Making them employable from day one after completing the courses with Job Specific Industry Linked Training Programs. Courses designed by PFAMES are all based on the 80:20 rule wherein 80% of its content is skill based training and only 20% is classroom training. Enabling students to gain exposure to the industry workings right from the beginning.

PFAMES ensures that all its courses are up-to-date with the latest technology trends prevalent in the industry whilst ensuring a strong academic foundation. PFAMES also provides individuals with the opportunity to Earn while Learning along with Placement Assistance.

Q. What will be the starting stipend students can expect?

A. During the six months period of Industrial on-the-job training which is followed by three months of classroom training, students will be able to earn a stipend of INR 10,000 (to be confirmed)

Q. As per the model, what if the student didn't get placed in Prime Focus then how PFAMES is going to support?

A. Following the successful completion of the courses, PFAMES will provide students 100% Placements Assistance. PFAMES has partnered with major studios making it possible for the students to be absorbed within the Industry.



JOIN INDUSTRY LINKED FULL TIME AND PART TIME TRAINING PROGRAMS



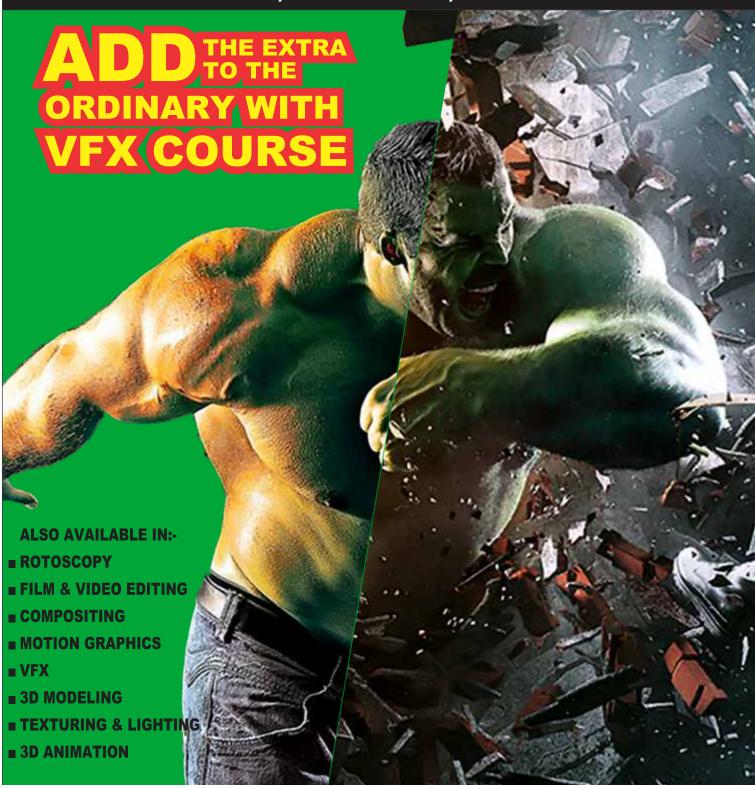
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Arena Animation Suraj Verma Director



Q. What would be the headline for the todays VFX industry in India?

A. Imagining unimaginable surroundings is what VFX is all about

- VFX is not what you see, but what you make others see.
- "The VFX industry is fast emerging as an indispensable component for Media & Entertainment Industru."
- An unimaginable magnitude of Special Effects has excited the entire Media & Entertainment Industry to look for superlative growth.

Do you see any Gap area in today's training and Industry structure? If yes, how it can be shaped up?

A. The younger generation is very creative and imaginative. The immense job opportunities in the market at times result in attrition in the training faculties which results in retaining the good trainers at a very high cost. The training structure at our organisation is highly innovative and any organization which does not adapt itself as per the evolving techniques, would not be able to churn out trained candidates for the highly volatile VFX Industry.

Q. What all courses do you provide in the verticals of VFX? And how are courses being structured?

A. (a) We provide AAIP_VFx (Arena Animation International Program)- This course prepares the students for Industry needs and ultimately

makes them ready for the VFX industry. This course gives them a knowledge about other areas as well which helps them in understanding the application of the same to the needs of the industry.

(b) VFX Pro- This is a specialization course in VFX. It gives an in depth knowledge and a detailed insight into the subject, which are required for him to be a VFX Artist.

O. How differently your institute work? What is the USP of Arena Animation?

A. We at Arena South Extension, Preet Vihar and Kohat (Pitampura) prepare our students in accordance with the need of the Industry. Very often, we use the latest and most novel techniques to train our students, which may not be otherwise a part of our routine course. Utmost efforts are made to make sure that each and every student passes out as a professional. Our trainers are highly experienced and Industry experts, having worked in



the relevant fields, the result of which is that our academies mentioned above are very highly rated and are held in high esteem by the top Industry experts and organisations related to this field. All our trainers upgrade their skills regularly to maintain their industry expertise. We design our curriculum in line with latest trends in technology after a careful market study.

Q. Do students undergo any screening test before admissions?

A. We have a process through which we assess a student for his/her creativity, his goals in the profession and the dedication with which the student wishes to achieve his goal and aspires to be a Professional in this field. This process self-learning and very interesting for the student which gives them an insight of their strength to achieve what they desire.

Q. Do you have any personal placement cell or any other way to place the students?

A. Yes, we have a well structured placement procedure. Every student desirous of getting placed has to register his relevant details, his portfolio and profile on our placement portal. The placement executives organize campus interviews and also conduct all relevant activities to ensure that the students get placed with good organizations. We have a very high placement rate and most of the students registered on our portal get placed in top organisations of the industry. We take pride in our quality education, placement record etc which has created thousands of students as our ambassadors who have been recommending our Institutes for quality education.

Campus Engagement initiatives also help in propelling the placement season forward and also bridge the gap between company expectations and student aspirations, this is evident from the positive feedback provided by companies who participate in the placement season.

The portfolio of participating companies comprises of a healthy mix of recruiters from our regular hires as well as new companies too.











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COURSES OFFERED

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ANIMATION

FILM DESIGN

DMES ID 1001 ADVANCED DIPLOMA DURATION- 24 MONTHS

COMMUNICATION

DESIGN

DMES ID 3001 ADVANCED DIPLOMA DURATION- 24 MONTHS

FILM

PRODUCTION

DMES ID 6001 DIPLOMA DURATION- 12 MONTHS

INDUSTRIAL

DESIGN FOUNDATION

DMES ID 4001 DIPLOMA DURATION- 12 MONTHS

CHARACTER

ANIMATION

DMES ID 1002 DIPLOMA DURATION-12 MONTHS

VISUAL EFFECTS

DMES ID 1002 DIPLOMA DURATION-12 MONTHS

COMPOSITING

DMES2010 CERTIFICATION DURATION- 6 MONTHS

ART & DESIGN

DMES1001 CERTIFICATION DURATION- 6 MONTHS

3D MAYA

DMES1003 CERTIFICATION DURATION- 6 MONTHS

GRAPHIC DESIGING

DMES3002 CERTIFICATION DURATION- 6 MONTHS

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Sathish Narayanan Founder Director

Q. Do you provide specific courses on Rotoscope, Matte Paining, Color Keying and 3D conversion? If yes, on what parameters the courses are been structured?

A. All our course are designed as per the industry practices. We are providing 24 months / 12 months and 6 months comprehensive visual effects course. Our longer duration course covers all aspects of VFX process from ideation to final output, starting from VFX pre production, thumb rule of Green screen and blue screen shoot, Conceptualization, 3D Set extension, Compositing, Roto Scope, Matte Painting, Color Keying, Paint and match move. All 3 courses has specialization for 3 months toward the end of the coures. During the specialization students learn the process and technique on the real film footage / live

projects. They have been taught the real industry practices in Roto like Hard edge soft edge, VFX roto, Stereo roto, how to break down the splines, how to save the file and keep the nodes clean and organized etc.

Q. What is your centres USP being a featured institute?

A. Our Academu is centrally located in Pune. Camp. Area 5000 Soft of State of the Art facility with best infrastructure. The computers are similar to the high end machines used in production houses, industry experienced faculty, backed and supported by our Director with over 20 years of Industry experience. We also invite Roto / Paint / Comp supervisors from various studios to give lectures.



A. We do have a Creative aptitude test given to each and every admission. The test is more to provide them scholarship and to assess their ability. If they score above 80% score in the test, then they get scholarship up to 40% in their course fee.



A. Rotoscopy is a process used in every film released. In a year approximately 2000 plus films are released in India and each and every film has Rotoscopy work. Therefore the demand in the industry is huge. In addition we outsource work from Hollowood. Unfortunately in India we have very little fine arts colleges, average yearly fine arts students pass out would be not more than 800 from all over India. Out of which only 20% chooses Animation or VFX, we are left with only 150 to 200 Fine arts students. Therefore, it is not possible to relay only on Fine Arts graduates, we have to train non artist to become an Rotoscope artist. Indian VFX industry is growing tremendously. Companies like Delux, Technicolor, Digital Domain, Double Negative, Primefocus, Legent Studios, Roto Makers, Anibrain, etc has thousands of Roto artist working on only International projects. We may have more than I lack Roto artist working all over India, out of which not even 1% of them are with Fine Arts background. Therefore, even a Non artist can perform Roto provided he gets proper industry standards training.

Q. Do you have any personal placement cell or any other way to place the students?

A. We have our HR and Placement officer Mrs.Radhika Bhutada looking after the students placement. Moreover, our Director is very well connected with Industry and he is also a consultant for many VFX & Animation studios. Therefore, our student gets an opportunity to work as an Intern and placement as well.





Reliance Education

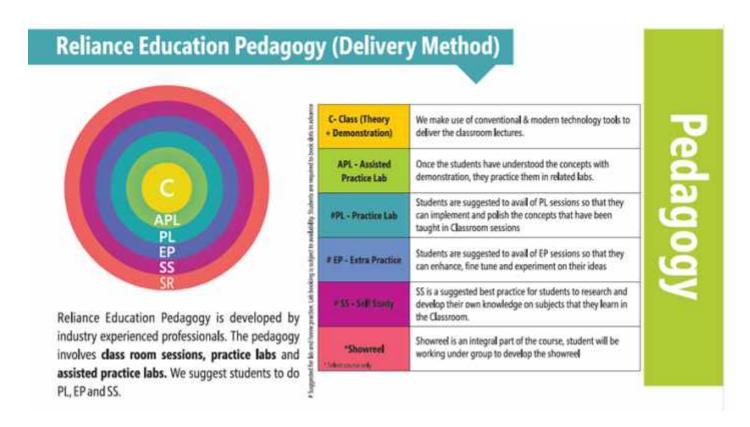


O. What kind of training do you provide to the students for Roto, Matte Painting, Color Keying, and 3D Conversion?

A. Reliance Education is committed to bringing excellence to our students through our programs and facilities. We provide specialized training for 1.5 months on Roto, 1 month for Colour keying, as well as 1 month for match moving which is another vital area of VFX Film making. This training is of the mentioned duration also taught as a specific topic. Matte painting is covered as an independent module of 1 month in our triple program in Animation/VFX, Advance Program in Animation/VFX. 3D Conversion or Stereo compositing is not provided as any specialized program, since we cover the same within the 6 months program on Compositing.

Q. How the training is being structed? What is the course duration?

A. The course is divided in phases of concepts, knowledge of tools, technical implementation of the tools, production tips and tricks. All of these are complimented with practical assignments.



O. Are there any parameters or screening test you hold for the students to get admission?

A. Yes there is definitely a criterion for enrolments in the specialisation programs. There are specific pre requisites for Roto, Color Keying and Matchmove

Q. Do you have a defined placement cell?

A. Yes. All Students are supposed to submit their CV's along with show reel to the HO at Pune camp, via email at the end of their course. Depending on the specialisation of these students we then organise and arrange for interviews with various Production houses (Studios). We receive requirements for talents from these Production houses like TATA ELXSI, MAYA DIGITAL STUDIOS, XENTRIX, Double Negative, Technicolor and so on.

Once our students are ready with their showreels we conduct campus interviews, Skype interviews or one to one interviews based on the suitability of the recruiting companies.

Q. Do you conduct counselling sessions for the students?

A. Yes. After the completion of every semester/Block (6 months duration) the students are counselled on their performances by their respective faculties. Open Houses are conducted for students wherein they address their issues towards which the team at Relianc Education makes appropriate changes.

INITIATION AND REMUNERATION

Career/ Employment Progressions and their starting salary

An individual with minimal exposure to the workings of the industry would get anywhere ranging from INR 10,000 to INR 15,000 subject to factors like out-put and productivity.

Career progression for diverse streams are as follows:

DIGITAL PAINT

Jr Paint Artist > Digital Paint Compositor > Jr Compositor > Sr Compositor > Subject Matter Expert > Team Leader > Asst Supervisor > Compositing Supervisor

ROTOMATION

Jr Paint Artist > Digital Paint Compositor > Jr. Compositor > Sr Compositor > Subject Matter Expert > Team Leader > Asst Supervisor > Compositing Supervisor

Jr Paint Artist > Digital Paint Compositor > Jr Compositor > Sr Compositor > Subject Matter Expert > Team Leader > Asst Supervisor > Compositing Supervisor

MATCHMOVE

Jr MatchMove Artist > Matchmove Artist > Sr Matchmove Artist > Team Leader > Supervisor





POLICIES IN ACTION Employment percentage

Currently there is a huge gap between demand and supply of skilled human resources. Although there are a huge number of candidates with some or the other certification, they lack the basic understanding and knowledge of specific job roles and job related skills. This is the major reason for the low availability of skilled work force in the industry. Individuals with industry linked skill based programs tend to be the ideal work force for the industry with maximum employability.

However, some challenges continue to plague the animation and VFX industry. However, government of various states like Maharashtra (allocation of land for setting up National Centre of Excellence for Animation, VFX, Gaming and Comics), Karnataka (Policy design to include digital art education in curricula of certain fine arts schools). Telangana (planning to set up an incubation centre in Huderabad) have announced or are coming up with policies in support of the animation and VFX industry. The same would enable the Indian animation and VFX industry to effective.









About MESC

Founded in 2012, Media & Entertainment Skills Council is a Not-for-Profit Organization, registered under the Societies Registration Act, 1860. The Council has been promoted by Federation of Indian Chambers of Commerce & Industry (FICCI) with financial support by National Skill Development Corporation (NSDC). MESC has a mandate to create 11.74 lakhs (1.2 mn approx.) skilled workforce by 2022 and contribute to the National Skill Mission of creating 500 million skilled workforce by 2022.

The key objective of MESC Council is to create a robust and vibrant eco-system for quality vocational education and skill development in Media & Entertainment Space in the country.

In addition, the Media & Entertainment Sector Skill Council aims to serve as a single source of information on M & E sector with specific reference to Skill and Human Resource Development in India. The Council is also implementing Standards, Training, Accreditation & Reward (PMKVY) scheme of Government of India. Under the PMKVY Scheme, MESC has introduced the training programme in affiliated institutes and completed the assessment and certification of approximately 8,000 students.

PRIME OBJECTIVES OF MESC:

- Develop National Occupational Standards
- Establishing Industry Academia Interface
- Standardization of Training Process & Certific
- Set-up effective Labor Market Information System

QUALIFICATION PACKS:

OCCUPATION	QUAFICATION PACK NAME	QP ID.	NSQF Level	NO. of NOS's
Animation & Gaming	Art Director	MES Q 0501	5	4
Animation & Gaming	Charactor Designer	MES Q 0502	4	5
Animation & Gaming	Layout Artist	MES Q 0503	4	5
Animation & Gaming	Lighting Artist	MES Q 0504	4	4
Animation & Gaming	Colour Key Artist	MES Q 0505	3	4
Animation & Gaming	Clean-up Artist	MES Q 0506	3	4
Animation & Gaming	Storyboard Artist	MES Q 0507	3	4
Animation & Gaming	Animator	MES Q 0701	4	7
VFX (Visual Effects)	VFX Editor	MES Q 3501	4	4
VFX (Visual Effects)	Colourist	MES Q 3502	4	4
VFX (Visual Effects)	Rendering Artist	MES Q3503	4	4
VFX (Visual Effects)	Roto Artist	MES Q 3504	3	4
VFX (Visual Effects)	Compositor	MES Q 3505	4	4





Signing of MoU between Media and Entertainment Skills council & Punjab Skills Development Mission



MESC in Discussion with Navjot Singh Sidhu & Navjot Kaur Sidhu for setting up of Center of Excellence in Punjab.



Mr Mohit Soni, COO, MESC at Panel Discussion during state level Skill Training Provider Meet, Haryana



Kaushal Bharat Kushal Bharat Skilling India for a better tomorrow



MESC representing the M&E sector during the Unite India 2017, Hyderabad.



RPL (Recognition of Prior Learning) at Hyderabad

Training of Trainers program at Guwahati, Assam









MESC INDIVIDUAL MEMBERSHIP APPLICATION FORM

Facilities available to MESC members

Annual Membership Fees Rs 1,000/-Lifetime Membership Fees: 10,000/-

- Access to certified skilled manpower
- Training and Certification of existing/new manpower
- Design of training programmes as per the requirements of the industry
- Networking Opportunities
- Newsletter/Journal
- Conferences and events of the MESC Sector Skill Council
- Role in designing the National Occupational Standards of the Sector
- Publication of member articles in MESC's publications circulated across the industry
- Policy Advocacy

Name of the Bank:

Bank Account Name:

Contact: 9999194676

UNITED BANK OF INDIA

MESC

Bank Account Number: 359018039336

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	MEMBERSHIP FORM	
1. Full Name	Name of the Organization	on
2. Type Media House Ani	imation/ VFX Studio TV, Film & Production	Education Trainee Other (Pls specify
3. Segment Small Medi	ium Large Other (Pls specify)	
4. Address for Communication		
5. Phone No	Email Id:	
6. Website (If any)		
7. Membership type: Annually	Lifetime	
Single Point of Contact (for Or	ganizations)	
Name		
Designation	Landline	No
Mobile No	Email Id:	
7. Segment of interest Instrum	nentation Automation Surveillance Cor	mmunication (Broadcast)
8. Mode of Payment NEFT [Cheque Cash	
		Signature

Branch IFS Code: UTBIOTNM709







MESC CORPORATE MEMBERSHIP APPLICATION FORM

Facilities available to MESC members

- Access to certified skilled manpower
- Training and Certification of existing/new manpower
- Design of training programmes as per the requirements of the industry
- Networking Opportunities
- Newsletter/Journal
- Conferences and events of the MESC Sector Skill Council
- Role in designing the National Occupational Standards of the Sector
- Publication of member articles in MESC's publications circulated across the industry
- Policy Advocacy

Annual Membership Fees Rs 5,000/-

Bank Account Number: 359018039336

Contact: 9999194676

	MEMBERCHIR FORM
	MEMBERSHIP FORM
1. Name of the Organiz	tion
2. Type 🔲 Media Ho	se Animation/ VFX Studio TV, Film & Production Education Trainee Other (Pls spec
3. Segment Sm	I
4. Address for Commur	cation
5. Phone No	Email Id:
6. Website (If any)	
•	act (for Organizations)
Name	
Designation	Landline No
Mobile No	Email ld:
7. Segment of interest	☐ Instrumentation ☐ Automation ☐ Surveillance ☐ Communication (Broadcast)
8. Mode of Payment	NEFT Cheque Cash
	Signature
Name of the Bank:	UNITED BANK OF INDIA

Branch IFS Code: UTBIOTNM709











"Let's make India the Skill Capital of the World"

Shri Narendra Modi

Honourable Prime Minister

PMKVY (Pradhan Mantri Kaushal Vikas Yojna) is one of the biggest project led by MSDE (Ministry of Skill Development and Entrepreneurship). The goal is to skill a huge number of Indian youth by providing industry related skill training so that they can achieve a better livelihood. The Short Term Training imparted at PMKVY Training Centres (TCs) is expected to benefit candidates of Indian nationality who are either school/college dropouts or unemployed. Apart from providing training according to the National Skills Qualification Framework (NSQF), trainings for soft skills, entrepreneurship etc is also being on the list. Individuals with prior learning experience or skills shall be assessed and certified under the Recognition of Prior Learning (RPL) component of the Scheme. RPL aims to align the competencies of the unregulated workforce of the country to the NSQF.

JOB ROLES offered by MESC

under PMKVY (Pradhan Mantri Kaushal Vikas Yojna)



EDITOR

ANIMATOR

ROTO ARTIST

HAIRDRESSER

SOUND EDITOR

MODELLER

MAKE-UP ARTIST

CHARACTER DESIGNER























Prominent M&E Industrial Training Partners



























Media & Entertainment Skills Council

Media & Entertainment Skills Council

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