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Full Coverage about BigSharks Studio on Page 16



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INDIAN VFX BREAKING OUT?

The mood in the VFX business is buoyant thanks to an enterprising bunch of filmmakers and studios with a global vision and mission

FICCI – KPMG predictions for Indian Animation, VFX and Gaming

Riva Animation drives deep into bollywood

Toonz Media Group: Sketching out a \$1 billion roadmap



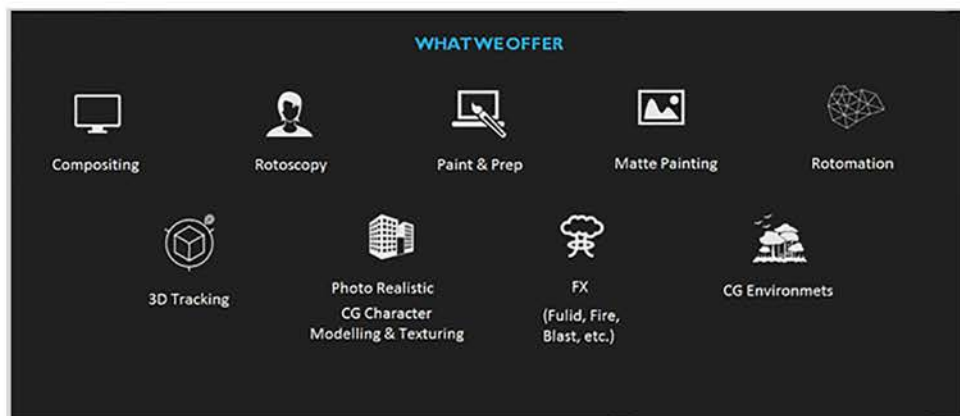
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From the EDITOR IN CHIEF

Indian VFX: The growth urge

There has been some cynicism about the Indian animation, VFX and gaming story. Indian studios have mainly been involved in low end labour intensive outsourced jobs like wire removal, keying, matchmoving and rotoscoping, is some of the criticism that has been hurled at the 400 odd CG and VFX service providers. Hence, the Indian AVG industry should not really pat itself on the back.

However, we at AnimationXpress.com believe that the industry is penning a script that can only see it emerging as the winner in the global game. Who would have thought that an Indian company – Prime Focus World - would end up owning more than 80 per cent of an award winning global studio such as Double Negative and emerge as amongst the world's top 3 VFX studios?

People may argue that investments going into VFX in India are not big enough as in the US. Indeed, neither are the overall production budgets. They are minuscule compared to what is invested in a single film by a US major studio. A young India - more than 57 per cent of its population is below 35 years in age - has developed a taste for quality visual effects in big budget international films. The box office collections of some fantasy and superhero Hollywood releases have recently surpassed those of local Hindi film productions.

Nevertheless, an interesting story is beginning to unfold in the Indian AVG world. Even as India – under a business friendly government – is beginning to rewrite the rules that had made it a difficult place to do business over decades, a new bunch of film and entertainment professionals and entrepreneurs are venturing out, willing to risk it all, in order to leave their stamp globally.

Take the case of ARK MediaWorks' which

Editor in Chief
ANIL WANVARI



has tapped into this hunger for spectacular cinematic storytelling through its fantasy VFX spectacle *Bahubali: The Beginning*. 25 per cent of its \$18 million budget was kept aside for 4,500 to 5,000 VFX shots. Its gross box office collection has crossed the \$90 million mark worldwide, giving producers the confidence that yes indeed audiences in India and overseas are open to queuing up in cinemas to watch CG-heavy films from India.

ARK Media roped in a clutch of 17 studios to roll out the VFX vision of helmer S. Rajamouli and VFX supervisor V. Srinivas Mohan. Among them: Hyderabad-based Makuta and Firefly Creative Studios.

Other Indian studios that have been leaving their imprint on the VFX map include: Prasad EFX, Red Chillies VFX (owned by Bollywood star Shah Rukh Khan), Tata Elxsi, NY VFXWALA (owned by Bollywood star Ajay Devgn), Riva Animation and VFX, Digikore Studios, Anibrain Studios.

The list could be longer and indeed will grow so as more investments are poured into VFX by Indian producers of Tamil, Telugu, and Hindi movies.

What some of the smaller studios could do is think strategically on the way forward.

Something that Prime Focus has done effectively by acquiring other outfits globally and earned the film making world's respect. Not just in India, but all over the world.

Scale is important in VFX, almost as important as quality and timely delivery. And the smaller studios need to show they can consistently deliver on all three parameters.

For starters, a couple of them – or more than a couple of them - could partner locally to go out and present themselves to Hollywood. Pooling resources together would give them access to capital and talent. And that could help give film makers in the US the confidence to give them complete VFX projects – rather than pieces.

The fact that Bollywood stars such as Shah Rukh Khan and Ajay Devgn are excited about visual effects and are investing in studios should give it a further fillip. Now what's needed is even more governmental support and incentives to studios which snare large scale VFX projects and in the process help give an outlet to CG artists' talent as well as generate employment.

If a small nation like New Zealand can produce a Weta Digital, surely Indian visionaries can do so too. There's talent aplenty, hence India definitely can produce more than just one Prime Focus World.

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PixStone Images: Visualising a great future

John Devasahayam is pleased as punch. The IT veteran made a mark for himself as an IT professional over a three decade career. But these days what's keeping him excited is the success that his Chennai based studio PixStone Images has achieved in just four years of existence.

PixStone Images has earned a name for itself as a Prep Comp services provider in South India and more so globally. Its core competence lies in serving as a very effective off-shore partner for Stereoscopic conversion, VFX and VR studios by handling a wide range of Prep Comp work that is manpower intensive.

"We have innovated, created and utilised our very own proprietary delivery model of IDS or India Delivery Studio to deliver work on a cost effective, consistently reliable and scalable

basis," says Devasahayam.

Over the past four years, PixStone Images has worked on over 30 major motion pictures, a few TV shows, music videos and commercials and recently, the company has ventured into the Virtual Reality space with a keenness to explore this new technology that everyone has been talking about.

Primarily into working with Hollywood based Conversion Studios, the studio roughly a year ago started delivering VFX services as well.

Some of the services it offers include rotoscoping, prep, compositing, matchmove and rotomation. Among the big titles that it has lent its expertise to include: *The Walk*, *Gods Of Egypt*, *Transformers: Age of Extinction*, *Guardians of the Galaxy* and *Godzilla*.

PixStone Images has 12,000 sq ft of swanky studio space in the developing industrial suburb of Perungudi in Chennai. 250 dedicated, hard-working and creative artists work in multiple shifts through six days a week to meet all client deadlines, while adhering to the highest of quality standards.

Leading this entire initiative is Devasahayam. An entrepreneur to the core, he has logged it out for 33 years in senior executive positions and built successful IT Companies. Industry peers have labeled him as one of the pioneers of the IT distribution business in India during the early days of growth in IT, specialising in large scale IT outsourcing.

He leads a management team with individuals who bring innovative technical skills and a business oriented focus that makes PixStone



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Images unique within the outsourcing industry.

As an outsourcing leader, the studio believes in organically building up its workforce by constantly training fresh artists. It also holds workshops to identify and groom leadership from within, ensuring a tightly knit delivery force consisting of multiple delivery units which work well in sync with each other.

Through the concept of IDS, PixStone Images dedicates a specific process oriented team and studio space for its clients. This team works on understanding the client's pipeline and attuning each and every member to his or her production standards of efficiency and quality.

The PixStone Images unit then effortlessly works as an extension of the client's production team, offering complete transparency through weekly reviews and daily communication from its producers.

The studio also has fail safe processes in place

that alert everyone in the value chain and thus prevents any complications that could adversely affect its partner's production deadlines. The goal of IDS is to offer a client partner client a thoroughly reliable offshore delivery team that it can be in control of.

The secure studio space (with security exceeding MPAA norms) has been physically audited and approved by Paramount, Sony, Fox and Disney/ Marvel, with Disney/ Marvel re-auditing PixStone Images recently and approving it again.

In this technology driven world, where tech keeps changing at a blink of an eye, the studio keeps in mind to constantly upgrade its hardware. The focus is to have the fastest state of the art gear when benchmarked against the best available within the industry. As far as software is concerned, it is entirely licensed and supported by the studios' respective creators.

The studio believes it is important to cultivate relationships with all its clients; be they big or small. Through the company's model of business and production practices, it has established strong working relationships with all its partners.

Some of them have gone on record to state that their PixStone partnership has been one of their best experiences in outsourcing out of India. Others also have said that they have full faith in the studio's ability to execute projects in the foreseeable future.

That should help the team of PixStone Images to break into even bigger grins.

Indian Animation and VFX industry earns its stripes globally

It's Quality rather than Quantity that matters' as it was rightly said by Roman philosopher Lucius Annaeus Seneca. And India has both!

When it comes to the Indian Animation and Visual Effects (VFX) sector, both the quality and quantity of projects have witnessed an upward graph recently. The country's numerous institutes churn out a plethora of professionals each year, something which has come in for harsh criticism for sometime. But the quality work its studios have been delivering recently has led to praise being showered on them. AnimationXpress magazine gives you a lowdown on some of the more laudatory ones.

Animation and VFX heavy feature films

India has created animated films like *Chaar Sahibzaade* (2014), a 3D animated historical movie, which was made on a \$3 million budget, collected a total of \$10.52 million with box office returns of 250 per cent! All of it was created in India. Disney's *The Jungle Book* – which has grossed a worldwide total of \$829.3 million (as per the box office numbers till 16 May 2016) with around \$35-40 million of that being contributed by Indian screens has a major portion created by Indian artists. Another Indian blockbuster *Baahubali: The Beginning* (2015) delivered 4000 to 5000 VFX shots with a high budget of \$18 million and gained \$90 million in India alone.

Apart from this, *Delhi Safari* (2012), a stereoscopic 3D computer-animated feature portrayed the abilities of Indian animators and it won the National Award for the Best Animated Film.

Bollywood has also increased its confidence in animation and VFX as films like Shahrukh Khan's *EAN*, Indian superhero films like *Krrish 3* and *Ra.One* have used considerable visual effects which has been completely created in India right from alpha to omega.

The current scenario of Indian feature films displays the dependence on animation and VFX to enhance the visual experience of the viewers and create quality work in order to compare with the global standards. India still has a long way to go in order to compete in par with James Cameron's *Avatar* which earned a worldwide total of over \$2.7 billion. But, considering India's work in the recent Jon Favreau's *The Jungle Book*, the potential of Indian animation has been redefined or rather scaled upwards as the entire film was digitally created with only Mowgli as the sole live action character.

Television broadcasting quality content

The television space which began with *Chhayab Aaya* (1986), based on the adventures of a Casper like ghost, as the first completely Indian animated series has now travelled leaps and bounds with high quality 2D and 3D content. *The Adventures of Ténali Raman* (2003) broadcasted on Cartoon Network began the 2D animation trend in India followed by *Little Krishna* which was broadcasted on Nickelodeon. Both these series denoted Indian folklore and mythological stories which displayed the essence of Indian art of storytelling. As of now, the local content broadcasted in India is travelling overseas with Nickelodeon's popular show *Pakdam Pakdai* created in India being syndicated across more



than 7 countries like the Middle East, France, Germany, Malaysia, Indonesia while, the *Chhota Bheem*, another show based on a mythological character, has travelled to different parts of Asia mainly South East Asia, and Middle East. However, India still is on the road to create a complete global TV series like the famous *Oggy and the Cockroaches*, *Tom and Jerry* or Marvel franchise which has neither geographical nor time boundaries.

Advertising paving way for experimentation

Innovation in animation has been constantly evolving. In fact 'Change is the only Constant' in this space. Varied techniques and styles of animation like stop motion, claymation, puppet animation, 2D, 3D and live action animation have been incorporated mainly in the television commercial space as advertising allows a platform for experimentation.

The recent *Rajasthan Tourism Sand art* displayed a distinct combination of using sand and techniques of animation to tell a simple yet effective tale. The famous *Vodafone Zumi* 3D advertisement has been created using computer generated imagery (CGI) unlike the *Zoo Zoots*



that were live action characters. Animation and VFX have boosted

the entertainment factor as the features of various products and creative marketing strategies have been manipulated profusely through the advertising medium using these techniques in a short span of time.

Digital is the new destination for content and business

Broadcasters, content creators and production houses have taken the digital route by creating and uploading animated content on mainly YouTube and other digital platforms. *ChuChu TV* showcases mainly nursery rhymes for kids using animated characters and has over 4.36 million subscribers on its YouTube channel.

Videogyan also features nursery rhymes and animated content for pre school audience and has over 1.63 million subscribers on YouTube. While, *Sesame Street* a global animated content channel, which was launched in 2006, has over 5.3 million subscribers. These figures clearly show the comparison between Indian and global digital content.

Also Nick India and Pogo TV have gained tremendous traction on YouTube by providing content mainly in the kids genre and keeping in mind the varied age groups as well. In fact a majority of content has turned into franchises in the digital space as 'not everything but anything' can go viral and become popular on this fast paced easily accessible platform.

Indian Animated Shorts travelling global

In the current scenario, the attention span of the audience has considerably reduced. Instead of expressing themselves through a full length feature, a number of Indian creators prefer creating animated shorts and conveying their message in a 'short and concise' manner. Animated short films have taken the wheel as these films travel across the globe for various prestigious film festivals and gain high accolades.

Indian Animated shorts like *Printed Rainbow* and *True Love Story* by Gitanjali Rao, *Fisherwoman* and *Tuk Tuk* and *Fateline* by Suresh Eriyat, *Chhaya* by Debanjan Nandy, *Komal* and *like Sisters* by Climb Media, *Talking Walls* by Shaaz Ahmed and *#Save Little Shelley* by Saptarshi Dey have been featured at numerous film festivals across the globe since years and have won various awards. Studio



Eeksaurus' animated short *Fateline* directed by E Suresh won the Annecy Cristal at the Annecy International Animation Film Festival 2015. It was the first time that an Indian production had bagged this coveted award, which is considered to be the highest honour for animated content in this category across the globe. Students from various Indian institutes like National Institute of Design (NID), The National Film and



Television School, Films Division of India, IIT, Aptech, MAAC and so on have also created good quality animated short films highlighting various influential stories and delicate social issues. After all, animation is a medium which provides utmost creative freedom and these creators have tapped this opportunity to the maximum.

Outsourcing projects have pruned India into a major global player

The Jungle Book, *Game of Thrones*, *Terminator* are packed with VFX shots – many of which have been created in India. Full length international animated films like *Penguins of Madagascar*, *How to Train your Dragon 2*, *Norm of the North*, *Kung Fu Panda 3* have been worked upon by medium sized creative studios and large studios using local artists. Indian animation and VFX studios have been delivering high quality projects to various foreign players. Outsourcing has been

serving as a major factor for improving the quality and quantity of India's work.

In fact, this cycle of outsourcing has made India an independent player with power, potential and perfection.

There has been a 13.8 per cent growth in terms of animation and VFX services, production and post production in the year 2015 according to the FICCI KPMG report 2016. More than the scale of production, the quality of animation and VFX work in India has improved to a great extent. That in turn has led to international studios beginning to trust in the Indian “juggaad” (indigenous solution finding method). This AVG story can only get better for India's studios with more work coming Indian outfits' way. They in turn will have to respond by delivering on clients' timelines and quality, leading to more projects. The circle can only become virtuous from hereon. Amen to that!



Top 10 Bollywood grossers (domestic collection of net) of 2015 with number of VFX shots

Movies	Box office collection \$ million	VFX Studio	Number of VFX shots
Bajrangi Bhaijaan	47.4	Prime Focus	500
Prem Ratan Dhan Paayo	30.7	Prime Focus	1200+
Bajirao Mastani	25.9	NY VFXWAALA	1800+
Tanu weds Manu Returns	22.5	Prime Focus	200+
Dilwale	21.9	Red Chillies VFX	1600
ABCD 2	15.6	Riva VFX	70
Baby	14.1	Riva VFX	900
Welcome Back	14	Prime Focus	835
Singh is Bling	13.3	Prime Focus	620

Source KPMG in India analysis, 2016

FICCI-KPMG predictions for Indian Animation, VFX and Gaming

Hardwork. Dedication. Passion. Subsidies. Talent. Space. You name it and India has it all. Maybe not to the extent that some of the other Asian countries do. But the fact is that the Indian animation, visual effects and gaming industry which was once considered a no entry zone by global majors, is now growing at an unimaginable pace and is on the verge of getting on stage with them, some predict, within the next five years.

So much so that even international studios have set up shop over here. DreamWorks Animation Studio, Technicolor, MPC, Double Negative, Ubisoft - all have their facilities right here. And that trend is only going to multiply with more players setting up base in India to take advantage of its vast pool of talent – both in creative as well as technology.

The reverse is also happening with Indian studios marching globally. Prime Focus Limited has made its mark on the international VFX and animation map. Toonz Animation has acquired a studio in Spain and is on the verge of acquiring another one in the US. Others are likely to follow suit and get acquisition hungry.

Management and advisory firm KPMG has been partnering with the apex chamber of industry FICCI and has been bringing out an entertainment industry report annually during its FRAMES convention. The FICCI KPMG report covers the performance of various media segments for the calendar year by industry size, key trends, regulatory updates, industry-wide challenges, future outlook etc.

The 2016 edition of the report states that the Indian animation, visual effects, gaming industry has nearly 300 animation, 40 FX and 85 game development studios with more than 15,000 professionals employed by them. And the animation and VFX sector grew at a rapid CAGR of 13.8 per cent with gaming at 12.8 per cent in 2015 over 2014

Overview from 2011 to 2015

Back in 2011, animation services accounted for \$105.3 million which saw a 4 per cent CAGR increase from 2011 to 2015, accounting for \$123.1 million in 2015 whereas animation production increased from \$62.3 million to \$83 million, a 7.5 per cent increment. VFX, which was a puny \$91.8 million industry in 2011, grew at a race horse speed of 23.5 per cent CAGR to \$213.3 million in 2015. Post production services too ballooned smartly from \$200 million in 2011 to \$337.8

million in 2015 – CAGR of 14 per cent. The animation and VFX sector jointly witnessed a 13.8 per cent growth in 2015 over 2014. The gaming industry too has doubled in the past five years touching \$392.6 million in 2015 from \$192.6 million in 2011.

Animation, VFX and Gaming industry: Projections

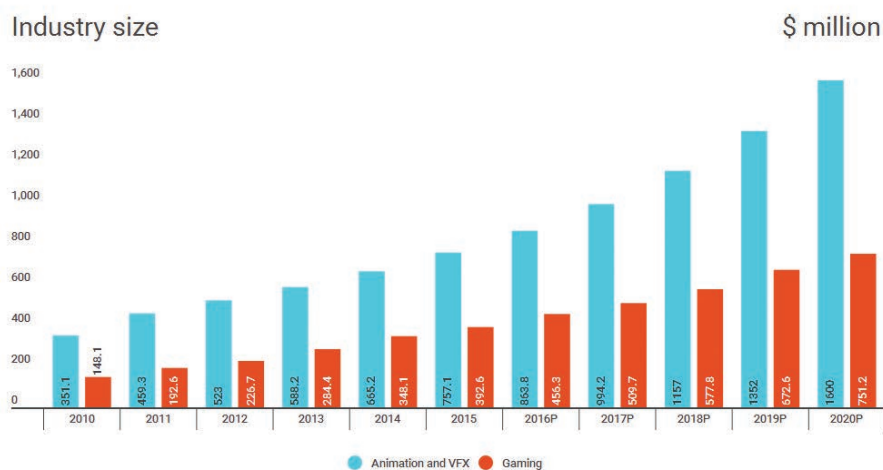
This year, the animation and VFX industry is projected to gross \$863.8 million. And the next four years will see it double to a size of \$1.6 billion (by 2020) – 16.1 per cent CAGR. The gaming segment is predicted to witness a comparatively slower yet radical growth of 13.9 per cent CAGR; from \$456.3 million in revenues in 2016 to \$751.2 million by 2020.

Further, the animation industry (services + production) is estimated to expand handsomely at an 8.6 per cent CAGR between 2016 and 2020. The VFX industry (VFX + Post-production) is estimated to gallop ahead at a CAGR of 18.5 per cent.

Though the industry is currently niche, it's been gaining tremendous momentum thanks to government initiatives and the efforts put in by studios and the artists. Many Indian studios and production houses are packed with work — be it outsourced from abroad or in-house projects for the Indian market.

These statistics clearly highlight the nation's animation, visual effects and gaming industry's solid potential. A rosy future awaits it.

Animation, VFX and Gaming industry: Size and Future Projections

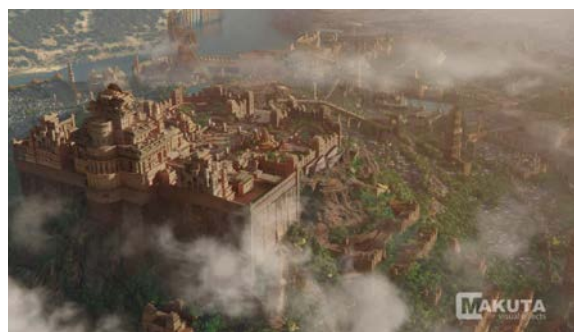


Source: KPMG in India analysis, 2016

Baahubali: Showcasing India's VFX mastery

The year 2015 unveiled one of the biggest visual extravaganzas on the big screen in India that was given shape by the visionary Telugu cinema director SS Rajamouli. We are talking about *Baahubali: The Beginning* that has gone on to break and create several records along the way ever since its release on 10 July, 2015. The second instalment of the film is expected to be released in 2017.

Produced by Shobu Yarlagadda and Prasad Devineni, the film comprises of around 90 per cent visual effects with around 5,000 VFX shots and helming the visual effects part was the three time National Film Award winner, V. Srinivas Mohan who came on board the team of *Baahubali: The Beginning* as the VFX Supervisor. Over 600 artists from over 17 VFX studios across the world worked on various scenes.



Set in a period 2000 years ago, the dream-fantasy tale of two brothers warring to occupy the throne of a kingdom could not have been possible without visual effects and the belief director Rajamouli had in its contribution to enhance the power of storytelling. In an earlier interaction, V Srinivas Mohan had revealed that Rajamouli's knowledge of technology is very helpful for VFX supervisors like himself, as there was less time spent in visualising the shots and sequences as all the visuals were already playing out in Rajamouli's mind. All Mohan had to basically work on was bringing

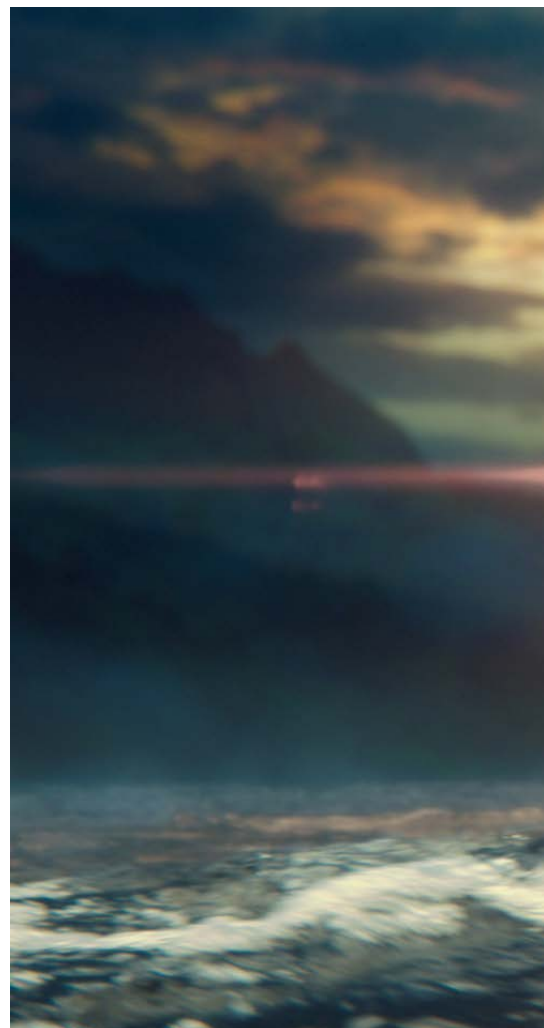
the photorealistic effect to the images that were shot on sets to make them look life like.

The visual effects department did concept drawing for each scene over six to seven months and then prepared a storyboard to see which scene required visual effects. Rajamouli, with a track record of making special effects-rich blockbusters wanted three things for his magnum opus: a visual extravaganza, showcase Indian heritage and culture, and create magnificent forts and spell-binding fights.

Overall the first part majorly features the 1500 feet high waterfall, war and avalanche sequences. 17 VFX facilities worked tirelessly on completing this project over the last three years of its making, with Makuta VFX and Firefly Creative Studio taking up the major chunk of the work; apart from that Prasad EFX, DQ Entertainment, Tau Films, Part 3, Igene, Srushti VFX, among others worked on the feature.

The biggest challenge was to create a 1500 feet high waterfall, which played an integral role in taking the story ahead for the lead protagonist Sivudu/Baahubali. The final waterfall that you see in the movie took nearly two years to create, although the team had managed to get the 2D waterfall in just six months. But to get it to look perfect, it took another one and a half years.

Makuta VFX worked majorly on bringing the waterfall to life along with working on the shots of the Mahishmati city from top. The studio's team had to deal with a lot of complexity in fluid dynamics and simulations. The kind of work that went into these sequences included 2D, 2.5D matte painting, set extensions, wire removals, digitally creating environments and animals, face and body replacement on the baby, among many other things.



The major sequences that Firefly Creative Studio worked on were: the war sequence, avalanche sequence, beheading sequence, the snake and underwater fish sequences. In all 20 minutes of the film's runtime in terms of VFX were delivered by Firefly.

The war sequence in the film was one of the most challenging scenes to accomplish successfully as the aim was to show a 100,000 Kalakeya savages and around 25,000 Mahishmati soldiers. In order to achieve this, the team built an L-shaped green screen of almost 1,200 feet and used drones and vehicles to capture soldiers running. It took around 120 to 150 days to film the war sequence alone. Over 2,000 artists worked on the war sequence with 500 support staff on location; a mighty task Rajamouli successfully pulled off.

Firefly Creative Studio co-founder, Phani Eggone shared his experience on working



on the war sequence. He mentioned that all the breakthroughs were done on the previz (previsualization) stage. The director wanted it to be an epic and mammoth sequence, and they were able to define the span of the battlefield and nail it. They were also able to show proof of staging and formations.

For him, pre-production set the tone for the sequence and, in the post, the major work came with the revisions. Till the eleventh hour the idea was to have the war sequence in a very negative and dark mood, which would reflect in the colour tones of the sky, but Rajamouli played a masterstroke that the war should be fought in broad daylight, which completely changed the fortunes of the film.

Tau Films worked on the Bison sequence, which was created completely in CGI. Apart from the bull's head prop that was used on the set to give the actors some spatial context and feel, so that Rana could apply his strength to bring alive the

intensity of the scene, the bull was rendered entirely in post-production. Prasad EFX did some important work on the pre and post war sequences.

Over 600 artists worked on the entire project during the peak delivery days and the large chunk of shoot schedules were executed in controlled environments and in front of the chroma screens. And the end result is something that everyone associated with the project is proud of!

This film that came as a breath of fresh air due to its captivating visual effects and storyline and was made with a budget of \$18 million has gone on to gross more than \$90 million, making it the third highest grossing Indian film across the globe.

The success of this movie, paved way for it to get a graphic novel treatment and as far as the second part is concerned we can definitely

expect more of a visual treat as 40 to 50 per cent of the shoot schedule for *Baahubali: The Conclusion* was already completed during the time when '*The Beginning*' was being wrapped up.

Baahubali: The Conclusion will see a switch of VFX supervisors as director SS Rajamouli has roped in RC Kamalakannan, who was the VFX supervisor on Tamil superstar Vijay's '*Puli*', to curate the visual effects. How the second part pans out, we will have to wait as it's set to release on 14 April, 2017.

Most of *Baahubali* was developed in Hyderabad and used local talent. It was principally a homegrown feature produced by homegrown talent and with this, *Baahubali: The Beginning* sets the tone of where the Indian VFX industry is headed and the day isn't far when Indian cinema will be on par with their Hollywood counterparts.

Animation's Real Star



Prasad Ajgaonkar

The secret sauce for making a successful animation film or TV show, according to iRealities CEO Prasad Ajgaonkar, the producer of the box office hit Chaar Sahibzaade

When you make a film, remember you make it for the audience. The audience does not come to see animation; they come to see a 'Good Film' told through the medium of animation.

The basic *funda* for the success of any film is the 'Story'. It does not matter whether it is animation or live action, the audience comes to see a good story and it does not make a difference between the two. And then the rest is up to the medium, how it is presented and propagated. To make things simple we need to have one clear understanding that we are not making an animated film, but we are telling a story. We forget this basic fact and this is the reason for failure in most cases.

A lot of times we tend to create animation and in this whole process we forget or rather overlook the fact of storytelling. Creating fancy animation, fine tuning the minute details and adding extra effects in animation is good but sometimes it kills the story.

Marketing plays a significant role to enhance the reach of any film. You need to create a buzz so that people know something unique has been created. In India, there are budgetary restrictions but the industry is opening up now to animation and is investing in such projects.

In order to create better films, you need to take a major leap! You cannot just marginally improve because the gap between our content and international content is too vast. So, keep attempting long jumps, short jumps will only cover short distances; hence, aim far away!

In our film *Chaar Sahibzaade* (2014), we did not come between the emotions of the audience



and the content. As the film was very close to the heart of the Sikh community, and dealt with a sensitive issue, we ensured that animation did not disturb the sentiments of anyone. In fact, it connected the audience to the emotions that the filmmaker wanted to portray. In any film, animation should not disturb the audience. It should engross the audience and engulf them in the flow to feel what the characters in the story feel.

It was a delicate issue to handle but we made the audience cry. And they cried not because of the animation but because they connected to the character, to his story. The audiences of various background felt what the character felt and were a part of the story. They didn't watch the film, but they 'became a part' of the film.

*If you are creative
you don't have to
show it by being
pretentious...let
your work speak for
itself!*

'If you are creative you don't have to show it by being pretentious...let your work speak for itself!' Often, we are pretentious, we pretend to be an animation studio and create extensive animation. Just remember, you are a storyteller first and are using animation just like any other medium to tell the story. Do not think that you are superior. Ultimately, if the audience is not buying a ticket for your film, you can make out how well you have fared. It is that simple. So don't let success get to your head!

'Don't be what you don't want to be...' Do not focus on being someone else. Work on making your identity by creating quality content and expanding the base.

Animation film making is a long process which requires continuous efforts. Consistency is the

crux of any studio. An idea is the brainchild of a single artist and the artist should be a part of the entire cycle till the idea is converted into a full fledged film. An artist involved in pre-production has the right to know what goes in the production and how it will look in post production. Respect your artists for they are not just animators but the source and summit of creativity!

Budget is not even the reason for success... Passion is! For if budget was the reason for success, every high budgeted film would be a huge hit. It all boils down to 'Passion'; it depends on how passionate you are. If you put your heart and soul in anything that you do, you can connect to the audience profusely. There is no star in animation, the only star is content...so enhance that star and let it shine in a paramount way in your film!

The author is the CEO of iRealities, a Mumbai based animation studio.

BigSharks Studio: The minnow which wants to be a VFX big fish

Flagged off with a simple mantra “Connect, create meaning, make a difference,” BigSharks Studio has made rapid strides in just one year of its existence to emerge as a fully equipped Visual Effects and Stereo Conversion outfit in North India. Situated in the city of Nawabs - Lucknow, BigSharks had a young brigade of six at startup. It now boasts of 150 plus employees.

15 January 2015 marked the debut of BigSharks Studio by the dynamic founding members - Anuj Srivastava, Gaurav Singh, Hemant Singh, Maan Singh, Sachin Kumar and Nitesh Chandra – who between them have diverse experience in VFX and Animation with companies like StereoD, Prime Focus and Xentrix. Their objective: contribute to the International entertainment industry with their expertise, high managerial and creative skills.

Having previously worked on films like *Ant-Man*, *Terminator 5*, *Monster Hunt* and commercials for Samsung, Xiaomi and Gatorade, BigSharks can truly claim to have arrived, courtesy this blue chip client base. Its client credentials will soon have top notch additions: it recently delivered 60 minutes of 2D to 3D stereo-conversion for *London Has Fallen*, and it's currently doing visual effects for A-listed brands like Microsoft, Deutsche,

Verizon, AT&T, Thundersoft and Google. The newbies have delivered some 1,200 shots for VFX and 4,600 2D to 3D stereo conversion shots at a shoestring price.

The studio uses the X3D pipeline which is a mix of innovation and creativity. “The X3D pipeline facilitates artists and the management to create groundbreaking virtual reality and cinema ready 2D to 3D stereo products while reducing human errors,” explains Gaurav.

X3D involves the use of outlined edges of various elements in a frame and extracting their matte information (refer image 1). These mattes are then placed in different planes on the Z-Axis to create a disparity map (refer image 2) giving it a virtual feeling of being present in the environment.

Gaurav believes that VFX projects – whether Indian or international – have a lot to offer and more of them are coming India's way. Says he: “There are no limits on the creativity and Innovation front. VFX has its own world, which has no regional or cultural boundaries as it works at the sole factor, ‘the speed of a human

mind.’ Creativity neither has nor should be limited to any defined horizon.”

Gaurav believes that both Indian and international audiences have taken pretty well to the use of VFX. And this is evident from the spurt in the usage of VFX not just in movies but also in the television commercial and daily series space. Both TV channels and production houses are setting aside higher budgets for CG and VFX because audiences have begun to expect a lot of CG and computer wizardry in whatever they watch.

To help realise the team's dream of bringing about a drastic revolution in the AVGC industry, BigSharks Studio has launched its BigSharks FX School. The idea is to hone young talent at the school in order to have a bunch of home-trained and home-grown studio-ready artisans – something the industry

sorely lacks.

With that kind of pipeline of talent continually flowing in, BigSharks Studio should be ready and geared for any project that comes in.

Creativity neither has nor should be limited to any defined horizon



Image 1



Image 2

Riva Animation dives deep into Bollywood



The Riva Animation & VFX team transformed an early morning sky scene in the big Bollywood success, PK, bringing in an alien spaceship using CG

What may seem impossible to the naked eye, can be created using VFX. Bollywood and visual effects have conjointly entertained audiences for around a century but even more so recently. Even if the story of the film is not interesting, visual effects does the work of highlighting it even as it enhances the visual experience.

In India's Bollywood, Riva Animation and VFX, a Mumbai based studio, has delivered substantial work in terms of visual effects for various films in the past two years.

India took the risk of creating a film called *PK* (2014) consisting of an alien and spaceships which grossed \$100 million worldwide.

The challenge lay in displaying the hypothetical situations in the plot of the movie with utmost reality. Riva Animation and VFX delivered 700 VFX shots for this film directed by veteran director Raju Hirani. An alien spaceship amidst the cloud, fire, explosions, blasts, crowd multiplication and crowd creation were all done using CG techniques.

Throughout the film, the protagonist portrayed by Bollywood superstar Aamir Khan had a distinct alien kind of look as his ears were created using CG and his head was 3D tracked. Over 100 artists laboured for six-eight months as the film called for a plethora of VFX sequences.

The start of 2015 brought another major Bollywood film named *Baby* starring the renowned actor Akshay Kumar into Riva's corridors. Around 900 VFX shots were delivered in just under a month's time for this action packed movie. As this film demanded a number of action sequences, the visual effects had to look real and yet match with the stunts performed by the actors.

Along with blasts and explosions, Riva worked on background creations for this film as a complete sequence of Nepal was created. The entire film had nearly 90 minutes of VFX shots or it can be said that every alternate shot in the movie was a VFX shot. Reference of Google Earth was used to study the geography of the place to create various sequences. Photographs were taken for reference before creating textures, the CG shots were created using Maya for animation and 3ds Max for all the effects.

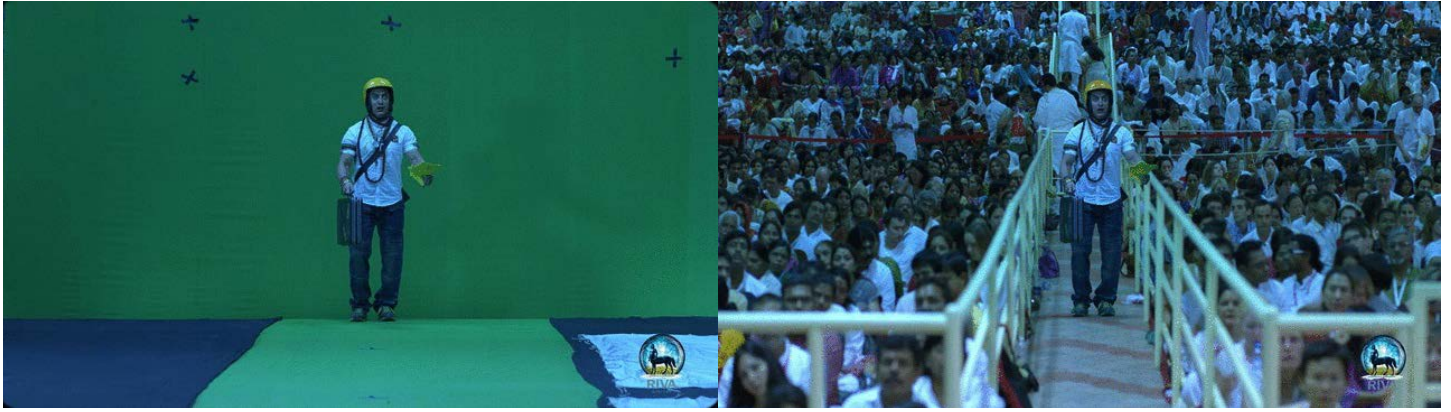
India's first 3D dance drama film *ABCD 2* (*Anybody Can Dance 2*) directed by veteran choreographer Remo D'Souza was produced under Walt Disney Pictures in June 2015. This film aimed to be in par with Hollywood dance films both in terms of quality and story. An entire CG stadium with an energetic multitude cheering for a dance competition was created by Riva as the plot of the film demanded a splendid climax.

This film also featured a sequence where a human character was disintegrated into feathers in a normal real life setting.

These visual highlights for the film enriched the viewing experience of film goers worldwide. Moreover, *ABCD 2* was entirely 3D so some of the 2D shots were converted into 3D using CG and VFX. This film consisted around 350 VFX shots, most of which were stereoscopic conversions into 3D as Nuke software was used for compositing these.

Creating amputated legs throughout a Bollywood film *Wazir* (2016) for veteran actor Amitabh Bachchan was a task that Riva undertook and, successfully completed too. The actor was shown on the wheelchair in the entire film and therefore his actual legs were hidden using VFX.

In some of the sequences, the bare amputated legs were shown which were digitally created. The legs had to look old, rugged and weary and therefore VFX played a major role in giving that extra effect. The usual blasts, explosions and action sequences were created for this film too. The film featured a sequence in which a prominent area in India's capital Delhi had to be created. And a chase sequence on a major highway was enhanced by adding digitally created cars, vehicles, lights, monuments and a background environment.



For the film PK, crowds were added to a green screen shot. Film goers did not realise that VFX had been used for this scene



A dramatic sequence was created involving a road accident for the Akshay Kumar starrer Baby



The highway sequence for the film Baby was tricky, but VFX helped find a solution

An uncertain situation between two countries namely Iraq and Kuwait with Indians bearing the brunt as intermediaries was portrayed through a Bollywood film *Airlift* (2016). In this film, Riva went a step ahead to create helicopters, choppers, tanks, fighter planes along with war blasts and explosions. A huge ship and sea-water was also digitally created as it was difficult to shoot these sequences live. This film too was an action packed film as it starred Akshay Kumar and was filled with war sequences due to the conflict between the two countries. Only VFX could make these sequences possible as it added life to the actual setting and helped in bringing alive a notable historic event.

Around 900 VFX shots were delivered within a month for the Akshay Kumar starrer movie, Baby

On the verge of completing two years in the Indian VFX industry, Riva Animation and VFX has dominated Bollywood by bringing about a paradigm shift in the art of filmmaking.

Directors, producers, actors and production artists now believe in the potential of VFX and trust the faculty to produce what may seem unimaginable. The scenario of Indian filmmaking has changed completely as VFX and high end CG technology has replaced long manhours and concentrated physical efforts. Optimum use of technology is what defines VFX, and Riva has availed of this benefit to bring about an emerging revolution in India.

Toonz Media Group: Sketching out a \$1 billion roadmap



Perseverance, idea, talent, strategy, courage, foresight, expansion plans and willingness to take risks define the journey of Toonz Media Group, one of India's largest animation studios. Founded in 1999, Toonz Animation was Kerala's first animation venture and today after 17 years it has grown into a multi national company generating revenues totting up to \$10 to \$15 million from India alone with more than 600 employees.

The company specializes in creating both 2D and 3D animated content across platforms like television, digital and theatrical feature films. Toonz is amongst India's animation pioneers having produced India's first animated television series called *The Adventures of Tenali Raman* in 2003. For now, along with production of animated TV series, the company is focusing on creating animated content for digital platforms and co-producing with major global players.

"We are already producing 4000 minutes of animation in 2D and close to 2000 minutes of animation in 3D which is quite big as compared to any standards. Our idea is to be in the top five slot globally when it comes to quantity of production in the next two to three years," expresses Toonz Media Group CEO P. Jayakumar.

Jayakumar has major ambitions for the group. He is dreaming big and dares to state that Toonz can emerge as the Disney of India and can even cross a billion dollars in revenue. He points out to the blazing growth pace that Toonz's parent investor UST Global - which started operations around the same time as his company - set for



Toonz Media Group CEO P. Jayakumar : He's got growth on his mind

itself. The company began with 40 people in Thiruvanthapuram and today employs more than 18,000 professionals "Today, UST Global is the No.1 IT business in Kerala and has 1.2 billion dollar revenue. So, we are growing in all aspects," he says.

He has identified what the company needs to get there; content production is not enough. Says he: "Production of content is the business that we started with and this is our bread and butter. But the business that will take us on top is distribution, digital, licensing, merchandising and acquisition of other companies."

Toonz recently bought a company in Spain called Imira Entertainment to strengthen its content library. With this acquisition the company now controls almost 4000 hours of kids content across the world.

Toonz is in talks with a number of major players in India, China, USA, New Zealand, Middle East Asia, Spain and many other regions to expand the company's footprint further. "We are looking for acquisitions in the digital, licensing and merchandising space. The idea is that by March 2017 we want to be a completely integrated media company," says Jayakumar.

He has been eyeing an outpost in the Silicon Valley and the company is in talks to buyout a US based company which is in the top 5 in the digital business there.

"This deal will make us a major player in the digital space globally as we are already planning to launch our Spanish, Turkish, Arabic and Russian YouTube channels in the coming months," he explains.

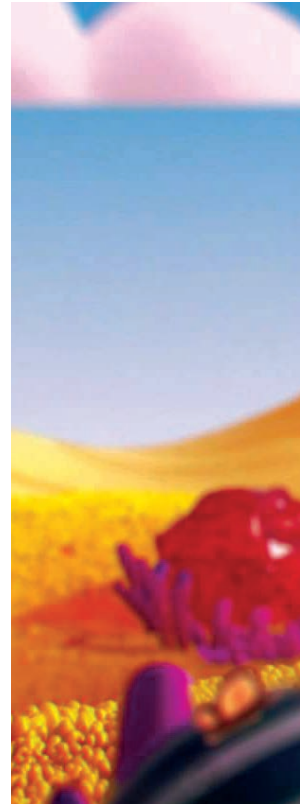
Toonz, despite being a late starter in digital, has been notching up some attractive audience numbers online and on mobile.

It launched its own digital kids channel called 'Chotoonz' in late 2014. It quickly gained cachet with kids, without much effort. It has been clocking up over 50 million views per month in just the initial six to seven months.

A team has been set up to curate original content for digital, which should help it ramp up its digital presence further.

"I know we have some way to go," confesses Jayakumar. "The Indian industry - including Toonz - have ridden out the storm. Now it's our time to bear the fruits of all our hard work."

Premium Games - The new flavour for Indian indies



Hrish Oberoi

Contrary to what people might think, Indians have been making video games since the late nineties. While the number of developers would have been a trickle in those days (you could count them in one hand), their tribe has ballooned to at least in the hundreds; and this is without counting the one-person, indie-developers, sitting in their parents' houses and pontificating how they can 'make the most kickass game an Indian has ever made, oye!'. My estimate of those types of developers would be in the thousands.

The reason for this explosion of developers, trained or untrained, is because of the times we live in. Today, it's really easy to just pick up a computer and build a game. Programming is being taught in schools, art and artists are available on the internet and game development software is available for free. But most importantly, all of this leads to the largest avenue to sell games directly to consumers... the current smartphone App Stores.

Because of this easy access to development and sales channels, there are thousands of developers sitting at home developing games unwisely

thinking they can strike it rich.

Well, it's not that simple!

But hey, isn't *Candy Crush* making like a million dollars a day?

Yes, but the problem now is that you're playing in their field, which means you need to play by their rules, and the current rules are dictated by the consumers who demand everything for free.

So what? *Candy Crush* is free!

Well, yes, yes it is! *Candy Crush* is free... Free-To-Play! But the art and science of building a successful Free-To-Play game is like striking it rich on the stock market where to be successful you need a bevy of quantitative analysts doing number crunching, since it's as much about the data as it is about understanding the business.

So are we all doomed?

Absolutely Not! Since there is no better time

The first part of making games is thinking about the game and not the business model



Screengrab from Candy Crush Saga TV Ad - YouTube

than now to be able to make the games that developers have wanted to make and get them in front of an audience, the concentration should be exactly that, to make the games; and the first part of making games is thinking about the game and not the business model.

A lot of market and ecosystem factors have contributed to the development of the gaming sector; most notably the rise of indie games worldwide in the past seven years, their universal accessibility through the internet, and the tools available for anyone to be able to create them. These indie games are now available on every gaming platform; whether it's the mobile phone, the PC or any of the consoles; and so we've seen a lot of International Indie game creators create Premium games that are, more or less, platform agnostic.

Some of the successes of last year include games like *Her Story*, *Leo's Fortune*, *80 Days*, *Tales*

from the Borderlands, *Transistor* and so on. These are examples of games that are inherently Premium games but easily platform agnostic, and their developers have brought them to every gaming platform possible. In doing so, the App Stores are just another avenue to sell their games and not just the easiest one available. Even Apple acknowledged the continuing existence of quality premium games by creating the "Pay Once & Play" section, which featured only Premium games.

*Even Apple
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Once & Play"
section*

to other platforms easily, but these are titles and generally exceptions to the rule. *Device 6*, *A Sailor's Dream* and *Monument Valley* come to mind, and these are very specific to mobile only.

Of the Indian developers, this year we've seen some of them take the cues of these Indies and try to replicate it, but it's too early to tell if they will be successful as yet.

We've definitely seen some bold experiments with games like *Stay*, *Mum* and last year's *Unrest* and the upcoming *Asura*, *Good Robot* and *Sky Sutra*, and only time will tell if they've achieved what they set out to do.

So are premium games the way to go for Indian Indies?

Well, it depends. Developers should just concentrate on creating the best game experience that they can; and once they know they can do that, only then should they move onto thinking about layering a business model over it. For Indian developers, if they can create an outstanding, standalone premium game, which is good enough to be picked up by any international publisher across multiple platforms, then they are more likely to have a successful hit with this premium game (even on the App Stores) than they are likely to have with a free-to-play game.

The author is the CEO of Photon Tadpole, a Mumbai based games development & games production company.

The role of education in India's AVGC transformation

The unfortunate reality of India is that the two most important decisions that a child makes is choosing their parents and PIN code wisely. But this problem is not like cancer or climate change where solutions are unknown; fixing India's infrastructure of opportunity lies in a radical revamp of our 3Es (education, employability and employment).

This is not only an economic imperative - a million youth will join the labour force every month for the next 20 years - but a political one, as the 100 million new voters of the 2014 polls will be joined by another 60 million in 2019. Yes, the meter is down.

However, India will produce 171 IAS officers, 700 pilots, 8,000 chartered accountants, 300,000 MBAs, 1.5 million engineers, 45 thousand doctors and lots of visual effects technicians this year.

In India, 3D Animation and VFX have slowly but steadily been established as mainstream career options. The rare ability of creating magic on the screen, immortalising work which transcends geographies; fuels the decision of a media aspirant to pursue a 3D Animation and VFX course. A course in 3D Animation and VFX propels a student to enter the exponentially growing M & E Industry.

Visual effects is now becoming a compelling tool in storytelling. Earlier it was just added on, now it is planned right in the preproduction stage.

70 to 75 per cent of our films require VFX, we have 40 VFX companies in India catering to Domestic and International requirement. Films like *Baahubali* and *Bajirao Mastani* have redefined the power of VFX and the day is not far when Indian VFX will be a power to reckon within the global arena. Similar sentiments resonate for Animation.

India continues to hold its ground when it comes to outsourcing, several co-production works are happening, several International

projects are now being front ended in India. Near about 40 per cent of sequencing work of *Puss in Boots* was lead created in DreamWorks India. The presence of International studios like DreamWorks, MPC and Technicolor has given a massive shot in the arm for Indian animation.

If one knows exactly where one is going then that person becomes incapable of going too far



Shajan Samuel

In India we overemphasise on a graduation degree. The fact is that a degree doesn't provide a job particularly in the AVGC industry, we need to find a better balance between learning for living and learning for earning.

There are only a few training providers in India which focus on all round / wholesome education. The world of work is changing and

the most important employability skills for an animator or VFX artist are an eye for detail, gift of the gab, creative flair, observation skills and challenging the status quo. Merely learning CG software is not enough.

The best way to prepare the student into the world of work is to provide structured learning which moves beyond classroom training. Periodic interventions, assignments, calendarised exams, industry interface, participating and showcasing work in competitive film festivals, group work sharpens the dexterity of the student.

Academics in school is a "sampling error" because getting ahead is largely about individual smartness and hard work. But getting ahead in life is largely about working with other people.

Life is a team sport and nothing big or meaningful can be accomplished alone. Events, which allow students to work in groups, meeting unknown people, forging relations and strengthening loose ties, help them prepare better for the real world of work.

The next-wave of impact in skills lies in figuring out models that will enable the creation of a market in collateral-free student loans or third party financing at the entry gate of training which can be repaid courtesy his pay from the job he/she gets at the exit gate. Employment at the exit gate is key to creating a viable, scalable and sustainable model.

There is a larger purpose than grades; that our aspirations must go beyond and that our dreams must be bigger than our current resources. If one knows exactly where one is going then that person becomes incapable of going too far. One has taken a step, commit to it. This boldness requires power, magic and a certain touch of genius.

The author is the SVP of MAAC (India), a national animation, VFX & gaming educational institution.

Industry Directory



Company Name:

Animation Xpress India Pvt. Ltd.

Company Profile: Animation Xpress is one of the world's leading portal for news, information and community activities for the animation, visual effects, comics and game development industries and the technology and education assisting the above.

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Email: connect@animationxpress.com

Website Link: www.animationxpress.com



Company Name:

Basilic Fly Studio Pvt. Ltd.

Company Profile: At Basilic Fly, we combine passion with creativity to create insanely happy clients. Our 9000 sq ft studio, houses 126 core artists within our 150 seat facility, capable of delivering Visual effects catering to the needs of motion pictures, commercials and TV content.

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Website Link: www.basilicfly.com



Company Name:

BigSharks Studio Private Limited

Company Profile: Bigsharks Studio is a cutting edge VFX Company. Built around an exceptional team of visual effects professionals, BigSharks' facility provides end to end visual effects and 2D to 3D stereo conversion services at a modest cost.

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Email: gaurav.singh@bigsharksstudio.com

Website Link: www.bigsharksstudio.com



Company Name:

Freebird Animation Pvt. Ltd.

Company Profile: Freebird is a creative led independent 2D and 3D animation company whose goal is to produce and deliver quality Digital Animation for Digital Media, Television, Features, Gaming and Commercials.

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Website Link: www.freebirdanimation.com



Company Name:

Javvadi Studios

Company Profile: Javvadi Studios is a full post production boutique driven by a diverse roster of award winning multi disciplined talent. Our mission is simple: We're dedicated to crafting compelling visual stories that engage audience and connect them to brands.

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Website Link: www.javvadistudios.com

Industry Directory



Company Name:
PixStone Images Pvt Ltd

Company Profile: Specialised Pre Comp services company for Steroscopic conversion, VFX and VR Studios. Our Unique Proprietary delivery model (IDS - India Delivery Studio) enable customers with consistent quality and reliable deliveries.

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Website Link: www.pixstone.com



Company Name:
Prism & Pixels VFX Studio

Company Profile: A leading VFX Studio in Chennai specializing in Post Production Digital Laboratory. It has delivered high quality digital DI / VFX in hundreds of Indian regional language films over seven years. Its skilled and talented team ensures that the client's creative vision is realized and only the very best in visual effects is delivered.

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Company Name:
TeamWork Studio Pvt. Ltd.

Company Profile: An independent post production house, TeamWork Studio is gaining a reputation as India's most preferred service provider in visual entertainment, catering to the growing demands and requirements of the film, television, broadcast and advertising media.

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Company Name:
The Graphicslate.com

Company Profile: TheGraphicSlate.com is a news service that covers the creative side of Animation, VFX, Gaming and Comic industries along with the Technology and Education that supports them.

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Company Name:
Unifi Media

Company Profile: Unifi Media is the fastest growing post production studio in Bengaluru offering a wide range of digital services like Digital Colour Grading, Visual Effects, Digital Set Extension, Clea Up (Paint), Final Compositing, Digital Cinema Mastering (DCP) and Film/Video Restoration.

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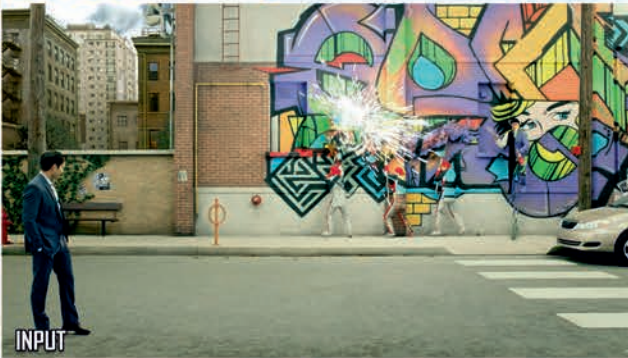


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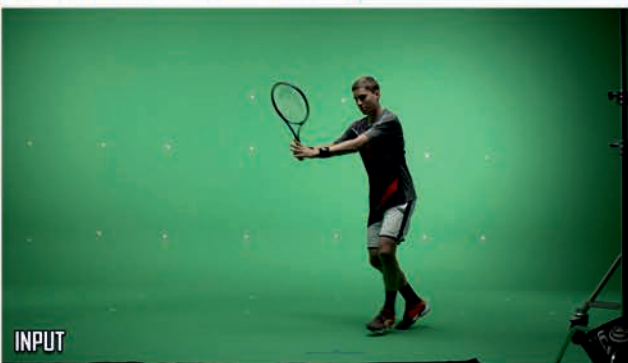
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