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An AnimationXpress.com Special Issue No. 3

October 2018

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NO. OF EPISODES: 80

LENGTH: 2 MINS - 14 MINS



# FUNZONE

3D ANIMATED KIDS SONGS

[YouTube.com/ChuChuTVFunzone](https://www.youtube.com/ChuChuTVFunzone)

NO. OF EPISODES: 30

LENGTH: 3 MINS - 10 MINS



# CHU CHU TV

NURSERY RHYMES & KIDS SONGS

[YouTube.com/ChuChuTV](https://www.youtube.com/ChuChuTV)

NO. OF EPISODES: 140

LENGTH: 2 MINS - 8 MINS



# STORY TIME

ENCHANTING STORIES FOR LITTLE ONES

[YouTube.com/ChuChuTVStorytime](https://www.youtube.com/ChuChuTVStorytime)

NO. OF EPISODES: 25

LENGTH: 2 MINS - 7 MINS



# CHU CHU School

CURRICULUM BASED LEARNING CONCEPTS

NO. OF EPISODES: 40

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# SPARK

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October 2018

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in India!



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Animated shows get game

Indian animators' Open Source romance



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So we are on to another MIPCOM SPARK issue. And we are happy to bring it to you. The past year and a half has been the story of swashbuckling forays by the global majors into the Indian OTT market – Netflix and Amazon Prime – with their slate of originals. Additionally, there has been spend by local OTT players on sports rights acquisitions by the likes of Hotstar, SonyLiv as well as the relaunches of Zee5, SunNXT, and the impending reintroduction of Voot from Viacom.

Our cover story “It’s raining OTTs” encapsulates this trend for those who are unfamiliar with the Indian market.

Indian kids broadcasters have been setting up in house creative and writing teams to come up with local characters, stories and commissioning studios to produce them into animated shows. And they have met with great success. Now the studios are looking at syndicating the shows to other broadcasters internationally and creating their own global successes. Our second lead story gives insights into this trend. Smaller Indian studios have been relying on free open source software to bring their characters to life. The story on Indian animators open source romance will give you an idea of why this is happening.

The MIPCOM 2018 SPARK issue also has stories around how IP owners are using online games to build viewer stickiness with their shows and characters which are popular on television, profiles of a couple of leading Indian animation studios.

AnimationXpress.com is exhibiting in P-1.J29 and is also representing some library and catalogue from India’s content rich production sector including animation, documentaries, and films in different languages.

MIPCOM 2018 is also a landmark for other reasons for India’s animation community. An Indian pavilion has come up in the Palais des Festivals located at P-1 B2.

Backing this is the Services Export Promotion Council (SEPC- which comes under the ministry of commerce) director general Sangeeta Godbole who has drawn up affordable packages for smaller animation studios making MIPCOM accessible to them. We, at AnimationXpress, along with the Ankur Bhasin- headed Media and Entertainment Association of India (MEA) have been urging India’s cautious studios to become a part of the pavilion.

Hopefully, it is the first of many such initiatives, which will help give a boost to the Indian animation sector that we so eagerly want to see explode onto the world scene.



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**Founder, CEO & Editor-in-Chief**

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# India's animated IP rush

Sharmindrila Paul

India has long been eyed as a service destination in the animation sector. However, in recent times, a clutch of homegrown studios buoyed by a supportive bunch of kids broadcasters, have been taking the original IP trail. While some of the broadcasters have been extremely clear about total ownership of the animated IP, others have been open to sharing the merchandising and licensing rights. That's despite the fact that IP development is a collaborative effort between broadcasters, animation studios and creators. However, since broadcasters are carrying most of the risk by investing millions in the IP, rights ownership is something they demand before commissioning a new show.

*Little Singham*, inspired by the successful Bollywood film, *Singham*, is one such example of collaboration between Discovery Kids, Rohit Shetty Picturez and Reliance Animation.

Says Discovery Kids business head Uttam Pal Singh: "To be honest, local IPs are doing well in ratings and broadcasters are investing a lot in development of tentpole properties. Even the advertisers are

“



I believe it's the right approach and a good direction for the overall industry primarily led by the demand from kids for more locally relevant content.

- Discovery Kids head Uttam Pal Singh

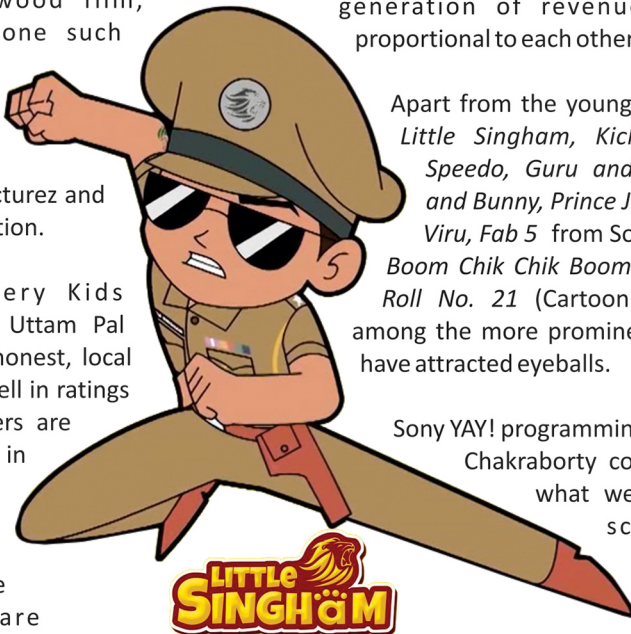
”

more keen to come on board a local IP which is connecting with the audience.”

The show has also whipped up huge advertiser interest with the growing popularity including FMCG brands like Dabur Red Paste, Britannia Cakes, Dettol, Flipkart, and Heinz- Glucon D and B. This IP has worked wonders for Discovery India as advertisement partnerships and generation of revenue is directly proportional to each other.

Apart from the youngest super-cop - *Little Singham*, *KickO and Super Speedo*, *Guru and Bhole*, *Honey and Bunny*, *Prince Jai and Powerful Viru*, *Fab 5* from Sony YAY!, *Rudra-Boom Chik Chik Boom* (Nickelodeon), *Roll No. 21* (Cartoon Network) are among the more prominent titles which have attracted eyeballs.

Sony YAY! programming head Ronojoy Chakraborty comments about what went behind the scenes in the creation of a new superhero in



town, KickO. Says he: “Everything from KickO’s car to his watch to the relationship he shares with his friends, is something kids will relate to. We associated with Green Gold Animation as it is one of the best animation companies in the country and to deliver such animation, there was no second thought on who we wanted to partner with.”



**“The germ of thought for *KickO* and *Super Speedo* came from an extensive research from our target audience that kids love wrist watches and remote.**

- Sony Yay! programming head Ronojoy Chakraborty

Sony YAY! owns the IPs of all the six shows it has created so far, since the launch of the channel. Most of the broadcasters hire writers and creative artists to come up with concepts which are unique, and one of a kind and worth taking into production. While owning IPs means a lot more investment for broadcasters, it also allows creative control as well as possibilities of extensions.

Says SPN kids genre business head Leena Lele Dutta: “We evaluate concepts based on



**The statistics so far has been skewed towards the broadcaster created IPs and not the ones from production houses.”**

- SPN kids genre business head Leena Lele Dutta

merits and not on who it is coming from.”

The response for these shows has been fantastic so far for most of the channels. In the past year, Sony YAY!’s reach has grown 57 per cent and the channel has grown to 17.2 million viewers in August 2018 according to BARC, India U+R, 2-14 All NCCS, 24 hours and Universe size 185 million. Regular focus group studies have shown the tremendous love that kids have for KickO and Honey and Bunny.

On the other hand *Little Singham* has helped Discovery Kids race up the charts by contributing close to 60 per cent viewership to the channel in week 17, as per BARC. Not only that, it has also accelerated the rise of the channel to the second position in the kids’ genre from the ninth position in the seventh week of 2018.

Nickelodeon – part of Viacom18 Media - too has its slate of local home-grown IPs. Among



them there are many firsts: *Pakdam Pakdai*-India’s first chase comedy, *Motu Patlu* – the only adult protagonists in the



Rudra is set to cast his spell

kids' animation category that have gone on to be chart toppers, to Shiva - India's whiz kid and *Gattu Battu*- India's first animated detective series.

With the launch of its fifth IP, *Rudra-Boom Chik Chik Boom*, Nickelodeon has forayed into the untapped genre of magic in the country, making it the broadcaster with the maximum local IPs and also a large library of 350 hours. Like Sony Yay!, it too has an inhouse team which conceptualises and creates strong characters and IPs and hands them over to local studios to produce.



The launch of *Rudra* has added further depth to our portfolio and has provided impetus to our objective of engaging kids and creating a dynamic kids ecosystem."

-Viacom18 head kids entertainment cluster Nina Elavia Jaipuria

Says Viacom18 head, kids entertainment cluster Nina Elavia Jaipuria: "We have been focused on creating an entire ecosystem for kids that extends beyond television with our successful portfolio of iconic 'Made in India IPs."

Nickelodeon has topped the charts in the kids' entertainment genre in the country over the past four years, that too with a

huge margin. The channel has continued to grow with Sonic which is close to just 40 GTVs behind its stalwart competitors.



"We are looking at producing IPs and characters that have the ability of resonating with viewers across the globe."

- Turner India executive director and network head kids, South Asia Krishna Desai

Turner India executive director and network head kids, South Asia, Krishna Desai explains that his firm has been at the front line of the IP revolution. "Home grown IPs are a natural evolution in itself for content development. We are a part of the animation industry, which is still very young in India being just two to three decades old. But, I would certainly say that we have leapfrogged many things and tried to help the industry by encouraging a lot of home grown content on both our brands."

Turner's IPs such as *Roll No. 21*, have also enjoyed quite fan following courtesy the new treatment and smart execution as it is the number one show







on Cartoon Network in India.

As per the BARC data (*A Peek into Kids Viewership*), children aged two to 14 years, as an audience, account for 20 per cent of total TV impressions. This is the highest share across all age cuts while 87 per cent kids in the same age group watch non-kids channels, while only 13 per cent watch kids channels. So the inclination to more exclusive and exciting local original content is created to attract more kids to characters and content they can relate to.

For getting more traction for their IPs, broadcasters have adopted various means, such as on-ground events, that help them to reach a large number of kids and animation fans at a single go. It also enables them to establish their IPs as a specific brand. For instance, Sony YAY! celebrated Teacher's Day this September, by bringing the second season of its flagship initiative, *Heroes Behind the Heroes* by



Choreographer Terence Lewis

acknowledging a few eminent personalities across myriad fields such as Indian tennis player Sania Mirza, choreographer Terence Lewis, Indian film director, producer and screenwriter Subhash Ghai, Nobel Peace Prize recipient Kailash Satyarthi and Indian Sarod player Ustad Amjad Ali Khan Bangash. This event was promoted by their successful IP- KickO.

The channel also collaborated with Domino's Pizza, a huge brand in itself, to celebrate its second birthday with children from Hope Foundation. It treated the kids to a host of fun activities starting with a screening of an episode from *KickO and SuperSpeedo* and unlimited pizzas.

Similarly Nickelodeon conducted its annual school contact programmes across 1000 schools and a dozen cities from Chennai to Chandigarh, to bring alive the magic into the classrooms with some fun games that encourage kids to focus and believe in the magic they possess, through their homegrown IP, *Rudra*.

Extensions have also been made in the gaming area. Discovery Kids' reach has doubled

in the last six-seven months and the *Little Singham* game has garnered more than five million downloads. *Little Singham* also won the Best IP award at Indian Licensing Expo





The chase is on with *Pakdam Pakdai*

(ILE) and they just launched its second season in September.

“This has been the most important milestone we have achieved-

that Discovery Kids has been able to connect with kids audience like never before – this bond is very special for us,” Pal Singh stated.

Industry professionals assert that original IPs from the houses of several broadcasters are not only going to stay but increase exceedingly. And while Indian kids shows have yet to pick up the Disney character allure globally, ambitions are running high. Says Dutta: “We definitely want to push for more original content and plan to take the syndication beyond India. Our syndication team will be at several markets this year and talking to potential buyers. We believe all our concepts are universal and can transcend geographical and cultural boundaries, making them consumable across many markets.”

Pal Singh too reflects a similar view, “The plans are on and there is interest from other regions. However our endeavor is to make it successful locally first and be true to our audience.”

Turner’s Desai believes that creating compelling stories and visually appealing

animation is not a quick and easy process as it involves thorough visualisation and storytelling. But he is confident that the industry has the potential for generating all-encompassing viewership, with animated content being made not only for kids but also for grown-ups to enjoy.

Viacom18 content kids cluster head Anu Sikka also asserts “While our focus has been and will remain to gain local viewership in India, our IPs have already been syndicated and are airing in territories beyond our region- in various territories in



Asia. Our most successful IP in international markets has been *Pakdam Pakdai*, which has been sold in Latin America, South Europe and Asia. Being a chase comedy with animal characters it is a more universally accepted show.”

India’s IP creators have just started taking tiny steps in the hyper competitive world of kids content. Will they sprint ahead?♦♦



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# INDIA'S INDIE HEAVY



## Vaibhav More

Owner and Director at Vaibhav More Films.

Recent Projects: Zee HD Channels Ad, Videocon Neo Curve Ad

*"Every day, every script and client is a challenge. Challenges keep me going. The medium never disappoints me as there is so much to learn and explore that a lifetime is less."*



## Soumyadipta Roy

An animator and graphic novel illustrator.

Recent Projects: *Fuzzy Critters*

*"Art and animation is an expanding world for me. Everyday is a deeper step into the depths of the imagination. It's fun, it's challenging, and it's great!"*



## Vivek Ram

Senapati of Vaanarsena Studios.

Recent Projects: *Myth - O - Katha*

*"We artists don't really see it as an industry. It's more about creation and expression, and as long as there is an urge for me to create, you'll find me here."*



## Prosenjit Ganguly

A noted name in the animation industry

Recent Projects: Have worked with Vaibhav Kumaresh in the making of *Lamput*

*"Animation for me is telling stories in a language of impossibilities."*



# ANIMATION WEIGHTS



## Vaibhav Kumaresh

Founder and Director at Vaibhav Studios.

Recent Projects: *Lamput*, *Return to the Jungle*

*"The curiosity and excitement to explore animation as a medium of storytelling pulled me into it."*



## Vivek Bolar

CEO at AUM Animation Studios.

Recent Projects: *Andy Pirki*.

*"To succeed, you need to be in the right place at the right time and take advantage of the opportunities. I believe that I am in the right place at right time."*



## Ravi Shankar

The creative mind behind the first Sanskrit animation movie, *Punyakoti*.

Recent Projects: *Punyakoti*; CD-Rom on Panchatantra, *Fables of India*

*"I see the increasing empowerment that digital technologies are bringing to animators and this keeps me going."*

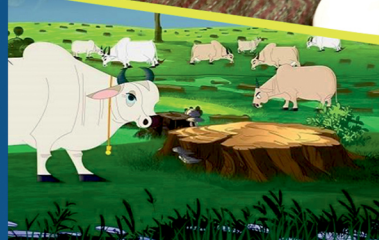


## AV Girish

An animator with an experience of over 20 years in the industry.

Recent Projects: *Punyakoti*; Short film for UNESCO, *Devi*

*"Even after 20 years of working in the sector, I feel the best is yet to come."*



# Shemaroo Entertainment adds spice to its identity

*In the Indian content ownership, aggregation and distribution context, the Mumbai-headquartered Shemaroo Entertainment, can truly be labelled a pioneer. It's a leading Indian content powerhouse with a global footprint.*

*The company has been a core part of Bollywood and has maintained relationships with leading production houses and film studios over the years. With a brand in existence for over five decades, Shemaroo continues to offer premium content and services to customers in more than 30 countries, across several Indian*

*comedy, devotional, music and kids.*

*Shemaroo is a trusted partner to many of the biggest media platforms such as YouTube, Hotstar, Star Gold, Zee Cinema, Vodafone, Reliance Jio, Tata Sky, Apple iTunes, and the west Asia-based Etisalat. It is an organisation led and driven by young minds and young hearts, providing premium entertainment experiences, in unique and creative ways.*

*AnimationXpress got into a quick and short chat with Shemaroo Entertainment CEO Hiren Gada to get a glimpse of the revamped Shemaroo. Excerpts from the interview:*



*languages. Its catalogue is diverse and ever-growing with over 3,500 titles. The company has been reimagining and redefining itself by delivering content across age groups in genres such as movies,*

**Shemaroo has undergone a brand revamp after 55 years. Can you throw more light on it?**

Shemaroo is proud to be truly Indian. We Indians love our masala (spice) as much as we love our masala content. And with over five decades of doing what we do best, we've come to understand what Indians really want when it comes to being entertained. We recently re-introduced our brand with a fresh and disruptive format which will appeal to audiences who love Indian content across the world.

The new identity is dynamic and future-facing. Both the new logo and tagline represent what the brand has always been intrinsically known for - entertainment and joy.



Shemaroo Entertainment CEO Hiren Gada

**What are the new areas of content you will be exploring?**

We are experts in identifying trends and curating content which is loved and enjoyed by Indians all over the world. We are rapidly expanding our content library to suit the new emerging platforms and have received encouraging feedback from audiences and our partners. Given the opportunities that exist in the market, we want to offer services on all platforms in all forms.

We have a vast library of Bollywood films across popular Indian regional languages such as Gujarati , Marathi , Punjabi,

fulfilling the content gaps in lifestyle, wellness, spiritual and kids content. We are the major content partners to all key Bollywood platforms and our content is being distributed via syndication to diaspora and non-diaspora markets in Eastern Europe, Russia, Africa, Latin America and Far East.

Shemaroo also distributes its content through telco relationships in several countries such as Nigeria, Kenya, Indonesia, Thailand and many others. The team at Shemaroo is positive about its new avatar and will continue to win the hearts of its audiences - young and old alike.♦♦

# ABAI's Bengaluru AVGC Center of Excellence to launch

With the aim of upskilling India's talent in the AVGC sector, the Center of Excellence will bring state-of-the-art technology and training within the reach of budding artists.

Developments over the year have indicated that India is emerging as a key animation and gaming development market and the country is now seen as a leading destination for high-end, skill-based activities.

In view of the growth prospects, the government of Karnataka department of innovation technology – working along with ABAI (a non-profit organisation aimed at developing the animation, VFX and gaming – AVGC - industry in India) - has taken proactive steps to set up the AVGC Centre of Excellence. This will help the IP and creative community by providing them a 'pay as you go' state-of-the-art facility that will respond to the industry's purpose to set up a high-end digital production studio for incubation and production that has the requisite components to build an ecosystem and hub for Bengaluru to continue its industry leadership.

The 30,000 sq. feet facility is currently under completion in the Whitefield area and has state-of-the-art shared infrastructure with technology and infrastructure for full body motion capture – *optical motion capture system* with the

necessary control room, support infrastructure with studio space; *facial capture system: facial capture headsets* to capture the actors' face. Separate rooms to capture ADR style facial capture and dubbing simultaneously; *AR/VR Lab: A completely modular facility* to accommodate the rapidly changing needs of AR/VR industry. This will support the latest HMD, portable workstations, high performance graphics workstations and video walls / caves; *high speed 4K camera system: camera with support infrastructure with 1000FPS at 4K resolution* for the table top shots and other VFX needs of the movie industry.



The Center of Excellence will also feature a *restoration facility: auto and manual restoration work* for the archival content; *incubation centre: high end workstations with popular software available for any customer to come and use for their projects, as per their needs; DI facility: colour correction facility with properly calibrated monitors and projection system* to support high resolution and high colour depth projects and a *mastering facility: to transcode and master to various standards such as DCP, broadcast and digital streaming channels.*◆◆



# INDUSTRY TESTIMONIALS

AnimationXpress has aggregated a relevant community of industry professionals, artists & technicians in animation, gaming and VFX. We at Technicolor India have partnered with AnimationXpress for our recruitment needs right from inception.

Biren Ghose  
Country Head  
Technicolor, India

Good to see Animation Xpress going to new segments and new areas, for example, sound. It's really good to be working with you guys. Pleasure working with you and all the best and wish you guys a lot of success

Pankaj Kedia  
Sr Regional Director –India, SEA  
& ANZ Dolby laboratories

I just want to thank Animation Xpress for being a platform between Animation companies like myself and students. Really building a bridge across the worlds. We have been sharing information on their experiences within Animation and Visual Effects.

Phil Stilgoe  
CEO Centroid  
Motion Capture

AnimationXpress is one of the most trusted sources of news and information for animation & the VFX industry in India. We at Autodesk, rely on it for market intelligence. For more than a decade now, it has additionally contributed to the CG community in india through the industry events & initiatives it puts together.

Alok Sharma  
Head-Media & Entertainment  
Autodesk India

# Toonz Media Group spreads its global footprint

**Southern-India-based company, Toonz Media Group is a global force in kids content creation, production and distribution.**

An existence for 19 years is the kind of a landmark many an Indian animation studio would aspire to achieve. With that kind of experience under its belt, the P. Jayakumar-led Toonz Media group's portfolio covers the entire spectrum of the entertainment sector. This spans across its divisions of:

\* Original IP creation - 2D and 3D animation production in its 350 talent-strong state-of-the-art studio;

\* Rights management and global distribution through its own company Madrid-based outfit Imira Entertainment;

\* Digital platforms and web channels across the globe under its Chotoonz, Malish TV and additional brands;

\* An animation training academy, an annual animation summit and young talent awards;

\* A specific digital gaming content creation and production division;

\* A licensing and merchandising arm to exploit its in-house and third party IPs internationally.

Toonz has also been involved in commercial, financing and development of



P. Jayakumar, CEO, Toonz Media Group

content with offices around the world in locations like, Trivandrum, Los Angeles, London, Madrid, Moscow, Istanbul, Auckland, Quebec and Singapore.

It partners with major international entertainment producers, networks, broadcasters and platforms, producing premium and successful kids' and family



Mondo Yan



Toonz Animation work space

series, shorts and movies.

Its roster of successful and long-running partnerships with global kids' leaders is top of the line and includes broadcasters and OTT platforms such as Nickelodeon, Disney, Turner Networks, Netflix, Marvel, BBC, Google, Amazon, Sony, Universal, RAI, RTVE, and Discovery Networks to name just a few. It has also signed deals with top notch, recognised and successful studios such as Hahn Fims, Telegael, TVE, Yellow Entertainment and Neon Creation (with which it is co-producing).

Not just that, with respected co-producers and broadcasters as partners, for commercial exploitation and global distribution, Toonz is currently developing, producing and co-producing a large number of kids and family titles. This includes: kids comedy series *Mondo Yan*, *Sindbad*; the *7 Galaxies*, *Dee Dee the Apprentice Sorceress*, *The Story of Bookworm GoGo*, *My Nina* based on a

successful global licensing property, the hugely successful slapstick *Rat-A-Tat*, which has hundreds of episodes and a string of other exciting and entertaining original kids titles that are in the making at Toonz's studio.

Part of the multi-billion dollar family-owned Geneva-based, Comcraft Group, Toonz Media is perfectly poised and positioned to expand its global reach and continue its two-decade commitment to engage and entertain kids of all ages, and their families.

With original quality content, being proactive to the global kids' market's evolution and aligning in harmonious perfection with its partners' productions and programming needs, Toonz Media Group, at the same time, is preparing future generations of animation talent in its studio, the largest and most active in Asia.♦♦

# It's raining OTTs in India

Sharminidra Paul  
Yugandhara Shete

Wherever you go – in metros or in towns - in arguably the world's fastest growing economy, young and old Indians alike are logging on to their mobile handsets and their PCs, to watch the latest from a clutch of OTT platforms as well as messaging services. Like the rest of the world, India too is in the thick of a digital video consumption boom. And it's all thanks to the mobile data price wars initiated by India's fastest growing

coming from mobile handsets aka smart phones.

Over 65 per cent of 450+million internet users in India are currently mobile-only and the country is adding six million users every month, as per Telecom Regulatory Authority of India (TRAI) data. By the end of 2017, smartphones had outnumbered its users as 47.4 per cent users possessed a smartphone or more each. Predictions are



telco Reliance Jio. The skirmishes have resulted in mobile data being priced at probably the lowest in the world.

Statistics underline that OTT is beginning to capture a large chunk of Indian viewers' daily video watchtime. Estimates are that video consumption has been growing at 500 per cent per annum and most of it is



that this explosion in the internet and mobile penetration is expected to continue with 640 million Indians expected to buy an internet pack, and 700 million expected to buy a snazzy smart device by 2020. Needless to say, online video - one of the most consumed pieces of content – is expected to grow as well as the number of platforms offering it.

Today, the Indian OTT landscape is dotted with more than 30 OTT platforms – giant foreign owned and global, broadcaster-led and independent ones. Additionally, newer OTT players are pacing the sidelines with a shift in focus from the English and Hindi speaking urban youth to mass market, regional audiences.

Deloitte India strategy and operations senior manager Shilpa Taneja affirms: “The growing penetration of smartphones and rollout of 4G in the last couple of years has widely promoted the overall digital access and consumption across the country. This has led to an increasing demand for premium digital content and across categories such as movies, music and live sports. This increased consumption has come on two fronts – more number of people viewing content over OTT apps and people spending, on average, greater amount of time on digital media.”

Frost & Sullivan’s recent analysis, Over-the-top (OTT) Video Services Market, India, 2017–2022, reveals that the OTT video market in India is beginning to see real traction with more competitors and new innovative platforms. With 180.3 million active online video viewers and almost four million registered subscribers, the OTT video services market earned over Rs. 37 billion in 2017, and will likely grow at a compounded annual growth rate of 17.3 per cent over the next five years.

While the big foreign daddies initially came to market with an offering consisting of international films, originals, and some Hindi and regional films, they have over the past year been focusing on digital originals – both films and short series. The reason: the need to build local consumer connect as most viewers prefer entertainment content in their language and flavour. And India being a complex nation, where 30 languages are spoken by more than a million people each, localisation is extremely crucial for even getting a chance into the viewers mindscape edgewise.



Hotstar – one of the early movers in the market part of the Star India group (now a part of Disney) – today boasts a handsome slate of exclusive Hollywood films and TV series from leading American studios, and of course its high priced sports properties like the Indian Premier League, the Pro Kabaddi League, the Indian Soccer League, India cricket, among many others. With more than 300 million downloads of its app, -- monthly active users and 10 to 12 million paying subs (at Rs 999 per annum), it is among the leaders offering subscriber

video on demand (SVoD), a freemium model and pure advertiser video on demand (AVoD) services. At its peak, it live streamed one of the IPL matches to 10.3 million concurrent users- a record of sorts.

It is muscling up and gearing up to launch a new raft of originals.

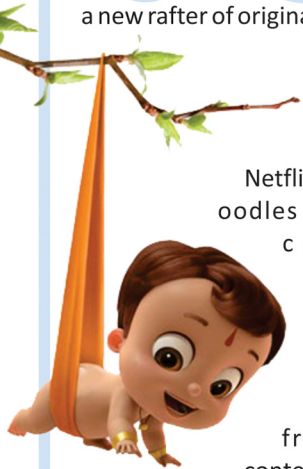
Global streaming powerhouse Netflix has been gaining oodles of media space courtesy its localisation drive with its slate of originals ranging from series to films and so on apart from doubling its content library through acquisition of local content.

Says a spokesperson: "Over the past two years, we've witnessed a huge appetite for entertainment and plenty of fan enthusiasm for our content and service, with word-of-mouth for our movies, TV shows, documentaries and stand-up comedy specials from around the world, helping to fuel growth in India. We've licensed titles that include much-loved blockbuster films in several Indian languages such as Hindi, Tamil, Telugu, Marathi and more, as well as indie favourites."

It followed up the acquisition binge by anteing up top dollar to commission original films such as *Love per Square Foot*, *Brij Mohan Amar Rahe*, *Lust Stories*, stand up comedy specials such as Aditi Mittal and Vir Das, and impactful series such as *Sacred*

*Games* and *Ghoul*. The strategy seems to be working. Estimates are that the service has anywhere between 700,000 subscribers and 900,000 subscribers, each paying an average of around Rs 700 (around \$9) a month.

Netflix CEO Reed Hastings sounded pleased while speaking during an investor briefing recently. Said he: "We're starting to turn the corner in many of the nations where our viewing is climbing up as we're continuing to improve the programming. I'll include India in the description and say we're really pleased with the progress and tracking we're making since we launched 2.5 years ago, and we just have a lot of work and a lot of opportunity ahead. With this triplet of *Lust Stories*, *Sacred Games* and *Ghoul*, we're really getting some nice



Mighty Bheem



momentum in our India growth. We've got a long way to go to expand languages and many other aspects to be able to be a broad Indian product."



And there's more lined up. A handsome slate of originals is in various stages of pre-prod, production and post-production. Some of these titles include: *Baahubali: Before the Beginning*, *Mighty Bheem*, *Little Things*, *Selection Day*, *Bard of Blood*, *Leila*, *Midnight's Children* and *Crocodile*.

Of course, its biggest rival has been Amazon Prime Video which has managed to get an estimated three to four million users at about Rs. 599 a year. Along with Netflix, it has sent prices for films (Hindi and regional) northwards, sparking off an acquisition frenzy amongst local players backed by large broadcasters. Originals too have flowed from its studios: drama series such as *Inside Edge* and *Breathe*, comedy and music talent hunts such as *Comicstaan*, *Remix*. Mentioned Amazon CEO Jeff Bezos in a letter to shareholders recently: "Prime



added more members in India in its first year than any previous geography in Amazon's history. Amazon has a larger play in the country with its e-commerce business. The former's play is about monetising the content in any part of the world."

PricewaterhouseCoopers (PwC) partner and leader, media and



entertainment Frank D'Souza adds, "Amazon has the advantage because it is basically offering music and prime services, so the whole game for Amazon is how to keep the customer on its platform as long as possible. Whether that helps on sales of products video consumption, audio consumption their strategy is different."

YouTube – which is the largest and most consumed video service in India with 245 million users logging on to its 300 channels with more than a million subs each - has got into the fray with the first of its originals being the AR Rahman helmed music talent search show called *ARRived*. Launched as an AVOD service, it is expected to launch its SVOD version in the not-too-distant future.

Similarly, the industry has witnessed the growth of different national OTT platforms like the Viacom18 backed Voot, Bollywood major Eros International's EROS NOW, the Sony Pictures Networks backed Sony LIV, Zee 5 from the Zee Entertainment Enterprises stable, Sun NXT from south Indian language broadcasting power player Sun Networks, regional and global south east Asian player Viu and the independent players promoted by production companies such as Balaji Telefilms' ALT Balaji, SVF floated Hoichoi (Bengali), youth targeted alternative OTTs such

The ZEE5 logo, which features the word 'ZEE5' in white inside a colorful circular graphic with red, green, and blue segments.

The EROS NOW logo, which features the words 'EROS NOW' in blue and red.

as TVF and Arre.

Sony Liv, with over 85 web-originals has spread across various Indian regional languages. It has tapped the heartland of the country as well. It pioneered at addressing the need for regional language content on web by launching India's first ever Marathi web series to cater to the Marathi milieu, early in 2017. Shows like *Married Women Diaries (S1 – S2)*, *Black Coffee*, *Love Bytes (S1 - S2)*, *Kacho Papad*, *Pako Papad*, *YOLO- You Only Live Once*, *Full Tittt* and *Pyaar On The Rocks* have been popular with the viewers.

Says SonyLiv CEO Uday Sodhi: “The introduction of original shows has definitely spoken in our favour in terms of viewership which reaffirms the credibility of the content offering. We envisioned the changing content consumption pattern and digital growth very early.”

Eros Now is another OTT entertainment platform that had 2.1 million subscribers in



FY 2017. It saw a massive jump of 276 per cent Y-o-Y in FY 2018 with 7.9 million paying subscribers and 100 million registered users. As of Q1 FY 2019, Eros Now boasts of 10.1 million paying subscribers and 113 million registered users marking a significant



growth of 27.8 per cent. It has 11,000 plus digital movie titles across 10 Indian regional languages that contribute to around 70 per cent of the total movie content available for streaming on digital platforms.

In April 2018, Eros Now released its first direct-to-digital film *Meri Nimmo*, which opened to positive critical reception. Till date, it has successfully premiered over 180 films and over 300 episodes of original short form programming. Recently, it also launched its first original digital series, *Side Hero*.

“Our real surge for original content kick-started with *Side Hero*. Though, we have done a few interesting IPs in the past like *Meri Nimmo*, *Salute to Siachen* amongst others, *Side Hero* is our real first foray in the world of originals. We believe that originals will play a significant role in contributing to the culture we want to create with the brand, and no better way to kick start the journey than with comedy, the most popular genre in the country. We will continue to invest in our content programming strategy, technology and data sciences to be able to build a brand, a product and a service for tomorrow,” states Eros Group chief content officer Ridhima Lulla.

She adds: “We believe that the



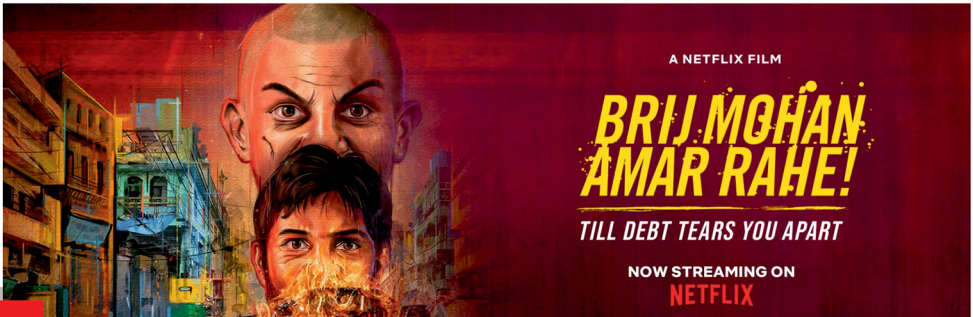


consumption in regional content has grown significantly and it is that piece of the cake that you can't neglect. However, it will not limit for any content to travel beyond boundaries as subtitles have made it easy for digital platforms. To attract consumers, it is important to have good content and it will sail across in whichever language it is



made.”

All eyes are on homegrown entertainment majors such as Viacom18's Voot (which is now under the Reliance umbrella) and Zee Entertainment Enterprises' Zee5. While the latter has gone in for a reboot and a clutch of new originals in different languages, the former is expected to undergo one soon.



Hyper local players such as ALT Balaji and Hoichoi have been commissioning producers to churn out originals at relatively modest budgets compared to the big boys. While Alt Balaji has around 3.3 million subs and a roster of around 30 originals apart from hundreds of hours of acquired content, Hoichoi currently has 1400 hours of content which includes 500 plus Bengali

movies, 1,000 plus songs, 22 original shows, six original films and 20 shorts.

Hoichoi co-founder and SVF (Shree Venkatesh Films) executive director Vishnu Mohta mentioned about this striking reach, “Our main concern is our audience and to give them enough good content to binge on. We are currently the biggest Bengali entertainment platform worldwide and we have bigger plans of expansion-to Middle East and Bangladesh by partnering with their local telecom partners like Etisalat, Du and Robi.”

Currently, its investment time with all the OTT players building up on originals which is essential get traction with Indians who have been used to paying a paltry Rs. 150-300 for a cable TV bundle that offers more than 300 channels with the latest programming from Hollywood's majors as

well as from Bollywood. Hundreds of millions of dollars are being poured in, to lure price sensitive fickle consumers to sample the new offerings and acquire them. Phase I of the OTT journey has begun. Wider distribution through telcos, cable TV and DTH networks, alliances with each other and expansion internationally will decide how smooth the ride will be.♦♦

**BIG  
FLIX**

**SUN  
NEXT**

# Indian animators' Open Source romance

Yugandhara Shete

India's animation studios have for long been a beachhead for outsourcing Hollywood's majors looking for cost effective and quality turn over of product. Animation hubs have sprouted in Mumbai, Hyderabad, Pune, Chennai and Bengaluru with a mushrooming of scores of studios wanting to replicate the success story that majors such as Green Gold, Cosmos-Maya, DQ Entertainment and Toonz Animation have scripted through original IPs.

Though creativity is not based or counted on the software tools used, these indeed help in giving it a physical form. While India's large animation studios have relied on licensed software provided by the likes of Maya, Toon Boom, Adobe, Unity, among many others, the high cost for licensing has forced some smaller studios to look at low cost or zero-price alternatives. They have increasingly been relying on Open Source software.

Some of the popular Open Source software used and trusted by them include Blender, Krita, Pencil 2D, Gimp, Shotcut, Open Toonz, Maefloresta, Synfig and many more. A non profit organisation came up with Blender in the 1990s. Developed by Dutch animation studio Neo Geo in 1995 it has since then, amassed a large support community.

After marking successful 20 years, the initiative is only growing with each passing day and has made a remarkable impact on the industry.

AUM Animation, founded by Vivek Bolar uses Open Source software for its entire work process, from pre-production to final editing. Bolar thinks that the future is brighter with the growing AVGC industry. Says Bolar: "The software is cost effective and easily available in source code form in the public domain. The flexibility and agility of the software helps attract more and better talent and is turning out as a blessing for students who cannot afford the licensed, closed source software. It's a valuable learning opportunity for upcoming talented artists. Also, there are no bugs or viruses reported with the Open Source software till date. Even if one finds any, developers can easily fix those as a large number of people from around the



*"I make an appeal to Indian studio directors to use these software on a larger scale, so they build a community where ideas and views can be shared and exchanged"* - Vivek Bolar



world are involved in this community."

Vaibhav More Studio founder Vaibhav More himself uses Open Source software like Krita instead of Photoshop, Blender instead of Maya and Linux OS instead of Windows at his studio.

"I wish to spread more awareness in the new generation of artists. I hope we can have a bigger and better open source culture in India," says More.



Vaibhav More Studio artwork

*"I wish the upcoming artists set a trend using these software. Open source is the future,"* - Vaibhav More



He switched to Open Source software in September 2017 for many reasons. Among these: the software is bug free and light weighted; the various online support groups chip in with help, in case of any doubts, and finally as he did not feel right about using pirated versions of the higher priced licensed products.

"I have been using Blender and Krita

primarily since a year now and I am very happy that I made the switch," says More.

Open Source software can be modified and redistributed without additional permission. This culture gives freedom to animators and developers to communicate and improve their usability keeping the artist's requirements in mind.

Andy Pirki



Pencilati Studios has been a part of the Indian animation industry for the past three years. The studio decided to produce an in-house 3D film along with their projects in gaming and character designing using the Open Source software, Blender, as a primary production tool because of various reasons. It allowed the studios to refocus on acquiring a talented team of artists, thereby saving client's time and funds. Also,



***“We wanted the project to be a learning experience resulting in a high quality production. Blender was easier to adapt to than we initially thought”*** - Vivek Singh Sidhu

the software has more tools as compared to the traditional software.

“There was continuous support from the online community. Even on a functional context, the experiences boosted our efforts,” stated Pencillati Studios managing director Vivek Singh Sidhu.

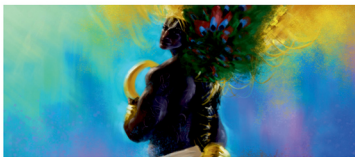
OpenToonz is another 2D animation software that was earlier known as Toonz and was used by Studio Ghibli to create masterpieces like *Spirited Away* and TV shows like *Universe* and *Futurama*. The software is now free and open for budding animation artists.



Pencillati Studios' *The Bloop Troop*

studio grows. He too like the other users finds it appealing that the software can be moulded to your specific requirements and a pipeline can be built around it.

***“The team at Vaanarsena has completely switched to Krita for all their 2D projects, and are currently testing Blender for their 3D needs”*** - Vivek Ram



Vaanarsena's *Myth-o-katha*

Animator and Vaanarsena founder Vivek Ram finds the open source initiative very good for the long haul. Software costs make up a huge chunk of studios' expenses, and if the studios were to start using Open Source early, this cost would literally be zero as the

Says Vivek Ram: “It's only a matter of time before this becomes truly mainstream. Currently, in India a few studios and a few training institutes have started exploring these options, and very soon we will see some great output coming out of this.”

Ram finds it comfortable working on Krita and is planning few longer format series along with the already ongoing *Myth-o-katha* series which is published thrice a week using the software.♦♦

# Technicolor's Bengaluru advantage

Technicolor's India Studio unites industry-leading artistry with cutting-edge technology to pioneer Indian industry

The Technicolor India studio located in Bengaluru is a hub for its leadership in the AVG business. It is a primary studio within the US\$5 billion global arts and sciences leader involved in technology and production services for the M&E industry.

## Animation and Games

Technicolor has been involved with several iconic shows, helping clients win seven Emmy Awards in just the past eight years. These include: *Mickey and the Roadster Racers*, *Kung Fu Panda: Legends of Awesomeness*, *Spirit Riding Free*, *All Hail King Julian*, *Puss in Boots*, *Penguins of Madagascar*, *Alvin and the Chipmunks*, *Boss Baby* and *Teenage Mutant Ninja Turtles* for clients DreamWorks Animation Television; Walt Disney; Nickelodeon etc.

In Games it has been involved with *FIFA*, *Need for Speed*, *Asphalt 9* and *Grand Theft Auto V*, for clients like Electronic Arts, Gameloft, Rockstar Games and Ubisoft.

## VFX for Film and Television

MPC Film has worked on a string of titles which have won several Oscar nominations and three wins for the best VFX - *The Jungle Book*, *Life of Pi* and *Rachael in Blade Runner 2049*. Toronto studio *Mr. X*, which worked on Del Toro's award winning *Shape of Water*, has been producing content in Bengaluru for the past two years for TV

series such as *The Strain*, *Godless* and *Vikings*.

## Advertising

MPC Advertising creates 400 commercials a year and has worked on many award-winning ads for major brands. The India group has, together with the global ecosystem of studios, bagged the VFX Cannes Gold in 2014, 2015 and 2017.

## India Advantage

The secret of success for Technicolor India is in having the best skills development programs through its group brands, artists being exchanged globally and its several academies and upskilling initiatives. Across these brands, Technicolor also works with some of the most advanced workflows and pipelines and has set up a pioneering software development team of over 150 technicians in India alone.

## MIPCOM 2018

A MIPCOM regular Technicolor has sponsored the participant's lounge; it participates in IP development and co-production and takes shows to the market as well as through sister arms.

Country head Biren Ghose works together with all of the group brands to leverage opportunities for the studio and ensures the further development of the India production platform.♦♦



# One Take Media: A go-to channel between high quality content producers and audiences

**F**ounded by Anil Khera (the former CEO of Videocon d2h), One Take Media (OTM) has already made a notable place for itself in the industry. Having offices in India and UAE, the company is a successful conduit between high quality content producers from across the globe and the right audiences.

OTM's network of content producers, ranges from cutting edge animation studios to movie studios which specialise in content production for distribution. It also has its own production facilities where the team conceptualises specialised content for specific markets. The company's mission is to transcend geographical and linguistic boundaries as it feels



providing Value Added Services (VAS) to global DTH and cable platforms in various genres like kids nursery rhymes, kids animated series, kids animated movies,



Dimpy Khera  
Director

Anil Khera  
Founder & CEO

Shamoly Khera  
Director

entertainment should be accessible to everyone.

OTM specialises in content production, global content acquisition and distribution,

celebrity based master chefs' cooking shows, Hollywood movies in English, Hollywood movies dubbed in Hindi as well as various regional languages like Marathi, Bengali, Tamil, Telugu, Kannada and

Malayalam; Regional movies in Telugu, Tamil, Kannada, Malayalam, Bhojpuri, Marathi and Gujrati; South Indian films dubbed in Hindi; and foreign languages like Turkish and Korean. OTM is the first company to invest in dubbing Korean and Turkish TV series in Hindi in India.



The company also provides consulting services on setting up a DTH business and supplies all consumable products set top boxes, CAS, dish antenna and accessories. In India, OTM has renowned clients like the country's biggest DTH operators Dish TV, Videocon d2h, Airtel DTH, Viacom18, and Discovery TLC.

## Cartoonee



It is successfully running active kids and active cooking on Dish TV and Videocon d2h platforms while OTM has recently collaborated with Airtel DTH and launched a premium Hollywood Movies VAS channel for Airtel DTH subscribers.

Besides that, the company has also launched 16 VAS services on cable TV MSO INDigital Cable Service and has been successfully providing content to DTH and mobile app companies in Indonesia, Nigeria, Nepal, Dubai and other countries worldwide.

With over thousands of hours of content, OTM offers content licensing services, acquires TV rights, VAS/SVoD Channels and so on, across a wide array of genres and formats. It possesses a rich library of varied content and its production studio has been a part of some world-class content creation projects. It provides resources to help producers produce media content, help distributors distribute media content and acquire media content.♦♦

# Animated shows get game

Krishanu Ghosal



With the onset of original IPs' rush in the country, the tinnit of promoting the same is raking up the pitch as well. The marketing paradigm has shifted from being heavily based on televised content to digital. The recent splurge in data consumption with the introduction of dirt cheap rates by India's hyper competitive telcos is further proving to be the catalyst.

Apart from the regular mix of video and text advertisements which are being used for promoting in the digital ecosystem of India, India's content creators are going further bringing in more interactive ways to engage their target audience. Gamifying the IPs has reportedly helped the creators and broadcasters, consistently.

Traditional modes of promotion require user acquisition spends mostly through digital mediums like Facebook, Google Ads and third party networks. From that perspective, it is quite critical to arrive at the life time value of a user that exceeds that of the acquisition cost, so as to achieve break even marketing at the least. Promotion and marketing via IP is more uncontrolled and relies heavily on organic volume, while traditional methods rely on controlled user acquisition spends.

The trend, however, not new to the sub-continent is gaining traction.

If you log on to the Turner India owned Cartoon Network India and POGO websites have more than 250 web games. Also, there are currently 50 plus mobile games on Google Play and the iOS store. A lot of these have been launched in the APAC regions and globally by Turner. All of them are based on IPs.

"There are almost 10 plus web games based on homegrown IPs like *Roll No. 21* and *Lamput*. We also have games such as *Pirki Rescues*, *Chhota Bheem* and *Mighty Raju*, all based on successful POGO shows. There is also a mobile game, *Tik Tak Tail- The Game*, launched in Q2 of 2018, which is based on the popular chase comedy show *Tik Tak Tail* on POGO and has garnered 1,000,000 plus downloads on Google play. We're looking forward to launching more mobile games based on local IPs in the coming months," says Turner India senior director – network and content distribution Rohit Khetarpal.

*Ben 10 Alien Experience* from Cartoon Network's popular franchise *Ben 10* has seen over 10,000,000 plus installs on Google Play. In May this year, Cartoon Network and Korean



game developer SundayToz launched *We Bare Bears Match3 Repairs*, a match-3 puzzle game as well.

IP based games leverage on the fan following of the IP through other mediums like social media, YouTube, TV, Instagram and many more. Hence, the best way to actually augment the strength of gaming is by tapping into these mediums and engaging the fans with games. The fans themselves also seek their favourite characters/series in new innovative formats, and gaming being interactive and immersive leads to great word of mouth spread leading to marketing happening via virality.

Discovery Kids' reach has reportedly doubled in the last six to seven months and the *Little Singham* game, based on the broadcaster's most recent IP has garnered more than five million downloads.

According to Nazara Technologies CEO Manish Agarwal, "A game is a live project and is something that is worked on continuously and hence the lifetime extends based on the valuable updates you provide to engage and retain your consumers. Some games do not click at a basic level with users and in this case the lifetime could be very short in terms of less than three months, however in the case that the core game-play is working, lifetime can be easily exceed to a couple of years. Some of the best games in the market today are games that have been released more than five years back."

Generally there are various revenue models for the titles. Primarily, web games based on characters and IPs are created with an engagement perspective, and hence have less ads or none at all. However, there are also paid premium games and games free-to-download

with in-app purchases, apart from ad-supported mobile games.

"At Turner, we believe that when kids start loving the characters and their world, they become fans. And for us, games are an important medium for such engagement between the fans and the characters they adore. Games are vital to our fan-first strategy," further states Khetarpal.

A well created IP needs the right amount of marketing and in a nation which has the youngest population in the world and topping the charts of android downloads in 2017, it is imperative to push for more interactive mediums to engage the audience.

A sizeable chunk of broadcasters and creators is teaming up with established large scale and indie gaming studios dotted throughout the country and abroad to bring in immersive experiences to retain fans. With daily rewards in place in many cases which promote cross platform engagement, games seem to be catching on in a country where an impetus was definitely needed for the gaming industry as well.

"Just as Bollywood holds a special place in India as compared to Hollywood, local and relevant content will always hold a special place in gaming as well. We have barely scratched the surface in terms of local content. The market is growing exponentially as smartphone penetration is increasing and cost of data is decreasing, leading to first time mobile gamers who will look for and engage with content that is vernacular as well as relevant." concludes Agarwal.♦♦



# Globalisation of Tikka

Ankur Bhasin

**C**hicken tikka masala – yes! You got that right! We are right now in the chicken tikka masala moment or specifically – the tikka moment! Does that pique your curiosity?

If it does, let us get into the meat... or otherwise!!

Chicken tikka masala is a dish consisting of chunks of roasted marinated chicken (chicken tikka) in a spiced curry sauce. The sauce is usually creamy and orange-coloured. Originating from the Indian sub continent, it is among the United Kingdom's most popular dishes, leading a government minister, Robin Cook, to claim in 2001 that it was "a true British national dish."

This is exactly the trajectory where Indian M&E exports are heading. But not to the UK, no! Indian content is going global!

Demonetisation and GST (goods and service tax) were the buzzwords of 2017 and despite the dual jolt, India's M&E exports have continued to grow riding on rapidly digitising markets and global increase in demand for content.

The Indian M&E sector reached Rs 1.5 trillion (US \$ 22.7 Billion) in 2017, a growth of about 13 per cent over 2016. With its current trajectory it is expected to cross Rs 2 Trillion (US \$ 21 billion) by 2020 at a CAGR of 11.6 per cent. In terms of percentage, the growth in the M&E sector in 2017 has been led by digital media at 29 per cent followed by film, animation, VFX and gaming.

The increasing stronger footprint of Indian M&E exports is visible in the first ever Indian pavilion set up by the SEPC (Services Export Promotion Council) with support from the MEAI (Media & Entertainment Association of India) and Animation Xpress India at MIPCOM.

The rest of the world is becoming increasingly receptive to India's creative output thereby boosting exports of homegrown original content. Furthermore, India's animation, VFX and post production facilities have climbed up the value chain in services as the world has realised that quality is the additional benefit along with cost advantage with Indian delivery.

In the words of SEPC directorial general Sangeeta Godbole, "India has millions of fascinating stories to tell. The world is waking up to that treasure. As Indian



**Ankur Bhasin**

Secretary, Media & Entertainment Association of India (MEAI) and CEO, Bhasinsoft and Encore Films.

production values improve, we hope to create an ever increasing body of brilliant original content."

## Co-production with India – a rising trend within a sunrise industry

Despite the lack of money on the Indian end for the co-production treaties, there has been a surge of international co-productions with Indian studios. Indian studios are realising the benefit to potential partners through co-production thereby bringing down total project costs and making it lucrative to co-produce with India. While bigger studios have been actively pursuing this for many years, this new resurgence, in part because of promotion by media and entertainment bodies such as MEAI, is bound to boost original content exports from India over the next five years.

India currently has co production treaties with the following countries:

Australia, Bangladesh, Brazil, Canada, China, France, Germany , Italy , New Zealand, Poland, Spain, South Korea, United Kingdom.

### The way forward

There are a plethora of factors / disruptions that can positively shift the growth trajectory of the industry. Here is a short list that is of paramount importance:

- Implementation of the National IPR Policy 2016 and stronger anti-piracy laws.
- Incentivising content production (various policies showcase funds but are either not enforceable or have missing matching funds).
- More liberal censorship allowing the

creation of content as per consumers' preferences; preferably moving towards a rating system like in other developed nations.

- Ease in clearances / permissions and wider implementation of the single window clearance for filming and screen building.
- Incentivising content distribution outside India for Indian content makers.
- Further incentivising shooting within India which would also boost tourism.

### Takeaway

The current slide in Indian currency valuation is bound to bump up exports in the short term. However, rising crude prices may have a negative impact on revenue streams directly linked with advertising as inflation rises due to the same. However, these short term factors are unlikely to curb the overall growth of Indian M&E exports. It is estimated that M&E sector exports will grow from US \$1.63 billion to US \$4.95 billion by 2020 even in the absence of a significantly positive disruption. It is further expected that with a million direct jobs and 3-3.5 million indirect jobs, the Indian M&E sector will provide 4 million to 4.5 million jobs by 2020.

India's demographic dividend gives it the potential for rapid growth over the next few decades and a surprise element despite the pointers above.

Maybe the next revolution will be paneer tikka masala!♦♦

# Cosmos-Maya – Rise of the IP creator

Cosmos-Maya has come a long way. Back in 2012 when the company began its journey in IP creation with Motu Patlu there were only 40 odd employees. Today there are more than 1200. With 12 shows on air/in production, including three European & one Brazilian Co-Production, with over a 60 per cent market share in the domestic Indian animation production business, Cosmos-Maya is scaling newer heights by the day and has indeed become one of the most dynamic studios in this industry. Even on the digital side, the studio has more than 20 channels on YouTube under the umbrella brand with a cumulative subscriber base of more than 11 million as of September, 2018.

Cosmos-Maya is a Singapore and India based animation company that produces high quality 3D as well as 2D animation content. KKR backed Emerald Media, a Pan-Asia platform established by the leading global investment firm, for investments in the media and entertainment sector, acquired a controlling stake in Cosmos-Maya in early 2018.

The company primarily focuses on creating IPs in the kids' animation

space and is presently working on multiple Indian animation TV series with all the leading linear and non-linear broadcasters. As a leading producer of some of the most successful shows in the space, the studio presently has 12 shows on air and six under production. Cosmos-Maya holds a distinct record for consistent delivery of popular Indian animation content and has produced an unprecedented 30000 minutes of original animated content in the last five years, comprising over 1350 half hour episodes.

Rajesh Kamat, MD Emerald Media said “With the creative muscle that Cosmos-Maya brings to the table and the financial muscle of Emerald Media together, the way forward from here is only northward.”

Cosmos Maya, founded by Ketan Mehta commenced its journey 20 years ago, and today the studio manages to deliver 30 half hours of animated content on a month on month basis, which is nothing short of a record. “What we have managed to do is unheard of and going forward, there is a focus to maintain that momentum and scale newer heights for the business”, Mehta said.



# Advantage Indian animation

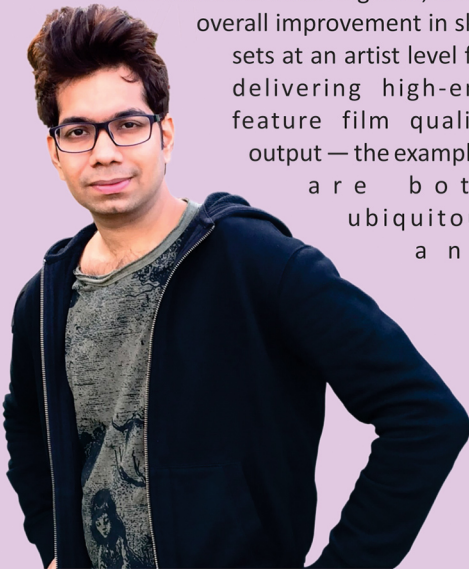
The animation industry is India's best kept secret. The audience is not aware that a lot of international projects have been outsourced and Indian animators have produced stellar work without due recognition or their stamp on it. But times have changed.

With four international co-productions and a significant domestic market share, Cosmos-Maya is spearheading this change.

## Make in India

Indian animation and visual effects studios embody the 'India Shining' phenomenon like no other business does. Be it DreamWorks setting up shop in India or an indigenous Prime Focus acquiring the mammoth Double Negative, or the overall improvement in skill sets at an artist level for delivering high-end feature film quality output — the examples

are both  
ubiquitous  
and



abundant. It is leading to more international investments into India.

The maturity of the industry leading up to much more original Indian productions and domestic successes has aligned the industry with the macro level phenomenon of 'Make in India'. Homegrown brands like *Motu Patlu* and *Chhota Bheem* have laid the rock solid foundation for what one would term as the IP revolution. However, there are still many creative avenues and styles of animation, visual appeal and musicals that are yet to get ticked off in the creative bucket list for Indian animation. A revolution in the licensing and merchandising business should be the next step in order to have holistic growth for a studio.

## Multi-platform presence

A VoD OTT like YouTube brings in a sense of egalitarianism for all. YouTube offers a kind of freedom where every platform is the same because it is not dependent on the programming slot or the airtime it gets.

There is enough and more room for pay TV in India as well as terrestrial and digital television to grow. We foresee that for a diverse market like India, both businesses will continue to thrive in the near future. This is great news for content providers for they can now cater to everyone's content requirements across the spectrum.

With a plethora of great content on both TV and OTT, we now see a world where consumers are spoilt for choice. Cosmos-Maya being the nimble footed, progressive market leader in original Indian animation content creation in kids' space, has been very agile in its strategy to adapt to these

changing market dynamics. It has been following a digital first approach followed by pay TV (non-linear first, followed by linear television).

Proof of the pudding was *Selfie with Bajrangi*, which launched on Amazon Prime Video and became a sleeper hit with its debut on Disney Hungama. *Inspector Chingum*, the first spinoff series of the massively popular show *Motu Patlu*, was

plurality where everyone has their own niche. The key to this is international collaboration for animation producers wherein there is a merger of storytelling, ideas and technology to achieve and create new standards for Indian animation on a global level.

Ours is a business that follows the trend. The industry that thrived only on low- to mid-range 2D animation is now a 3D-



launched on Amazon Prime Video and will be available soon on pay TV.

### Evolved sensibilities

In our country, children remain the primary consumers for animation. In order to cater to this segment, it is highly imperative that the industry has a deeper understanding of what kids are consuming. Here, homegrown content has started playing a huge role. There is a huge demand for content catering to Indian sensibilities.

Although the demand for homegrown content is rising, we are in a beautiful era of

dominated industry. Some of the most successful studios have now forayed into 3D production, post the success of 3D shows like *Motu Patlu* and *Shiva*.

Similarly the coexistence of pay TV and SVoD is a new trend that is here to stay. All it takes is one successful show and the model is formed — a trend is set and then we move towards creating a new trend. This is one of the most glorious phases of this business.♦♦

*This is a guest comment by Cosmos-Maya CEO Anish Mehta.*

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