

# Media Talk Back

## Gaming

Rise of Interactive Entertainment

**The Power of Billion users**  
Gaming Industry in India

**Emerging Technologies**

Future of Gaming

**Driving Innovation & Evolution**

Experts & Start-Up Section

**Funding Magic**

Entrepreneurship & Expansion

# DICE Ecosystem

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KAUSHAL BHARAT, KUSHAL BHARAT!

Media  
TalkBack

# THE FUTURE OF GAMING



Honorable Minister Shri Dharmendra Pradhan releasing the 2nd Edition of Media and Entertainment Skills Council's Magazine "Media Talk Back" during the Global Skills Summit 2017 at FICCI.

## MESSAGE FROM THE CHAIRMAN



**Dr. Kamal Haasan**

Chairman (MESC) Film Actor,  
Producer, Director & Screenwriter

The National Award winning actor, director and producer Dr. Kamal Haasan, identifies the real need to enhance skilling 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 when it comes to showing the art of Indian Media & Entertainment Industry. He intends to offer programs for training the students and also the trainers in such a way that the skill gap between academia and industry is minimised to the lowest possible limit.

## MESSAGE FROM THE EDITOR IN CHIEF



**Ashish S.K.**

Founding Governing  
Member of MESC

I extend my thanks and regards for supporting and contributing the information and insights required during the creation of our 2<sup>nd</sup> monthly magazine highlighting about Media & entertainment 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!

Sub-Editor

**Mohit Soni**

Chief Operating Officer

Conceptualised by

**Shruti Mehra**

Manager - PR & Communications

Designed by

**Sumit Bhardwaj**

([www.iconiccreators.com](http://www.iconiccreators.com))





## THE POWER OF A BILLION USERS

# GAMING INDUSTRY

## IN INDIA

All of us have grown up playing board games like Ludo, Snakes & Ladders, Monopoly, Scrabble; indoor games like Chess, Carom, card games (especially around Diwali) and outdoor games (before we picked up cricket, soccer or tennis) like "Gilli Danda," "Kancha," Kho Kho or Stapu (Kith-Kith)."

Games which are intrinsically fun have been used as a tool to develop skills like concentration power, hand-eye coordination and stimulate basic mathematical & analytical skills. India has always had a rich gaming culture. Games, for a very long time now, have been a common and most preferred mode of entertainment.

With one of the world's largest youth population, India is poised to become one of the world's leading markets in Gaming Sector. The Indian gaming industry was valued at \$543 million in 2016 and is projected to grow to \$801 million by 2022. "In 2016, India accounted for a share of 0.55 per cent of the global gaming industry and this is anticipated to grow significantly over the next five years. The growth is driven by rising younger population, higher disposable incomes, introduction of new gaming genres, and the increasing number of smartphone and tablet users.

Moreover, increasing focus of gaming companies towards Augmented Reality (AR) and Virtual Reality (VR) related games in the country is expected to boost India's gaming market in coming five years. Console gaming accounted for the second largest share of 35.51 per cent in India's gaming market in 2016, followed by computer gaming (15.54 per cent share).

### ADVANTAGE INDIA

- World's largest youth population
- World's second largest Internet population
- Availability of creative talent
- Huge skills base across IT, Testing and Arts
- World-class infrastructure and advanced technology
- Presence of big development centres like Microsoft, Nvidia, UbiSoft, Zynga, Electronic Arts, Disney, Playdom, Sony, Digital Chocolate, etc.

### QUICK GLANCE AT GAMING SECTOR IN INDIA

- Mobile Gaming to cross USD 571 million by 2016 at 13.45% CAGR between 2013-2016 leading to 22.8 percent CAGR growth with 208.2 million mobile game users
- Mobile games and app market projected to be worth USD 400 million by 2016
- The PC gaming segment is estimated at USD 59.7 million in 2014 and is expected to grow at CAGR of 16.8% to touch USD 130.0 million in 2019
- Cyber Café Market Is currently estimated at 3000 cafes of which 1500 have 5 or more machines dedicated to games
- 95% are mobile centric games
- Growing focus on the 'kids genre'
- Arcade style games are one of the most popular genres, followed by puzzle and racing genre
- Gaming based on famous hyped events like Kaun Banega Crorepati, T20fever.com, IPL, Khel Kabaddi, etc.





# ONLINE GAMING FAST SPRINT IN INDIA



The online gamer base in India is expected to almost triple to 310 million people from the current 120 million by 2021, according to a report by Google India and KPMG.

While projecting the gamer base to grow, the report has also estimated the industry to be worth USD 1 billion by 2021. "The online gaming industry in India is expected to gain momentum and grow to USD 1 billion by 2021, from the current USD 360 million, at a growth rate of 20 per cent.

"With a 117 per cent spike in searches for online games by Indians, it is estimated that the current online gamer base of 120 million gamers in 2016 will grow to 310 million by 2021," the report said.

As per the report, more than half of the gamers opt for a particular game through referrals and influence of their peer group. It also said that 75 per cent of these gamers own smartphones worth less than Rs 20,000, a third of their online entertainment wallet is spent on games.

"While up to 6 different games are simultaneously played by young gamers, mostly strategy games find their way into heavy gamer's lives and casual gamers opt for puzzle games," the report said. Driven by a growth in smartphone user base and digital payments, the industry has seen 100 per cent growth in online gaming searches compared to last year. It also found that revenue generated by top 100 'freemium' gaming applications grew by 22 times over paid games.

## OVERVIEW: WHO IS PLAYING?

1. The average age of gamers: 35
2. The average age of game purchasers: 38
3. Male gamers: 59% & Female gamers: 41%
4. 60% of video game purchasers are men & 40% are women
5. Households that own a device used for playing video games: 65%
6. Households that own a device exclusively for playing video games: 48%
7. The average number of years gamers have been playing: 13



## DEVICES THE MOST FREQUENT GAMERS ARE PLAYING ON

PC:	56%
Dedicated Game Console:	53%
Smartphone:	36%
Wireless Device:	31%
Dedicated Handheld System:	17%

## 12 TYPES OF COMPUTER GAMES EVERY GAMER SHOULD KNOW ABOUT

Today's computer games are loaded with action, and there are many different categories or genres of games. But, many games can be considered to be more than one genre. For instance, a soccer game could be considered a sports game, as well as a simulation game. Here is some information that will help you to better understand the various computer game genres.

1. Massively Multiplayer Online (MMO)
2. Simulations
3. Adventure
4. Real-Time Strategy (RTS)
5. Puzzle
6. Action
7. Stealth Shooter
8. Combat
9. First Person Shooters (FPS)
10. Sports
11. Role-Playing (RPG)
12. Educational





# EMERGING TECHNOLOGIES: FUTURISTIC GAMING

Technology is evolving in an amazingly rapid speeds. If you need any real observable proof of the speedy advancement of digital technology over the years, take a look at the gaming industry. From the very early years of black-and-white 2D games like Pong (1972) to the first 3D game, 3D Monster Maze in 1981, and from primitive first-person shooters like Wolfenstein 3D (1992) to complex, life-like shooters like Battlefield 3 (2011), there's no doubt that the gaming industry has seen its fair share of technological evolution.

It has been exciting ride for all of us gamers, both casual and hardcore types. Most of us have a wish list for how games will turn out in the future. Well, it's hard to say if they will come true, but we might very well extrapolate from existing trends, which is the whole point of this article. Here are 5 features you can expect in the future of gaming.

## MULTI-SCREEN GAMING

Multi-screen adds a new dimension to games as they can now be played on television and consoles, or mobile devices. For instance, Chrome cast enables people to project board games like Monopoly on their TVs and play the game with their smartphones. Aside from Google, other big-name companies such as Sony, Microsoft and Nintendo are producing secondary devices that promote multi-screen gaming and make it fun.

Some of the most promising enterprise linked to multi-screen gaming are - Wii U's GamePad, Microsoft's Smart Glass and Sony Cross-Play

## OPEN SOURCE GAMING

Type of gaming that allows independent developers to produce mobile and web based games through a simple and affordable process. A prime example of this is the Ouya microconsole. The Ouya offers a 1080p display as well as an array of free-to-play and cheap games. Most importantly, it acts as a development kit, making it possible to develop and share games without an expensive software development kit. However, Ouya isn't the only open source development tool on the market. Other companies that offer affordable development tools include YoYo Games and Flying Monkey Interactive.

## AUGMENTED REALITY

Augmented Reality is the new trend in the field of technology. Augmented Reality has more or less enhanced the marketing activities of most of the industries like tourism, hospitality, healthcare, real estate, retail, gaming and the list is endless, as every day new industries are getting introduced. With the release of Pokémon Go, the effect of AR in gaming reached worldwide. Many people who were still not accustomed with this term also enjoyed playing the game. Pokémon Go actually brought the entire gaming community together.

## IMMERSIVE GAMING VIRTUAL REALITY

The market for virtual reality technology is potentially vast, its applications are growing, and it's attracting money at a rapid clip. Hardware and software in the space will rake in an estimated \$2.3 billion in revenue for 2015 worldwide, vs. \$90 million in 2014, according to research data from Statista. By 2018, the firm expects sales of virtual reality products to reach \$5.2 billion. The global virtual reality (VR) in gaming market will grow steadily during the next four years and post a tremendous CAGR of more than 84% by 2020. The virtual reality market is highly competitive and consists of major players including Samsung Electronics, Sony, and Google.

## CLOUD GAMING

Without a doubt, the most exciting and game-changing technology for the future of video game industry is cloud gaming. Cloud gaming takes advantage of faster, more reliable internet connections by giving gamers the ability to stream games through video and file streaming methods.

With more reliable and faster internet connections, the technology of cloud computing has begun to gain massive momentum and the entire gaming industry sees it as an opportunity to make games as easy to access as music and movies.



# The Future of Entertainment

## Augmented Reality & Virtual Reality



### Anand Gurnani, Founder, vamrr™

A student is walking on Mars while actually being inside his school lab. A home buyer is walking through 15 different property options while actually walking in his own home. Vehicle designers working in different locations of the company are collaborating on a car design by actually sitting inside it and discussing the texture of the seat cover.

Anand Gurnani, presenting on Making India Experience VR to 250 developers and designers at vamrr VR Dev Con.

A patient is dealing with his fear of vertigo by walking on a virtual sky-bridge, even while he is actually walking in the safe comfort of the doctor's VR treatment lab on the ground floor.

#### Sounds Ridiculous? But its true.

Virtual Reality, Augmented Reality & Mixed Reality, which are part of the Reality Continuum are technologies that are ushering in the dawn of the immersive age which make all the above possible.

VR AR MR along with Computer Vision and Deep Learning are all set to revolutionize every segment. Its effective use cases being across Defense, Education, Health, Automotive, Aerospace, Real Estate, Product Visualization, Industry 4.0, Travel, Gaming, Entertainment, Oil & Gas, Mission Training, Corporate Training and more.

People with Various specializations and domain skills are required to work together in a VR team to create these solutions. A whole new discipline of designing for VR is emerging, including UI, UX, Interaction Design & 3D Design. A plethora of new age 3D Engineering is required which focuses on real time lighting and low poly yet realistic modeling, high fidelity and physics precision. And then come the software developers, the solution architects, the testing and Q&A specialists.

We will witness a huge surge in demand for VR AR MR solutions and platforms, and with that of the talent associated with building it. This could be the next big growth area if enough good talent is nurtured and if startups are pushed to think beyond incremental ideas.

Over the past 1 year, having organized 25 conferences across 8 cities with more than 1500 companies and 3000 delegates participating, I can say with conviction that India is on the cusp of a Virtual Reality revolution. We at vamrr have interacted with thought leaders from IT, from Health Care from Industry 4.0, from Education, from Automotive and Aerospace and every domain has shown its bullishness in exploring the transformation benefits of VR AR & MR.

As a platform committed to building the virtual augmented mixed reality and deep tech ecosystem, vamrr helps in building curriculum, in training teachers, in putting together learning and development workshops, in helping design and manage VR Labs that are focused on accelerating the commercial value and job creation potential of the technology.

In our multitude of Indian and International interactions, we realize that of course the consumer or the enterprise client is not interested in any technology in isolation or in a silo. Its about solutions, utilities and experiential enhancement. When integrated along with other emerging technologies such as Deep Learning, Computer Vision, Artificial Intelligence and IoT, VR AR MR become really the empowered interface for the future.

They technology benefits enterprises in having higher consumer acquisition at better costs. It benefits organizations in better mission preparation for their workforce in safer, more efficient and with faster learning. The technology helps enhance the marketing and pre sales of any product. It helps in remote design collaboration, and in remote virtual repair.

The list is endless.

I'd like to end this short note with a reminder. Virtual Reality is not about gaming. Its a game changer across every Industry and vertical, be it enterprise or consumer. And the wise government, the future ready school, the shrewd entrepreneur and investor and the ambitious student is that which invests time, effort and money in this technology. Immerse in it and benefit before the immersive age dawns upon you.



Sharatchandra Aithal of Krayonik presenting on Extended Reality & Aerospace at vamrr VR Dev Con Chennai - Automotive & Aerospace.



### About Anand Gurnani, Founder, vamrr™

Anand Gurnani is an Internationally renowned expert, speaker and ecosystem builder. He is building the Indian ecosystem for the Deep Tech Immersive Age, and currently focused on putting together the Virtual Augmented Mixed Reality ecosystem through vamrr. | [anand.gurnani@gmail.com](mailto:anand.gurnani@gmail.com)

### About Vamrr™



vamrr™ is the authoritative platform for understanding the potential of new age emerging technologies as well as for engaging and collaborating with virtual, augmented mixed reality ecosystem.

### About Virtual Reality

Virtual Reality involves placing a user inside an environment via a headset or cave system. The environment is either computer generated or shot by a 360 camera. Once inside that environment, the user experiences it as if "present" in that environment. The more advanced the VR, the more immersive and interactive the experience.

### Augmented Reality

Augmented Reality does not replace the users view of the environment. It adds 3 Dimensional & 2 Dimensional data, characters and simulations into the physical environment when viewed by the lens of the phone or by a headset. Imagine a new technician learning about what next to do with the machine, just by pointing his phone at a component.

### Mixed Reality

Mixed Reality takes augmented reality to the next level, where physical and digital elements interact with each other in an environment.







[www.mescindia.org](http://www.mescindia.org)

### About MESC

Founded in 2012, MESC 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 from National Skill Development Corporation (NSDC).

MESC (FICCI) has a mandate to create 11.74 lakhs skilled workforce by 2022 and contribute to the National Skill Mission of creating 500 million skilled workforce by 2022.

### PRIME OBJECTIVES OF MESC:

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

**240+**  
TRAINING CENTERS

**52+**  
QUALIFICATION PACKS

**15+**  
ASSESSMENT AGENCIES

**400+**  
TRAINERS TRAINED

**50+**  
CERTIFIED ASSESSORS

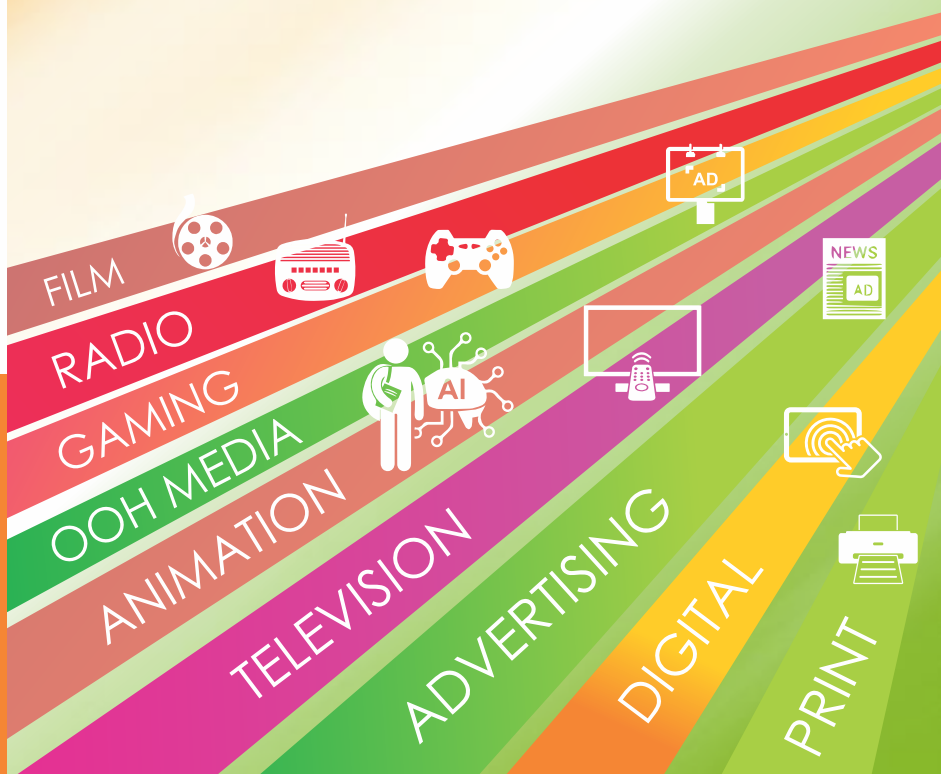
### MESC Consortium Partners



“**SKILLING YOUTH  
BUILDING NATION**”

### Leading Industry Associations creating employability

Bringing together knowledge across different industry sectors to guide on the development of required skills, with a focus on growth & competitiveness. Awards benefits of being supported by trades unions and professional bodies.



# SUNRISE INDUSTRY- MEDIA & ENTERTAINMENT

INDUSTRY SIZE (IN INR BILLION)

159	FILMS	<b>WORLD'S LARGEST PRODUCER OF FILMS</b> MORE THAN 1500 FILMS PRODUCED ANNUALLY ACROSS VARIOUS LANGUAGES
617	TELEVISION	<b>INDIA IS 3<sup>rd</sup> LARGEST TELEVISION MARKET IN THE WORLD</b> OVER 175MN TV HOUSEHOLDS
23	RADIO	<b>MOST AFFORDABLE ACCESSIBLE &amp; REACHES 99% OF INDIAN POPULATION</b> OVER 250 MILLION AUDIENCES ACROSS 80 TOWNS – POISED TO GROW AT OVER 20%
305	PRINT	<b>WORLD'S LARGEST NUMBER IN NEWSPAPER CIRCULATION</b> MORE THAN 70,000 NEWSPAPERS & OVER 100 MILLION COPIES SOLD EVERYDAY
58	ANIMATION & VFx	<b>ONE OF THE FASTEST GROWING SECTOR IN INDIA</b> GROWING AT CAGR OF 16.1% OVERTAKING GLOBAL INDUSTRY GROWTH RATE
31	GAMING	<b>YOUNGEST SECTOR WITH HIGHEST POTENTIAL</b> GROWING AT CAGR OF 13.8% MATCHING GLOBAL STANDARDS

## OCCUPATION MAPPING - OPPORTUNITIES IN M&E SECTOR

S.NO.	MEDIA & ENTERTAINMENT SKILLS COUNCIL Occupation Mapping Within Subsectors	FILM	TELEVISION	PRINT	ANIMATION	GAMING	RADIO	DIGITAL	OOH MEDIA	ADVERTISING
1.	Acting / Voice-overs	*	*							*
2.	Ad Sales / Account Management/ Schedling / Traffic		*	*			*	*	*	*
3.	Art & Design - Print, Advertising & OOH			*					*	*
4.	Art & Design - Animation & OOH				*	*				
5.	Set Crafts - Film, TV & Advertising	*	*							*
6.	Broadcast Operations		*				*			
7.	Camera	*	*							*
8.	Animator				*	*				
9.	Direction	*	*		*					*
10.	Journalism		*	*			*	*		*
11.	Hair & Make-up	*	*							*
12.	Lighting	*	*							*
13.	Production	*	*		*	*	*			*
14.	Asset Creation				*	*				
15.	Screen/Script Writing	*	*		*					*
16.	Sound	*	*		*		*			*
17.	Editing	*	*		*					*
18.	VFX	*	*		*					*



# Exclusive Coverage

## Gaming Industry Today & Tomorrow – Expert Section



Apar games, the game development arm of Apar Global Pvt. Ltd., began its journey in may 2007 in Mumbai, India. Apar games is in the business of online and mobile gaming. It does game development for iOS, Android, PC and Consoles. With a process driven approach, commitment to quality and innovation, it has contributed to over 100 published titles across the globe. Apar games has not only established itself as a strong contender in the Indian online gaming industry, but has also become a reliable partner to many developers and publishers in markets spanning the globe, from China to Europe and America.



### Laxmi Khonalkar CEO – Apar Games



#### Q. How is the Gaming Industry shaping in India?

A. Due to mobile payment facilities, cheaper yet, better internet speeds, public WiFi facilities at major locations in metro and penetration of smartphones has created a big opportunity for gaming sector. In India, One of the top applications downloaded on phone are games. Currently Indian game development industry is operated mainly by a indie to small studios. There are foreign bigger developers like EA, Disney, Rockstaretc and few mid sized gaming studios developing games, with main focus on mobile. In past, success of games based on India IPs has shown great success.

There are companies like TIS, TCS who are into serious games or applied gaming, which is also a good area to explore.

#### Q. What could be the future of Gaming Industry in terms of technology?

A. Technology in gaming changes very fast hence, it must be updated about not just the game development tools but also the gaming trends. Students wanting to pursue career in game programming must know programming languages such as C++, C#, Java. Also, game development tools like Unity 3D. Game Artists can learn about graphic designing, Ui, UX designing, 2d classical animation, 3D modeling, 3d animation tools. Game designer Game QA need to study the concepts of game designing and testing.

#### Q. Which are the best areas to get hired?

A. One can join any department of gaming company, game programming, art development, game designing , community management, backend development etc.

#### Q. What is your advice for upcoming Game Designers?

A. Be aware of prevailing technology, and trends, never forget basics of designs and game mechanics principles. Be ready to challenge yourself. Be experimentative.

#### Q. Which are the Tools in Game Design sector?

A. There are various tools available. You can choose tool that you are comfortable with. Some of the tools can be Buidbox, Construct2, Unity.

#### Q. How can we showcase their portfolio in Gaming?

A. Be focused on which area of game development you want to enter and choose the tasks that can demonstrate the best. Like programmer being able convince their logical strength will be more valuable as opposed to mastery over a tool. Artist can showcase their artwork. And game desinger can show a game prototype or game design document.

#### Q. What are the challenges for people wanting to enter Game Design or development?

A. Structure courses which can teach basic concept as well as the tools need to evolve.

# Employer of the Month

Lakshay Digital



Lakshya Digital Pvt. Ltd. operates as an interactive entertainment and game development services studio. It provides outsourced game development services, on-call game art services, casual games, and learning games for various platforms. The company was founded in 2004 and is based in Gurgaon, India. It has its game development studios in Gurgaon and Pune, India.

Lakshya Digitalis aims to be amongst the Top Video Games Production Companies in the world , leveraging a Technology and Process-enabled global delivery model.

## Manvendra Shukul CEO – Lakshay Digital



**Q. What are your main deciding factors when choosing a platform to start development of a new game?**

A. First of all, Lakshay Digital is the largest company in the gaming sector in all over India with more than 500 employees working as gaming aspirants.

We develop games on all platforms and genres (action, arcade, agnostic) etc.

We are the developers of Top Games Globally and when we run projects we define them with quality so there is no specific genre that we think about when we develop a game.

**Q. How is the gaming sector shaping up in India?**

A. In India, gaming industry is on the go and the way things have happened were based on the primary medians that the society has been following.

Video games are globally the new form of technology. Gaming is a billion dollar industry and has a lot of potential as we move forward towards future. Parents and kids are very keen to make this a globally career option. Gaming is an upcoming sector of technology and future.

**Q.What would be the future of gaming industry in term of technology and for students who want to pursue a course in gaming industry?**

A. One thing which we really need to understand is gaming technology in the real world is something very different. Games that are programmed turn imagination into real world and they try to recreate the realism. Any new technology that comes in can create huge difference and India has a potential of becoming huge. This is a career option which is the future. It not only addressess the technology or artists but it addressess something that is phenomenal.





# Exclusive Coverage

## MONITIZATION OF FREE GAMES & FUND RAISING FOR START-UPS



GodSpeed Gaming Solutions PvtLtd (GodSpeed Games) is a Specialized, Reliable and Cost Effective alternative to in-house resources for the development and implementation of leading production methodologies and infrastructures. We are one of the leading Games and Technology companies, providing Games and Application Development, Live Ops, Games Quality Assurance and Game Support Services to global leading companies.

### Ranbeer Hora CEO – GodSpeed Games



**Q. How is the Indian Gaming Market as compared to the global market and what are the factors contributing to the growth of the industry?**

A. Gaming across the world comprises of different players, their choices are different and so are the platforms. The growing trends in the gaming industry depends largely on the demography. So, you will note different stats for different demographics.

There are around 2.2 billion gamers around the globe and the revenue expected for industry in the year 2017 is \$100 billion plus. As per the Newzoo research paper, Digital game revenues will account for \$94.4 billion or 87% of the global market. Mobile being the most lucrative segment, with smartphone and tablet gaming growing 19% year over year to \$46.1 billion, claiming 42% of the market. In 2020, mobile gaming will represent just more than half of the total games market. Asia-Pacific is by far the largest region, with China expected to generate \$27.5 billion, or one-quarter of all revenues in 2017.

This is where the Indian Gaming Industry comes into play. However, rapid growth of low-cost but powerful smartphones has enabled mobile gaming to take off in a big way and India today is well positioned as the next major gaming market. With expansion of Jio and smartphone penetration, data consumption is expected to increase leading to increasing adoption of mobile games. India's gaming market is poised to soar, as Gamers are exploring global hits, and downloads and usage are exploding across different genres of games. Average gamers in India are already devoting more time in games and spending for game content.

**Q. . Are there any known Funding groups who invest in online gaming start-ups? What are the basis of their investment.**

A. There are different methods available for funding the entertainment software development. Even though most of these options are equally valid, the decision for the best channel depends on your project or company. The choice between Self-funding, Crowd Funding, Publisher Funding or VC Funding is not straight forward and requires a thorough understanding of the industry trends. Each of the above modes has its own pros and cons.

However, due to the rapid growth in digital industry there are many active venture capital firms in India for startups. Funding through VC's in India is an essential part of startup ecosystem. As you progress to the growth stage in your startup, the most important requirement for scaling up is of funding and to meet this requirement you need to establish connections with reliable investors. Some of the active venture capitalists in Indian startup ecosystem are : Blume Ventures, Sequoia Capital India, Nexus Venture Partners, Unitus Seed Fund, India Quotient, Orios venture partners, Seedfund, Kae Capital etc.

Some of the factors that investors decision depends are listed below:

- Risk vs Reward
- Size of Market
- Competitive and a great product
- Management
- Size of Market
- Risk Analysis

**Q. Most of the games are available as free versions across various mobile platforms and online. In such case what is the monetisation model for the game creators?**

A. The mobile gaming market is huge, but assuring a sip of this juice is far from easy. There is fierce competition. Creating a really fun and addictive game is only half the battle. Clever marketing is of equal importance if you want your game to stand out. Studios should have a clear vision to understand from where the profits are coming from. Choosing and selecting the right monetization model can be the difference between success and failure for any studio, and if you're just starting out this will play a major part in determining whether you will have mobile game development as a successful business or just a hobby.

There are a few monetization options only available that help studios generate revenue. Whether you decide to offer in-app purchases (IAPs), or serve ads through a mobile ad network, or charging users up front for the downloads, the monetization strategy has a huge impact on the Developers apps' future. Choosing the right model directly impacts your growth, affecting both revenue and user engagement.

Let's take a look at few available options:

1. Paid Apps
2. Advertising
3. In-app Purchases

**Q. How many employees is Godspeed games planning to recruit over the next 2 years and what will be the major skills sets?**

A. At GodSpeed we are always looking for talented individuals who have hunger to learn and are always striving to be the best. Because we have Services as well as Production division, we are continuously looking for opportunities in the Industry and have regular additions in our team across different departments.

Though we have been very selective and slow in the initial years, we are now looking at building the core team of 75+ people with cross platform experience and energetic individuals who are open to take up new challenges and learn new skills in this evolving gaming industry.



**Ninad-Chhaya CEO - GoPhygit**



**Q. Do you think India is at the inflection point with the gaming industry?**

A. Across the three main gaming verticals viz PC / console games, online games and mobile games, mobile gaming has been the primary growth driver for the gaming industry in India.

The rapid increase in smartphone penetration along with faster and affordable internet access has played a key role in the growth of the Indian mobile gaming industry. App stores introducing multiple payment options like direct carrier billing and multiple price points for in-app purchases has helped game developers in integrating multiple monetization options in their games along with in-game advertisements which also helps the consumers thereby resulting in the overall growth of the gaming ecosystem.

The introduction of 4G has also helped the growth of online gaming with more and more people getting online to play popular online games.

As a factor of better and more affordable devices and connectivity, and multiple monetization models, it can be safely said that the gaming industry in India is at an inflection point.

**Q. Cross-platform is a major issue which players do face, is there any upcoming technology to except tools like PhoneGap, WidgePad etc to make players job simpler?**

A. Cross-platform gaming engines like Unity3D, Unreal etc have been around for the past few years helping game developers develop and deploy their games across multiple platforms, not just on mobile but on the web, PC and console as well. The gaming engines not only give the developers the ability to shorten the go-to-market timeframe to launch their games but also give players the choice of playing their favourite game across multiple platforms of their choice.

**Q. What are the various ways to generate revenue through free mobile games?**

A. Mobile games can be monetized in different ways depending on the monetization model chosen by the game developer for their games.

Primarily there are three ways games are currently monetized:

**1. Premium Games**

In this model, the games are offered for a one time download price which can range from USD 0.99 and upwards depending on the pricing determined by the game developer for their game/s.

**2. Freemium Games**

As the name suggests these games have a dual model of monetization, free + premium = freemium. These are essentially free-to-play games which the player initially downloads for free and monetization is either via advertisements (in-game ads or branded / sponsored games) and/ or in-app purchases.

**3. Paymium Games**

In this model, the games are offered for an initial download price which can range from USD 0.99 and upwards depending on the pricing determined by the game developer for their game/s and additional monetization is through in-app purchases or a monthly subscription model which is gaining traction fast.



# Startup Section

## Making a Mark



99games is a Super Indie Studio that develops and publishes mobile games. The studio has over 15 game titles, 20mn downloads and many global awards

### Rohith Bhat CEO – 99 Games



#### Q. What is the current path your company is following and what are the future funding plans?

A. 99Games has a 2-prong strategy – a Global strategy where we focus on making games for the global audience since that's where the monetisation potential lies and an India strategy where we want to establish ourselves as leaders in this space. Taking this into consideration, we have developed and published games like Star Chef, SpellUp, The Jim and Frank Mysteries which are more tailored towards the global audience while at the same time we have also experimented with the Indian market through the release of Dhoom: 3 The Game, FAN: The Game and Sultan: The Game that has generated a significant number of downloads. While we are already backed by quality institutional investors like Kalaari Capital, Ascent Capital and Dream Incubator, we will be looking to raise more funds in the near future to support our 2-prong strategy.

#### Q. What are the biggest risk and challenges for a start-up in the Indian gaming industries?

A. The Indian gaming industry is a niche industry where one of the biggest challenge is getting quality talent that has a good blend of creative and technical skills. Since there are not many established gaming institutions in the country, the onus is on the gaming studios to invest on mentoring and grooming talent through national and international conferences and events and provide on the job-training to get them to scale up. Investing in a new game is always a risk every publisher has to take since there is no way to anticipate if the game will become a hit with potential to monetise significantly. All one can do is ensure that the game is of high quality standard and well-balanced with a global appeal and with the right infrastructure to treat gaming as a service.

#### Q. How to understand the Indian market gaming requirement? Which game was the turning point for you?

A. Understanding the target audience for whom you are developing the game is very crucial for any game, be it global or Indian. The game should be conceptualised and designed keeping the target audience in mind. This ensures that the game and its mechanics are relatable and easily grasped by the potential audience. While action and racing games have done well in the Indian space, Cricket and Bollywood based games that the Indian consumer can identify with have done well in the past. For us at 99Games, the release of Dhoom: 3 The Game was a turning point, in the Indian context. This was our first game in collaboration with Yash Raj Films released over 3 years ago. Dhoom: 3 The Game is a bike racing game tailored to a male audience of 18-25 yrs. It was first published exclusively on the Windows Phone in close partnership with Microsoft and thereafter on all other mobile platforms including iOS, Android, Blackberry to name a few. Dhoom: 3 The Game has over 22 million downloads till date and continues to monetise for us.



#### Q. What are your expectations in next 10 years from Indian gaming industry?



A. Gaming has been gaining great traction in India. Indian Mobile gaming revenues are set to reach \$1.1 billion by 2020. Much of the growth can be attributed to the growing use of more potent smartphones. Google Play will continue to be a dominant distribution channel while Apple will start gaining a significant market share in India. Currently, players are very conscious of data usage and that will change in the next few years. Ad revenue trumps IAP Revenue due to low credit card penetration currently but with steps taken towards India digitisation, this trend is likely to change in the near future. Currently, Top Grossing lists on the Google Play Store are dominated by Global titles while music, movies, TV are all dominated by Indian content. This will happen with Gaming too.

# Startup Section

## Making a Mark



Mech Mocha make their own games as per the business module. They work on mid core level games and also do publishing of global successful games for the Indian market. They Believe an identifying the games which they think will work in the audience, the localizers, and then publish it.

### Shauryam Gupta Co-Founder



**Q. Indian have been the most difficult audience to understand, so how do understand the perspective of the person who download and play the game? What is the initial phase you do as a base of evolution?**

A. There are two approaches to it. One, we do user testing in person, we interact with lots of people and analyse there behaviour. Second, we analyse data from the AppStore. for which we can launch some short rough games on the Play/Appstore, watch people play, record their behaviour (the retention), followed by that we make an educated guess of work that what kind of games people will like in the Indian market.

**Q. Which would have been the best game you designed so far and what were the number of downloads?**

A. Currently we have launch Chota Bheem in Google PlayStore , it has more than 5 million downloads, discluding any side loads or anything.

**Q. Games on PlayStore or AppStore are free bees, so with a monetization model you work with from an entrepreneur perspective?**

A. With monetization perspective, there are three parts to generate revenue from a game. One is through the In-app purchases. Hypothetically, if the game is in the mid core category it is very interesting to play and to complete the level or sets they need extra in-game currency so for people end up purchasing in-game currencies like points, boosters etc. Secondly, there are video Ads, rewarded video Ads, were you can progress in the game by watching the video. Third is with man partnerships, if you good scale you can approach any advertiser. Recently we tied up with Patanjali for Chota Bheem for advertisement purpose.

**Q. In your team most of the people are young phases we see. What would be the average of your employers and which background they come from?**

A. The average age of our employers are 25, all the co-founders are around 25. Our leadership team is very experienced though, but we have lot of younger folks as well, so the average age is 25. Regarding the background of the team, we have multi-disciplinary teams. We have lot of artist in the team, engineers, Business Developers, Product Managers and all.

**Q. What is the first level of funding you people have raise and what are the future plans now?**

A. We have recently raised funding from Glome Ventures and Flipkart. We have also raised \$5 million from Accel Partners, Shunwei Capital., and existing investor Blume Ventures.

**Q. What would be your initial suggestion for a startup company like yours and looking forward for an investment?**

A. It completely depends upon the stage and level of the company and the business model. If you are on a very early stage and have just conceptualized the business model so getting into funding need to know that what kind of investors you are looking and then building a personal relationship with them because you don't have a product and investment means that they are investing in you not the product for that they need to understand you.

**Q. Are there any agencies somebody need to approach in those business model, plans. What is that the investors look in before they fund?**

A. Business model is definitely very important. People who are not that technically sound approach people and agencies to design business model. But ultimately the inputs have to come from you.

**Q. What is the number of people you hire or are planning to hire on any annual bases? Any defined key skill sets?**

A. We are looking to hire 50 more people in coming year. Every game has multi-disciplinary teams, so, we will be hiring lot of artist so can do concept art, illustrators, 3D artist. There are lots of gaming engineers

**Q. Unity have been the preferred platform for all gaming companied, is there any specific reason?**

A. There are majorly two reason which I personally Think. One is community support and second reason is cross-platform.





# Success Story

## Hrishi Oberoi – Founder and CEO (Photon Tadpole)



### Q. What would you like to say about the monetization as a challenge in Indian gaming industry?

A. It's a myth that monetisation is a challenge in the Indian Gaming Industry. Like all other businesses, making money requires a certain skill set and if you have the right products and the business knowhow, it is definitely possible to monetise in India. The problem has been with smaller developers who usually can't get a foothold in the grossing charts and fail to make money out of the Indian ecosystem. Whereas most Indian gaming companies have not managed to feature in the top 100 grossing charts, there have been a handful of Indian companies to successfully do so and these have seen their revenues grow more than 100% over the last one year. The key to monetising in India is to make sure the games are made in such a way that they can compete with the top games in the world like Supercell's "Clash of Clans" and King's

"Candy Crush". Having said that, the growth opportunities for monetising in India are pretty exponential with the Jio coming into the space in a big way and a higher adoption of digital payments in the last 8 months.

### Q. What was the gaming environment 20 years from now ago and how do you see it growing?

A. 20 years ago the biggest platform for gaming in India did not exist, i.e. the mobile phone. As the adoption of the mobile phone grew in India, the access to gaming for Indians also grew and along with that opportunities for game developers also grew. The industry has seen a huge shift over the past 20 years in the culture and adoption of gaming, albeit mostly on the mobile platform. Along with this and ubiquitousness of the internet, access to gaming has become almost universal. But this has also led to growth and adoption of gaming on other platforms and a steady growth in other related gaming fields such as e-sports and competitive gaming. The growth of the industry going forward is only going to be exponential as the adoption of smartphones increases, the accessibility to cheap data on these phones become more affordable and digital payments become more acceptable.

### Q. What has made you think of turning from an employee to entrepreneur and start your own company?

A. I don't think it was ever a doubt in which direction I was headed. At Indiagames, the culture was that of a startup, right up to the sale to Disney and the philosophy of functioning like a startup and having a sense of ownership of what you did almost bred us all to behave like entrepreneurs. Most of us in the senior management of the company, especially those of us who were there from very early on, saw the growth trajectory of Indiagames and felt that we could do the same for our selves in various other fields with our own companies. In fact, I can think of at least 7 to 8 startups which have been formed from ex-employees of Indiagames. For me personally, this was an opportunity for me to translate a lot of my knowledge and learnings of the past 15 years to areas which I feel very strongly about and possibly create great successes on the way.

### Q. As an entrepreneur what are the challenges you foresee and how do you plan to overcome them?

A. I think at this stage, it's almost a cliché to think about the challenges of an entrepreneur considering how much has been said and written about this topic. Of course, all of them are absolutely true so I will point out the most pressing ones for me personally. Raising capital is obviously one of the bigger, up front challenges, and making sure the team you raise you funds from buys into your vision in the same way that you do. The biggest challenge is always the people challenge. It's not just the skill gap that needs filling, but the soft skills and the attitude gap is very important to plug. We recruit our employees taking 3 major factors into consideration out of which the functional ability is only one third of what we look for. The other two factors are 'positive attitude' (especially in the face of adversity) and 'pro-activeness on the job'. Market challenges and competition challenges will always be there but if these two are taken care of, the rest can be endured.



### Q. What differentiating factors will your organization be bringing in the Gaming Sector?

A. We have a very strong focus on building the Indian ecosystem. For us, this means that we want to create content that is readily consumable for Indian audiences (throughout the world) as well as work with Indian developers to reach out to these audiences. Most players in the gaming sector in India are either concentrating on building platforms for consumption or content that is borrowed from other avenues (such as licensing existing IPs). We believe that there is a need and an opportunity to solve the content problem in India as far as the gaming sector goes and solve it beyond the existing Teen Patti games and the licensed Bollywood and TV games.

### Q. Are you on lookout for VC or PE funding, if yes what is the initial value you wish to raise?

A. Yes, we are looking for funding at the moment but very early stage funding and with strategic partners only. We're not looking to raise more than half a million to a million dollars at the moment and only if the need arises. We are ideally looking to grow organically as much as we can for the initial stages and get into a later stage funding only when we are more mature as a company.



# Exclusive Coverage

ADVENTURE RECRUITMENT (adventurous careers for games professionals)



Adventure Recruitment is a recruitment firm serving the mobile games industry, virtual reality, console and PC games markets. Since 2006 Adventure Recruitments has been sourcing top talent for our clients and bringing the best career opportunities to games professionals across the globe.

Founded in 2006 and our company has been in games recruitment for over 15 years.

Adventure Recruitment offer a good mix of professionalism and a friendly approach for candidates looking for job opportunities and employers seeking the industry's leading talent. We like to create long term relationships with our candidates and clients to work with them and see them progress over many year

## Joseph Cairns CEO - Adventure Recruitment



**Q. Can you share with us an insight about Adventure Recruitment and key area focus areas?**

A. We specialize in helping gaming companies to hire key members of staff. We work with mobile gaming companies, virtual reality, console and PC games companies. We help them to find experienced programmers, artists, designers and producers. Our CEO Joseph Cairns is from the UK where he started in recruitment, he then lived in California for 8 years doing games recruitment and has now been in Bangalore for 10 years. He has trained our team on international methods of recruitment and we have a network of 36,000 games industry professionals and 4000 in India.

**Q. What are the challenges you foresee in the globalized workforce hiring?**

A. Most of our clients are having trouble hiring people for certain positions. It is a high demand and growing market. The challenge we often find is that clients have to move quickly, they have to sell their company to the candidates (as much as assessing if the candidate is right for them) and they have to be willing to pay market rates to hire the right people.

**Q. Which are the countries in the sectors mainly hires for?**

A. We recruit people mainly in the USA, Canada, UK, Germany, and India. India is about 50% of our business.

**Q. What level of hiring's do you undertake? Is it fresher's, experienced or veterans?**

A. We only work with experienced candidates.

**Q. What are the key areas you consider while shortlisting a candidate for international recruitment?**

A. We have helped companies in India to hire Art Directors, Producers and Design Directors from abroad. They look for market knowledge and willingness to live in India. We have helped some programmers from India to get jobs in Europe. They need to be very strong, hands-on programmers.

**Q. Who are the major employers in the gaming sector or media industry you basically work with and what numbers in profile do they hire on an average yearly?**

A. We work with most of the main developers in India. We prefer to keep our client list confidential. We provide examples of our successful campaigns and references to new clients.

**Q. What will be your suggestions for someone willing for employment abroad? Are there any special preparations they need to make in advance?**

A. Realistically it is very difficult as a games industry professional to get a job abroad. Some programmers and product managers have done it, but there is no clear path to doing it. You will have to work hard and be one of the top people at one of the main developers in India and then apply for jobs abroad. The Indian market is getting much better with more opportunities so there are lots of reasons to stay in India.



THE FUNDING MAGIC

# ENTREPRENEURSHIP & EXPANSION

Driven by the desire to change things the way they work, entrepreneurs strive to realize the true potential of their business ideas. But, lack of deep pockets and competition from bigger market players is something that kicks the startups out of their road to success. It is these initial times and hardships that startups need a backing. And, this is exactly where Angel Investors come into play.

Angel investors are usually experienced entrepreneurs who themselves have been through the same phase and the ones who understand what it takes to create a billion dollar company out of an Idea. With handsome amounts of money in their pockets and a will to trust others with their finances, these 'Angels' step in and provide the initial support and sometimes mentorship that helps startups successfully take over these crucial and challenging times.

As a part of our In Focus: Starting up in Indian series, this time we bring to you comprehensive list of active Angel & PE Investors in India.

Blume Ventures  
IDG Ventures  
Tiger Global  
Nexus Venture Partners  
Jungle Ventures  
Zodius Capital  
Mumbai Angle  
Fund Tonic  
Ah! Ventures  
Indian Angle Network  
Unilazer Ventures



# Upcoming Gaming Events in India



## GAMINGMONK CHAMPIONSHIP

16th - 17th September 2017, Mumbai

23rd - 24th September 2017, Delhi

Game Titles : FIFA17

Game Titles : FIFA17



## THE TAIWAN EXCELLENCE GAMING CUP – SEASON 4

18th September – 1st October 2017

7th – 11th October 2017

Game Titles : DOTA 2

Game Titles : CS:GO



## INDIAN ESPORTS CHAMPIONSHIP (IESC) – SEASON 2

September through November

Game Titles : Dota 2, CS GO and Piercing Blow



## ESL INDIA PREMIERSHIP – SECOND EDITION

May through December

Game Titles : Dota 2, CS GO, Rocket League, Clash Royale, Just Dance



# Engagement with Stakeholders



MOU signing with Assam Skill Development Mission



Meeting with Mr. Rajesh Rao, CEO, Dhruva Interactive



MESDC and NSDC Team in interaction with Mr. Wolfgang Tochterle.



RPL Orientation Program at Hyderabad



UNESCO Team at MESDC



MESDC with FTII PUNE Team



Meeting with Mr. Manvendra Shukul, CEO, Lakshay Digital





Indo Global Education Summit 2017, Chennai



Meeting with FEFSI President for RPL chennai



Interview by V Leaders during Education Global Summit



MESC during World Bank Meeting in Mumbai



NSKFDC, Training Partner Orientation program by MESC



MESC team at NITTR Emerging trend Education conclave



Meeting with Mr. Bala, Director, Annapurna International School, Hyderabad



Global Skill Summit Delhi



# Featured Institute

## Ramesh Sippy Academy of Cinema and Entertainment



Thousands come from far and wide in search of their destiny to the industry of their dreams – the industry of cinema and entertainment. Time has acknowledged that one needs the perfect catalyst comprising the requisite skills-set and a roadmap to ride one through the often intimidating and complex labyrinth of the industry which has become the wind beneath one's wings to finally give form to those celluloid dreams.

With an endeavour to give back and share the myriad experiences of over 40 years, I have given form to RSACE an Institute that is one of its kind bridging the gap between theory and hands on knowledge by highly experienced industry professionals.

What makes it truly unique is its Tie up with Mumbai University. This partnership will award a graduate degree to students that complete their study in the chosen course of filmmaking by the highly respected and recognised Mumbai University.

There has been a fundamental change over the years in the way cinema and entertainment is consumed. In addition to cinema



screens and televisions at home, there are a plethora of handheld devices at one's disposal. The internet has become a major source when it comes to consuming content – computers, laptops, mobile phones, tablets define the new-age consumers of entertainment.

At RSACE, it is our endeavour to equip students with the skills required to create content that keeps pace with new-age media. Having said that, while the mediums have changed, the ethos of cinema and entertainment remains untouched and at its very core, cinema is all about stories. RSACE's core purpose is to produce generations of film professionals that will contribute to great storytelling," Ramesh Sippy.



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- Advanced VFX Match Moving
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- Audio Editing

**Duration : 11 - 30 Months**





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6. Website ( If any) \_\_\_\_\_

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- Designation \_\_\_\_\_ Landline no. \_\_\_\_\_
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