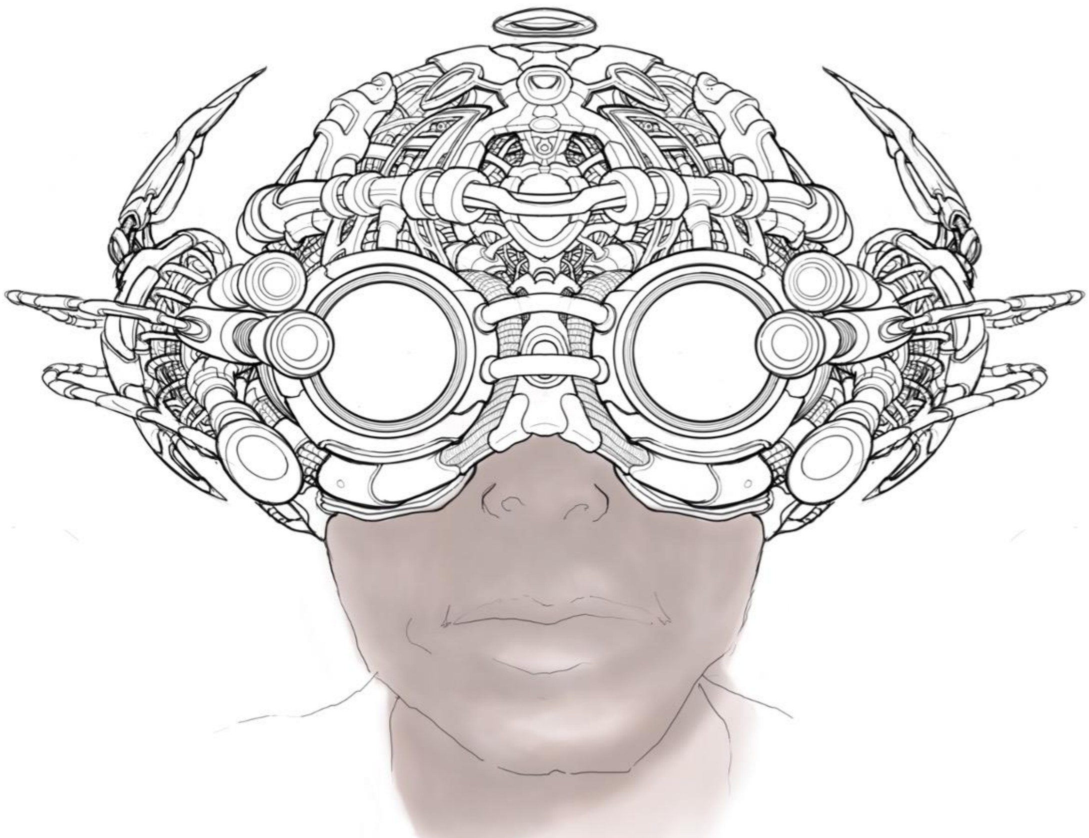
Creative Industries in India Mapping Study

August 2022



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“How do you eat an elephant?”

“One bite at a time.”

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Cover image courtesy Rahul Dutta

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Executive Summary

India is a large and dynamic country with a young, growing and increasingly educated population. Existing industrial, educational and cultural links mean there is a considerable appetite for research and innovation collaboration in the creative industries between the UK and India. Despite the variability and sometimes paucity of official data, there is substantial evidence of the scale of the creative industries in India and the extent to which it is innovating.

Two significant innovation areas stand out:

- The application of technologies in screen and games sectors, which is driving growth across a cross-section of sub-sectors which has been dubbed 'AVGC' (animation, visual effects, gaming and comics). Although historic growth has been centred around cheap service labour in a technology-oriented set of sectors, there is strong potential for India to build a content-driven economy;
- The development of a design-led socially and environmentally sustainable approach to crafts and textile production which underpins, among other sub-sectors, the fashion industry in India and across much of the globe.

Our research shows that:

- Several creative industries sub-sectors generate significant revenues for the Indian economy, notably IT, publishing, advertising and film
- The crafts sector provides employment across the country, and sits alongside agriculture as the mainstay of revenue generation and employment for many communities
- Bollywood is known internationally for its prolific production of Hindi films, with 236 films released for theatrical viewing in 2021; Telegu cinema is hot on the tail of Bollywood. As of July 2022, it produced some of the highest grossing Indian films worldwide, and is attracting global film production companies such as Disney which made its first South Asian-content film in Telegu.
- Other sectors are held in high regard on account of their links to regional identities and cultural heritage, for example India has a very strong festivals sector
- India is the world's textile factory, driving production that serves the global fashion industry, both traditional embroidery and weaving, and technical textiles.
- India is also home to international IT hubs, which are now developing as important centres for sub-sectors such as animation, visual effects and games. These started as service providers for international film and TV producers, but there is an increasing interest in co-production.

Large parts of the creative industries are under-recorded in official figures, since they take place in the informal economy. The crafts and performing arts sectors in particular operate through family and community-led activities, often outside of the formal economy; but the lack of formal data is evident in all of the sectors to some extent.

There are a large number of government ministries and departments with interests in innovation and growth within the creative sector, from the Ministries of Culture and Textiles to the Ministry of Micro, Small and Medium Enterprises. There have been a wide range of general enterprise policies which have benefited the creative industries, including Digital India and Start Up India – which are assisting the micro-businesses that characterise all sub-sectors - and Atmanirbhar Bharat Abhiyaan or Self-reliant India which supports investment in content creation and brand development. Most recently, there have been a number of important new initiatives from central government to support the AVGC sector. But policies are not joined up and, despite the recognition of the value of the creative industries and the creative economy, there is no coherent strategy for investment or growth of the sector as a whole.

Given India's size and political geography, state-level policies and interventions are sometimes more effective, with a range of tailored initiatives to support certain sectors in specific geographies. But, while state-level policies can undoubtedly be effective, there is scope for better systems for learning from local initiatives about what works to develop the creative industries and sharing that knowledge nationwide. This complexity can make it difficult to address cross-cutting issues, such as IP, that affect all of the creative industries sub-sectors.

There are three Deep Dives in the report to address some of these issues and opportunities in more depth: on AVGC, Design for Sustainability, and Geography.

Design for Sustainability:

Sustainability is a driver for public policy and commercial innovation investment in India. There is significant activity taking place across the crafts and textiles value chains, with a recognition among policy and industry partners that sustainable production runs from the production of fibre, through the various manufacturing processes to distribution and retailing.

- Governmental interventions include setting up Mega Integrated Textile Region and Apparel Parks, which aim to cluster textile manufacturing and provide access to new technologies, develop skills and provide entrepreneurship training. The MITRA Parks are each expected to generate 300,000 direct and indirect employment opportunities.
- In 2019, the Minister of Textiles and the Clothing Manufacturers' Association launched Project Su.RE with 16 brands, committing to reducing carbon emissions and reducing waste.
- A number of large Indian firms are already active in research and development related to making technical materials from recycled plastics for clothing and architecture, and producing specialist textiles suitable for sportswear, for example.

AVGC:

There has been massive growth in animation, visual effects and games over recent years, building off the historic strengths of India's position as a global centre for software and IT. Major international film and TV production houses have been tapping into the skills associated with those sectors to outsource post-production visual effects and animation. With a growing domestic market, strong cultural and story-telling traditions and its own film industry, India has been blending technology and creativity across a number of sectors. This has been accelerated by the expansion of digital consumption during the Covid-19 pandemic.

- In 2021 the animation industry grew by 24% and the visual effects sector by more than 100%
- Online gaming grew by 18% in 2020 and by 28% in 2021.

In 2022, the Government of India launched an AVGC Task Force, stating that the AVGC sector has the potential to become the 'torch bearer of Create in India and Brand India' policies. There are emerging clusters across the country, with particular strengths in Mumbai, as the home of Bollywood, and in cities in Telegana and Karnataka – the latter having established an AVGC policy as early as 2012.

Geography:

India is a vast country with large geographical hubs of activity and significant presence in regions across the country, supported by state-level policies:

- Mumbai and Delhi are established clusters, but there are concentrations of media-related sectors emerging in cities in the South of India such as Hyderabad and Bengalaru.
- By contrast, traditional crafts and performance sectors are widely spread across the country, often in rural areas. These sectors have geographically situated specialisms related to the place's agriculture and draw on the community's cultural heritage. These specialist crafts provide partial employment for large numbers in the informal economy and are considered politically and culturally important.
- The scale of the country and the sheer range of its traditions means that state governments are the key to building on these place priorities. One example is the AVGC focus recently announced by the Union government, but which started with the state-level engagement and intervention much earlier.
- Hyderabad is building on its film-industry success to become a major hub for AVGC and sectors using creative technologies.

Drawing from the above, our research concludes that:

- There are multiple areas for research and innovation collaboration.
- There should be focused action on AVGC and on sustainable textiles and fashion, drawing on the insights from the Deep Dives
- Other areas for collaboration include work on IP policy and its application through 'Geographical Indication', potential collaborations with the Indian diaspora in the UK, and further research to understand the informal nature of key sub-sectors.
- Finally, given the diversity of the creative industries and challenges of navigating across multiple government departments and agencies, international collaboration and trade would benefit from a co-ordinated support mechanism to inform research and innovation across sectors.

1. Introduction

Introduction

Research brief

In response to a brief from UKRI India, the task we set ourselves with this research was to capture and present a comprehensive overview of the creative industries sector in India, the industry ecosystem which supports it, and the policy frameworks within which it operates.

The original call invited:

> a scoping study to provide an overview and mapping of the creative economy in India, and the research and innovation ecosystem which supports it, including highlighting particular areas of strength, growth, and innovation [in order to] acquire a more detailed understanding of where the opportunities and possible barriers lie for future India-UK creative industries research and innovation.

In seeking to distil a significant amount of data and information, our aim was to provide a clear understanding of where the opportunities and possible barriers lie for future India-UK creative industries research and innovation collaboration.

Our work has entailed:

- Searching and using reliable data (where it exists), to count the size and make-up of each of the nine sub-sectors which make up the creative industries in India. This has included turnover and employment data, information on major companies or organisations working in each sector, and an assessment of the main trends in market development or activity
- Identifying areas of strength and growth, including areas of innovation, meaning new or improved processes across the creative industries supply chain and/or new or improved products and services.
- Reviewing national policies and, to a lesser extent, regional policies, to understand the extent to which government understands and has engaged with the sector.
- Capturing market shifts and trends: identifying where there is growth, what is driving that growth, and drawing out the ways in which that growth might be stimulated by technological innovation, demographic change and policy engagement.
- Looking in some depth at the geography of the creative industries, noting the importance of state and city-level activities and capturing where the various sub-sectors are concentrated.
- Undertaking three deep-dives. We have looked in more detail at the AVGC (Animation, Visual effects, Games and Comics) sector; at design for sustainability within fashion and textiles; and at the question of geographical concentrations of creative industries including a focus on two cities, Hyderabad and Jaipur.

In so doing, we have sought to identify areas within the creative industries where there may be the greatest potential to undertake or develop collaboration between researchers and companies to support India-UK research and innovation collaboration. In some cases, this includes pinpointing areas where there may be a need for further in-depth scoping or research to fully understand possible collaboration opportunities.

Methodology

Mapping the creative industries across a country of 1.4 billion people with a large informal economy was, as one of our stakeholders put it, "an impossibly big nut to crack".

We adopted a phased process that loosely followed the Design Council's 'Double Diamond' methodology[1] (see below). The need for an in-depth look at three-to-four key opportunity areas had been agreed with the commissioning group but it was important that this was preceded by the broader scan of the nine creative industries sectors. These scans provided a platform for the deep-dive selection process.

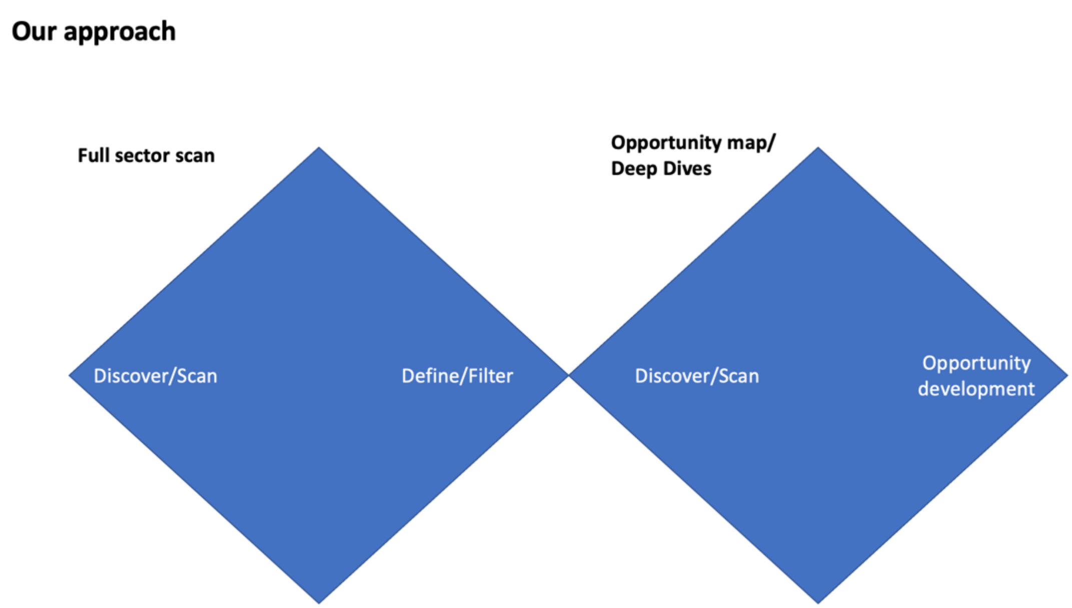


Figure 1.1 Research approach, based on the Design Council's Double Diamond

Stakeholder discussions

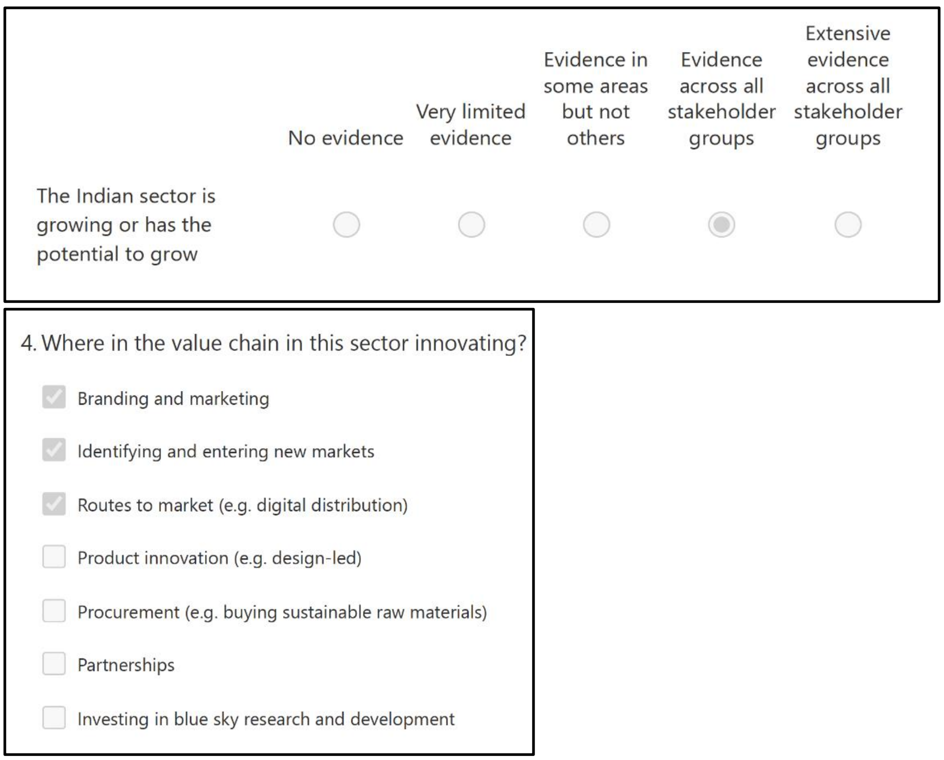
The study started with a series of interviews with stakeholders with specialist knowledge of creative industries policy from the UK and India, and the research commissioners. These interviews had two purposes. Firstly, to revisit the scope of the study and ensure that the research was aligned with stakeholder expectations. Secondly, to draw out an understanding of how the Indian creative industries are currently understood and viewed by UK and Indian decision-makers.

Sector scans

Following this, the team studied and reported on the Indian equivalent of the UK's nine creative industries sectors. Secondary data sources included research undertaken by international, national and local NGOs and governmental bodies such as UNESCO; industry umbrella group and trade body reports and websites; academic studies; market analysis reports; policy documents; and news sources. Using these we attempted to identify and, if possible, confirm each sub-sector's scope, contribution to the economy and numbers employed. The studies also asked what or who was driving innovation, whether this was public policy or private investment, and where it could be found in the supply chain. Summaries of these findings were collated into reports on each of the nine sub-sectors (see Section 3).

Filtering

The team analysed the sector scan data using a 'filter' to identify to what extent each sub-sector was innovating, where in the supply chain innovation or growth was located, and where geographic concentrations could be found.



	No evidence	Very limited evidence	Evidence in some areas but not others	Evidence across all stakeholder groups	Extensive evidence across all stakeholder groups
The Indian sector is growing or has the potential to grow	○	○	○	◉	○

4. Where in the value chain in this sector innovating?

- [x] Branding and marketing
- [x] Identifying and entering new markets
- [x] Routes to market (e.g. digital distribution)
- [ ] Product innovation (e.g. design-led)
- [ ] Procurement (e.g. buying sustainable raw materials)
- [ ] Partnerships
- [ ] Investing in blue sky research and development

Figure 1.2 Examples of the scan data analysis framework

The above are samples of the 'filtering' exercise which guided our analysis of a what was a complex set of data. This process helped to inform the selection of the three sectors/themes for deep dives.

Deep dives

Three areas were chosen for deep dives: the fast-accelerating adoption of technology in key sub-sectors - what in the UK we call CreaTech, which has been dubbed AVGC (animation, VFX, games and comics) in India; design for sustainability in fashion and textiles, which we selected in response to the Indian government's focus in the UN Sustainable Development Goals (SDGs) [2], the significance of textiles to Indian employment, and the growing interest of global fashion brands in sustainable fashion; and a geographical focus, looking in particular at creative clusters in two geographic areas, Hyderabad and Jaipur. These studies consisted of focused secondary research and depth interviews with policymakers, NGOs, creatives, academics and industry specialists working in the fields.

We ran a workshop with stakeholders and experts in Delhi half-way through the deep dives to playback and test our emerging findings. The purpose of this additional research was to understand the mechanisms which support or block innovation and growth in these areas, where there are strengths in the Indian sector, where there is potential for collaboration with the UK and where there is a need for further research. The workshop formed part of an extended visit to India by the UK-based research team, during which time visits were made to major cultural and creative projects and activities, and meetings were held with senior Indian stakeholders.

Opportunity mapping

Research for the deep dives comprised digging further into the secondary sources, and undertaking interviews and, where possible, visits to key sites. In total 23 depth interviews and 25 stakeholder meetings were held. Team members also attended:

- The Creative Industries Council's UK-India CreaTech Trade Mission events between 21-24 February 2022[3];
- Jaipur Literary Festival in London[4], a two-day Festival of talks and discussions on UK-Indian cultural collaboration;
- The High Commission of India and Nehru Centre's 'UK India Together' Creative Industries and Cultural Economy Seminar on 27 June 2022 during the annual India Global Forum, London[5];
- A two-day stakeholders' consultation on Understanding India's Creative Economy run by Indian Council for Research on International Economic Relations (ICRIER) in partnership with the Asian Development Bank Institute on July 4-5, 2022;
- The launch of the British Council's India/UK Together season of collaborative talks, films, music art and projects[6];
- The Commonwealth Games Business Forum event on Creative and Digital Technologies[7] on 3 August 2022
- The Whitehall and Industry Group webinar, Strengthening UK/India Relations: a Cross-Sector Perspective[8], 10 August 2022.

In addition to enabling the team to see presentations about existing partnerships from a wide range of UK and Indian businesses and policymakers, these events demonstrate the appetite to increase collaboration between the two nations, particularly in the areas of CreaTech and content creation, and enabled us to begin identifying and testing opportunity areas.

2. Policy and Economic Context

Policy and Economic Context

This section provides an overview of India's policy structures, key governmental and governance agencies and civil society bodies that influence national attitudes and approaches to the creative industries. It starts with a brief explanation of India's demographic, geographic and cultural context, and includes a detailed assessment of the policy context within which the creative industries function.

Further information on the regional governance and economic geography of India is covered in the Deep Dive on 'Geography'.

Overview

India is a nation of 1.4 billion people with an average age of just over 28 years old. It covers 3.287m sq. km.

Figure 2.1 Political map of India[9]

The Indian economy is expected to grow by 7.1-7.6% in 2022/23 and to remain one of the world's fastest growing. A Deloitte report noted that, as a domestic demand driven economy, India will feel less impact with investments continuing to grow despite some impact from supply chain disruptions and other global uncertainties[10]. A recent article in the influential Hindu Business Line predicted that it will be India's creative economy that will drive growth, but for this to materialise there is an urgent need to develop the right policy framework[11]. This offers an immense opportunity for developing UK/India collaborative partnerships in this sector.

It should be noted however that there is a sizeable and significant level of informality in the Indian economy, not least in the creative industries. The International Monetary Fund[12] defines the informal economy as 'activities that have market value and would add to tax revenue and GDP if they were recorded'. The Independent Labour Organisation[13] states that India's informal economy accounts for more than 80% of employment outside agriculture and that informal employment is growing even in regulated sectors as gig economy approaches spread around the world.

In India, several of the creative industries sub-sectors are located within the informal economy: Handicrafts, including textile artisans, performing and folk arts, music and some elements of the new digital economy, such as social media influencers are operating at levels below the income tax threshold. Creatives working in informal economies tend to lack access to the investment capital, understanding of regulatory systems such as IP and formalised research and educational opportunities that encourage innovation and economic growth. And, noting that many workers in the informal economy are women and those from excluded communities, the lack of information collected makes it difficult to design effective policies to address social protections and inequalities in the labour market.

National government structures and policies related to creative industries

There is as yet no harmonised official government recognition of creative industries or a developed creative industries and/or cultural policy, with responsibilities spread over 16 different ministries and 28 state governments. Policy initiatives are highly fragmented across different sectors and lack synergy[14].

Although the term creative industries does not occur in current government policy documents, a Task Force on Cultural and Creative Industries was appointed by the erstwhile Planning Commission (now transformed into the NITI Aayog, or the National Institution for Transforming India) as early as 2005, to make recommendations for the Tenth Five Year Plan. It had proposed the creation of a National Mission for Cultural Industries, which would serve as a single nodal body providing policy recommendations to the government as well as legal and financial support and capacity building and marketing services to practitioners. However, the recommendations of the task force were not adopted in subsequent plans.

Key ministries and governmental agencies

In their 2022 report, *Catalysing Cultural Entrepreneurship in India*[15], Gupta and Anandaram identified the need for inter-ministerial cooperation for strategic planning and recommended as a medium-term solution the setting up of a dedicated nodal agency or Committee on Cultural and Creative Economy (CCCE) under the Department for Promotion of Industry and Internal Trade (DPIIT), which oversees the Make in India, Start-up India and Invest India initiatives[16].

DPIIT, a Ministry of Commerce and Industry agency, is responsible for determining industrial policy at central government level and, given the number of schemes and initiatives it administers, is perhaps the most important player in the current creative industries policy landscape. It oversees, for example, the National Design Policy and the National Intellectual Property Rights Policy, which are both essential to the creative industries, in addition to policies on foreign direct investment.

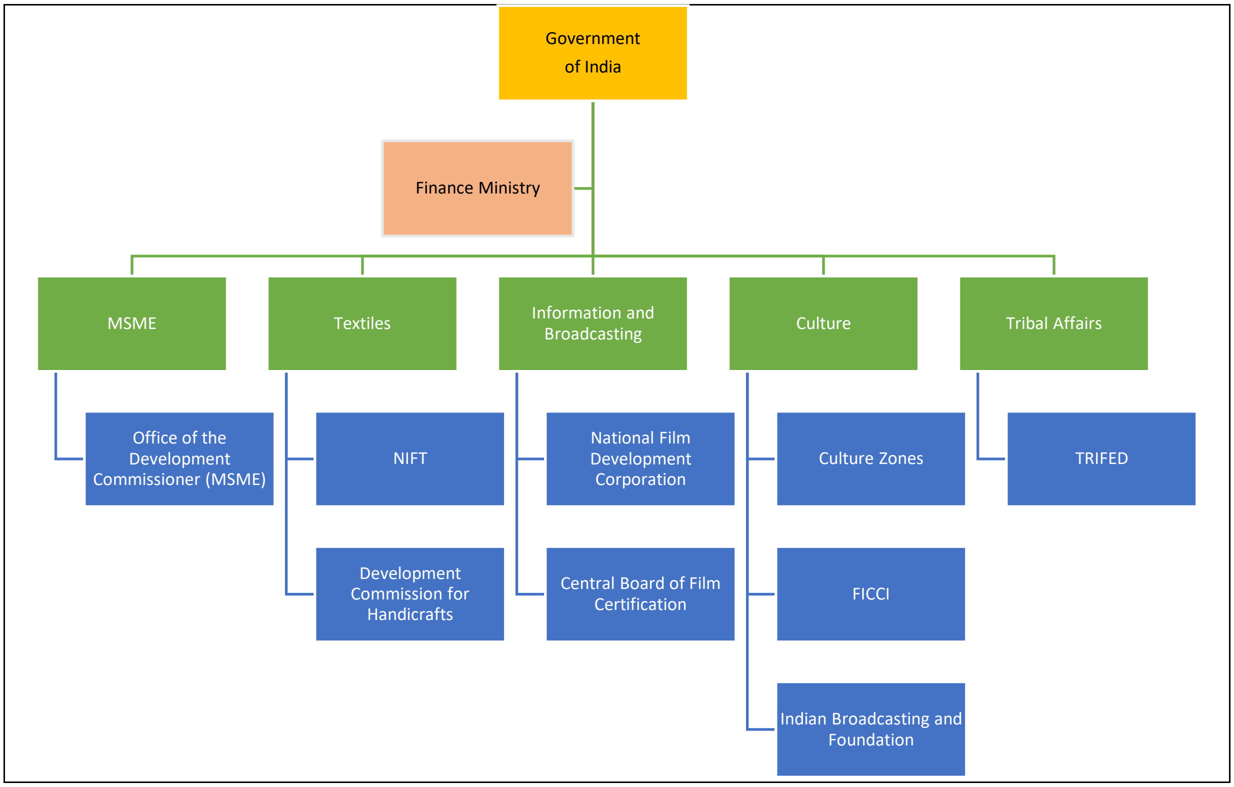


Figure 2.1 Key Government of India ministries and agencies

In addition to the DPIIT, the report identifies the Ministries of Textiles, Culture and Tourism, Micro, Small and Medium Enterprises, External Affairs, and AYUSH (Ayurveda, Yoga & naturopathy, Unani, Siddha, and Homeopathy) as essential to the task of planning for the growth of creative industries. These sit in tandem with other pre-existing bodies and policies like NITI Aayog, Invest India, Start-up India, the Indian Council for Cultural Relations, Crafts Council of India, Network of Indian Cultural Enterprises (NICEorg)[17] and the Federation of Indian Chambers of Commerce and Industry (FICCI).

Policy

At a national level there are several industrial policies that are having important impacts on creative industries innovation: Digital India, Atal Innovation Mission, Start-Up India, Make in India, and regulations regarding foreign direct investment and intellectual property. Two recent developments likely to influence the creative industries are the Atmanirbhar Bharat Abhiyaan or Self-reliant India campaign and AVGC – animation, VFX, gaming and comics – Task Force. Cutting through these is an emerging policy on working toward the UN Sustainable Development Goals by 2030[18].

Make in India aims to improve the 'ease of doing business' in India to encourage FDI, primarily in manufacturing[19]. It includes investment in new infrastructure such as industrial clusters and better logistics. The annual budget for the policy in 2020-21 was INR1.28bn (GBP13m). It targets 25 sectors, including textiles, leather, media and entertainment. Importantly for innovation in the creative industries more generally, it includes a focus on supporting research activities by improving IP registration processes, up-grading technologies and digital infrastructure. Policies within Make in India include FDI regulations.

When dealing with innovation in the creative industries, however, some organisations will fall under the **Foreign Contribution (Regulation) Act** (updated 2020)[20]. The FCRA requires not-for-profits – including universities and some trade or membership associations – to apply for FCRA registration every five years in order to receive payment from international clients, donors, partners or collaborators.
Despite these restrictions, the Indian government is keen to promote international investment. Examples of policies to encourage investment include the incentive schemes for audio-visual co-production and for shooting foreign films in India[21]. International film co-productions, officially sanctioned by the Ministry for Information and Broadcasting, can claim up to 30% on 'qualifying expenditure' in India up to a maximum of INR20m (GBP210,000). Foreign films can claim an additional 5%, up to INR5million (GBP50,000) if more than 15% of the staff are employed in India.

Intellectual property[22]. India is a signatory to the World Trade Organisation's (WTO) 1995 Trade-Related Intellectual Property Rights (TRIPS) system. There are six IP rights that enable full and effective protection of intellectual property goods and services. The TRIPS Agreement is a 'minimum standards' accord. Members can enhance protections if they wish and are free to determine how they implement it within their own legal system and practice[23]. The six rights are copyright and related rights; trademarks; geographical indications, including appellations of origin; industrial designs; patents; integrated circuit layout-designs; and trade secrets and test data.

One key area of IP in relation to Indian is 'Geographical Indication'. GI is defined as 'indications which identify a good as originating in the territory region or locality in that territory, where a given quality, reputation or other characteristic of the good is essentially attributable to its geographical origin (TRIPS Article 22.1)[24]. In other words, a GI mark is proof of where the product is made and signifies distinctiveness and excellent quality; it is an important element of the establishment of value for key creative sectors. For example, handicrafts are considered traditional cultural expressions so are registered under the Geographical Indication system for each region's specialisms. 231 places were listed as handicraft regions on the Indian IP office's Geographical Indication register[25], compared with 129 agricultural regions and 36 listed as manufactured. Geographical indication provides a shared brand identity that protects individual makers and micro-businesses without each having to apply for trademarks within India and globally.

Start-Up India[26] is a key policy initiative for the creative industries. The Start-Up India action plan was launched in 2016 and is led by the Ministry of Commerce and Industry. It includes 19 actions aimed at making entrepreneurship easier through tax incentives and credit guarantees, reducing bureaucracy and costs associated with IP registrations and compliance, and supporting incubation partnerships between academia and industry. In the creative industries, these policies are driving the development of textile parks, craft and AVGC clusters across the country.

Launched in 2016 the **Atal Innovation Mission** (AIM) is a GoI initiate to promote innovation and entrepreneurship (NITI Aayog 2020)[27]. The policy launched programmes ranging from Tinkering Labs in schools to Community Innovation Centres in underserved cities, rural and tribal areas, and mentoring schemes partnering MSMEs and entrepreneurs with advisors from industry, academia and NGOs. With innovation widely defined, the Mission has been inclusive of creative industry sectors. Zootopia-2021, for example, asked design and architecture students to work with zoo managers to rethink and transform the zoo experience for animals and visitors.[28]

In May 2020 Prime Minister Modi launched the **Atmanirbhar Bharat Abhiyaan** or Self-reliant India campaign[29]. The campaign aims to stimulate start-up and MSME growth, develop infrastructure, simplify regulations for start-ups, and improve technology systems. As part of this drive for economic growth the government has identified the AVGC sector as a high growth area. In April 2020 it announced and launched the AVGC Promotion Task Force to guide policy development and place India at the forefront of content creation. The sector it said, 'has the potential to become the torch bearer of Create in India and Brand India'. India has the potential to capture 5% (GBP33.1bn) of the global market share by the year 2025, with an annual growth of around 25-30% and creating over 1,600,000 new jobs annually'[30].

Probably the most influential policy in relation to innovation and growth is Digital India[31]. According to the India Brand Equity Foundation (IBEF) India had some 63 million Micro, Small and Medium Enterprises in 2021, more than 99% of them were micro businesses and only a fraction were formally registered. Of these 68 per cent wanted to use digital technologies to introduce new products and services and to undertake branding. Hurdles found included digital skills gaps, and investment and data analysis skills gaps. Covid-19 accelerated digitisation as it did in other countries. Opportunities identified in Digital India relate to e-commerce and digital payments, and direct selling for micro-businesses. Launched in 2019, Digital India is one of the GoI's flagship programmes. It aims to 'transform India into a digitally empowered society and knowledge economy'.

The **National Design Policy** (NDP), approved in 2007, is of particular significance to Indian creative industries as it encourages design innovation in small scale and cottage industries and crafts, and enshrines it as an important driver of economic, industrial and societal development. Furthermore, it highlights craft traditions and cultural heritage as crucial components of Indian design and makes provisions for training programmes for artisans to enable 'the process contemporisation of traditional craft products for commercialisation in a broad spectrum of niche markets'[32]. The Design Clinic Scheme, implemented by National Institutes of Design across the country, aims to improve the manufacturing competency of the MSMEs through design intervention and to provide a value-added edge in the global market. It thus supports the Make in India initiative, which since its launch in 2014, has aimed to facilitate investment in design and innovation in some creative industry sub-sectors like furniture, leather and footwear, ceramics and textiles.

3. Sector scans

Advertising and marketing

Headline data

The advertising and marketing industry in India has internationalised and matured in the 21st century and is highly focused on the opportunities provided by digital media. The advertising sector has seen sustained growth in revenues since 2008, growing from INR221bn (GBP2.2bn) in 2008 to INR795bn (GBP8bn) in 2019. In 2020 revenues dropped to INR59 bn (GBP6bn) but recovered in 2021 with an 18.6 - 25% growth rate compared with the previous year to a market size of INR746bn (GBP7.85bn), and forecasts are for growth through 2023[33].

Digital advertising is demonstrating the fastest growth. Digital reached a market size of INR213,530m (GBP22.48m) in 2021, compared to INR157,820m (GBP1,661m) in 2020. TV advertising grew 25%, digital advertising grew 29%. Three quarters of digital advertising was on mobile devices[34] and this looks likely to grow as, globally, mobile averages 50% of digital advertising.

Within this digital market, social media drew a 29% share, online video 28%, paid search 23% and banner ads 16%. EY[35] found digital advertising grew 29% to reach INR246bn (GBP2.6bn) in 2021. This included advertising by SMEs which might have considered traditional media too expensive. Along with niche long-tail advertisers, SMEs spent INR117bn (GBP1.23bn) on digital advertising, including advertising earned by e-commerce platforms of INR55bn (GBP.58bn), or 16% of total digital advertising.

While the pandemic saw large negative impacts on media planning and buying, content marketing, graphic and web design and PR/communications all grew.[36] Overall advertising grew 25% in 2021, ending the year just 6% below 2019 levels[37].

Policy, legislation and regulation

Advertising and marketing are largely self-regulating in India[38]. The primary bodies which ensure standards are the Advertising Standard Councils of India (ASCI), Advertising Agencies Association of India (AAAI) and the Indian Newspaper Society (INS). Governmental regulation is maintained through the Prasar Bharti's advertising guidelines. Prasar Bharti is an autonomous governmental broadcasting agency which has oversight over state-owned broadcasters Doordarshan and All India Radio (AIR). The Ministry of Consumer Affairs also maintains an online portal where consumers can post complaints about misleading advertisements.

Architecture

Headline data

There is every indication that architecture is a growth industry in India but disaggregated data is hard to come by. We have therefore considered indicators from construction and higher education to unpack the health of the sector.

According to the Q4 2021 Global Construction Survey, the construction industry in India is expected to grow by 16.5% to reach INR42,127billion (GBP435bn) in 2022[39]. The real estate market stood at USD200 bn (GBP163.5bn) in 2021 and, according to India's Housing and Urban Affairs Secretary, is forecast to grow to USD1 trillion (GBP830bn) by 2030.[40] As of 31 March 2020 there were 99,825 architects registered with the India's statutory body, the Council of Architecture (CoA)[41].

The growth in real estate and construction markets is reflected in the growth in architecture courses from 12 in 1972 to 471 schools approved by the statutory Council of Architecture (CoA) by 2020. Combined these courses see approximately 20,000 architects graduate each year.[42]

Policy, legislation and regulation

The 1972 Architects Act created a legal framework for registration, education and practice standards (undated in 1989 and 2003) and constituted the Council of Architecture (CoA)[43] as the oversight body responsible. The CoA is a statutory body charged with the responsibility to regulate the education and practice of the profession throughout India. It also maintains the national register of architects[44].
The practice or profession of an architect is governed by the Architects (Professional Conduct) Regulations, 1989[45] (as amended in 2003), which deals with professional ethics and etiquette, conditions of engagement and scale of charges, architectural competition guidelines etc.

The Council of Architecture Training & Research Centre (COA-TRC)[46] was instituted in 2005 as a joint initiative between CoA and the Centre for Development Studies and Activities (CDSA). There are two TRCs, one in Pune and one in Bhopal. They are national 'institutes of excellence' in research and education. They also facilitate business incubators and provide mentors for architectural start-ups.

The Archaeological Survey of India[47] is a government agency under the Ministry of Culture. It is responsible for researching, protecting and maintaining cultural heritage and ancient monuments and archeologically sites. It has 3692 protected monuments under its purview.

The National Institute of Urban Affairs[48] was 'set up to guide the Government of India in matters of spatial growth, climate change, water, sanitation, preparing master plans, and overall urban planning policy'. It conducts research on urban development and provides reference architecture standards, training and development for architects in urban planning.

Crafts

Headline data

'Handicrafts' is the second largest employer after agriculture In India. India Brand Equity Foundation (IBEF) claims India is home to at least 7 million artisans, with up to 200 million working in the informal sectors and deriving some income from handicraft production[49]. The informal and collaborative nature of much handicraft production in India makes estimating employment numbers difficult however; according to official data, the Ministry of Textiles estimates that only around 680,000 people were employed as artisans in 2017-18.[50]

The handicrafts sector is defined by a large number of micro-SMEs, and sits between commercial enterprise and domestic work. In Kashmir, for example, wicker handicrafts are a form of income diversification accounting for up to 67 per cent of household income[51]. However, the disorganised nature of the sector, means producers have limited negotiating power or marketing infrastructure[52]. Communal production and traditional patterning mean these crafts do not sit easily within an IP system predicated on capturing the value of an individual's or a corporate entity's creativity. IBEF data suggests exports of the value of £2.7 bn in 2020.

Craft fairs and markets are central to the sector as a market place, and a place where crafts people can sell their wares directly to the public and meet other makers. They are one of the few places where this fragmented sector assembles. The Surajkund International Crafts Mela, for example - a few miles south of New Dehli – is hailed as the world's largest crafts fair[53].

Attempts have also been made to develop social enterprises for joint marketing at a national level. **Fabindia** is the largest retailer of craft products. It has 144 shops in 35 cities and sources products from over 40,000 makers[54] many of them self-organised co-operatives.

At the governmental level, **Biswas Bangla** is a marketing corporation set up by the West Bengal government's MSME and Textiles Department to promote its artisanal products. It runs six showrooms in Kolkata, as well as outlets in New Delhi, Darjeeling and Bagdogra Airport

Policy, legislation and regulation

The Ministries of Culture and Tribal Affairs have an interest in the sector, particularly in maintaining traditional craft skills. The **Ministry of Tribal Affairs** provides finance and development support and provides grant-in-aid to **TRIFED**, a national cooperative body with a mandate to bring about socio-economic development among tribal communities[55]. TRIFED aims to develop markets for tribal products, including crafts, and to provide education and training in handicrafts.

Specific policies include:

- **Ambedkar Hastshilp Vikas Yojana**[56]. Launched in 2001, Ambedkar Hastshilp Vikas Yojana aims to encourage self-help groups, support the creation of thrift and credit unions and run training on entrepreneurship for crafts workers. Key elements of the policy are support for design and technology upgrading, HR development, infrastructure, research and development and marketing support.
- **Make in India** focuses on 25 sectors including handlooms and handicrafts. Handloom exports, both traditional and contemporary were valued at USD353.9m (GBP294.8m) in 2017-18.
- **Handicrafts Mega Cluster Mission**[57]. Handicrafts employ 212,000 artisans in 744 clusters across the country. Clusters were identified in Surat, Varanasi, Agra, Bareilly, Hyderabad, Chennai, Lucknow and Mumbai. The Ministry of Textiles cluster policy and programme aims to create centres of excellence and infrastructure support for over 10,000 handicraft exporters and six million crafts workers. There are four mega clusters in operation to date: Bareilly, Lucknow, Bhuj, Jammu and Kashmir.
- **Craftmark**[58] is a sector-wide labelling standard. It certifies 250 craft enterprises which work with approximately 165,000 artisans across India.

Design, including fashion and textiles

Headline data

The design sectors were cumulatively worth INR188,320m (GBP1982.5m) in 2020 and were forecast to grow further in 2021 despite Covid-19. The sectors are estimated to be growing at 23-25% a year[59]. The Confederation of Indian Industry (CII) research into the design sector[60] identified manufacturing as the main employer of designers, closely followed by consumer goods and retail[61]. Just over half of independent design enterprises (54%) reported annual revenues of between INR1 and INR50 million (GBP10,000 - 0.5m); 53% reported working for clients outside India.

The United Nations Conference on Trade and Development (UNCTAD) noted

> India's creative goods exports nearly tripled from USD7.4 billion (GBP 6.16bn) in 2005 to USD20.2 billion (GBP16.83bn) in 2014. Design goods accounted for the largest share of creative goods exports with a value of USD17.9 billion (GBP14.91bn) in 2014. ... Fashion industry in India is likely to continue its growth as the country has a large young population. .... India had a positive trade balance in creative goods trade, which stood at USD15.4bn (GBP12.83bn) in 2014[62].

Of the various sub-sectors under the heading of Design, Fashion and Textiles is by far the most significant. Textile manufacture is one of the most important economic sectors in India, contributing 2.3% of India's GDP in 2016-17 with an estimated 45 million people working in or directly employed in textiles. Globally, India produces 95% of hand-woven fabric[63].

Policy, legislation and regulation

The Ministry of Textiles' Vision, Strategy and Action Plan for Indian Textile and Apparel Sector 2024-25 identified a number of actions related to fashion and textile design.

- Introduce an investment allowance of 15% across the textile and apparel value chain to encourage the growth of SMEs
- Work with state governments to support the building of new workspaces for textile production.
- Introduce a government-seeded equity fund to provide venture capital for start-ups.
- Develop integrated textile parks to become 'mega textile parks' (clusters)
- Make efforts to attract foreign direct investment into the high priority sub-segments of fabrics, processing, garments, technical textile and textile machinery manufacturing.

The **National Design Centre**[64] is run by the Ministry of Textiles. Its objective is to promote design and product development within the textiles sector and to promote quality within the handicraft and textile production sectors by orientating towards design. It provides trend forecasting, mentorship, R&D, exhibitions and industry networking.

The **Ministry of MSME** provides policy and support in relation to textiles through its Khadi and Village Industries Commission as well as general support through facilitating investment, promoting clusters and developing entrepreneurship skills.

The Department for Promotion of Industry and Internal Trade (DPIIT) is part of the Ministry of Commerce and Industry and leads on Make in India, Start Up India and IP. It is responsible for the **India Design Council** (IDC) a non-departmental public body The IDC's remit is to develop strategy related to all aspects of design in order to 'make India a design enabled country'[65]. It leads on design policy[66], runs the India Design Mark and the India Design Mark Awards and supports design education.

CSIR-CLRI Design & Fashion Studio is a department of the Ministry of Science and Technology. Established in 1993 its objective is to support the Indian Footwear Industry through trend forecasting, R&D, testing and knowledge exchange.

National Design Policy

India instituted a **National Design Policy** in January 2007[67]. This led to the setting up of the India Design Council two years later. The National Institute of Design (NID) was declared an institution of national importance In the National Institute of Design Act 2013.

India Design Council[68] is a strategic national body tasked with

- Design awareness and promotion – amongst the public and industry including MSMEs, as a key factor in innovation and economic competitiveness.
- Design development – including investment, research and development, education/industry partnerships and supporting IP management.
- Positioning India as a design destination by promoting Indian design and designers
- **India Design Mark** is a quality standard symbol promoted by India Design Council which has launched in 2012.

Design IP is protected under the Designs Act 2000 and the Designs Rules 2001. Designs are defined as 'new features of shape, configuration, pattern, ornamentation, composition of colours or lines or combination thereof, applied to any article... [that] appeal to and are judged solely by the eye'[69]. Designs are protected if they pass a test of novelty and registrations lasts an initial 10 years but can be extended for another five. Traditional designs are protected under geographical indication regulations (see Crafts section).

Film, Television and Radio

Headline data

The Film, TV and Broadcasting sector has usually outperformed India's GDP. A FICCI-EY report of 2021 shows that the media and entertainment sector in India is expected to reach INR1.73 trillion (GBP18bn) by 2021 and then grow at a rate of 13.7% to reach INR2.23 trillion (GBP23bn) by 2023[70]. Television is the largest segment and is expected to account for 40% of India's media market by 2024[71]. The 2014 Make in India initiative of the Indian government lists media and entertainment as one among the 25 sectors in which the government is focusing to encourage investments through relaxations on foreign equity norms and procedures.

Digital media (along with Games) are two sectors that have overtaken print media and filmed entertainment respectively in the last couple of years on account of the pandemic[72]. Digital media and Online gaming are the only two sectors in the screen media and entertainment industry that saw growth in 2020. Their contribution to the entertainment sector increased from 16% in 2019 to 23% in 2020.

The EY-FICCI report suggests that 2021 saw an all-time high of more than 100 films being released digitally on streaming services without a theatrical release[73]. The report says that during the pandemic consumers have got into the habit of watching films online, a habit they predict is here to stay.

India currently ranks first worldwide in terms of annual film output[74] and is the world's second largest TV market after China[75].

Television

Television was introduced to India with the Doordarshan (DD) channel on September 15, 1959 in Delhi with the help of UNESCO, initially focusing on programmes related to community health, traffic, duties and rights of citizens. Doordarshan is owned by the Ministry of Information and Broadcasting. As per a 2017 Press Information Bureau of India report, 'more than 90 % of Indian population receives Doordarshan programmes through a network of nearly 1400 terrestrial transmitters'[76].

As of March 2020, an estimated 212 million TV households which are being served by cable TV services, Direct to Home (DTH) services, Headend in the Sky (HITS) services, Internet Protocol Television (IPTV) in addition to a terrestrial TV network of Doordarshan.[77] Out of these, 42% are news channels and 58% are non-news channels[78]. There are 926 private satellite TV channels licenced by the Ministry of Information and Broadcasting[79]. Every broadcaster is mandated to follow the Programme and Advertising codes as prescribed under the Cable Television Networks Regulation (ACT), 1995. The Cable Television Network (Regulation) Amendment Act of 2011 mandated a complete shift from analogue cable TV to digital addressable system (DAS), the last phase of which was completed in March 2017. As of November 2020, the Ministry had granted 1702 Multi Service Operators (MSO) registrations[80].

The sector is closely connected and dependent on the advertisement industry. In terms of revenue generated the industry grew from INR740,000m (GBP7,648m) in the year 2018 INR780,000m (GBP8,061m) in 2019, which was a growth of 6.48%[81]. Subscriptions accounted for most of the revenue, which rose from INR435,000m (GBP4,496m) in 2018 to INR468,000m (GBP4,837m) in 2019.[82] The second largest revenue generator for the industry is advertisement, which rose from INR305,000m (GBP5m) in 2018 to INR320,000m (GBP3,307m) in 2019[83].

Film

The government continues to play a big role in the production, dissemination and preservation of film content in India. All activities related to films come under the supervision of the Information and Broadcasting Ministry of the government. The activities of the films wing of the I&B ministry are carried out by nine separate organisations:

1. **Central Board of Film Certification** (CBFC): a statutory body that takes care of regulating public exhibition of films in accordance with the Cinematograph Act of 1952.
2. **Children's Film Society India** (CFSI): produces children's films and TV programs in multiple languages.
3. **Directorate of Film Festivals** (DFF): The DFF organises film related events in the country including the National Film Awards, the Dadasahed Phalke Awards and the International Film Festival of India.
4. **Film and Television Institute of India** (FTII): The FTII provides film and television related education including degrees and post-graduate courses in direction, screenplay writing, cinematography, film editing, sound recording and design.
5. **Films Division**: The Films Division is headquartered in Mumbai (Maharashtra). It produces documentaries and news magazines promoting government programmes and documentation of Indian history.
6. **National Film Archives of India** (NFAI): The body is responsible for the preservation of India's film heritage and for facilitating Indian film-related research.
7. **National Film Development Corporation** (NFDC): The NFDC has produced more than 300 films in several Indian languages. The NFDC provides 100% funding to debutant film makers on socially relevant projects.
8. **Satyajit Ray Film and Television Institute**, Kolkata (SRFTI): The SRFTI was established in 1995 as an autonomous educational institution under the Ministry of Information and Broadcasting to provide professional education and technical expertise on film making and TV production.
9. **Film Facilitation Office** (FFO): The FFO was set up as part of the NFDC to facilitate film shootings in India by foreign film makers. The FFO has facilitated 120 international film makers from 27 countries to shoot in India since its formation[84].

Radio

At present India has 1203 operational radio stations[85]. 2020-21 saw a drop in revenues generated as live shows were suspended on account of lockdowns. The radio segment saw a drop of 54% revenue in

2020. Ad volumes are reported to have fallen by 27%[86]. In 2021 radio revenues recovered by 12%, but remained at 51% of 2019 levels. Ad volumes are still 6% behind 2019 volumes[87].

Radio in India functions in four different forms: Public radio or Akashvani, commercial radio, community radio, and amateur radio.

While the first three are regulated by the Ministry of Information and Broadcasting, the amateur radio stations are taken care of by the Wireless Planning and Coordination Wing which part of the Department of Telecommunications under the Ministry of Communications. Analogue terrestrial radio broadcast in India is carried out in Short Wave, Medium Wave and Frequency Modulation (FM). Private sector radio stations broadcast in FM only.

IT, software and gaming

Headline data

Since the 1990s India has emerged as a leading IT and software hub in India. The IT and Business Project Management (BPM) market accounted for 9.3% of India's GDP and 53% of the global outsourcing market in 2021[88]. India ranks third in developing disruptive technologies, with United States and China taking and first and second spots respectively[89]. According to India Brand Equity Foundation (IBEF) in the financial year 2022, the top three IT companies in India - TCS, Wipro and Infosys - are expected to offer 105,00 job opportunities[90]. According to Software Technology Parks of India (STPI), software exports by IT companies connected to it stood at GBP13.31bn by the first quarter of 2022. The National Association of Software and Service Companies' (NASSCOM) 2022 report[91] suggested the IT industry in India has reached GBP185bn in revenue with over 5m directly employed.

Development and Regulation

The liberalisation reforms of the 1990s were seminal for the IT industry in India. India's supercomputing programme was launched in 1991 and its first software technology park was created by the Ministry of Electronics and Information Technology in Pune in the same year, with the objective of promoting software exports from India and with a special focus on SMEs and start-ups[92].

Broadband service was made available to India from 2004. In 2010 the government auctioned 3G and 4G spectrum services and Tata Docomo was the first private operator to launch 3G services in India. A total of nine mobile operators had participated in the bid. The last spectrum auction took place in March 2021 and only three bidders participated in it- Airtel, Jio and Vodafone[93].

The growth of digital services in India has allowed subscribers to access most requirements with regard to information, education, commercial transactions and entertainment. It has revolutionised the telecom and television industries as well. Since 2015 the Telecom Regulatory Authority of India (TRAI) argued the growth of online content, also known as Over The Top (OTT) has reduced conservation, reproduction and distribution costs, which, in turn, has promoted the explosive growth in the supply of online content' [94].

The development of the IT and software sector in India has gone hand in hand with the growth in mobile technology. The mid-1990s was also the time when the telecom sector in India was liberalised and private players like Airtel and Vodafone emerged. With the increase in the FDI cap from 49% to 74%, further development was made in the mobile technology sector[95]. In 2016 Asia's richest man, Mukesh Ambani, entered the market with Reliance Jio. Jio gave its subscribers free voice calls and data at extremely low rates, thereby expanding mobile consumption in both rural and urban areas. Today Jio is the largest mobile operator in India followed by Airtel and Vodafone[96].

It is important to note the role that the smartphone revolution in India has played in the growth of the IT industry. A 2021 report by BCG noted that an average household in India has two smartphones[97]. The smartphone is seen as India's biggest equaliser. It has given people access to technologies that were previously the preserve of the rich alone[98]. This is best explained by the fact that in 2020 India had 749 million internet users across the country, making it the second largest online market in the world after China[99].

Museums, Galleries and Libraries

Headline data

The concept of galleries, libraries, archives and museums (GLAM) as a sector that shares similar features is relatively new. These are institutions which have the objective of providing access to knowledge. Reports suggest that despite India's rich cultural heritage, little effort has been made to integrate the different GLAM components. Consequently, museums, libraries and galleries in India need to be studied under separate subheads.

The growth in the museum and library sector is driven by an increasing interest in heritage and cultural tourism in recent years. This is also evident in local non-profit groups or smaller commercial ventures into creating neighbourhood museums, heritage walks, heritage experiences etc. The increasing focus by the present government on India's ancient heritage has ensured that schemes and budgetary allocations have emerged for the museum sector. In 2016, for instance, the Museums Grants Scheme was announced by the central government with the objective of providing financial assistance to the state governments, local bodies, societies and trusts for setting up new museums and the development of existing ones.[100] Consequently, the 2022 budget set aside a budget of INR1bn (GBP10.3m) for a museum at Vadnagar, the birth place of prime minister Narendra Modi, under the museum grants scheme.

Museums

An official government report in 2013 identified 833 museums, of which 142 were administered by the central government, either directly through the ministry of culture or through the Archaeological Survey of India (ASI) or other ministerial departments[101]. Another 300 museums are governed by state governments. The National Council for Science Museums (NCSM) administers 48 science centres/museums/planetariums across the country. Further there are museums attached to universities or heritage sites and those that are governed by other ministries such as railways, tourism, environment and the like.

Libraries

The number of public libraries in India as of 2018 is estimated to be 46746[102]. Of these, six libraries are directly administered by the Ministry of Culture.[103] Approximately 42 % of them are run by NGOs.[104]
The six libraries administered by the Ministry of Culture are: The National Library (Kolkata)- Apex body of the national library system in India; the Rampur Raza Library (Rampur); the Khuda Baksh Oriental Public Library (Patna); Delhi Public Library, which has a network of branches, sub-branches, zonal, community, braille and mobile libraries across India; the Central Secretariat Library (New Delhi); and Raja Rammohun Roy Library Foundation (Kolkata), which has responsibility, among other things, for financial and technical assistance to libraries across India.

In 2011 the National Knowledge Commission in 2011 submitted a report with 10 recommendations on libraries. This became the basis for the Ministry of Culture's National Mission on Libraries. The mission set up four working groups to carry out its plans and programmes, aimed at improving school libraries and setting up a national virtual library[105].

In 2016, the Indian Public Library Movement (IPLM) was launched by the non-governmental trade association and and technology advocacy group, the National Association of Software and Service Companies (NASSCOM), funded by the Bill and Melinda Gates Foundation's global library initiative. Recommendations made by the IPLM include that the subject of public library be shifted from the state list to concurrent list; need for a national policy that brings uniformity and standardization of existing library systems in India; the need for a separate ministry to deal with libraries; financial autonomy of the public library system; strengthening of the existing rural library network; and an Indian Library Service cadre like IAS, IRS.

Galleries

As per a 2018 FICCI-KPMG report, the Indian art industry is valued to be USD14.6 million dollars. There has been a growth of appetite for visual arts in India in recent years, driven mainly due to cultural initiatives like city-based art festivals, exhibitions in galleries and art biennales. India is the commercial gallery hub for the South Asian art market[106]. The contemporary art market in India emerged in the early 1990s, which was the earliest among South Asian countries. Currently 57% of modern and contemporary art galleries in South Asia are in India. The Indian art market went through a boom between 2005 and 2008, during which period significant investment was made to strengthen the gallery infrastructure of the country.

Key players

The art market has limited public funding so private patronage is the key component in supporting artists and art infrastructure. The **Ministry of Culture** in the government of India has only one art gallery under its purview- The National Gallery of Modern Art (NGMA), which was established in 1954. Subsequent branches of the gallery came up in Mumbai and Bengaluru. **Public museums** such as the National Museum in New Delhi or the Salarjung Museum in Hyderabad are spaces for the exhibit of art works as well.

Private art galleries which sell art works to the (affluent) public have historically dominated the Indian art market. There are currently over 1500 art galleries in the country[107]. These include Vadehra Art Gallery (New Delhi), Espace Gallery (New Delhi), Experimenter (Kolkata), Lakeeren Art Gallery (Mumbai) among others. Other big private art patrons include the Kiran Nadar Art Museum (New Delhi), The Gujral Art Foundation (New Delhi), The Inlaks Shivdasani Foundation and the Alkazi Foundation for Arts (New Delhi).

Performing and Visual Arts and Music

Headline data

A 2016 EY- FICCI report[108] on the dance and theatre industries in India stated that the ’performing arts industry in India reached INR236 billion (GBP2.44bn) in 2012 and is expected to witness a CAGR of 2.5% over 2012—2018 to reach INR275 billion (GBP2.84bn) in 2018’. A more recent study[109] suggested that the market worth of the performing arts is USD3.8billion (GBP3.13bn). Given the global market size of an estimated USD30billion (GBP24.7bn), this is a significant sector

The earlier FICCI report also noted an increase in average weekly time spent in listening to music on digital services and predicted that subscriptions for online music streaming services would exceed seven million by 2024. In fact, only two years [110] later, in 2018, Gaana, an Indian music steaming app claimed the market already stood at 150 million users and forecast it would reach 400 million by 2020, a reflection of the huge growth in mobile penetration in India.

Information on live industry is difficult to gather since it is so fragmented, and estimates are not always accurate[111]. But data from the Indian Music Convention and PwC puts the revenue of this industry at around USD280bn (GBP233bn)[112]. The Indian recorded music industry was valued at t INR10,680m (GBP110.4m) in 2018 [113].

In 2018 KPMG-FICCI[114] estimated the Indian visual art market is estimated to be worth INR17bn (GBP170m), a rise of INR2.4bn (GBP25m) over 12 months.

Performing Arts

The Indian performing arts industry includes traditional theatre, classical dance, opera and musical theatre, ballets, folk dance, contemporary concert dance, popular and alternative music, puppetry, magic, mime, recitation and spoken word, circus arts, stand-up comedy and performance art. While there are pan-Indian characteristics in the traditional performing arts, there are also discrete cultures separated by language, religion, caste and location that make it unusual to find any one specific art form that could be considered national in reach and appeal.

The premier government organisation for performing arts, the Sangeet Natak Akademi, recognises eight Indian classical dance forms—Bharatanatyam, Kathak, Kathakali, Kuchipudi, Manipuri, Mohiniattam, Odissi and Sattriya—while the Ministry of Culture also includes Chhau[115]. There are also hundreds of folk dances that are meant to be participatory and communal, associated with festivals, seasons and rituals, often part of specific Adivasi, caste, or religious identities. Jazz dance, Bollywood and various social dance forms like salsa have become exceedingly popular in the past twenty years, as has hip hop. There is considerable crossover between some parts of this sector and the mass media and entertainment industries[116].

Visual Arts

The visual arts eco-system in India comprises artists, art galleries, museums, auction houses and private non-commercial art initiatives. While the market is dominated by recognised artists, the interest in new artists is considerable. According to a CII (Confederation of Indian Industry) blog, 'E-platforms, offering curated, branded online auctions across an assortment of art and collectibles, also have significant future potential'[117].

The Indian art market was estimated to be INR17bn[118] and it is expected to grow to INR 160 billion by 2040.

The Indian market is still in its early stages of economic development and is expected to flourish in the wake of India's improving levels of education and growing economy. Interest is evident as, although the pandemic halted the majority of economic activities around the world, the visual arts market in India rose. The primary reason is that visual arts is considered a safe economic investment. The Indian art auction market had a turnover of INR8,809m (GBP91m) in 2021, up 57.3% from the previous year[119].

Music

Valued at INR10,680m (GBP110.4m)[120], the Indian recorded music industry has strong links with other creative industries sub-sectors. The TV industry, including music channels, music-based reality TV, or series that feature film music, commercial and music, generates revenue of about ~INR28,500m (GBP29456m);[121] audio streaming over OTT platforms like Jiosaavn, Gaana, and Wynk has led to more than 4,440 million monthly streams[122] with a market value of INR27,000m (GBP279m)[123]; FM radio generates revenue of INR21,700m (GBP244m);[124] live events and festivals (such as Sunburn festival[125], NH7 Weekender[126], and Gaana Crossblade)[127] generate a revenue of INR18,200 m (GBP188m)[128] [129].

The global growth in streaming platforms is supported by a digital distribution and publishing infrastructure which manage the technical aspects, licences and contracts with multiple platforms, then collect and distribute royalties enabling independent musicians and composers to focus on creating content. Since streaming platforms are global, so too are these support organisations. For example, Horus Music[130] and its sister organisation Anara Publishing[131] are UK based, with Indian subsidiaries providing targeted support for Indian musicians wanting to navigate domestic, diasporic and international markets.

The Indian film industry relies heavily on music with most films being musicals. Film producers often sell official soundtrack rights to produce the seed money for the film. Until 2021, copyrights were awarded to film producers instead of the actual songwriters[132]. Artists still earn few royalties even though there have been amendments. These royalties equal USD4m (GBP3.3m) in the Indian music industry[133]. The revenue generated that can be attributed to the music component of films is INR20,900m (GBP216m)[134].

Publishing

Headline data

The publishing industry in India is the sixth largest in the world[135]. In 2019 the Indian publishing market was estimated to be approximately INR 500 billion (GBP5.2bn) according to the Association of Publishers of India and EY-Parthenon report *Value Proposition of the Indian Publishing*[136]. 'In terms of revenue, publishing is one of the largest media-related industries in India, larger than print media (newspapers and magazines), digital media (social media, apps, online streaming, music, and games), filmed entertainment (movies), and radio and music'.

According to a FICCI report, India ranks third after the US and UK in English language publishing,[137] with a market size of c.INR10,000 crores (GBP1bn). Industry participants estimate a 10–15% share of foreign publishers in the market[138]. According to the Nielsen India Book Market Report (2015), 'Fifty-five per cent of trade sales are of books in English. Books in Hindi account for 35 per cent of Indian language sales'. But it is hard to come by accurate statistics about the size and turnover of Indian language publishing due to the highly localised and disorganised nature of the industry and because privately owned publishers are not legally required to publish their financial data.

According to Association of Publishers of India and EY-Parthenon's 2021 report: 'Between 2015 and 2019, the size of the publishing market nearly doubled, with the industry contributing to c.0.25% of India's GDP. In 2019, the total publishing market stood at c. INR500bn [GBP5.17bn] and is estimated to grow to c. INR800bn [GBP8.27bn] by 2024'. The key growth drivers for the industry are increase in enrolment ratios and decrease in drop-out rates in all educational institutions, demand for private education, increased expenditure on education, and support from govt. policy and initiatives[139].

As of 2019, the publishing industry directly and indirectly employed circa 1.2 million people. Financial data often clubs printing industry statistics together with publishing leading to a blurring of information. This is exacerbated as print media encompassing newspapers, magazines and periodicals has considerable crossover with electronic and digital media, since most large media houses have diversified to straddle multiple channels of communication.

Industrial model

The Indian publishing industry exports 1.5 times more than it imports. Some of the key countries where India exports include the U.S., the U.K., and a number of African countries such as Nigeria, Ethiopia, and Ghana[140]. Educational publishing forms the bulk of exports.

Trade publishing is minuscule in comparison with educational publishing,[141] but it commands the bulk of publicity and cultural capital. While book fairs where publishers and distributors set up stalls to interact directly with readers have been crowd pullers at all the major metros for decades, the past ten years have seen the proliferation of literature festivals and cultural events that are free and open to the public[142]. The New Delhi World Book Fair and the Kolkata Book Fair record more than 80,000 daily attendances and, in 2020, the Jaipur Literary Festival had 500,000 festival-goes; during the pandemic lockdown, the online show in 2021 had 27.6 million viewers.

Meanwhile Indian educational publishing is growing. It exports to over 188 countries and India is a market leader in the academic publishing, although the lack of a digital footprint is a likely barrier to growth[143]. According to one source, India exported printed books worth USD106.42 million (GBP87.6m) in the year 2020-2021 (Apr-Nov)[144]. This data is complicated by the fact that printed stationery items are incorporated into the printed books category. Indian exports of printed books, newspapers and pictures totalled USD330m (GBP27m) during 2021, according to the UN's COMTRADE[145] international trade database.

Policy, legislation and regulation

The Indian government has several institutions that preside over the world of letters in India. It funds autonomous bodies with a mandate for publishing books in multiple Indian languages at affordable rates such as The National Book Trust (NBT), the Children's Book Trust (CBT) and the publishing divisions of the Ministry of Information & Broadcasting, the NCERT and the Sahitya Akademi. It offers grants for language promotion and translation, and schemes for authors.

The major government funded support of Indian literature comes through the various state and central Sahitya (Literature) Akademis. Set up in 1954 as an autonomous national academy of letters under the Ministry of Culture, the Sahitya Akademi is 'the central institution for literary dialogue, publication and promotion in the country and the only institution that undertakes literary activities in 24 Indian languages, including English'[146].

4. Deep Dives

Deep Dive 1: Design for Sustainability

Introduction

Sustainability is a driver for public policy and innovation investment in India, as it is in the UK. In this section we investigate the ways in which technology and, in particular, design-led innovations are transforming business practices and supply chains across the crafts, fashion and textiles sectors. The deep dive considers the areas where design and innovation are already creating new systems and products, and asks where there is scope to build on this strength in ways which might have a broader impact.

Indian Design

When the first National Institute of Design was established in Ahmedabad in 1961, with a view towards deploying 'the design disciplines inherited from the Bauhaus as a tool for national regeneration', India's economic policies were largely geared toward protectionism, with design being regarded as a 'postponable luxury, or as an option to be applied after a product was developed rather than integrated into the development process'[147]. The liberalisation of the Indian economy in the 1990s meant that design awareness accelerated, necessitating interventions at the policy level that could keep abreast of industry and consumer demands. On February 8, 2007, India became one of a handful of countries with a national policy around design. Representatives from the Confederation of Indian Industry (CII), the National Institute of Design (NID), and the Department of Industrial Policy and Promotion (DIPP) along with design professionals across the country were involved in the drafting. The policy addresses design education, application, promotion and standards, with a view to incorporating design principles in industry to gain a competitive edge in global markets. The focus was on creating suitable conditions for achieving a 'design-enabled innovative economy' driven by 'original Indian designs in products and services drawing upon India's rich craft traditions and cultural heritage'. The policy's catchphrase 'Designed in India, Made for the World' aimed to encompass this integration of traditional design practices with contemporary innovative processes to develop a national brand.

Indian Textiles

Textiles has historically been a highly significant sector for India, with high value addition and product diversification. The textiles sector is classified as within, and constitutes a significant proportion of, the handicrafts sector. According to Invest India, textiles and apparel is India's second largest employer providing direct employment to 45 million people and to 100 million people in allied industries[148].

India is a leading supplier of natural fibres like cotton, jute and silk; accounts for 95% of all hand-woven cloth globally and is the largest producer of cotton in the world. Cotton production supports 5.8 million farmers and 40-50 million people in allied sectors.

India also produces 6% of the global market's technical textiles, a market that has grown at a compound annual rate of 10%. Exports of textiles (including cotton yarns/fabs/made-ups/handloom products, man-made yarns/fabs/made-ups, handicrafts excluding handmade carpets, carpets and jute including floor coverings) stood at USD29.8billion (GBP24.55bn) between April-December 2021, and the Indian textiles market is expected to be worth more than USD209billion (GBP172bn) by 2029[149]. India scaled its highest ever exports tally at USD44.4 billion (GBP36.6bn) in textiles and apparel including handicrafts in 2021-22, a substantial increase of 41% and 26% over corresponding figures in 2020-21 and 2019-20[150] respectively.

Investment, markets and supply chains

Textiles are a significant source of foreign direct investment (FDI). 100% FDI is possible under regulations for the Indian textiles sector under what is called the automatic route. This states that the non-resident investor or the Indian corporation does not need permission from the Government of India for the investment. FDI in Fashion and Textiles reached USD 3.75 billion (GBP3.13 billion) in March 2021[151]. Major Indian textiles firms operating in India include those identified in the Design and Fashion section above who operate to various extents in each of the market segments. The market also includes the artisanal producers discussed in the Crafts overview. There is a third section of the textiles market, the power loom and garment factories, which work for global brands producing textiles and clothing for the international retailers.

Circular economy

'The circular economy is a systems solution framework that tackles global challenges like climate change, biodiversity loss, waste, and pollution'[152].

Fashion and textiles have been accused of following a 'take-make-dispose' pattern, particularly in the 'fast fashion' segment that places the full cost of production on the environment and social systems in the places garments are made, while selling clothes as cheaply as possible for a market based elsewhere. Textiles produce 1.2 billion tonnes of CO_2 equivalent emissions each year [153], more than international flights and maritime shipping. And Bauck[154] concluded that the fashion industry emits a similar amount of greenhouse gasses as Russia.

In 2019, Aditya Birla Fashion and Retail Ltd. (ABFRL) announced that it would join the Circular Apparel Innovation Factory (CAIF) launched by Intellecap, the advisory arm of The Aavishkaar Group, which works to build businesses that can benefit underserved segments across Asia and Africa. The CAIF was launched in 2018 to search for, seed, support and scale circular textile and apparel innovations in India. As a marquee name in fashion and lifestyle, ABFRL's partnership with CAIF is expected to foster an ecosystem wherein not only ABFRL, but the entire fashion industry can potentially be recognised as global innovators in circular fashion[155].

The NITI Aayog's efforts have shaped the Circular Economy & Resource Efficiency discourse in India, through the publication in partnership with the European Union-Resource Efficiency in India Initiative (EU-REI) of its *Resource Efficiency Strategy for India*[156] in 2017. This focused on the need for strengthening capacity, regulation and efficiency measures to advance India's climate and SDG agenda. To complement this, the National Resource Efficiency Policy (NREP) in 2020, which focuses on crucial economic sectors and prioritises textiles, packaging and plastics; nonetheless, it is instructive to note that while these policies have specifications for adherence to general environmental standards, there is still very much a need to mandate action for transitioning to circular processes in the textile and apparel sector[157].

Social sustainability

Following the Rana Plaza factory collapse in Bangladesh in 2013 which killed more than 1,100 workers, global fashion brands including luxury names such as Dior and Saint Laurent came under intense scrutiny with customers asking about their production processes. The result was the Accord on Building and Fire Safety in Bangladesh[158], an 'independent, legally binding agreement between brands and trade unions to work towards a safe and healthy garment and textile industry in Bangladesh'. This Accord has proved largely successful and, in 2018, 200 brands and retailers agreed to extend it for a further three years. These brands source from over 1,600 Bangladeshi ready-made-garment factories that employ over two million workers. In September 2021 an extended Bangladeshi model of legally enforceable commitments, coupled with independent oversight and obligations to pay prices sufficient to ensure safe workplaces came into effect. 170 brands had signed up as of August 2022[159].

In contrast, in India brands have not signed up to a legally enforceable agreement, rather there have been a series of attempts at industry-led reform. In 2016 a group of luxury fashion houses proposed the Utthan Framework[160] aimed at improving factory safety for Mumbai's embroidery workers. Signatories included LVMH (owner of Dior and Fendi), Burberry and Mulberry and Kering (Gucci and Saint Laurent). The pact aimed to improve transparency regarding who was employed in the workshops where subcontracted production was carried out. However, as a New York Times investigation reported in 2020[161], the pact had little effect, with many embroiderers still fulfilling orders in unregulated workshops that did not comply with Indian safety regulations.

There are opportunities here for collaboration. As Ritu Sethi, founder of the Craft Revival Trust, argued - ethical brands aiming to make worker conditions sustainable can only do so through thorough understanding of the Indian crafts context and formal acknowledgement of the value added to fashion brands by Indian design-craft expertise. Meanwhile, Indian artisans could benefit from learning about international regulations and markets.

Government policy

The Indian government has been proactive in framing export promotion schemes to benefit the textiles industry. It has approved a USD1.44billion (GBP1.19bn) Production Linked Incentive scheme for textile products, particularly man-made fibre apparel, fabrics and 10 segments of technical textiles products. On the other hand, government funds made available for schemes such as the National Handloom Development Programme (NHDP), Comprehensive Handloom Cluster Development Scheme (CHCDS), Handloom Weavers' Comprehensive Welfare Scheme (HWCWS), and Yarn Supply Scheme (YSS) have shrunk over the years from INR5,056million (GBP52.62m) in 2016-17 to INR3,900m (GBP40.49m) in 2019-20[162].

Textiles

In October 2021 the Ministry of Textiles announced funding for seven Mega Integrated Textile and Apparel Parks, known as MITRA Parks. The scheme is situated within the Aatmanirbhar Bharat, self-sufficient India, policy; the UN's sustainable development goals; and the 5F (farm to fibre, to factory, to fashion, to foreign) vision. Each MITRA Park sits under a state government authority and is intended to operate across the value chain, with the objective of developing economies of scale and an enterprise ethos that generates innovation, collaboration, growth and foreign direct investment. Each park is expected to directly generate 100,000 direct jobs and a further 200,000 indirectly. In total, 17 MITRA Parks were proposed in the challenge process by 13 state governments[163].

Handicrafts

A drive for growth in exports is reflected in the Office of the Development Commissioner's (Handicrafts) policies. This is the national nodal agency for craft and artisan-based activities. It is responsible for implementing schemes such as the National Handicraft Development Programme (NHDP), Ambedkar Hastshilp Vikas Yojana and Comprehensive Handicrafts Cluster Development Scheme (CHCDS) which assist in the development, marketing and export of handicrafts, and the promotion of craft forms and skills. Since 2016, the Pahachan scheme has registered 2.69 million artisans of an estimated 7 million, in a bid to organise and standardise the Indian handicrafts sector. However, these efforts are still at a nascent stage despite their acknowledged economic value, especially in terms of export potential.

Supply chain innovation

Industrialised fashion and textile innovation

While industrialised textile production and garment manufacture in India are generally very efficient, there are key areas in the supply chain where delays, costs and waste are produced[164]. In particular these are:

- The bullwhip effect where each site in the supply chain - end customer, retailers, distributor and manufacturer - each add small quantities to their customers' forecasts to bring down material costs and ensure supply. This amplification leads to more garments being produced than the demand forecast, to losses as retailers and distributors discount to drive sales, and to wastage as unsold garments are scrapped.
- Just-in-time inventory management. Just-in-time is a mechanism to enable distributors and retailers to reduce warehousing costs and improve flow through the system. It should eliminate the bullwhip effect, however, in uncertain trend driven markets such as fashion, while just-in-time may be a good management tool for manufacturers, it works less well for retailers who are responding to demand from customers on a day-to-day basis.
- Garment producers create samples for fashion buyers and designers to approve. This process can take a number of weeks as different fabrics, prints and shapes are made-up and revised.

This can lead to delays in production that mean garments miss the season-window and, consequently to reductions in sales forecasts. This can leave fabric producers and garment manufacturers with excess material to be disposed of.

Traditional textile innovations

Traditional textiles have seen significant innovation within distribution and retail with the development of cooperatives launching retail outlets following the model set by FabIndia and craft markets such as Dilli Haat in Delhi and the Ministry of Minority Affairs' Hunar Hatt showcases where artisans sell directly to customers.

One model of improving sales for handloom weaver co-operatives particularly adapted to a decentralised mode of production has been demonstrated by Dastkar Andhra Marketing Association (DAMA), established in 2001. It provides design and technical support to over 400 weavers through 20 handloom weavers co-operatives and groups located across seven districts of Andhra Pradesh and Telangana. Interventions are executed in production (loom support through market orders in the initial stage), stockroom (affording aggregation of product) and marketing through different sales channels. It aggregates products across various weavers' co-operatives and co-ordinates and distributes according to market demand. DAMA sells the products from the designated looms directly. The average value of production from looms working for DAMA is 30% higher than the non-DAMA looms in the cooperatives. DAMA asserts that one of the results achieved through its model is in generating more regular work and higher earnings to the weavers[165].

Another model for maintaining continuous demand for craft skills has been successfully demonstrated by Anokhi[166] since 1970. Originally set up as a business connecting handblock printers in Jaipur with a wider market through design value addition and marketing expertise, Anokhi was an early mover in introducing Jaipur handblock cotton textiles to fashion retail chains in the UK when it became a primary supplier for the brand Monsoon. Since then, Anokhi has supplied a diversified range of textile products to retail businesses in the UK, US, France, and other countries. The maintenance of consistent and sustained demand has enabled independently owned printers and tailoring establishments to grow as businesses.

Technical textiles

Technical textiles are engineered textile materials and products manufactured primarily for technical performance and functional properties. Technical textiles products are divided into 12 broad categories (agrotech, buildtech, clothtech, geotech, hometech, indutech, mobiltech, meditech, protech, sportstech, oekotech, packtech) depending upon their application areas. Technical textile accounts for approximately 13% of India's total textile and apparel market, and is regarded as a high value sunrise sector. The Indian technical textiles segment is estimated at USD16billion (GBP13.18bn), contributing 0.7% to India's GDP[167] and accounting for nearly 6% of the world market. Technical textiles as a segment has been enjoying strong a growth rate of 12% in India, compared to the world average growth rate of 4%. The availability of raw materials such as cotton, wood, jute and silk along with a strong value chain, low-cost labour, power and changing consumer trends have been identified as some of the contributing factors driving growth. However, the penetration level of technical textiles is relatively lower in India at 5-10%, against 30-70% in economically developed countries[168] indicating potential for further growth.

The Cabinet Committee on Economic Affairs (CCEA) established a National Technical Textiles Mission (NTTM)[169] in 2020, with a budget of INR14.8billion (GBP150m) over a four-year implementation period between 2020-24, in order to tap into the export potential of the segment. The NTTM scheme aims to ensure average growth rate of 15-20% per annum taking the domestic market size to INR3-4trillion (GBP33-41bn) by the year 2024 through market development, market promotion, international design collaborations, technical textile research grants[170], investment incentives and promotions, investment promotions and Make in India initiatives. It is targeting 10% average growth in exports per year by setting up a dedicated Export Promotion Council for Technical Textiles.

India's technical textiles manufacturing capacity came into the spotlight during the beginning of the Covid-19 crisis with the ban on export of critical medical equipment including N95 face masks and protective gears. At the time, India was entirely import-dependent for PPE kits. From manufacturing zero PPE kits in March 2020, it soon rose to manufacturing a quarter of a million a day in 60 days, becoming the second largest manufacturer after China. Today, India produces around 0.45m PPE kits and more than 15m masks a day[171].

Deep Dive 2: AVGC: Bridging creativity with technology

Dynamic scope

The film, media and entertainment industry in India have in recent years emerged as sectors with the strongest economic growth potential. The key reason behind that, as stakeholders note, is the digital transformation taking place in the country. The internet was introduced in India as recently as 1986, when it was made available to only educational and research communities. Today with the penetration of smartphones and 3G and 4G broadband services to remote corners of the county has revolutionised the entertainment industry. That, coupled with a significantly large youth population, a strong IT sector, and the central as well as state governments' policy interventions have resulted in the media and entertainment industry being driven largely through digital innovations. A 2015 consultation paper by the Telecom Regulatory Authority of India (TRAI) suggests that telecom service providers are overwhelmed by online content, also known as Over The Top (OTT) applications and services: 'Digitalization of content has reduced conservation, reproduction and distribution costs, which, in turn, has promoted the explosive growth in the supply of online content'[172].

Market drivers

The interest in the AVGC sector in India is mainly driven by the fact that the country happens to be one of the most important software hubs of the world. According to National Association of Software and Service Companies (Nasscom), the Indian IT industry's revenue is expected to touch USD227bn (GBP188bn) in 2022-23 from USD196bn (GBP163bn) in FY21[173]. The same IBEF report noted that software based product industry in India is expected to reach USD100bn (GBP83bn) by 2021; the IT industry added 450,000 employees in the financial year 2022, which is the highest addition in a single year.

Further, the extensive penetration of internet and social media into urban and rural households has driven the behavioral pattern among the country's population to be more digitally oriented. The digital infrastructure has seen an expansion with government initiatives in the last decade and more so in the last couple of years during the pandemic. Internet penetration increased by 5% between 2020 and 2021 to reach 834 million subscriptions. Out of this 795 million had broadband access, while only 24 million Indian households had a wired broadband service[174]. Cheaper and easier availability of smartphones has been yet another factor driving consumption of digital and IT based products. By 2021, smartphone users in India had reached 503 million[175].

The pandemic has in fact played a big role in expanding the market for the digital media and consequently the AVGC sector. Reports suggest that in 2020 the growth in the media and entertainment sector was in essence driven by digital media.[176] The digital segment of the media and entertainment sector registered a growth of 26 % in 2020 with digital and OTT advertising growing by 24%. The EY-FICCI report of 2020-21 pointed out that 28 million Indians (up from 10.5 million in 2019) paid for 53 million OTT subscriptions in 2020 leading to a growth of 49% growth in digital subscription revenues[177]. In 2021 the digital media segment grew by 29%, thereby surpassing the 2020 trends. The revenue generated by the segment reached INR303bn (GBP3.13bn) in 2021. While digital advertising grew by 29% in 2021 to reach INR246bn (GBP2.54bn), digital subscriptions also grew by 29% to reach INR56bn (GBP580m)[178].

The top performing apps in terms of revenue generated in the media and entertainment sector in 2021 were Disney+Hotstar, YouTube, SonyLiv, Zee5, and Netflix[179]. The content on OTT platforms has been largely responsible for driving growth in the animation and visual effects sector. The KPMG report on media and entertainment industry 2020 suggests that one of the key trends emerging in the animation industry in recent years is 'the focus on animated IP content which is influenced by Bollywood film franchises'[180]. The animation and VFX industry has shown a threefold increase in revenue share from 2011 to 2021. While the animation industry grew by 10% between 2020-21 to reach INR 24.5 billion (GBP253.4m), VFX and post-production segments contracted by 62% and 58% respectively[181]. In 2021 the animation industry grew by 24% to generate INR 30.5 billion (GBP315m). The VFX sector on the other hand grew by 103% to generate INR 38.2 billion (GBP395m) and post-production by 49% to generate INR14.4bn (GBP150m)[182].

AVGC – the four sectors

Animation

The animation industry of India has developed a unique voice. To begin with, it is much younger than its counterparts in North America and Europe, but in a short space of time it has emerged as a fairly evolved industry and much more locally driven than elsewhere[183]. From the early 2000s that we see sharp growth in Indian animation as many Indian cartoon channels began producing their own content rather than depending on American and Japanese shows. In 2018, Sony launched a channel with 100% locally produced content[184]. A 2019 report suggests that domestic broadcasting of animated content accounts for 30-35% of the revenue generated by the Indian animation segment[185].

VFX

By the 1990s, Hindi, Tamil and Telugu films began depending on VFX for their content and the 2000s saw a major explosion in the industry with a movie like Krish 3 making a record 3500 VFX shots. The milestone moment in the industry, however, was the release of *Bahubali-The Beginning* in 2015, which was packed with visual effects. This was the first Indian film to use VFX produced mainly by Indian companies and about 50 per cent of the work was done by the Hyderabad based studio, Makuta VFX. Thus, the release of Bahubali was a ground-breaking moment for the animation and VFX Industry in India. Productions like RRR and Brahmastra are expected to dramatically alter the storytelling business in India with more and more domestic content making use of extensive visual effects. In 2018, for example, several Indian films were made with extensive use of visual effects, with films such as *Zero, 2.0* and *Thugs of Hindostan*. An estimated INR700 million (GBP7.23m) was spent on VFX in *Zero* which featured around 5000 VFX shots. The film *2.0* on the other hand, onboarded 10 different VFX studios and some 3000 technicians from the across the world to work on the film[186].

Gaming

The history of the gaming industry in India is short. The sector's birth can be traced to the early 1990s when it was driven mainly by the penetration of domestic computers and Play Station consoles. From these early steps, the industry has rapidly grown with India emerging as one of the top gaming markets in the world. The rapid spread of smartphones and the 4G network along with two years of pandemic driven lockdown have resulted in a gaming revolution for India. A 2021 BCG Sequioa suggested that the mobile gaming industry in India is expected to triple its revenue to USD5trn (GBP1.15trn) by 2025[187]. The number of game development companies in India has grown from 25 in 2010 to 275 in 2019[188].

Comics

The comics industry in India is traced back to the 1920s when Hindi, Urdu and regional language magazines for children were published[189]. In its traditional form, the comics sector is represented in the publishing industry. In recent decades, however, the industry has seen a sharp decline because of increasing competition from satellite television and cartoons on the internet[190]. To keep up with the needs of digitalisation, several comics publishers have been releasing their comics or graphic novels in digital formats[191]. Diamond Comics, for instance, is reported to have digitised 2000 of their comics by 2021 and plan on increasing it to 10,000[192].

Government policy

One key challenge facing the digital innovations sector in India was lack of regulation and streamlining from the government. That changed in 2021 with the Information Technology rules which prescribe a framework for the regulation of digital content and have been formed to provide a level playing field to all stakeholders in the industry. They also make clear that the rules pertaining to the digital media sector will be administered by the Ministry of Information and Broadcasting[193]. The AVGC task force is to submit its first action plan by end of August 2022.

As per the latest government announcement made by the Minister of Information and Broadcasting on June 26th, 2022, the media and entertainment ecosystem wants to touch GBP82bn by 2030[194]. AVGC is expected to steer this growth.

Regional clusters and state interventions

Mumbai

In keeping with the rich tradition of filmmaking, the Maharashtra government was one of the first states to introduce an official AVGC policy in the country. The state had announced its first Information and Technology policy in 1998 to generate employment and increase efficiency in the sector. As of 2015, the state ranked second in IT in the country based on overall performance[195]. The state government's IT policy of 2015 aimed to attract investment of INR500,000m (GBP518m) by IT Parks and AVGC units in the state and to raise exports from the AVGC sector up to INR1m (GBP10,370)[196].

The Maharashtra government's AVGC policy 'will address the gap in qualified trainers through a train-the-trainer program based on industry's needs'[197]. It is also focused upon attracting global companies in the field, capturing a larger share of the outsourced international AVGC work, and facilitating a legal framework for intellectual property creation and protection. Accordingly, some of the key targets of the state in the sector include creation of an AVGC Centre for Excellence, establishment of a public private partnership digital art centre and setting up a venture capital fund for the AVGC sector.[198]

Karnataka

Karnataka ranks first in overall IT performance in the country and was the first state to announce an official AVGC policy [199] in 2012. About one third of India's software technology parks are located in Karnataka and it constitutes about 20% of IT companies in India. Almost every leading IT company has its presence in the state including Wipro, Infosys, IBM and Microsoft. It is worth noting that the capital of the state, Bengaluru, is the fourth largest technology cluster in the world after Silicon Valley, Boston and London[200]. The state launched the country's first AVGC centre for excellence in Bengaluru in January 2022.

Close to 11 per cent of the country's animation, VFX and game development studios are based in Bengaluru and about 14 per cent of AVGC professionals are based out of the city. Further, Karnataka has more than 80 training institutes providing education on AVGC and about 10,000 students being trained annually there[201].

The vision for Karnataka's AVGC policy 2017-22 includes the following:

- Developing the state as a leading global AVGC hub in terms of export revenues, projects acquired and employment created.
- Develop at least one two tier city in the state as a hub for AVGC after Bengaluru.
- Focus on skill development to build a pool of world class designers, animators, technicians, gaming professionals etc.
- Establish an AVGC centre for Excellence, an AVGC finishing school, and a Digital Post Production AVGC lab.
- Assist talent hunt programs and introduce AVGC courses and specializations in premier educational institutes such as IIIT Bengaluru and IIT Dharwad.
- Gain global prominence by attracting large and high profile AVGC projects to raise the profile of the Karnataka AVGC sector.
- Encourage creation of IP from Karnataka AVGC companies[202].

Telangana

The Telengana government's AVGC policy aims to open an Animation and Gaming incubation centre, known by the acronym IMAGE (Innovation in Multimedia, Animation, Gaming & Entertainment) in Hyderabad in Spring 2023 to provide an ideal environment for start-up businesses in this sector, and to develop an AVGC academy to create a sustainable talent pool. In order to attract investments and innovations in the AVGC sector the state government has been offering fiscal incentives such as tax exemptions and reimbursement of specific costs.

Finally, it is worth noting that India's tier II cities are experiencing a revolutionary moment in the digital innovation space. The film industries in Meerut, Malegaon and Indore, for instance, are making news for creating content with a unique flavour[203]. Stakeholders believe that with easier access to technology as a result of Digital India, and developments in social media and creative technologies, these cities have the talent and aspirations to produce low budget content.

Deep Dive 3: The Geography of Indian Creative Industries

This Deep Dive provides a perspective on the geography of India, including a focus on two cities. At every turn in our research, we were reminded of the fact that India has features more like many countries rather than one, with very strong regional cultural traditions, multiple languages and strong regional/state governments. No study of the creative industries in India could be complete without a fuller understanding of that geography.

Regions and Zonal Cultural Centres

In 1985 the Ministry of Culture set up seven overlapping cultural zones with autonomous centrally-funded Zonal Cultural Centres to protect, preserve & promote various forms of folk art and to create awareness about regional cultural heritage[204].

Zone	Zonal Cultural Centre	Member States
North Culture Zone	Patiala	Chandigarh, Haryana, Himachal Pradesh, Jammu and Kashmir, Ladakh, Punjab, Rajasthan, Uttarakhand
North Central Culture Zone	Allahabad	Bihar, Delhi, Haryana, Madhya Pradesh, Rajasthan, Uttar Pradesh, Uttarakhand
East Culture Zone	Kolkata	Andaman and Nicobar Islands, Assam, Bihar, Jharkhand, Manipur, Odisha, Sikkim, Tripura, West Bengal
North East Culture Zone	Chümoukedima	Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, Tripura
South Culture Zone	Thanjavur	Andaman and Nicobar Islands, Andhra Pradesh, Karnataka, Kerala, Lakshadweep, Puducherry, Tamil Nadu, Telangana
South Central Culture Zone	Nagpur	Andhra Pradesh, Chhattisgarh, Goa, Karnataka, Madhya Pradesh, Maharashtra, Telangana
West Culture Zone	Udaipur	Dadra and Nagar Haveli and Daman and Diu, Goa, Gujarat, Maharashtra, Rajasthan

Figure 4.1 States within each Zonal Cultural Centre

Cities

India's urban cities and towns are the centres of the organised economy of creative industries activities, and where the major international trade happens. Nonetheless, it must be noted that the vast majority of economic activity even in the most urban landscape, is still unorganised, and under the informal economic sector[205]. All cities have mixed use areas, including slums, informal settlements, and marketplaces, where craftspeople and artisans live and work.

The categorisation of cities in India according to tiers is done by the Government Pay Commission, which categorises based on the House Rent Allowance that a government employee has to pay[206]. There are eight Tier 1 (X) cities, with populations ranging from 18 million (Mumbai) to 5 million (Pune). There are 97 Tier 2 (Y) cities with populations from 4 million (Surat) to 500,000 (Kurnool)[207]. It is worth noting that even a Tier 3 (Z) city like Sonipat (just to the north of Delhi) has 292,000 people, which is comparable to a city like Newcastle in size and historical antiquity.

The Ministry of Urban Development leads the Smart Cities Mission, part of the Government of India's strategic policies inaugurated in June 2015 with a strong motive to develop 100 smart and sustainable cities. 100 cities have been identified as part of the mission with over 5000 funded projects[208]. Although the role of creative businesses in India's smart cities initiatives has not been explicitly acknowledged, there is considerable opportunity for engagement and influence – particularly in strong AVGC clusters.

In 2004 the UNESCO Creative Cities Network (UCCN) was created 'to promote cooperation with and among cities that have identified creativity as a strategic factor for sustainable urban development'. The network covers seven creative fields (craft and folk art, media arts, film, design, gastronomy, literature and music) and cities and candidate cities need to make an application stating how they will contribute to the objectives of the network. There are six Indian cities in the network: Jaipur (crafts and folk art), Hyderabad (gastronomy), Srinagar (crafts and folk art) Varanasi (music), Mumbai (film), Chennai (music). Applications are routed through the Union ministry in partnership with local municipal corporations and states. Mohammad in *India Today*[209] noted that the UCCN tag recognises artisans' skills and creativity of artisans and allows cities like Srinagar to present handicrafts on a global stage. Whilst India does not have a 'creative cities' policy there is support across Union and state governments for the designation.

All of India's major creative industries centres are located in major cities. Delhi leads with the highest number of seven sectors, while Mumbai has six. Both of these cities are populated with international diplomatic, non-profit, cultural and trade organisations and bursting with creative and cultural industry (CCI) activity and platforms.

Industry	#1 City	#2 City	#3 City
Advertising & Marketing	Mumbai	Delhi	Bengaluru
Architecture	Delhi	Mumbai	Bengaluru
Crafts	Ahmedabad	Varanasi	Lucknow
Design – Fashion, Graphics, Product	Mumbai	Delhi	Bengaluru
Digital Media, Film and Entertainment & AVGC	Mumbai	Delhi	Bengaluru
Galleries Libraries & Museums	Delhi	Mumbai	Kolkata
Performing Arts	Delhi	Mumbai	Chennai
Publishing	Delhi	Mumbai	Chennai

Figure 4.2 Creative industries sector hubs

Case Study: Hyderabad

Hyderabad is the capital and one of Telengana's largest cities. It was previously the capital of the Andhra Pradesh. Situated in Southern India, the civic infrastructure of the city is overseen by the Greater Hyderabad Municipal Corporation governed by the Telengana Rashtra Samithy Party (TRS) who also govern Telengana State. The city of Hyderabad covers an area of 625 square kilometres and has a population of 6,809,970 making it the fourth most populous city in India as of the 2011 census. It is designated as one of India's 23 metropolitan areas. It is also considered a one of India's eight Tier- X cities (also commonly known as Tier 1)[210]. It is one of the 100 smart cities and a UNESCO creative city of gastronomy for its flourishing and unique gastronomic culture.

AVGC

The Department of Industries and Commerce in the Government of Telengana has made AVGC sector a priority as part of its Invest Telengana policy. This follows on from the 2022-2023 Government of India announcement by the Prime Minister of wanting to make India a hub for game developers and gaming services given the huge software industry potential that already exists in the country and in the city.

Hyderabad owes much of its growth to the jobs created by the information technology industry in the city. HITEC City (Hyderabad Information Technology and Engineering Consultancy City) – the country's own Silicon Valley - and Genome Valley next door are some of the tech industry's biggest manufacturing and research and development arms[211]. Spread across 200 acres, HITEC City, commissioned in 1997, was created to turn the city into a global destination for IT and software solutions. Research and development have been key to the sector and global companies such as the Microsoft Indian development centre located there in 1998. Some of the major IT companies in the city include Google, IBM, SAP, Deloitte, Ericson and HP. Companies such as Facebook, Amazon (Amazon's biggest building worldwide is, in fact, in Hyderabad) and the RMZ groups also have purpose-built campuses and buildings in the area. Understanding the need to think about arts and sciences together, the Shilpakala Vedika a terracotta auditorium was built to host cultural programmes.

To boost the AVGC ecosystem, the state government has worked closely with investment partners such as Disney, Sony, EA, Makuta and others. The government has identified 150 companies working in VFX, providing employment to almost 30,000 people. The government has a dedicated AVGC policy- allowing up to 100% foreign direct investments in teleports, DTH, multisystem operators and broadcasting services. The Telengana State Industrial Infrastructure Corporation is now the nodal agency to create new AVGC parks and development areas to set up AVC clusters with reputed private companies[212].

Figure 4.3 HITEC City[213]

Telegu film industry and Ramoji Film City

Ramoji Film City also called a 'city within a city' is one of the largest film production centres in the worldrea of 2000 acres, the INR10,000 million (GBP103m) Film City comprises 40 studio floors, a fully-equipped prop shop, a set design and construction division, state-of-the-art equipment, experienced production staff, and hi-tech digital editing, dubbing and sound-recording facilities. In addition to offering 100's of films a space to shoot and postproduction facilities, the film city also doubles up a 'theme park' offering thematic holiday destinations.

Figure 4.4 Ramoji Film City[214]

The Telegu film industry based in Hyderabad, also called Tollywood, is based in Film Nagar, a neighbourhood that is home to a number of studios. Telegu film is currently one of the biggest exporters of Indian films alongside Bollywood. There are screenings across North America and Europe with some films recording huge box office. In fact as of July 2022 some of the highest grossing Indian films worldwide consistently feature Telegu films like *Baahubali* and *Baahubali 2*[215]. Since the formation of the state of Telengana in 2014 a number of films on Telegana tradition and culture have gained prominence. Walt Disney Pictures also produced its first ever South Indian film in Telegu (*Once Upon a Warrior*, 2011). Media consulting firm Ormax Media in its annual report noted that, with a 29% share of the box office, the Telegu film industry took top position as the market leader in the Indian film industries. In 2021 it had a staggering footfall of 161 million and £70 million revenue[216].

Case Study: Jaipur

Jaipur is the capital city of Rajasthan, India's largest state by area, and 7th most populous. In 2011 the population of Jaipur was 3.1 million, which is projected to have reached 4.1 million in 2022[217]. This makes it the 10th most populous cities in India, and one of the largest Tier 2 cities. According to a 2015 EY report[218], Jaipur was the second favourite emerging city for investment by foreign investors. 'Proximity to Delhi and investor-friendly policies in the state make it an attractive destination for foreign investors. As infrastructure in the National Capital Region becomes saturated, the 250km corridor between Jaipur and Delhi is increasingly becoming a hot spot. Jaipur emerged as a favourite among first-time investors, particularly in telecoms and IT-enabled services'.

Architecture sector

Heritage tourism is a significant source of revenue in Jaipur and architectural design a resource required by the growing tourism and heritage conservation industries. Rajasthan's Department of Archaeology and Museums was allocated a budget of INR371.98m (GBP3.86m) in 2021-22. The State government earmarked a tourism development fund of INR5,000 m (GBP51.85m) for the development of facilities at tourist site, their conservation and branding both at the international and national level, which it spent on projects such as Sound and Light shows in Jai Niwas Udyan[219], City Park in Mansarovar[220], and food courts called Jaipur Chowpatty[221].

The Devasthan Department is engaged in protection and promotion of religious culture. 390 temples and institutions are managed directly by the department and 203 are dubbed 'state self-sufficient'. INR 34.7 million (GBP360,000) was allocated for repair, renovation and development work. The Rajasthan Department of Tourism regulates the heritage hotel industry by granting Certificate of Heritage to any properties originally built before 1950 which has followed the regulations[222].

Festivals sector

Another creative sector allied to tourism is the fairs and festivals sector, which includes religious events and pilgrimages. The Jaipur Literature Festival, first held in 2006, has become world-famous. It is worth noting that this has not led to the development of a publishing industry in Jaipur, but rather, has encouraged allied events around food, music and crafts. Sanjoy Roy, the MD of the event management company that organises the festival, said that in 2015 they had conducted a survey which showed that:

> the city generated INR 40 crores [INR400 m/GBP4.15 m] worth of business over the five days of JLF, which was expected to cross INR 100 crore [INR1,000 m/GBP10.37 m] in 2020 in hotel, restaurants, taxi bookings, and the sale of Jaipur's traditional garments, jewellery and handicrafts items[223].

At a panel on the creative industries in India hosted by the Jaipur Literature Festival in the British Library, London on May 2022, Gayatri Rathore (Principal Secretary of Tourism, Art and Culture, Government of Rajasthan) told the audience that festivals are important for Rajasthan. Following the success of Jaipur Literature Festival the government of Rajasthan realised the importance of this model by supporting similar festivals for music and crafts to bring more attention to other cities and also help the local economy[*].

Crafts and design

Jaipur has been a member of the UNESCO Creative Cities Network since 2015. The citation notes Jaipur's legacy 'continues to bear witness to the diversity and vitality of the field of crafts and folk art, which employs about 175,000 people working in around 53,500 workshops'[224]. The Rajasthan Small Industries Corporation Limited (RAJSICO) provides export infrastructure services to the Rajasthan exporters/importers through a dry port (inland container depot) situated at Jaipur. It also runs the

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[*] Two team members attended the JLF panel Sustaining the Creative Economy at the British Library on 11 June 2022 where this was said. Details of the event here: https://www.bl.uk/events/jlf-london-at-the-british-library-2022

handicraft outlet Rajasthali, which had a turnover of INR26.49 m (GBP270,000) during the financial year to December 2021.

Jaipur is also an international hub for the gem polishing industry. RIICO established two Special Economic Zones (SEZ) Gems & Jewellery I & II (now Multiproduct SEZ) at Sitapura Industrial Area, Jaipur. During the financial year 2021-22 (up to December 2021) exports totalled some INR13,758 million (GBP142.68 m).

Jaipur is also home to the autonomous government-funded Indian Institute of Crafts and Design (IICD), the largest resource centre in the country. It offers undergraduate and postgraduate degrees in soft and hard material design, fired material design, fashion and jewellery design and crafts communication. IICD partnered with West Dean College to exchange ceramic practices, under the British Council's 2022-23 India-UK Collaboration Scheme, *Crafting Futures in India*[225]. The second of its three grants also went to another institute in Jaipur—the Jaipur Rugs Foundation which partnered with the University of the Arts London.

The state of Rajasthan has 11 handicrafts certified with Geographical Indication qualifications. Among them, the Blue Pottery of Jaipur (certified 2008-09), Kathputlis of Rajasthan (certified 2008-09), Sanganeri Hand Block Printing (certified 2009-10), Bagru Hand Block Print (certified 2011-2012) and Thewa Art Work (certified 2013-14) are all centred in Jaipur. The Rajasthan government's Industries website lists over 150 unique crafts in 18 categories. Many of these are made in small workshops in and around Jaipur, and many of the ones that are not are available at wholesale rates because of Jaipur's status as a handicraft trading hub.

5. Insights and recommendations

What we've found

We set out to map the creative industries in India and, in so doing, to begin to scope the opportunities and possible barriers for future India-UK creative industries research and innovation collaboration.

It is very clear to us that the opportunity is significant, and the timing is right to seize that opportunity.

- India is a large and highly dynamic-economy, with a population of over 1 billion and a fast-growing, highly digitised and outward-looking economy
- The average age of the population is 28, is becoming more educated and affluent and forming a powerful internal market
- The forthcoming Trade Agreement with the UK provides a clear incentive for engagement and reflects a broader ambition for international collaboration, for example those relating to higher education and research[226].

Together, these provide a powerful convergence of economic growth, a growing marketplace and new talent – within which the creative industries are playing a significant role:

- Despite the downturn during the Covid-19 pandemic, our research shows that all sectors in the creative industries are growing.
- Key sub-sectors such as publishing and advertising are strong and resilient; others such as mobile gaming, film, TV and radio are massive sectors innovating fast; while the performing arts and museums form a critical part of the nation's cultural fabric.
- There are important creative hubs emerging in traditional IT centres such as Hyderabad, which are home to a fast-emerging AVGC sector, attracting FDI.
- The creative industries are increasingly being recognised as an important driver of economic growth with numerous government departments developing policies and other interventions to support different sub-sectors.

A key feature of the creative industries is its informality, operating outside of the formal economy but a core part of the economic and social infrastructure for communities across the country. This is not just the case for crafts which operate like cottage industries, but also to festivals which are to be found in many towns and cities, taking many forms and celebrating different parts of the creative industries.

The connections of the creative industries to the country's culture and heritage should also not go unremarked. Religious festivals are, for example, an important part of the cultural infrastructure across the country, feeding through into the performing arts scene. They are also central to the traditions of storytelling which are evident in the film industry and in the growing games sector.

In many sectors, growth is being driven by industry investment, a growing level of government intervention, and some tentative foreign investment. Although foreign investment is often considerable, regulatory barriers have restricted FDI in many areas, and – despite a sizeable diaspora market - many sectors remain domestically demand-driven. There are meanwhile significant centres or hubs of activity and there are a number of important cities emerging which should be central to any future UK-India interaction (Delhi, Bengaluru, Hyderabad, Pune).

In short, there is a cluster of opportunities, with no single sector standing out.

There are, however, two areas which have the potential to be world-leading: AVGC, drawing on India's historic strengths in IT; and fashion and textiles, in which the social and environmental opportunity being afforded through innovation in crafts and textiles has the potential to influence global supply chains. These are elaborated on further below.

Barriers

There are some significant barriers to future collaboration. These should not constrain investment in targeted interventions but will need to be addressed – directly and in partnership with Indian partners.

Informality

Despite the obvious scale of the creative Industries, large parts remain largely uncounted. The recorded data for sectors such as crafts and fashion, for example, risks massively understating the scale and opportunity for innovation and collaboration.

Good quality data is critical to effective policy. This research report, conducted in a short space of time with limited resource, has drawn together available data on sub-sectors which map onto the (slightly outdated) creative industries sub-sector categories. There is strong evidence of innovation and growth in some sub-sectors, reflected in growing market investment and major success stories which appear to be more than just one-offs. But there is no reliable way of capturing the value of that economic return on a consistent basis.

The requirement for better data on the creative industries is not specific to India but the scale of the informal economy makes capturing that data even more difficult. Large parts of the Indian creative industries are driven by people and companies that sit on the fringes of or outside the formal economy. This is particularly true in the areas of performing arts, handicrafts and large sections of the fashion and textiles sector – where trade is dominated by sole-traders or what can best be described as cottage industries, operating in mainly local or regional markets with limited extra-territorial trade activities. In other sectors, such as festivals and some parts of the social media industry, despite thriving economic activity, the lack of reliable data means that freelancers and small businesses often operate 'under the radar', invisible to government support or intervention.

Co-ordination of government and other collaborators:

In many ways, India's position in relation to the creative industries in 2022 is not unlike that of the UK in 1998. There is an emerging political and industrial recognition of the value and importance of the mix of sectors which use creative intellectual property to generate economic return; but there is a lack of understanding of that value.

Multiple government departments are engaged in different parts of the creative industries, many of them proactively supporting key subsectors. Meanwhile, there are important state-level initiatives to strengthen or grow key sectors, whether it is festivals in West Bengal or AVGC in Telangana. But there is no joined-up or coherent policy programme of work for growing, supporting or stabilising the sectors and businesses which might drive innovation and growth.

Opportunities

In summary then, there is considerable opportunity for UK and Indian researchers and businesses to collaborate to share knowledge and know-how, to test and develop new products, services and experiences and to help develop a more sustainable and vibrant creative economy for both nations.

A set of recommendations follow which draw on all of the information which has gone before and in particular the insights gained from a wide programme of in-depth interviews and consultations. These recommendations are informed by the expertise of the research team, which combines a knowledge and understanding of the UK's creative industries and its strengths, and which has benefited from the in-country knowledge and in-depth understanding of and engagement with the Indian creative industries.

Areas of focus

We recommend two areas of focus.

Circular textile and crafts innovation and entrepreneurship

Our research has highlighted the ways in which the introduction of new technologies and associated skillsets have helped to stimulate innovation in textiles and crafts, in particular in relation to more sustainable or circular production models.

Mobile digital is enabling rural artisans to connect with markets, and with cloud-based design software and more local factories for producing smaller runs; entrepreneurship and design skills education are making rural crafts collectives more self-sufficient; technical innovation is reducing water pollution from fabric dyes; cloud-based computer aided design allied with localised micro-factories is reducing delays, transport costs and consequent waste from overproduction in supply chains. These are innovations which are not only enhancing the local, artisan-focused fashion and textile market, but also have the potential to have a significant impact on global supply chains, and help to facilitate a more circular global fashion and textiles economy.

Circular fashion is fast becoming an important innovation focus for the UK's creative Industries, with recent investments (for example, the Future Fashion Factory in Leeds, and the Business of Fashion, Textiles and Technology, led by the University of Arts London) demonstrating a strong appetite for innovation across the fashion and materials value chain. UKRI has identified circular fashion as a strategic priority, with engagement from multiple Research Councils. Meanwhile, the British Fashion Council's new Institute of Positive Fashion highlights the focus being given by international brands to the circular economy agenda. The scale of the textiles sector in India means that it is well-placed to become a major hub for global innovation, testing and developing new production processes and driving global change which will have an impact far beyond the creative Industries.

Building a content/product AVGC economy

The animation and visual effects industry has seen significant growth over recent years. Initially driven by the IT outsourcing industry focused around Hyderabad and Bengaluru, a large technology-driven service sector emerged to support the Bollywood film industry and increasingly outsourced productions from Hollywood and elsewhere. As outlined in the AVGC Deep Dive, growth has been significant in both over the last 10-15 years, fuelled primarily by cheap and highly skilled labour.

The growth of the games sector in India has benefited from the same skillset – enhanced by a massive growth in mobile usage among a relatively young population.

The convergence of technologies with fast-growing creative sectors has been recognised in the UK by the adoption of the term CreaTech and the development of a number of significant R&D support programmes (such as Audience of the Future, and the forthcoming CoStar). In the same way, the establishment of the AVGC Task Force in India is a recognition that animation, VFX and gaming are now key drivers in the Indian creative economy.

AVGC carries the promise of employment in a market with immediate and high demand. India has three strengths that a collaborative strategy can leverage: cultural heritage, a very rich tradition of oral storytelling and it is one of the world's largest consumers of data, with thriving creative industries. The challenge for the Indian creative industries is to build a more content-oriented rather than service-driven economy. The scope for collaboration between UK and Indian companies in this space is considerable.

The fact that UK and India are working closely to strengthen India's IP ecosystem, reduce regulatory bottlenecks and develop market access will make it easier for UK companies to do business in India. Given the shared history between India and the UK, there is large and unexplored scope in co-production of entertainment content as well.

Recent missions and round-table events on CreaTech in relation to UK and India indicate that there is already a strong awareness of this opportunity. The anticipated AVGC policy should provide a clearer roadmap for companies wishing to collaborate. Until then, the potential is greatest in places with established clusters and policies.

Additional research and collaboration areas

IP and regulatory regime

There are many similarities in IP regulations between the UK and India. There are, however, two important differences: firstly, in India copyright can be registered; and secondly, handicrafts are the primary focus of Geographical Indication in India, whereas this is limited to agricultural products in the UK. The UK geographical indication regulations do not apply to textiles or other handicrafts, which might act as a block to micro-SMEs and others looking to export. While trademarks are one potential route, this would require training in branding and international trade marking practices, and money to pay for registration in multiple territories. The relative weakness of the Indian Rupee makes what might seem reasonably priced to UK entrepreneurs unaffordable, and therefore, unsustainable, to many artisans in India.

Both Indian approaches have the potential to reduce risk for individual content creators. Despite this and various programmes to support registration, knowledge of and engagement with IP protections is low, particularly among small companies which would benefit from partnerships with UK firms as they grow their business and start to export. Similarly, UK firms would benefit from partnerships that help them navigate India's regulations and markets and develop new intellectual property suitable for both countries.

Governance

There are a large number and variety of government departments engaged in supporting the creative industries directly or indirectly. This breadth of engagement is not necessarily a bad thing and can ensure that there is an awareness of and commitment to the sector right across government. However, it can also lead to a lack of co-ordination. The AVGC Task Force indicates there is an appetite for a mechanism for facilitating a joined-up approach to policy and delivery, albeit limited to just one sub-section of the creative industries.

In the case of the UK in 1998, this coordinating function took the form of a cross-departmental creative industries Task Force, together with a mapping study which sought to demonstrate the value of the sector. In this case, we would recommend a cross-Governmental task force that brings together key personnel in UK Government departments and agencies (UKRI, DIT, FCDO) with relevant Indian Ministries. This group should be tasked with developing a UK-India creative industries action plan, which might be positioned as an annexe to the UK-India Trade Agreement and which might draw from the research and recommendations in this report.

The need for better data

As outlined above, a more considered programme of data-gathering is required.
It is for the Indian Government to establish longer-term data-collection methods, but in the short-to-medium term there is a need to undertake a fuller assessment of the opportunities for India-UK

collaboration across key areas of the creative industries economy. We would recommend focused research in CreaTech/AVGC, and fashion and textiles; and in selected geographies.

Understanding the informal economy in key sub-sectors

In the same way that in the UK there has been a growing awareness of and data-capture associated with the freelance economy which supports, for example, the film and TV sector, so – in India – a greater effort is needed to build an understanding of the informal economy, to help inform future government policies.

There are data sources on work in the informal economy. ICRIER's research into the creative economy was centred on the Government of India's Periodic Labour Force Survey. While this provides sound headline data, it is problematic in that creative industries are not well flagged, and individuals who work in more than one sector are often overlooked. There are additional commercial sources such as the Centre for Monitoring the India Economy's (CMIE) Consumer Pyramids which holds data on households and individual household members that seem promising for unpacking more granular data on employment patterns at the household level. NGOs and trade bodies also have research that coul be incorporated into policy making. In short, there is a case for a research programme that seeks to complete a large and complex picture of creative industries 'one bite at a time'.

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Annexes

Annexe 2: Glossary of abbreviations and terms relating to Indian governmental or industry bodies

AAAI - Advertising Agencies Association of India
ABFRL - Aditya Birla Fashion and Retail Ltd.
ACI - The Advertising Council of India
ADI - Association of Designers of India
Atmanirbhar Bharat Abhiyaan – Self-reliant India policy
AIACA - All India Artisans and Craftworkers Welfare Association
AIM - Atal Innovation Mission
ASCI - Advertising Standard Councils of India
ASEAN – Association of South East Asian Nations
Asian InCH – a encyclopedia of artisans and the artisanal practices that compromise Asia's intangible cultural heritage
AVGC – Animation, Visual effects, Games and Comics

CAGR – Compound Annual Growth Rate
CAIF - Circular Apparel Innovation Factory
CBFC - Central Board of Film Certification
CBT - Children's Book Trust
CCCE - Committee on Cultural and Creative Economy
CCEA - The Cabinet Committee on Economic Affairs
CDI - Chartered Designers of India
CDSA - Centre for Development Studies and Activities
CFSI - Children's Film Society India
CHCDS - Comprehensive Handicrafts Cluster Development Scheme
CII - Confederation of Indian Industry
CMIE - Centre for Monitoring the India Economy's
CoA - Council of Architecture
CoA-TRC - The Council of Architecture Training & Research Centre
Crore – 1 crore equals 10 million

DAMA - Dastkar Andhra Marketing Association
DD – Doordarshan TV channel
DFF - Directorate of Film Festivals
DPIIT - Department for Promotion of Industry and Internal Trade

FCRA – Foreign Contribution (Regulation) Act
FDCI - Fashion Design Council of India
FDI – Foreign Direct Investment
FEC - Film Enquiry Committee

FFC - Film Finance Corporation
FFO - Film Facilitation Office
FICCI - Federation of Indian Chambers of Commerce and Industry
FTII - Films and Television Institute of India

GI - Geographical Indication
Global InCH – International Journal of Intangible Cultural Heritage
GoI – Government of India

HWCWS - Handloom Weavers' Comprehensive Welfare Scheme

IBDF – Indian Broadcasting and Digital Foundation
IBEF - India Brand Equity Foundation
IBF – Indian Broadcasting Foundation
ICCR - Indian Council for Cultural Relations
IC-IAA - International Advertisers Association (India Chapter)
IDC - India Design Council
IHCNF - Indian Heritage Cities Network Foundation
IIA - Indian Institute of Architects
IIAD - Indian Institute of Art and Design
IIID - The Institute of Indian Interior Designers
IIT – Indian Institute of Technology
INS - Indian Newspaper Society
INTACH - Indian National Trust for Art and Cultural Heritage
IPDS - Integrated Processing Development Scheme
IPLM - Indian Public Library Movement
ISA - The Indian Society of Advertisers
ISDI - School of Design and Innovation

Lakh – one lakh equals 100,000

MESC - Media Entertainment Skills Council
MIFF - Mumbai International Film Festival for Documentary, Short & Animation Films
MSMEs – Micro Small and Medium Enterprises

NASSCOM - National Association of Software and Service Companies
NBT - National Book Trust
NCERT – National Council for Educational Research and Training
NDP - National Design Policy
NFAI - National Film Archives of India
NFDC - National Film Development Corporation of India
NHDP - National Handloom Development Programme

NICEorg - Network of Indian Cultural Enterprises
NID - National Institute of Design
NIFT - National Institute of Fashion Technology
NITI Aayog - National Institution for Transforming India
NITs - National Institutes of Technology
NTTM - National Technical Textiles Mission

ODOP - One District One Product

SIPP - Start-ups Intellectual Property Protection
SITP - Scheme for Integrated Textile Parks
SRFTI - Satyajit Ray Film and Television Institute, Kolkata

TERI – The Energy and Resources Institute
TRAI - Telecom Regulatory Authority of India
TRIFED – Tribal Co-operative Marketing Development Federation
TRIPS - Trade-Related Intellectual Property Rights

UCCN – UNESCO Creative Cities Network
USTTAD - Upgrading the Skills and Training in Traditional Arts/Crafts for Development

WIPO – World Intellectual Property Organisation
WTO - World Trade Organisation

YSS - Yarn Supply Scheme

UKRI launched in April 2018, UKRI is a non-departmental public body sponsored by the Department for Business, Energy and Industrial Strategy (BEIS). Our organisation brings together the seven disciplinary research councils, Research England, which is responsible for supporting research and knowledge exchange at higher education institutions in England, and the UK's innovation agency, Innovate UK. Our nine councils work together in innovative ways to deliver an ambitious agenda, drawing on our great depth and breadth of expertise and the enormous diversity of our portfolio. www.ukri.org

UKRI India plays a key role in enhancing the research and innovation collaboration between the UK and India. Since 2008, the UK and Indian governments, and third parties, have together invested over £330 million in co-funded research and innovation programmes. This investment has brought about more than 258 individual projects. The projects were funded by over 15 funding agencies, bringing together more than 220 lead institutions from the UK and India. These research projects have generated more than £450 million in further funding, mainly from public bodies but also from non-profit organisations and commercial entities, attesting the relevance of these projects. www.ukri.org/india

About the British Council

We support peace and prosperity by building connections, understanding and trust between people in the UK and countries worldwide.

We uniquely combine the UK's deep expertise in arts and culture, education and the English language, our global presence and relationships in over 100 countries, our unparalleled access to young people and influencers and our creative sparkle.

We work directly with individuals to help them gain the skills, confidence and connections to transform their lives and shape a better world in partnership with the UK. We support them to build networks and explore creative ideas, to learn English, to get a high-quality education and to gain internationally recognised qualifications.

We work with governments and our partners in the education, English language and cultural sectors, in the UK and globally. Working together we make a bigger difference, creating benefit for millions of people all over the world.

We work with people in over 200 countries and territories and are on the ground in more than 100 countries. In 2021-22 we reached 650 million people.