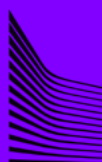


Indian music industry Market report



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Introduction – How to work best with India as a European music exporter

This report is the results of desk research and a fact-finding mission to India in the spring of 2022. The report gives an overview of how the music market and the music ecosystem works in India. In this introductory chapter, some insights are provided for those seeking to understand better how to start exporting music into India.

Bollywood and the music industry's structure

India's music industry is historically strongly linked to Bollywood, the film industry based in Mumbai. Music is an extremely important part of Bollywood movies, as in musicals. The songs are "sang" (lip syncing) by famous actors and actresses. Movie producers used to own all rights of the titles and recordings being used in their movies, composers and musicians were only delivering services in the background, pre-recording the songs. The rights owned by the movie producers were given to local labels for exploitation. Also a strong part of the live music sector was dominated by shows, where (movie) actors were performing playback. Therefore the industry's structure was (and to a certain degree still is) very different to the one in Europe. There was no need for (performing) artist management, a relevant part of live music, besides spiritual, was mainly happening in theatres, international labels and international repertoire had no significance.

Since the rise of the internet with its various distribution opportunities for music and audiovisual content, being a part of a Bollywood movie is no longer the only option for music to reach audiences. A growing number of artists started independent careers, the use of regional languages became an important factor in reaching audiences, structures such as labels, managers, agencies, or venues began to spread.

Although almost 80% of India's music industry's revenue is still connected to music from Bollywood movies (see section "Music genre consumption", page 19), (and regional music genres and devotional music are very strong), it still leaves an interesting market for international music, simply due to the size of the country and a changing framework.

Visuals

Another important thing, that is connected to the historic development of India's music market and an often bright and colourful culture, is the importance of images and visual content. This is reflected in music consumption habits – Indians spend 5.3h a week watching music videos, with the global average at 3.5 hours per week (see "Music consumption medium and geography in India" page 18). It will be difficult to break a song or an artist in India without a proper music video and a visual concept and strategy, with YouTube being the most important platform.

Languages and regions

With a population of almost 1.4 billion people, more than 100 different languages and differing cultures and traditions from region to region, one should see India as diverse as Europe to understand that breaking the Indian market would require a lot of different approaches, and those being adjusted to regional specifics. The use of regional languages already proved to be a good way for Indian artists outside of Bollywood to reach new audiences. One has to know that Bollywood movies (and the songs in

them) are in the Hindi language, with modern productions often use a hybrid of Hindi and English. There are also big movie productions outside of Bollywood, e.g. in Tamil or Telugu language, but still there seems to be a huge demand for songs in other languages, that are spoken by millions of people in India.

Another aspect connected to languages that is worth mentioning: everyone in the music industry speaks English very well and the main online distribution platforms and social media channels are the same as in Europe (besides TikTok being banned in India, see page 38–39). That means Europeans can easily communicate with partners and audiences through the channels they're already using, and there's no need for translators or intermediaries allowing access to local platforms as in other Asian markets.

Co-production and co-songwriting

One strategy to enter the Indian market could be working with local artists, especially if they take the part of the vocal performance using a local language. This could be e.g. a hip hop producer from Europe working with an MC rapping in Panjabi. Indian artists and management companies explicitly expressed mutual interest in artistic cooperation to the authors of this report. They're facing similar problems reaching audiences in Europe outside of the diaspora audience in some countries. Collaborations of artists and the companies working with them could open up new markets for both sides.

Local partnerships

The comparably small presence of Major labels in India is a chance for independent artists and companies to find appropriate partnerships; without gatekeepers there are more opportunities. Having local partners will be inevitable for a successful market entry. You can have your repertoire available in India through a European digital distributor, but building a fanbase will require strategic marketing activities, and that should be done with the support and advice of locals.

Plenty of room for niches

Traditional channels, such as TV and radio, that were very focused on playing mostly Bollywood songs, lost their predominance. One can now reach new audiences through social media platforms and digital services with diverse audiences that listen to all sorts of music genres. There is plenty of room for niche genres, such as Jazz or Electronic music. In these niches there is also local concert promoters and festivals that are open to working with acts from outside of India. As travelling from Europe is cheaper than from the USA, they are very interested in acts from Europe. Still this is financially challenging, especially so for new talent, so it will help being able to offer some kind of travel support (get in touch with your local Music Export Office to explore possibilities).

1. General national context

Society		Source
Population	1 393 409 000	UN data
Official language(s)	22 constitutional languages including Hindi and English	
Other important language(s)	Figures can vary but there is an estimation of 122 prominent languages in India	2001 Census of India
Recommended language to communicate with local professionals	English	
Currency	Indian Rupee (INR)	UN data
Currency exchange rate with € (past three years average)	1€ = INR 82.9916	European Central Bank
Demographic growth	1%	UN data
Life expectancy	70.5 / 68.1	UN data
Average age	26.2 / 63,7/ 10.1	UN data
Human Development Index	0.645	UN data
Gini coefficient	35,7 (2011)	World Bank
Economy		
GDP	2 779 352	UN data
GDP per capita	2 054.8	UN data
YOY growth	6.8%	UN data
Unemployment rate	5.4%	UN data
Minimum wage	INR4,576 (US\$62) ¹	India Briefing ²
Average wage	INR32,800 (US\$437)	India Briefing
Communication		
Smartphone in use (number of)	500M	
Mobile use (number of)	1,1Bn (79%)	Hootsuite ³
Broadband subscriptions household penetration Mobile subscriptions	34.4%	UN data

1 This is a national floor-level wage – and will vary depending on geographical areas and other criteria.

2 <https://www.india-briefing.com/news/guide-minimum-wage-india-2021-19406.html/>

3 Digital 2021, Kepios, Hootsuite and We are Social, 2021

Key points

- India is a large country composed by federal states where culture, traditions and languages differ. As a consequence, India could be considered as diverse as Europe and one needs to remember that behind national figures and data, India remains a pluralistic, multilingual and multi-ethnic society.
- India is ranked third largest (after China and USA) as well as among the fastest growing economies of the world. India is the 10th economic partner of the European Union.
- With more than 1.3 billion people, India has the second largest population in the world and is set to become the most populous country of the world by 2035 (UN forecast). The population is relatively young (on average 29 years old) and urbanising fast (34.5% in 2021, set to become 43% by 2035, UN forecast).
- In the last two decades, the Indian government has been very proactive in developing global telecommunication in the country, however, several parts of the country do not have a high speed connection quality. There were 658.0 million internet users in India in January 2022 (Kepios) and internet penetration rate stood at 47.0 percent of the total population at the start of 2022. 91% of the internet users access the internet through their mobile phone.
- India is and will continue to be the fastest growing Media & Entertainment industries market in the world with an increase of 19,1% for the music, podcast and radio segment between 2020 and 2025 (PWC).
- When it comes to evaluating international content opportunities in India, one needs to acknowledge the scale of young and connected urban people. Since the urban population represents 34.5% in India, this results in a niche in India. But a niche that represents millions of people.

1.1. Social and economic description

After growing at very high rates for years (except during the Covid crisis), India has become one of the largest forces in the world economy. The country is ranked third largest economy in the world after China and USA with a GDP PPP of \$9,301 billion according to the World Development Indicators database of the World Bank. In 2021, its GDP grew by 8.9% in comparison to 2020 putting India among the fastest growing economies in the world. This growth has been driven by the progressive shifts in the structure of its economy led by state policies: India moved away from agriculture to the service sector and has achieved recognition in several service sectors. For example, the Indian Pharmaceutical sector is known for low cost and good quality production of generic medicines. During the Covid crisis, India was a leader in the production of vaccines. India has also earned recognition for information technologies, chemicals and so on. This move benefitted a part of the population but India is also characterised by a very high level of informal sector where much of the Indian population works according to the OCDE⁴. The GINI index of India is also quite high (49,5) proving that

⁴ Economic Policy reforms 2021: Going for a growth, OECD, 2021

inequalities remain a strong issue in a country where the poorest 20% of households earn 4.1% of total income. In terms of international commerce, India is the 10th economic partner of the European Union.

1.2. Political and administrative organisation

In its constitution of 1949, India, officially the Republic of India, is an Union of States which led India to have a federal organisation of the 28 states and 8 union territories that compose the country, but with a strong centre. Since its independence from Great Britain in 1947, there has been a parliamentary system of government and the country is the most populous democracy of the world. The President is elected indirectly for a five-year term and the Prime Minister is the leader of the majority party in the parliament. All states, as well as certain union territories, have elected legislatures and governments following the Westminster system of governance.

Since Indian independence, the country has been mainly led by the National Congress Party, the oldest Indian party created in 1885, and first led by Mahatma Gandhi, principal leader of the Indian independence movement. The party's first Prime Minister was Jawaharlal Nehru and the party was leading the country till the 1990s. The Bharatiya Janata Party (BJP), founded in 1980, represents the Hinduism right-wing and won the legislative election in 1998, 2014 and 2019. Narendra Modi is currently Prime Minister of India. Its interior politics is a mix of liberalism and conservatism (in favour of Hindu culture). In terms of foreign relations, the Modi administration has been trying to reinforce its power in the region. Its borders with China are still a source of conflicts, and there tensions with Pakistan. The Modi administration highly reinforced the Indian army, its presence in regional and international summits and deepened its economic relationships with strategic partners such as the European Union.

1.3. Geography and demography

With more than 1.3 billion people, India has the second largest population in the world and is set to become the most populous country of the world by 2035 (the United Nations projects a population of 1.6 billion inhabitants before 2035). Its area represents 3 287 263 km². Uttar Pradesh (north-east) is India's most populous state (200 million people in 2011) followed by Maharashtra (states of Mumbai). Delhi, Bombay (Mumbai), Calcutta (Kolkata), Madras (Chennai), Bangalore (Bengaluru) Hyderabad and Ahmedabad are the main cities of the country. Roads are the dominant transportation network in India. The highway network is very developed but often narrow and congested. Public transport is not well-developed (no metro in Mumbai for example). The railway network is the 4th longest in the world and offers different classes of ticket – some Indian trains are very comfortable. Flying is a good transport for touring artists as well thanks to airports in all the major cities of India.

The proportion of Indians living in urban areas reached 34.5% in 2021 (a low rate in comparison to other emerging economies). The United Nations projects that India's urbanisation rate will rise to 42 per cent by 2035⁵. The population is quite young in India with an average age of 29 years-old.

⁵ World urbanisation prospects. s.l: United Nations; 2014

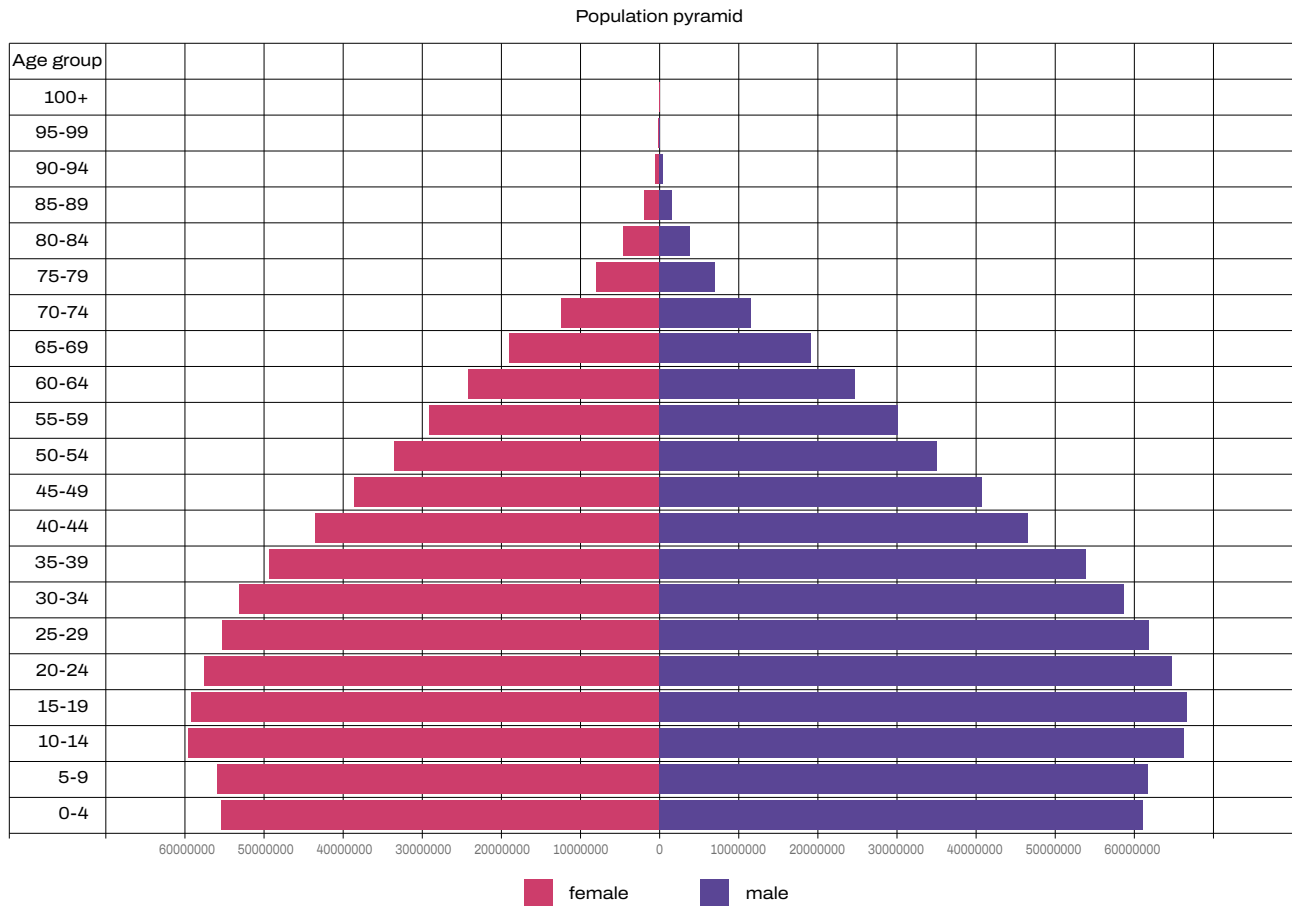


Figure 1.1. Indian population in 2019. Source: UNFPA Population Data Portal.

India has a large majority of Hindus (80% approx) and smaller shares of Muslims (15% approx), Christians, Sikhs, Buddhists, Jains and other groups. Even though India has a long term history of pluralism, the country is suffering from religious conflict between Hindus and Muslims, notably related to its independence history and the India and Pakistan partition during this period.

1.4. Internet infrastructure

In the last two decades, the Indian government has been proactive in developing global telecommunication in the country. India has a huge national telecommunications network and the top three mobile operators (Reliance Jio, Airtel, Vodafone-Idea) are extending coverage to address a surge in data consumption. However, several parts of the country do not have a high speed connection quality. According to Kepios, there were 658.0 million internet users in India in January 2022. India's internet penetration rate stood at 47.0% of the total population at the start of 2022. It is worth noting that 53.0% of the population remained offline at the beginning of the year. Most internet connections come from mobile phones (91% of the internet users access the internet through their mobile phone). Data from GSMA Intelligence shows that there were 1.14 billion cellular mobile connections in India at the start of 2022 (+3.1% year-on-year

change)⁶. The smartphone user base is expected to reach 829 million in 2022, accounting for 60% of the population.

1.5. Climate

December – March : winter with moderate cold temperatures

April – June : Summer with very high temperatures in April and May

July – September : monsoon season (above all in Southern India)

October – November : calm and moderate weather

1.6. Media & Entertainment Industries

According to an EY report, the Indian media and entertainment (M&E) sector stood at Rs.1.38trillion (~US\$18billion) in 2020 and is estimated at Rs.1.79trillion (~US\$24billion) in 2021. It is projected to grow to Rs.2.23trillion (~US\$29billion) by 2023, due to acceleration of digital adoption among users across the country. The market is expected to increase at 17% from 2020 to 2023. Following the same trends, the PWC Global Entertainment & Media Outlook: 2021–2025 states that India is and will continue to be the fastest growing M&E market in the world. Segments like Internet advertising, OTT, gaming, digital music and podcasts etc. will experience the highest growth due to the increased interest level of growing audiences, platform owners & advertisers. The report estimates an increase of 19.1% for the music, podcast and radio segment between 2020 and 2025.

When it comes to evaluating international content opportunities in India, one needs to acknowledge the scale of young and connected urban people. Since the urban population represents 34.5% in India, this results in a niche in India. But it is a niche that represents millions of people.

Pandemic and other geopolitical impacts

India has been hardly impacted by the Coronavirus crisis with a lockdown affecting the economy in 2020 (-6.6% growth)⁷ and also in 2021 with a massive second wave leading to job losses (and strong difficulties for a lot of informal workers), decrease in consumption and establishment closure. In response to the COVID-19 shock, according to the world bank, the government took several monetary and fiscal policy measures to support vulnerable firms and households, expand service delivery and cushion the impact of the crisis on the economy. Taking into account the GDP growth in India, the economy has already rebounded.

*According to the OECD *The direct impact of the war in Ukraine is relatively limited, as trade between India and both Russia and Ukraine is small. (...) The indirect impact, through global commodity and energy market shifts, is much larger. (...) These forces, together with the lockdowns in China and the EU embargo, are contributing to high inflation.**

Both crises will certainly have an impact on the music industry, the first one directly affecting the live music industry and the second one, the purchasing power.

⁶ Digital 2021, Kepios, Hootsuite and We are Social, 2022.

⁷ India economic snapshot, OECD. Online: <https://www.oecd.org/economy/india-economic-snapshot/>

2. Music ecosystem and institutional structure: organisations, unions and copyright collection societies

Key points

- The main CMOs in India are IPRS for authors and publishers and ISRA for singers. Due to some confusion and ongoing unclarity around government licences to copyright societies, there are two de facto operating CMOs licensing sound recordings – PPL and RMPL.
- The main trade association for the recorded music industry in India is The Indian Music Industry (IMI). There are no trade associations for live music or publishing sectors. In 2019 artist managers started MMF India.
- The post-Covid conventions remaining in 2022 was All About Music and Music Inc. both taking place in Mumbai and welcoming local and international players.

2.1. Collective Management Organisations

The Indian Performing right society (IPRS) – Created in 1969, IPRS is a representative body of Owners of Music (Composers, Lyricists (or Authors) and the Publishers of Music) and is also the sole authorised body to issue licences for usage of Musical Works & Literary Music within India..

<https://iprs.org/>

A summary of the types of collected rights in the country:

TYPES OF RIGHTS	
Copyright	
Radio	No
TV	Yes
Public performance	Yes
Mechanical rights	Yes
Digital rights on DSP	Yes
Digital rights on UGC services	Yes
Neighbouring rights	
Radio	Yes
TV	Yes
Public spaces	Yes
Private copy	No

There is an ongoing lack of clarity in India regarding the collective licensing of sound recordings. While the courts and the government are processing the issue of which organisation should ultimately be granted a collective management licence for neighbouring rights⁸, there are de facto two CMOs representing rights holders and granting licences – PPL and RMPL. It is possible that once the issue is officially settled, one of the organisations will remain licenced.

Phonographic Performance Limited India (PPL) – Founded in 1941 PPL India, is a performance rights organisation licensing its members' sound recordings for communication to the public in the areas of public performance and broadcast. PPL owns and/or controls the Public Performance rights of 350+ music labels, with more than 4.5 million international and domestic sound recordings⁹.

<https://www.pplindia.org/>

The Recorded Music Performance Ltd. (RMPL) is authorised and exclusively controls public performance rights and radio broadcasting rights (sound recordings) of its member companies, including both non-film and film songs of its members, who are music labels. All licences granted and issued by RMPL are conditional, non-exclusive and for limited period and purpose¹⁰.

Indian Singers' Rights Association (ISRA) – It is the performers rights organisation, incorporated in 2013.

<https://isracopyright.com/>

2.2. Music industry trade body/union

The Indian Music Industry (IMI) – Trade body representing India's Recorded Industry and affiliated with the International Federation of Phonographic Industry. It represents 204 record labels.

India does not have a national live music trade body to lobby the government and regional authorities on behalf of promoters.

There is also a Music Managers Forum India: **MMF India**

2.3. Diverse organisations related to music

Federation of Indian Chambers of Commerce and Industry (FICCI) – The organisation is not dedicated to music but it is worth noting because this non-government and not-for-profit organisation presents reports, publications and resources for the music industry. FICCI provides a platform for networking and consensus-building within and across sectors and is the first port of call for Indian industry, policy makers and the international business community. Two divisions are related to music FICCI's Entertainment division –

<https://ficci.in/sector.asp?sectorid=13> and the Art & Culture division <https://ficci.in/sector-chair-co-chair.asp?sectorid=2#SectorChair> <https://ficci.in/index.asp>

British Council – The British Council is present in different parts of India: New Delhi, Chennai, Kolkata, Mumbai, Gurgaon (administration centre). It has different programs

⁸ RMPL was granted a licence in 2021, while PPL has been applying for a licence since 2013. The case is still open with the Delhi high court reviving PPL's application. See <https://www.asiajplaw.com/section/in-depth/battle-between-indian-copyright-societies-sparks-question-how-many-copyright-societies-does-a-country-need> or <https://spicyip.com/2022/03/delhi-high-court-revives-ppls-copyright-society-registration-application-sets-aside-registration-of-rmpl.html>

⁹ Source: PPL website <https://www.pplindia.org/s/what-is-ppl>

¹⁰ Source: RMPL website <https://www.rmplindia.org/>

dedicated to or towards music such as the Festival For The Future that aims to develop artistic and cultural exchanges with the UK and to internationalise India and UK festivals in partnership with festival leaders, artists and major stakeholders to provide access to skills development and training. They developed a database of Festivals in India: <https://www.festivalsfromindia.com/>

Institut Français (French Institute) and Alliance Française – The French Institute is located in Jaipur and Delhi and the Alliance Française has a strong network in India (<https://ifindia.in/alliance-francaise/>). Both offer cultural events.

Goethe Institute – The institute has offices in Bangalore, Chennai, Kolkata, Mumbai, New Delhi, Pune. It offers a residency program and organises events.

2.4. Music industry professional events and conventions

All About Music (Taj Land Ends, Mumbai) usually takes place in September. It is a BtoB international music conference with Keynotes, Panels, Workshops, Masterclasses... It brings together national music professionals as well as international players. <https://allaboutmusic.in>

EARS (Mumbai) takes place in Mumbai and turned into a trade mission in 2022 for international professionals to meet Indian players. <http://ears.asia/2018/03/13/ears-on-mumbai-2018/>

Music Inc. (Mumbai) takes place in June. It is organised by Loudest.in and exchange-4media is focusing on brands, technologies and music industry. It gathers most of the Indian key players for talks, panels, masterclasses and some international players as well. <https://www.exchange4media.com/marketing-news/music-inc-20-set-to-return-this-world-music-day-97265.html>

The Exchange is an initiative from UK Trade & Investment (UKTI) along with Submerge. Together, they organised a two day-long conference with panels between key industry heads and some international speakers. <https://m.facebook.com/theexchangeIndia/>

3. Recorded music industry in India

Key points

- While India is among the biggest recorded music markets in Asia, the growth is slow. Based on the recorded music revenue per capita the Indian music market is underperforming. Streaming makes up 85.1% of Indian recorded music revenue (compared to 61% of global average) with subscription revenues growing very slowly, but ad-supported revenues are rising fast. Other important revenue streams are sync and video streaming.
- Indian consumers spend a lot of time listening to music, especially enjoying engaging with music visually (watching music videos more than the rest of the world).
- Historically the Indian music market has been dominated by Bollywood and film music in general which continues to represent 80% of music consumption. However, the relatively good internet infrastructure, affordable cost of data and openness to various digital services is driving a transition to digital music – with decreasing Bollywood market share leaving more space for international music, indiepop, hip hop, regional music and niche genres.
- The Indian audio streaming ecosystem is fragmented and lively. Established local services such as Gaana, JioSaavn, Hungama and Wynk compete with Amazon Prime, Spotify, Apple Music and other international DSPs. In general, the ad-supported revenue model dominates with the share of subscribers according to some accounts hardly reaching 4% of the population.
- The Indian recorded music industry structure is specific due to the historically strong ties between the film and music industries. The leading labels are T-Series focusing mainly on Bollywood film music, and Saregama (film music, Carnatic, Hindustani classical, Devotional and so on), commanding together more than 50% of the market share (Statista). The major labels are present, but their market share is not comparable with other large music markets. Sony Music Entertainment is the most established, having a market share of approximately 19%. Notable international digital distributors active in India are The Orchard, Believe, TuneCore and more recently CD Baby.

3.1. Recorded music revenues in India¹¹

India is one of the biggest markets in the Asian region alongside Japan, South Korea and China. With a revenue of INR 1620 Cr in CY21 (€147,77 million approx) it is part of the Top 20 markets of the world. With a population of 1.3bn inhabitants, this performance is way below what could be expected. The country could be part of the Top 10

¹¹ 11 India Trends 2021, IMI, 2022. Online : <https://indianmi.org/activities/india-trends/>

markets, as China is for example. Several factors explain this “underperformance”, the most important one is the value gap. However, as the world’s leading emerging market, India’s musical industry is showing signs of growth. The industry grew in 2021 (+ 20.3% in comparison to 2020) and has grown 15.78% over the past five years.

Recorded Music revenues share by sector

The recorded music revenues by sectors in India reveal a very important role for streaming (which largely exceeds the global average) and a notable share for synchronisation revenues (5.6%) which lead the country to reach top 20 biggest markets in this segment.

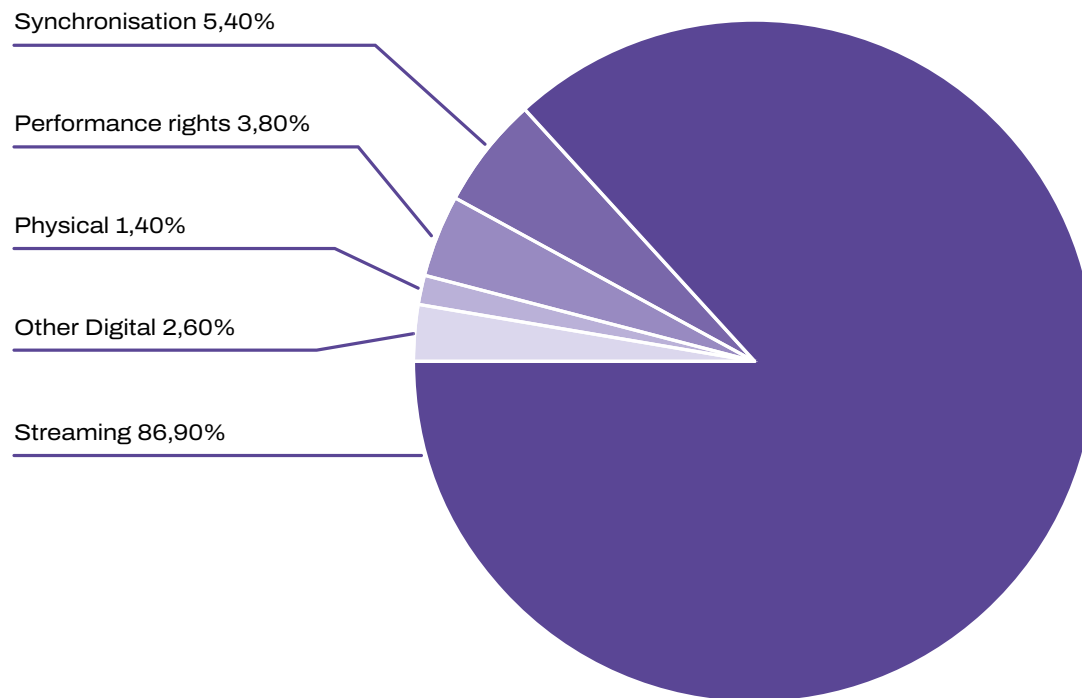


Figure 3.1.1. Recorded music revenue share in India. (Source: IMI, India Trends 2021)

Even if streaming revenues are the main industry revenue in India, they are considered to be way under what we could expect from a one billion inhabitants country. According to the interviews conducted with key players in India, the subscriptions revenues are still very low in India and the number of subscriptions stagnates. India’s population is accustomed to not paying for music and as a consequence, the total recorded music revenue per capita is very low. The streaming revenues are considered to be mostly composed of video streaming and ad-supported streaming. In 2020, the pandemic restrictions affected the performance rights of the recorded music industry with a drop in the public performance rights and the synchronisation revenues mainly because of the postponement of many film releases and cinemas closures.

Evolution of music revenues in India and factors that inhibit its growth

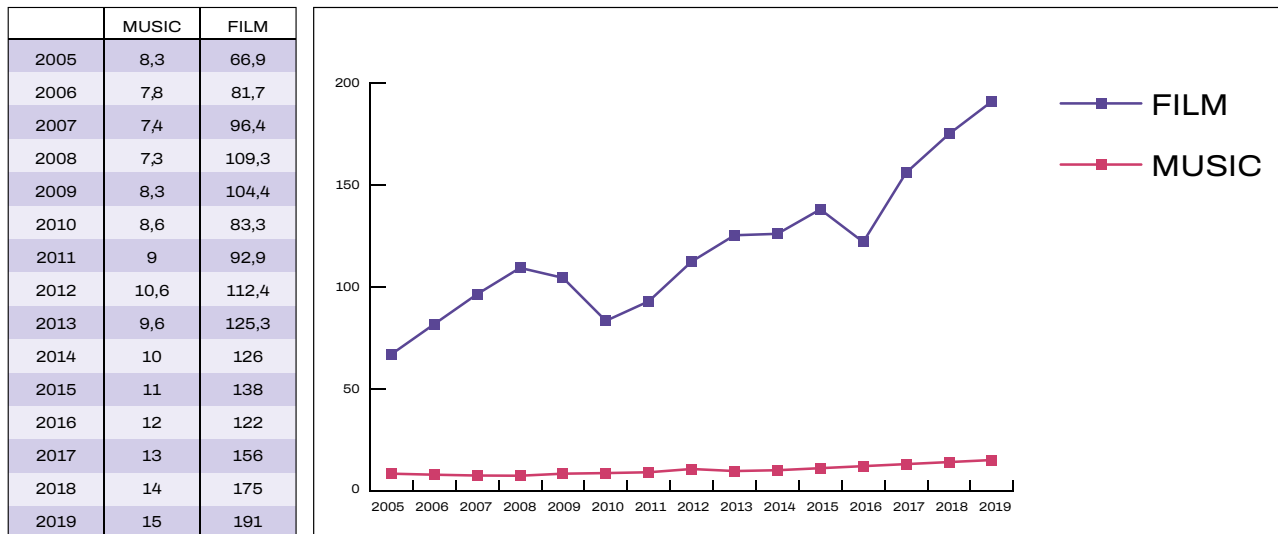


Figure 3.1.2. Recorded music yearly growth compared to film industry (% – 2005-2019)¹²

The Indian music industry is characterised by a continuous year on year growth. With a high consumption of music - largely online - and one of the cheapest average costs for Internet data in the world, the growth remains under that of the Indian film industry even though both industries are deeply related. In “A case for free market economics in the Indian recorded music industry” report from IMI, the factors are a mix of non-voluntary licensing on radio stations, the exemption of rights payments from weddings, music piracy and the value gap observed in social networks and short video apps. The fact that the strongest part of the online music consumption is on YouTube is another factor.

Piracy is an issue in the Indian music industry. 67% of music listeners in 2019 pirated music contents, compared to a global music piracy rate of 27%¹³. Stream-ripping remained the key method of piracy with 66% of pirated music accessed through stream-ripping sites. The revenue loss estimation stands between `217 cr. to `300 cr (between 2,17 and 3 billion rupees) annually for the recorded music industry¹⁴. However, with the streaming boom, piracy is no longer the first explanation of the underperformance of India. The fact that most streaming consumers are not willing to pay for music and never subscribe to any DSP is the main reason why. As a result, monetization remains very low in India. One needs also to acknowledge that the streaming music market concerns most of all the urban population (even if the trend is changing) while the rural population, representing almost $\frac{3}{4}$ of the Indian population, mainly consume music through radio and TV. What is more, another explanation comes from a very low royalty rate on radio stations and rights tariff deductions based on the category of city the music is broadcast in.

¹² FICCI Frames M&E Reports.

¹³ Digital Music Study, International Federation of the Phonographic Industry (IFPI) and the Indian Music Industry (IMI), 2019.

¹⁴ A case for free market economics in the indian recorded music industry, The Indian Music Industry (IMI), April 2021.

3.2. Music consumption medium and geography in India¹⁵

Indian music consumption is very high and exceeds the world average. Indian consumers enjoy visually engaging with music and spend almost one quarter of their listening time per week on YouTube. Still, audio streaming consumption is increasing with smartphones being the most used device to consume music and 97% of music listeners using it for this purpose. Radio remains an important way to listen to music, and social media to watch or listen to music.

A study from IFPI India studied the way Indian consumers listen to music and the share of time spent by medium. Streaming is by far the most important way to listen to music with YouTube leading the game.

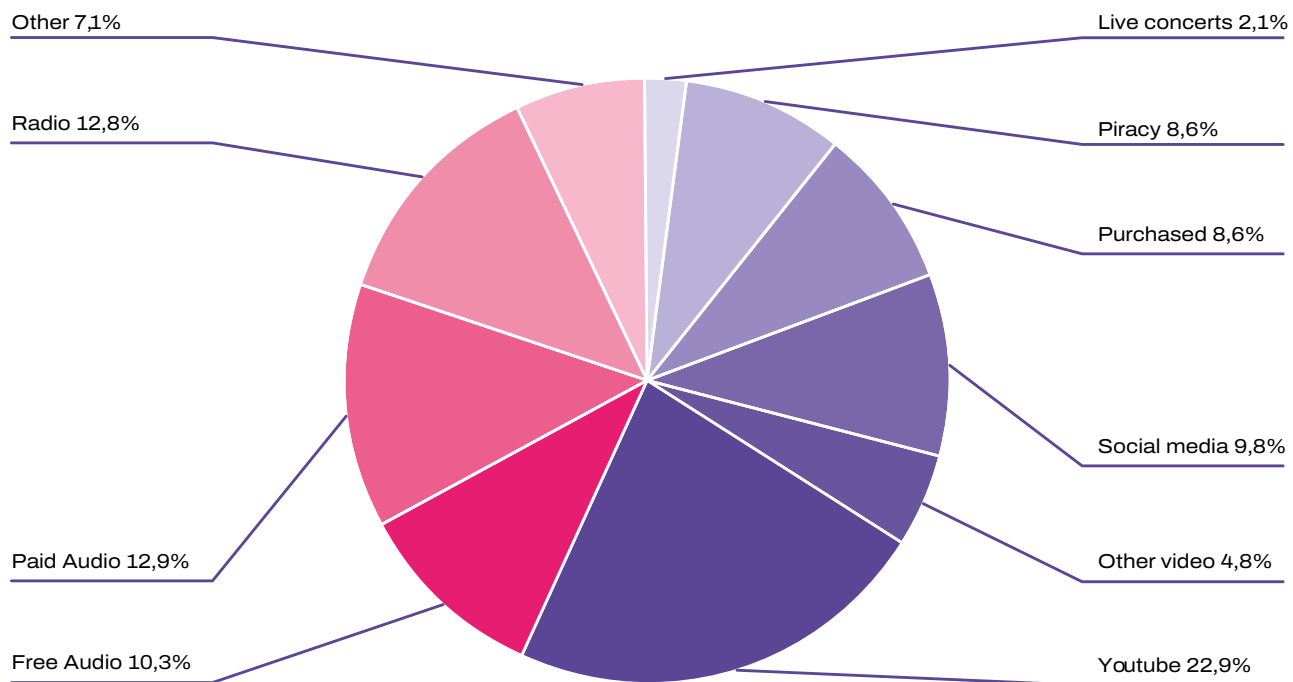


Figure 3.2. Music consumption by medium. Source: *Music Listening 2019*, International Federation of the Phonographic Industry (IFPI)¹⁶

In terms of geography, online music consumption is not limited to metro cities according to an EY and FICCI report from 2020¹⁷. Some online music services report that 50%-75% of their audiences come from non-metros and grow faster than metro audiences. Delhi, Mumbai and Pune were three Indian cities identified by Chartmetric as “trigger cities”. This concept of “trigger city” put the light on a streaming phenomenon: though some cities have almost no impact on global music revenues, they register very high streaming activities in global music services such as Spotify or YouTube, and as a result, they have a strong impact in influencing the hits of tomorrow (since the streaming platforms global charts only take into account plays). Among the top 20 cities of the world counting the most YouTube views of music videos, seven are Indian cities (Lucknow, Patna, Pune, Indore, Delhi, Jaipur, Ahmedabad)¹⁸.

¹⁵ Digital Music Study, International Federation of the Phonographic Industry (IFPI) and the Indian Music Industry (IMI), 2019.

¹⁶ Music Listening 2019, International Federation of the Phonographic Industry (IFPI), 2019. Available: <https://indianmi.org/towards-fair-compensation-for-music-in-private-radio-in-india%E2%88%97/>

¹⁷ The era of consumer A.R.T. (Acquisition | Retention | Transaction), India's Media & Entertainment sector, Ernst & Young (EY) and Federation of Indian Chambers of Commerce & Industry (FICCI), March 2020.

¹⁸ JOVE J. “Music “Trigger Cities” in Latin America & South/Southeast Asia (Part 1)”, Chartmetric, 2019.

3.3. Music genre consumption

Local music represents the largest part of the music sales and consumption in India. Studying the top 10 songs of 2020, 100% were Indian songs. But interestingly, this local consumption is not related to some specific genres or famous local artists with a strong fanbase, it emerges from Bollywood and other local film-producers. In India, the film industry is a major pillar of the creative industries and one cannot understand music consumption in India without acknowledging the close relationships between film and music. It is more than a trend; Bollywood has deep cultural roots in India since the beginning of the 20th century. Before the 90s, apart from some traditional folk artists (who were usually not commercialised), there was almost no “non-film music” and music sales (vinyl or CDs) were not standalone products. They were merchandise related to a film. According to the research of Cherie Hu, “*local music industry is essentially synonymous with Bollywood, which releases over 1,000 movies annually, and soundtracks account for nearly 80% of the country’s [music industry] revenue*¹⁹”. Music and cinema work as a “two-person team”. On a one hand, the success of a movie partly relies on its soundtracks, often released before the film as a powerful promotion tool. On the other hand, the music industry depends on Bollywood industry which can ensure a wide broadcast of the produced soundtracks in cinemas but also on radio, TV and more recently VOD. What’s more, the film industry is much more diverse than Bollywood. Famous soundtracks emerge from other areas, sung in other languages than Hindi. This includes Tollywood (Telugu), Kollywood (Tamil) and Sandalwood (Kannada) with the production of soundtracks in different languages proving that India is a very diverse country. As a result, the film industry and the soundtracks address the local needs for creative content and Indian consumers are accustomed to “watching music”. The strong local culture and availability of local content make it hard for an international artist to develop in India and to find an engaged fanbase there.

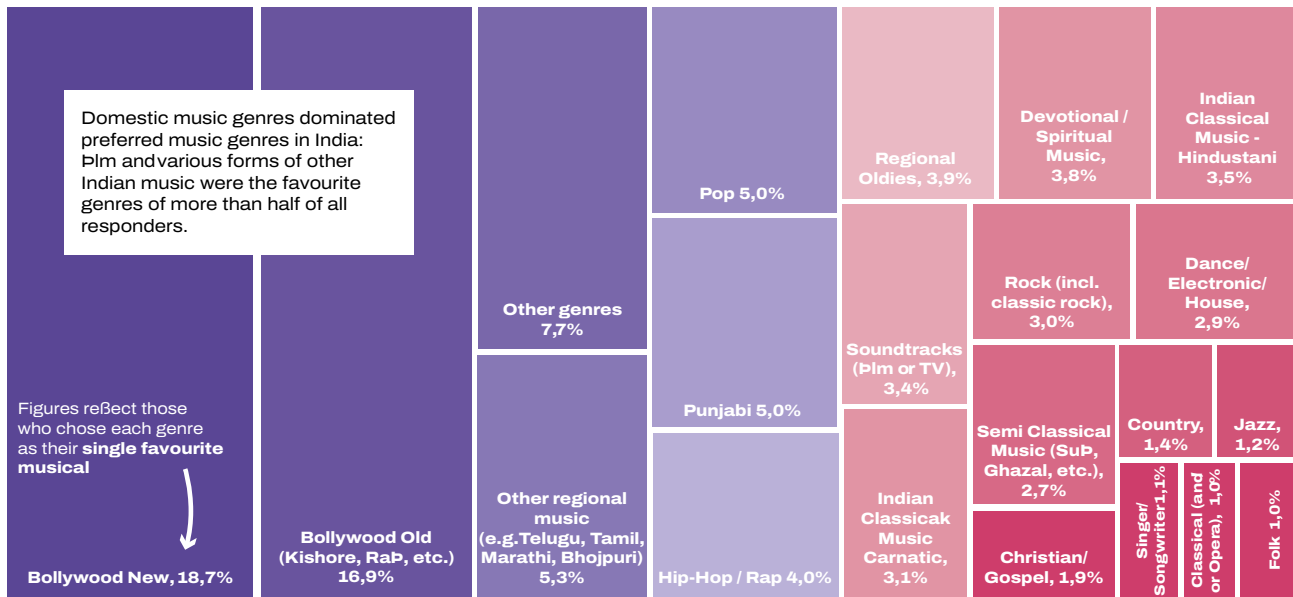
The domination of Bollywood has lasted for years. The most popular and consumed genre in India remains “playback” - songs sung by a playback artist for an actress to lip-sync the track in a movie. As a matter of fact, the music industry has never been artist-centric but rather based on soundtracks and films. Film-music continues to represent 80% of the music consumption²⁰ and produces around 10,000 songs a year in India.

According to the Indian Music Industry (IMI), the most consumed genres in India are:

- Bollywood (new)
- Bollywood (old)
- Regional (Telugu, Tamil, Marathi, Bhojpuri)
- Pop
- Punjabi

19 HUE C. “How India, The Global Music Industry’s Sleeping Giant, Is Finally Waking Up”, Forbes, 2017.

20 GURBAXANI A. “The best of Music Inc 2019: Discussions on the dominance of film music, streaming services in India” First Post, 2019



Source: IMI-IFPI Digital Music Study 2019

Figure 3.3. Music consumption by genre.

But things are rapidly changing in India. The country is characterised by a relatively good internet infrastructure accessible with an affordable cost (data is one of the cheapest in the world) with 1.3 billion inhabitants, 723 million internet subscribers and 400 million smartphone users in 2019 (the world's second-largest smartphone market) according to EY India²¹. The media and entertainment industry is going through a significant transformation. The Internet is expected to be the primary way to distribute and consume content. The availability of diverse applications, from social media to music services, gives access to very new content from the small but growing non-film music scene in India to international music. According to Shridhar Subramaniam, President, Strategy and Market Development, Sony Music Asia and Middle East "as India is one of the youngest countries in the world with 54% of the population below 25 years of age, we are now witnessing a new generation of artists expressing their creativity on social media and gaining public recognition. (...) This has allowed us to bypass some of the traditional mainstream channels, such as TV and radio – that would have been very focused on playing Bollywood songs – and allows us to build direct connections with fans". With the transition to digital music, Bollywood music observes a decreasing market share leaving more space for international music, indiepop, hip hop, regional music and niche genres (such as Jazz). One can now observe in India the rise of local hip hop scenes with local artists performing in the variety of the regional languages (Hindi, Punjabi, Kannada, Bhojpuri...). The market is steadily moving on a regional scale in India with artist-centric strategies. The evolving way of discovering and consuming music is leading the Indian music industry to observe structural changes and a new logic of artist development that is closer to the western music industry.

21 The era of consumer A.R.T. (Acquisition | Retention | Transaction), India's Media & Entertainment sector, Ernst & Young (EY) and Federation of Indian Chambers of Commerce & Industry (FICCI), March 2020.

3.4. Music audio streaming ecosystem in India

The streaming ecosystem in India differs from the biggest industry markets of the world. The music streaming market is young but characterised by a mixed key players system, with strong local services (Gaana, JioSaavn, Wynk) in competition with international players (Spotify, Apple Music, Amazon Music). Concurrently, YouTube (video) registers a very strong and always-increasing consumption - most of the music consumption occurring on this platform is video-music and film-music. But with a growing audio streaming market, India is home to a real battleground for streaming services. The most important local services are owned by telco providers (Reliance Industries and Bharti Airtel) or Internet companies (Times Internet, Hungama Digital Media) and have an important reach partly thanks to bundled offers. But in 2019, Spotify, YouTube Music and Resso were launched and India observed a 13% increase of music app downloads. However, most of the time the consumption in India remains ad-supported. When asking a panel of 1000 Indian consumers if they listened to one or several music streaming services last week, MIDiA research related YouTube led the consumption²². But our interviews revealed that audio music consumption is also strong on JioSaavn and Gaana.

Following this assessment, the streaming services below are described in a user's top-down ranking estimate thanks to different open data sources and the DSPs declarations. The figures depict India as a not (yet) subscription model market but rather a (still) advertising-led model. The subscribers hardly reach 4% of the overall population²³. Accounting firm Ernst & Young (EY) and the Federation of Indian Chambers of Commerce and Industry (FICCI) in their annual Media and Entertainment Report, state the number of monthly active users (MAUs) of audio-streaming services reach at a mere 197 million, data attributed to Comscore²⁴.

Gaana (1st) (local music service)

-> The platform was estimated to have between 180 and 200 million users and less than 2 million paying subscribers. It is difficult to know now the number of users in the platform since it shut its free tier offer in September 2022²⁵.

Gaana is owned by Times Internet, the digital venture of The Times Group and was launched in 2010. In 2018, Tencent (Chinese company) invested in the service. Gaana is available for desktop and mobile and is no longer offering an advertising-supported tier. The subscription costs INR99 (1,11€) for one month (INR399 for an annual subscription – 4,49€). The service developed other subscriptions with a gaming option, a voice assistant and the recent launch of a short video platform called HotShots. According to The Economic Times, Gaana had reached 185 million monthly active users (MAUs) in August 2020.

²² India music Consumer Behavior, MIDiA, April 2020. <https://www.midiaresearch.com/reports/india-music-consumer-behaviour>

²³ Declaration of Devraj Sanyal, the MD and CEO of the Universal Music Group in India and South Asia during the IFPI press conference for the release of the Global Music Report 2021.

²⁴ The era of consumer A.R.T. (Acquisition | Retention | Transaction), India's Media & Entertainment sector, Ernst & Young (EY) and Federation of Indian Chambers of Commerce & Industry (FICCI), March 2020.

²⁵ DREDGE S. "Gaana ditches free streaming in favour of paid subscriptions" Musically, September 12, 2022. Online: <https://musically.com/2022/09/12/gaana-ditches-free-streaming-in-favour-of-paid-subscriptions>

JioSaavn (2nd) (local music service)

-> The platform is estimated to have between 125 and 150 monthly active users and less than 1 million subscribers.

JioSaavn was launched in 2018 after the acquisition of Saavn, a leading streaming service, by mobile operator Reliance Industries (who already owned the music service Jio). Reliance Jio is the telco leader in India with 418.2 million mobile subscribers. However, no discounted bundle deals are available to its subscribers. A monthly subscription costs INR99 (1,11€) (annual subscription costs INR399- 4,49€).

Hungama (local music service)

-> The platform is estimated to have around 60 to 70 million users and less than 1 million subscribers.

Hungama is a local music streaming service owned and operated by Hungama Digital Media. The service has a strong focus on regional markets and contents and provides its platform in 11 regional languages. It also offers an audio-video format. The Chinese company Xiaomi invested in Hungama Digital Media.

Wynk (local music service)

-> the platform is estimated to have around 30 million users and less than 0.5 million subscribers.

Wynk is owned by Bharti Airtel and was launched in 2014. Bharti Airtel, with 302.3 million mobile subscribers, is the second largest mobile operator. In a 2019 press release, Bharti Airtel stated that Wynk was the leader in terms of daily active users. In terms of consumption, *“while Bollywood and International music continue to be the biggest categories on Wynk Music, it is Indian regional music that is witnessing the fastest growth. Overall, there has been a 75% surge in the number of users streaming regional music (...) the demand for regional language songs and local artists is seeing massive surge.”* In 2019, Bharti Airtel announced the launch of Wynk Tube, a service that offers access to a very simple interface for songs in an audio and video format and that is developed for towns and villages with a vernacular interface. On one side, Airtel offers Wynk Plus as part of a bundle (which includes Wynk Music among other applications) and on the other side, it offers Wynk for INR29 (Android – 0,33€) and INR60 (iOS – 0,68€) per month. More recently, Bharti Airtel published the 2020 financial result of Wynk. At the end of March, the service had 72.5 million users (MAUs).

Spotify (international music service)

-> Estimation of Spotify users is between 30 and 45 million users with approximately 1 million subscribers.

Spotify was launched in India in 2019 and is becoming one of the most important markets for the DSP. The company doubled the number of subscribers in this market since its launch in India²⁶. Monthly subscription costs INR119 (1,34€). A two-user Duo offer is available for INR149 (1,68€) per month, with a six-user Family plan costing INR179 (2,02€) per month.

²⁶ DREDGE S. “Spotify has doubled its subscribers in India over the last year”, Musically, February 28, 2022 Online: <https://musically.com/2022/02/28/spotify-has-doubled-its-subscribers-in-india/>

Top 200 Spotify (May 21') repartition by artist nationality and music genre [Source : Chartmetric]

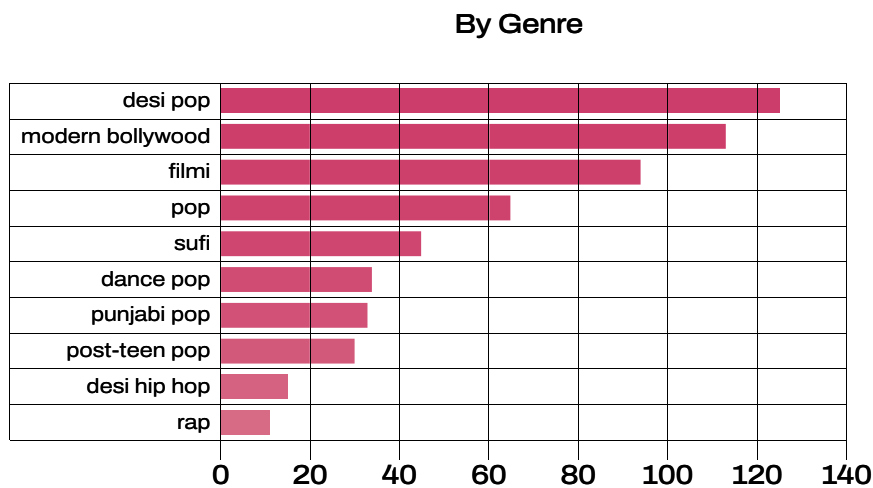
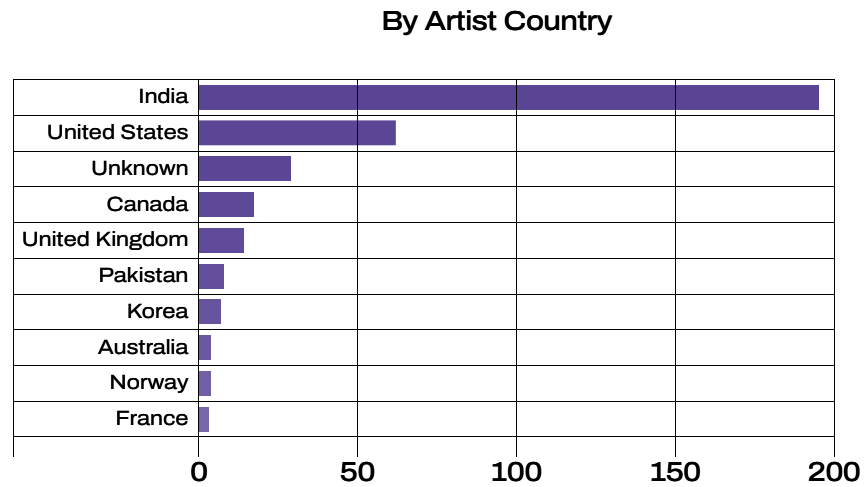


Figure 3.4. Top 200 Spotify by country.

Amazon Prime Music (international music service)

-> Less than 1M users

The music service of Amazon was launched in India in 2018, two years after Amazon Prime. It is one of the favourite DSPs for Indian consumers.

Apple Music (international music service)

-> Less than 1M users

Apple Music launched in 2015 in India. Monthly subscription costs INR99 (1,11€) , with a six-device family option priced at INR149 (1,68€) per month. Students are charged INR49 (0,55€) per month.

YouTube Music (international music service)

-> Less than 1M users

YouTube Music was launched in 2019 and costs INR99 (1,11€) per month.

Focus on YouTube

YouTube is the preferred streaming service to listen to music. Indian music consumers spend 22.5% of their listening time on YouTube (it is more than the time they spend on audio music services or radio) and 94% of the consumers use it to listen to music. YouTube not only covers urban areas, it's also available in smaller towns in India and it is consumed across all demographics. There are three major interconnected explanations of this phenomenon in India: the strong link between music and video, the cheap tariff of the data and the fact that YouTube is free.

With the second largest population in the world, India is a major market for YouTube. From April 30th to May 6th 2021, 6 of the 10 most listened artists of the world on YouTube service were Indian and together they accounted for 962 million streams globally. This data depicts the strong penetration of YouTube in India, as a daily used service. Channels are very important in YouTube consumers' music discovery. One of the most important channels is T-Series, a label releasing Bollywood music, with 134 million subscribers.

Focus on music piracy and ad-supported music

Piracy of recorded music (cyberlockers, P2P, stream-ripping) has long been a concern and a major issue in India. The last report from the International Intellectual Property Alliance (IIPA) stated that an increasing number of users are reported to be downloading apps that facilitate infringement despite the growth of licensed streaming services. The piracy rate is one of the higher of the world with 67% of internet users pirating music²⁷. In the third quarter of 2020, the music pirate website *pagalworld.mobi* received 37 million visits from India and the stream-ripping, *Savefrom.net* received more than 58.4 million visits. Stream ripping remains the major music piracy threat in India despite a fall of 11% in use²⁸. At the same time, even if the number of users of licensed music streaming apps is increasing, the conversion rate to paying subscriptions is still minuscule (about 1%).

3.5. Recorded music industry players

Record labels

Because of the strong relationship between the music and film industries, the Indian landscape of record labels is very specific. The leading music record labels are local labels that have been building their hegemony over the film industry. In fact, movie producers hire the artists to record the music before selling the rights to record labels and publishers. Few record labels have the capacity to buy these rights. This explains why a few local labels possess the majority of film music catalogue and have a very

²⁷ Digital Music Study, International Federation of the Phonographic Industry (IFPI) and the Indian Music Industry (IMI), 2019

²⁸ Digital Music Study, International Federation of the Phonographic Industry (IFPI) and the Indian Music Industry (IMI), 2019

strong back catalogue. This also explains why most of these record labels are publishers and why the copyright law favours the record label and publisher instead of writers and composers (see [Publishing chapter](#)).

According to diverse sources, the leading music record label in India is **T-Series**, a subsidiary of Super Cassettes Industries (SCI). The label focuses on Bollywood film-music production. No financial details are available but one can notice its huge presence in India through YouTube data. According to HypeAuditor²⁹ T-series channel is the most subscribed one in India with 113.4M Indian subscribers.

The second key player in India is **Saregama** that developed a repertoire in film-music, Carnatic, Hindustani classical, Devotional and so on, in different Indian spoken languages but also signed some of the most prominent Indian artists. The company used to be the Indian branch of EMI's Gramophone and is the oldest music label in India. It is based in Kolkata with offices in Mumbai, Chennai and Delhi. It extended its activities towards publishing, film production under the name of Yodlee Films and also multi-language Television content.

Majors are established in India but do not reach the same market share as they do in the biggest music markets of the world (USA, France, UK...). **Sony Music Entertainment** (SME) is the most set-up Major in India with a presence since 1996 (and now offices in Delhi, Mumbai and Chennai). SME has a strong focus on Bollywood and soundtracks but it recently began to develop its catalogue towards hip hop and regional music. **Universal Music Group** (UMG), based in Mumbai, expanded its business in India and South Asia in 2020 after launching WYRL Originals, a non-film dedicated music label and, in collaboration with **Mass Appeal**, Mass Appeal India (urban culture-focused entertainment company) to amplifying India's burgeoning hip hop culture on a global scale. **Warner Music Group** (WMG) also launched in 2020 Warner Music India in Mumbai in charge of India, Afghanistan, Bangladesh, Bhutan, the Maldives, Nepal, Pakistan and Sri Lanka.

Here is the label market share in India according to Statista:

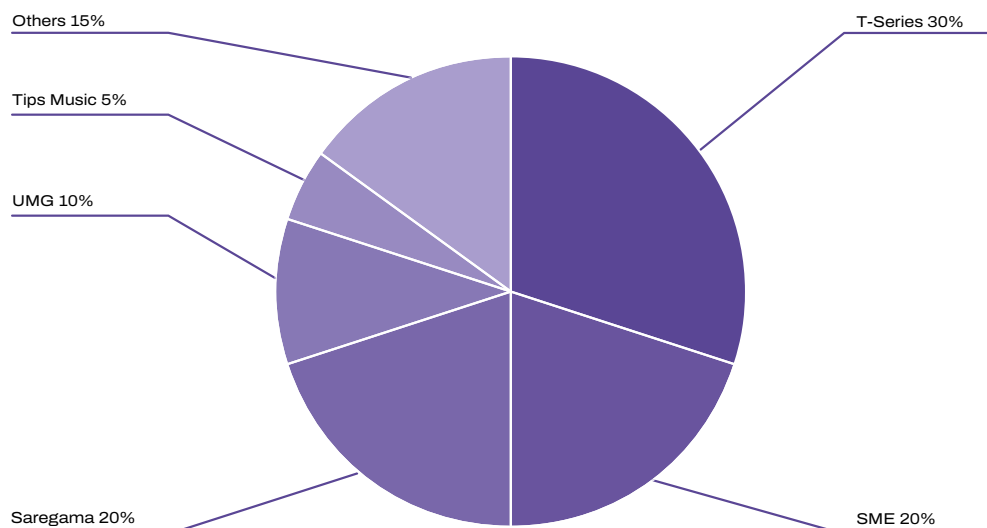


Figure 3.5. Recorded music market shares in India in 2016. Source: Statista³⁰.

²⁹ <https://hypeauditor.com/top-youtube-music-india/>

³⁰ <https://www.statista.com/statistics/694791/record-company-market-share-india/>

It is also worth noting the other independent labels:

- **Times Music:** Based in Mumbai, the label is a division of The Time Music Group launched in 1998. It is also a publisher. The label initially focused on devotional and spiritual genres but also released regional, Bollywood, folk and traditional music in different languages. More recently, the label began to be one of the pioneers in electronic music licensing local and international EDM labels in India and has been associated with the indie music scene in India.
- **TIPS industry limited:** Founded by Kumar S. Taurani and Ramesh S. Taurani, the label is based in Mumbai and is also a film production, film promotion and film distribution company.
- **Zee Music:** The company is a subsidiary of Zee Entertainment Enterprises based in Mumbai. It is a leader of film-music in India from Bollywood to regional films.
- **Venus Records (Believe):** Founded by Ganesh Jain and Ratan Jain in 1988, the label is known for Bollywood music and Indie Pop music. Venus was acquired by the French company Believe in 2019.

The recent mutation of the Indian music industry from Bollywood supremacy to the increase of regional enabled the launch of emerging record labels as for example WhiteHill Music (Punjabi), Humble Music (Punjabi), Riddhi Music World (Bhojpuri) and RNM Bhojpuri. A wide range of new labels is now emerging in India.

Digital music aggregators

- **The Orchard:** the Sony owned aggregator is the leader in India
- **Believe Music:** the Paris-headquartered music distribution and marketing company had a recent strong development in India with the acquisition of Mumbai-based Canvas Talent (artists-services and talent management management organisation) and Entco (live-music production). The distributor has international digital-distribution deals with local label Indie Music.
- **TuneCore:** Founded in 2005 and acquired in 2015 by Believe, it is an aggregator dedicated to independent musicians and has an office in India.
- **CD Baby:** The US-based aggregator entered India in 2019.

4. Live music industry

Key points

- The traditional live music industry in India has been divided between corporate events, sponsored festivals and very limited ticketing events. In terms of popular music, there are two scenes : lip syncing and film music concerts, and indie music (non-film music). The sector has been growing since 2010 and progressively shifted from traditional free and private towards ticketed events, followed by the appearance of new promoters and increased investment.
- The live music industry has largely relied on sponsorship, however ticket sales revenue has been growing at least since 2015 (8.7% growth in 2019). Ticketing market is dominated by one local company BookMyShow and most tickets are bought online via mobile.
- According to FICCI & EY young people in India enjoy live music concerts and they estimated (pre-pandemic) that the ca 8000 concerts in 2018 will double to 16 000+ by 2025.
- Apart from major international acts playing in stadiums, it is hard to perform in India for international artists. Important challenges are transport costs, international artist fees being low, the highly regional structure of India with its regulative and logistic complexity and lack of concert venues. At the same time, there are certain genres that have found audiences, such as metal and hard rock, electronic music, especially EDM and drum-n-bass and also in some cities vibrant jazz scenes.
- The festival scene in India was flourishing before the pandemic, however, it is also fairly volatile with new festivals emerging and disappearing a few years later. Next to the approximately 25 major festivals taking place every year, there are new types of festivals comparable in quality and scale with European events that invite more and more international artists.

The live music economy is divided into different scenes and types of events. A lot of tours and concerts are made for lip syncing music (in other words, film-music performed by the actors of the movie) attended by a lot of Indians. Film-music is a very lucrative scene in India for artists and promoters while indie artists are part of a growing but still emerging scene facing issues to find the right infrastructure and venues to give concerts. Indian concerts and events are divided between corporate events, sponsored festivals (generally medium-sized festivals) and very limited ticketing events. The live music sector has been growing since the 2010s according to an IQ International Ticketing Yearbook . The number of music events was increasing before the pandemic with a better inclusion of international music and indie music. This move has been followed by the appearance of new promoters and stronger investment from sponsors.

4.1. Live music industry revenues

According to a PWC forecast, before the pandemic the Indian live music industry registered a yearly growth of ticket sales revenues since 2015, with 8.7% growth in 2019 and \$84.4 million. **BookMyShow** is the leading company for ticketing in India with a more than 80% market share. It is in competition with the Alibaba-backed mobile giant Paytm which acquired [Insider.in](https://www.insider.in/) and TicketNew.

Most of the tickets are bought online and via mobile³¹. But the live industry in India does not rely on ticket sales, it rather relies on sponsoring.

There are many factors that inhibit the live music sector:

1. There are few venues dedicated to live music performances (rather bars and restaurants), and the infrastructures are not well equipped with often low quality of sound engineering. The medium sized venues are almost non-existent.
2. The prices for live music concerts are usually low but most of the important festivals are expensive for the local population.
3. There is also a complex system of authorization to organise a concert as well as complicated procedures for security. Most concerts taking place in hotels and restaurants are not declared in order to avoid author rights costs and concert taxation. The Entertainment tax can be expensive as well for a declared concert. This tax, established by local states, is a share of ticketing sales and can differ from one concert to another (exemption for classical Indian music and high rates for international artists that can vary for a state from another for example).
4. In the cities, the traffic jams can inhibit the people from coming afterwork to a concert.

As a result, India venues or promoters try to build an experience around music: with food and so on.

4.2. Consumption patterns and live music scenes

A huge number of Indians go out to film-music concerts in theatres and auditoriums. This is a strong live scene, generating revenues and gathering big audiences in India. Apart from this phenomenon, when observing India's behaviour towards live music, the culture of live music concerts is not very strong in India even if it is evolving. What we know is that a share of the population never goes to concerts in India whatever the type of music on offer (pop/rock, classical music or electronic music). MIDiA research studied the Indian behaviour and habits toward live music and the results correspond to the discussion the EMEX research team had in India: there is the same proportion of people who never go to concerts as the ones who go often and frequently³².

Electronic is nevertheless following a new trend in India, gathering a younger generation willing to go out and listen to music in clubs on a monthly basis at least. The same happened with the recent development of the number of festivals available that corresponds to the type of event a section of the population will attend. More generally, western music is mostly appreciated in the cities and by the younger generation. In fact, a recent report from FICCI & EY India observes that the youth enjoy live music concerts. Before the pandemic, the report evaluated approximately 8000 concerts in 2018 in India and expected growth³³.

³¹ International Ticketing Yearbook, IQ Mag, 2019

³² India music Consumer Behavior, MIDiA, April 2020

³³ The era of consumer A.R.T. (Acquisition | Retention | Transaction), India's Media & Entertainment sector, Ernst & Young (EY) and Federation of Indian Chambers of Commerce & Industry (FICCI), March 2020.

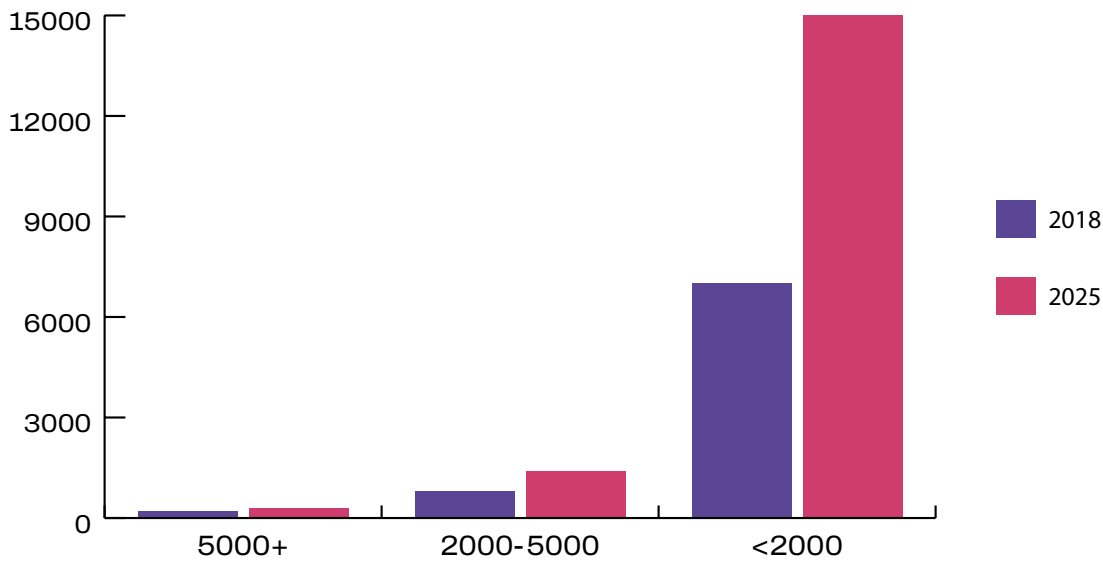


Figure 4.2.2. Live music concerts. Source: Industry discussions, IPRS, EY estimates

The global trend is a growing number of music concerts on offer with a strong increase in smaller concerts (less than 2000 capacity). It is not a surprise since India lacks infrastructures for larger size concerts.

There are niche genres Indians are fond of. During the 2000s, the country discovered metal and hard rock music and the genre became very successful. Since then, a lot of international artists of this genre have played in India in front of big crowds and metal fans have emerged everywhere in the country. This, though, appears now to be less the case. Electronic music is another genre that brings an important audience in India, driven by EDM and drum'n' bass music. Calcutta also has a jazz scene and there are several Jazz festivals in India.

Mumbai is the place where the music scene is the most developed in India. It is considered to have the highest number of proper indie music venues in India (around 20). Before the pandemic, one could attend several concerts the same night. Delhi possesses the approximate same number of indie music venues and Bangalore is ranked next. But then, Pune, Chennai, Goa all have fewer than 10 venues and the last cities where it is possible to play - but in very few venues - are Kolkata, Hyderabad, Chandigarh, Jaipur and Indore.

4.3. Venues and infrastructure

There are not many performance-oriented music venues in India. Most of the concerts take place in bars, restaurants, hotels or clubs from 200 to 600 capacity. There are also auditoriums presenting all sorts of performing arts that can reach a 1500 capacity. There is a shortage of international-standard arenas in India. An exception remains with venues exclusively dedicated to Bollywood artists or classical Indian music. As a result, most of the big concerts (with a 2000 capacity and more) take place in open air venues and can be produced between October and March. The club season takes place from June to September. The first performance-orientated venues (mixing a real stage, a restaurant and a bar) with a large spectrum of music genres emerged in 2007 with BlueFrog in Mumbai (now closed) one year after the establishment of the Hard Rock Café. Some other venues followed this trend: Humming Tree in Bangalore, Bonobo in Mumbai, TLR Café in Delhi.

Clubs and Bars:

In India, it is possible to find networks of brand venues. These networks allow tours in India and enable acts to reach other cities than Delhi or Mumbai.

- Kitty Su (Bangalore, Chandigarh, Mumbai, Delhi, Kolkata)
- Social Offline (Bangalore, Chandigarh, Mumbai, Delhi)
- Hard Rock Café (Delhi, Mumbai, Bangalore, Pune, Hyderabad, Chennai).

Then, other venues can be found in the different cities of India:

- **Delhi:** Out of the Box, Turquoise Cottage, The Anti-Social, Lodi Restaurant, Auro Kitchen and Bar, Summer House Cafe ;
- **Mumbai:** Mehboob Studios, Bonobo, Cool Chef Café, Aurus Restaurant Juhu, Flea Bazar Cafe, Jio – Gardens ;
- **Bangalore:** Opus, Counter Culture, The Humming Tree, Indigo Music Bar ;
- **Pune:** Kue Bar, The High Spirits ;
- **Hyderabad:** Bottles & Chimney, Syn Club ;
- **Kolkata:** Jamsteady, Someplace Else.

Auditoriums are also very important for live music in India but they mostly book Indian classical music or film-music. Here are the main auditoriums: Siri Fort Auditorium (Delhi); National Centre for Performing Arts (Mumbai); Manpho Convention Centre (Bangalore); Shilpa Kala Vedika (Hyderabad).

It is worth noting the Royal Opera House as well (Mumbai).

Open air places:

- Delhi region: HUDA Grounds, Gurgaon; Buddh International Circuit, Noida;
- Mumbai: Mahalaxmi Race Course;
- Bangalore: Palace Grounds, Freedom Park.

4.4. Festival network

Before the pandemic, the festival network was flourishing in India even if the festival sector was relatively small given the size of the country's population and unstable with new festivals from one year to another, and festivals disappearing at the same time. There are famous major festivals in India and approximately 25 major festivals each year (Sunburn, NH7 Weekender) and also new types of festivals that offer new experiences (in the desert or Indian valley). These festivals managed to reach the same quality and scale as European ones and invited more and more international artists. They address an international crowd and can offer VIP access. They are expensive for the average Indian consumer even if the spending power increases in India generally once you reach the middle class, which can afford entertainment such as concerts or festivals. A lot of festivals are founded by individuals from the Indian diaspora with western education. They benefit from important sponsor investment from brands, telcos or banks and are strongly dependent on these revenues as ticketing does not generate enough money to cover the festival expenditures, and public funding is almost nonexistent.

Festival	Localisation (city)	Music genre	Capacity	Period
NH7	Multi-city (Pune; Delhi; Bangalore; Kolkata; Hyderabad; Shillong (and 1 day-long festival in other cities)	Multi-genre + comedy	approx. 50 000 (per city)	October - December
Sunburn	Goa	EDM	1 million	December
VH1 Supersonic	Pune	EDM, jazz, rock, pop, reggae, indie		July
Magnetic Fields	Alsisar Mahal (Rajasthan)	EDM, techno, hip-hop, folk, indie pop	500	December
Electric Daisy Carnival India	Great Noida (close to Delhi)	EDM	350,000	November
Road to Ultra	Hyderabad, Delhi	EDM		March
Enchanted Valley Carnival (EVC India)	Aamby Valley City (Maharashtra)	EDM, techno, pop, Bollywood, folk, rock, jazz		December
Saarang (student festival)	Chennai (IIT Madras)	Folk, contemporary, rock, hip-hop, EDM		January
Mood Indigo (student festival)	Mumbai (IIT)	Rock, sufi, indian classical, Bollywood		December
Mahindra Blues	Mumbai	Blues		February
Storm	Bangalore	Rock, folk, indie, electronic		
Hornbill	Kisama Heritage Village (Nagaland)	Rock, pop, EDM, rock, hip-hop, blues, folk	12,000	December
Ragasthan	Jaisalmer (Rajasthan)	Folk, world, rock, pop, electronic	2,000	February
Covelong Point	Kovalam (Tamil Nadu)	Rock, EDM		August
Xchange IndiEarth	Chennai	Indian classical, folk, hip-hop, reggae, jazz, rock		December
Jamsteady's Big Sunday	Kolkata	Pop, rock, hip-hop, indian classical, folk		December
Sula Fest	Nasik (Maharashtra)	Electronic, dubstep, reggae	9,000	February
Ziro	Ziro Valley (Arunachal Pradesh)	Indie, pop, folk, world	6,000	September, October
Locals DISTRICT	Kalwar (Rajasthan)	EDM, techno		March

Table 4.4.1. A list of festivals. Source: own research.

4.5. Touring in India: Booking agencies, promoters and artist management agencies:

Apart from major international acts playing in stadiums, it is hard to perform in India. Bringing international artists in a context where local music is very strong and where there is a lack of venues for a tour is a challenge. With transportation costs and international artists fees, an act often needs an anchor in India to be able to tour there. Often this anchor is a festival to afford transportation costs, because then, a tour can be built around it. For international acts, one needs to take into account that the country is strongly divided with regions governed by their own laws and with a large number of languages and cultures more or less open to international acts and non-film music. Sometimes, showing adaptation to Indian specificities can be necessary. This is why working with a booking agency is always better. There are not a lot of reliable booking agencies in India. When negotiating with them, it is important to speak in dollars.

Example of booking agencies:

- Percept Live (EDM, Bollywood, international acts)
- Submerge (EDM)
- OML Entertainment
- KRUNK (dubstep, drum n bass, drumstep etc)
- blueFROG
- Mixtape (Rock)
- Liquidspace Entertainment
- Amarrass Records
- Music Gets Me High
- Audio Aashram

Some major promoters: Wizcraft, DNA Networks, Teamwork Arts, Krunk, Mixtape, Submerge Music.

4.7. Coronavirus impact

PWC forecast estimates a loss of 58.9% in ticketing revenues in India in 2020 due to the pandemic. With the economic impact of the pandemic, and the lack of public funds for the live music sector, the recovery of the sector will certainly be complicated.

5. Publishing

Key points

- The copyright law in India has for a long time differed in important respects from the standards set out in various international copyright and IPR frameworks. The industry practice has relied on film producers hiring composers to create music and thus becoming the rights holders of these musical works. The concept of an author holding exclusive rights for their works is fairly recent. A number of ongoing disputes in the copyright domain make it difficult to get a clear picture, including a dispute around licensing musical works to commercial radios and granting government licence to copyright societies licensing the use of recordings.
- India is ranked 36th in the world with ca EUR 20 millions in collections. IPRS was readmitted to Cisac in 2018 after a strong reorganisation. IPRS made efforts to strengthen the copyright collection system in India before the pandemic, improving its governance, developing licensing with digital DSPs and facilitating the promoters, venues and festivals declaration through an online system. The pandemic resulted in a 77% decrease in public performance collections.
- Due to the prominence of film music in the music industry, the Indian music publishing sector is deeply interconnected with recorded music production (very often for films). Therefore, the largest recorded music companies are also managing publishing rights – T-Series, Sony Music Publishing, Times Music and others. IMPF estimates music publishing revenues in India for 2018 to have been around EUR 25–26 million.

5.1. Copyright law and its recent evolution

The primary source governing copyright law in India is the Copyright Act of 1957. In terms of music, the copyright system in India is non-standard and results from the long term music and film industries' relationship. Copyright law in India has been evolving until very recently and is getting closer to what we experience in Europe but it still presents some weakness when it comes to songwriters, composers and performers rights. Considering the situation of authors in India, it is worth noting that the exclusivity culture between a songwriter and their publisher or a musician or singer with a record label is not relevant in the Bollywood context. At the same time, the idea of long-term copyright ownership for authors is recent because they used to see their rights removed in favour of the producer

For a very long period of time, the Copyright Act has been defining “musical work” as any combination of melody, harmony or both together. This definition completely excluded the presence of lyrics and voice as part of a “musical work” which removed all singers or lyricists rights from the musical work. At the same time, the Copyright Act has been providing copyright protection for both “musical compositions” and “sound recordings”. When it comes to composition, in a country where music is strongly related to cinema and where film producers are hiring composers and musicians to

create a song, most of the songwriters and composers never had any right over their lyrics or compositions. In fact, according to the Copyright Act, the first owner of the copyright in a musical work is the composer. If the work is composed in the course of employment under a contract of service, then usually the employer will own the copyright and no counterpart is defined. As a result, film producers would own the full rights and sell them to a record company who exploited the records in different ways and not only for the movie exploitation. This records company usually bought the master and publishing rights.

The Copyright Law was amended in 2012 to deal with the evolution of the music and film industry and to improve some archaic portions of the Copyright Act. It eliminated the unequal treatment between composers and lyricists. It also made clear that the authors owning the copyrights can claim the royalties for their works and extend the rights of the performers and broadcasting organisations.

This Copyright (amendment) Act, 2012, is now preventing authors and composers from assigning or relinquishing their rights and tries to secure reception of royalties for the utilisation of the work. By recognizing the difference between the usage of a work in the cinematography, film and other mediums and modes, it reinforces the author as owner of the copyright and gives a bigger importance to Indian CMOs for collecting royalties from other mediums of exploitation. Rates of royalties collection are now suggested by the Copyright Board. It also had an impact for the performers, securing royalties for each type of exploitation of their work. It is important to remember that prior to 1994 and India's accession to the TRIPS, performers' rights in their performances were not recognized in India.

The copyright amendment also focused on the digital area with the scope of reproduction rights having been widened to include storing of the work in any medium by electronic means. It introduces digital rights management (with IPRS licensing the catalogue it represents to DSPs and collecting the rights).

The Copyright (amendment) Act also broadened the scope of statutory and compulsory licensing provisions and the right to the broadcasters to broadcast any prior published musical work just giving a prior notice to the copyright owner and paying royalty at the rates prescribed by the Copyright Board to the owner of the work.

Despite this important amendment, Indian music copyright is still facing some difficulties. Music industry players would like to see a reinforcement of the law against online piracy with access control measures and prohibition of illicit streaming devices and apps and services related to them. Recent evolutions brought some progress with the government enabling judicial site blocking, but its scale remains insufficient to tackle the issue.

In practice, the industry is also affected by certain broadcasters, venues and promoters who do not pay royalties to rights owners because of strong fights between IPRS and radio broadcasters (see below). Last but not least, the Copyright Act assigned music copyrights to the songwriters and composers, but the practices in the core leading industry remain old fashioned and since the entertainment industry functions as per contractual relations between various stakeholders, the reality can be very different.

Focus on the radio licensing dispute:

For a long period of time, the India radio broadcasters used to pay royalties to the Indian Performing right society (IPRS) and to the Phonographic Performance Limited India (PPL) for the use of music. Since the amendment act, the rates are defined by the Copyright Board and the broadcasters would need a licence for the use of musical works from IPRS members. However, radio collections were affected by High Court judgements in Bombay, Kerala and Delhi in 2011 ruling that IPRS is not entitled to collect royalties upon private radio companies for the broadcast of recorded songs since the works of the lyricists and music composers are incorporated into the recording that is owned by the record label. So IPRS can claim only for live performances and remixes. The only CMO entitled to collect royalties on radio broadcasts for recorded songs is PPL. This situation was thrown into confusion at the end of 2020 when the Intellectual Property Appellate Board (IPAB) ruled in a case between Music Broadcast Limited and Tips Industries Limited, that FM radio broadcasters have to pay royalties to IPRS. But right after, at the beginning of 2021, the Delhi High Court in two cases (IPRS against Entertainment Network India and PPL against CRI Events Private Limited) went back on the 2011 position ruling that rights from FM radio stations need only to be paid to master rights owners. This situation explains why IPRS collections of royalties on FM radio broadcasters is close to zero.

International treaties:

India has signed a number of treaties and conventions related to copyright:

- Berne Convention 1886.
- Universal Copyright Convention 1951.
- Rome Convention 1961.
- WTO Agreement on Trade-Related Aspects of Intellectual Property Rights 1994 (TRIPS) (to which India is a signatory).

5.2. Collecting society figures

India is ranked 36th in the world with EUR 20 millions in collections. IPRS was readmitted to Cisac in 2018 after a strong reorganisation.

Before the pandemic, IPRS announced in its last business report for the 12-months ending March 2020 that the society registered a record number of collections and distribution. With an increase of 3.9% of its collection, IPRS ended with INR1,72bn (EUR 19M). The domestic incomes encompass performance, mechanical and local synchronisation fees while foreign incomes (from affiliated societies) encompass web-casting, streaming, synchronisation and foreign income of IPRS repertoire. Domestic incomes had a 20.4% increase, foreign ones fell 23.3% and royalties distributed were up 167.6%. IPRS registered a strong growth in broadcast because of the finalisation of negotiations with broadcasters (a situation that did not last afterwards).

Repartition of the IPRS rights collection ³⁴

	2020 (IND)	2021 (EUR)	2019 (IND)	2021 Share	YOY growth
Performing & Mechanical Right Licence Fees (Domestic)	1059940544	11 659 346 €	863380621	61%	23%
Broadcasting – Radio – FM	8320147	91 522 €	4829094	0%	72%
Broadcasting – Television	490000000	5 390 000 €	293606890	28%	67%
Webcasting/Streaming	46778105	514 599 €	44781576	3%	4%
Mechanical Rights	209524	23 040 €	4255770	0%	-51%
Public Performance	512747768	5 640 225 €	515907291	30%	-1%
Performing & Mechanical Right Licence Fees (Oversees)	477013586	5 247 149 €	626089589	28%	-24%
From Affiliated Societies	24869934	273 569 €	1084611230	1%	-77%
Webcasting/Streaming	452143652	4 973 580 €	517628359	26%	-13%
Synchronisation Right Licences Fees (Domestic)	188943445	2 078 378 €	171572677	11%	10%
Synchronisation	160254162	1 762 796 €	156380177	9%	2%
Performing Right for Synchronisation	25422783	279 651 €	15192500	1%	67%
Synchronisation (Oversees)	3266500	35 932 €		0%	
Total	1725897574	18 984 873 €	1661042887	100%	4%

Figure 5.2.1. Breakdown of IPRS collection

Before the pandemic, IPRS made a lot of effort to strengthen the copyright collection system in India. It improved its governance, steadily developed licensing with digital DSPs and facilitated the promoters, venues and festivals' declaration through an online system. Some of the major local publishers were reluctant to register as members of IPRS which meant that the collection society did not control the majority of the publishing market share in India. For example, T-Series was collecting its own share of rights directly from the sources of exploitation. It recently changed with T-Series registering itself as a member in 2021. IPRS now represents the biggest local publishers/labels: Saregama, Times Music, Aditya Music etc. along with localised international giants: Sony Music Publishing India and Universal Music India.

In 2021, the results were very different and showed to what extent the collection system is still facing difficulties in India. Of course, the Covid crisis is a major cause of a drop in collections in 2021. Since India went through a long-term lockdown and political restrictions, the country is suffering from the same loss of collection rights than the rest of the world (Cisac estimated a loss of 20-35% in 2020 for the creators) due to:

- Live events on hold
- Public performance slow return
- Cinemas closing of without a full capacity reach

It resulted in a decrease in the public performance of 77%. But the 2021 results also show a big room for improvement in the amount collected.

Repatriation of the IPRS rights collection ³⁵

	2020 (IND)	2021 (IND)	2021 Share	YOY growth
Performing & Mechanical Right Licence Fees (Domestic)	₹ 1 059 940 544	₹ 261 939 559	15%	-75%
Broadcasting – Radio – FM	₹ 8 320 147	₹ 2 890 000	0%	-65%
Broadcasting – Television	₹ 490 000 000	-		-
Webcasting/Streaming	₹ 46 778 105	₹ 140 500 256	8%	200%
Mechanical Rights	₹ 2 094 524	-		-
Public Performance	₹ 512 747 768	₹ 118 549 303	7%	-77%
Performing & Mechanical Right Licence Fees (Oversees)	₹ 477 013 586	₹ 1 360 874 473	80%	185%
From Affiliated Societies	₹ 24 869 934	₹ 35 076 372	2%	41%
Webcasting/Streaming	₹ 452 143 652	₹ 1 325 358 421	78%	193%
Mechanicals		₹ 439 680	0%	-
Synchronisation Right Licences Fees (Domestic)	₹ 188 943 445	₹ 75 623 883	4%	-60%
Synchronisation	₹ 160 254 162	₹ 42 395 509	2%	-74%
Performing Right for Synchronisation	₹ 25 422 783	₹ 32 919 875	2%	29%
Synchronisation (Oversees)	₹ 3 266 500	₹ 308 499	0%	-91%
Total	₹ 1 725 897 574	₹ 1 698 437 915	100%	-2%

Figure 5.2.2. Breakdown of IPRS collection

The results of IPRS in 2021 benefited from new licensing agreements signed with local music streaming service Hungama Digital Media and the OTT video broadcaster Alt Digital Media. 2021 also saw an increase in the international webcasting and streaming total thanks to a deal with Google Ireland Ltd for the use of IPRS-member content by YouTube. What is more, IPRS concluded new agreements with foreign CMOs in 2021.

5.3. Publishing revenues and key players

Since the music and film industry have been partnering for a century now, publishing and recorded music have been stuck together with major film record labels signing the publishing part. According to Independent Music Publishers International Forum (IMPF), there were very few options to contact a separate publisher in India and the most important record labels of India also managed copyright. The network estimates a music publishing collection for 2018 of EUR 25–26 million. The publishing companies are also underperforming because of the weakness of the Copyright Act towards songwriters, composers and publishers.

The biggest publishers are the same companies as the biggest labels : T-Series, Sony Music Publishing, Times Music (which is also the Indian sub-publisher for Warner Chappell Music, Peermusic, Wixen Music, CTM Publishing and Cloud 9 Music Publishing). There are also some key independent publishers such as Turnkey Music & Publishing founded in 2013 and working with both songwriters and copyrights owners. The publisher recently signed a deal with Kobalt bringing a large number of contemporary and classic international hits into the Indian music publishing market. There are also music publishing administration companies, for example Songtrust. Some smaller sized publishers can be mentioned as well : Muzik 247, Aditya Music India...

6. Media

Key points

- Music consumption in India is taking place on YouTube, DSPs and Instagram. Even if the TV and radio landscapes are well developed in India and channels of both media broadcast music, international and indie music can only see opportunities through social media and digital media.
- Radio and TV are either Bollywood and Hindi-centric or very locally focused. New forms of music discovery are emerging, following the global trends: podcast listening continues to gain in popularity in India and short videos on social media are, as everywhere in the world, a new form for music discovery.
- In 2020 TikTok was banned in India. Until this time, it was the only app proposing short-form videos, Indians were accustomed to this new format and formed one of the largest markets for the Chinese app. TikTok's exit has been widely compensated by Indian short videos applications (for example Mx TakaTak) or other international apps such as Thriller.

6.1. Social medias

Name of the social Media	Available in the country ?	Amount of users (Million)	Share of the population in the age of being an user (2022)
Facebook	YES	329,7	30.10%
Instagram	YES	230,3	35.00%
Twitter	YES	23,6	2.20%
Snapchat	YES	126,0	11.50%
Twitch	YES	--	
TikTok	NO		
LinkedIn	YES	83,0	8.60%
Facebook messenger	YES	122,5	11.20%
Whatsapp	YES	487,5	

Figure 6.1. Social media platforms in India (Hootsuite)

There are 467 million social media users in India in 2021 (33.4% of the total population and 42.6% of the population in age of using a social media- +13) according to Kepios, Hootsuite and We are Social report ³⁶. These users spend an average of 2h 26 minutes per day on social media. Kepios analysis also reveals that social media users in India increased by 19 million (+4.2 percent) between 2021 and 2022. The average number of social platforms used each month reach 8.6. India is one of the largest users of Instagram, Facebook and Snapchat in the world.

The Internet users favoured WhatsApp (81.2% using this app every month), Instagram (76.5% using it every month) and Facebook (74.7% using it every month).

Indians also spend a large average time on these platforms: 19.8 hours per month on WhatsApp, 19.5 hours on Facebook, 13 hours on Instagram. But the platform retaining the most Indian attention is YouTube with 29.6 hours spent each month on the platform. On these platforms, 7.1% of the users are following a band, a singer or a musician.

Indians are very keen on spending time watching videos online: 95% of internet users say that they watch video content every week, and music is their favourite video content with 61.5% of internet users watching music videos every week. As mentioned in the interviews, Indians watch music. In comparison to this figure, 49.7% are watching meme comedy or viral videos every week, 32.1% watch live streams every week, 32.9% watch video gaming and 31.7% influencer videos or vlogs.

Focus on TikTok ban :

The TikTok app was banned in India in 2020. At this period, it was the only app proposing short-form videos, Indians were accustomed to this new format and formed one of the largest markets for the Chinese app. TikTok's exit has been widely compensated by the creation of Indian-owned short-videos applications such as Mx TakaTak and other foreign apps such as Thriller. The challenge for these apps is the music catalogue offer. They are facing the challenge of the number of deals they need to achieve. Nevertheless, YouTube also developed YouTube Shorts and Meta launched Instagram reels covering the gaps left by TikTok ban.

List of short-video apps in India : Moj, Mx TakaTak, Roposo, Josh, and Triller.

6.2. Radio

Although India is best known for having a consumption of music through video ³⁷, the FM radio landscape is well developed, and radio is the most accessible media for a widest range of the Indian population. For a long period of time, radio was run and owned by the government. The entry of the private sector slowly began in the 90s with some experimentation. The two private players involved at this period were Times of India and Mid-Day Group. In 1998, the government began to draw a policy for a full-fledged entry of private broadcasters. Before that, the sole broadcaster in India was public: All India Radio. Prasar Bharti's public broadcaster now operates 470 broadcasting centres

³⁶ Digital 2021, Kepios, Hootsuite and We are Social, 2022

³⁷ 33% of Indians discovered music in film which is the world's highest figure according to the IFPI's "Engaging with music" report, 2021.

in 23 languages reaching 92% of the territory and 99% of the population. In parallel, India has 36 private FM broadcasters operating in 113 cities and 383 radio stations. In 2019, India had 349 operational community radio stations ³⁸.

COVID-19 crisis did not negatively affect the radio landscape in India. The COVID-19 crisis improved the engagement of the listeners to radio stations: the private radio industry has managed to increase its number of listeners by 23%.

Private broadcasters broadcast a lot of music on their radio stations, above all because, historically, music was a strong source of content to bring listeners to private radios since sport and news contents were reserved to the public broadcaster. According to the Digital Music Survey of 2019, radio was responsible for 21.7% of music listening time in India ³⁹. However the relationships between the radio industry and music industry are complicated since the radio broadcasters are not paying any songwriters and composer royalties to IPRS and are paying a very low rate of royalties to PPL (2%).

Despite a large number of radio channels, FM radio in India is primarily focused on Bollywood music and Hindi-language content. Few radio stations are in English and the international music broadcast is limited since this type of content is usually costly for Indian radios. Most of them will choose to only broadcast a few global and already very famous and mainstream songs. However, some radio stations created in the mid-2000s are more open to indie music:

- 94.3 Radio One (7 cities, international programs in Delhi and Mumbai)
- HIT 95 FM (Delhi)
- Indigo 91.9 (Bangalore, Goa)
- Chennai Live 104 (Chennai)

The Internet also improved the radio landscape. First, according to a FICCI-EY report *“Internet provides radio users music search capabilities, curated and personalised radio channels and playlists based on their listening habits along with enhanced sound quality. While most radio players have an online presence, they are also collaborating with online streaming portals to offer both online radio as well as curated streaming music services to users via the same platform”*⁴⁰. In 2021, 20.3% of the Internet users in India were listening to online radio each week. Podcast listening continues to gain in popularity in India as well with 21.3% of the internet users listening to podcasts every week. The Internet also brought online radio players.

6.3. Television

The TV landscape is composed of 918 channels (2019).

As with radio, TV is strongly watched on the Internet with 97.2% of Internet users streaming TV content each month, at an average of 1h 44 min. However, in terms of music, Bollywood has a central place in Indian TV programmes. Only a few channels broadcast concerts or music of international artists (VH1 and 9XO for example). Even MTV is only broadcasting music from Bollywood movies and Indian music.

³⁸ The Indian Telecom Performance indicators, Telecom Regulatory Authority of India (TRAI), 2022

³⁹ Digital 2021, Kepios, Hootsuite and We are Social, 2022

⁴⁰ The era of consumer A.R.T. (Acquisition | Retention | Transaction), India's Media & Entertainment sector, Ernst & Young (EY) and Federation of Indian Chambers of Commerce & Industry (FICCI), March 2020.

6.4. Newspapers and music websites

There is no specialised music magazine on offer in India. Most of this type of press is online. Rolling Stone India was launched in 2008 and focuses on rock and electronic genres but no longer has a printed version. Struti Magazine focuses on performing arts, Rock Street Journal focuses on rock news in the country and The Score on Indian music. Some newspapers have a music section: Deccan Chronicle, The Hindu, Times of India, Hindustan Times or The Telegraph. Some lifestyle magazines have music sections: GQ India, Platforme Magazine, Elle India, Vogue, Grazia India. Some music websites: The Wild City, Homegrown, Radio and Music, Savaal Magazine, What's The Scene.

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Annexe

Name Surname	Company
Abhishek Patil	Warner Music India
Achille Forler	Founder, Permanent Advisor to the Board of IPRS / Silk Road Communication - SYNC MAMA
Anil Makhija	BOOK MY SHOW
Ankur Bhardwaj	TEAM-WORK ARTS
Anuj Gupta	BOOK MY SHOW
Aradhana Mahtani	BOOK MY SHOW
Arjun Sankalia	Sony Music India
Ayush Arora	BIG BAD WOLF
Bhanuj Kappal	Freelance journalist (Rolling Stone, Pitch-fork, etc)
Blaise Fernandes	IMI
Chandi Soni	MUSIC PLUS+, All About Music
Deepak Bali	RMPL
Emmanuelle de Decker	GATE-CRASH
Mandar Thakur	TIMES MUSIC
Manisha Dey	GAANA
Neeraj Roy	HUNGAMA
Nevil Timbadia	BONOBO
Nishant Gadhok	GENTLY ALTERED
Nutan Jha	COO / SYNC MAMA
Rafael Pereira	TINU-UTS
Raghavender GR	Department of Jus-tice / Ministry of Law & Justice
Rakesh Nigam	IPRS
Ramprasad Sundar	Manager - Music Creative and Produc-tion / NETFLIX
Roydon Bangera	SKILLBOX
Sana Hamid	THE QUORUM
Savinay Shetty	MISFITS
Sharan Punjabi	NRTYA
Sharupa Dutta	TEAMWORK ARTS
Shirin Sukheswala	Manager

Sohail Arora	KRUNK
Soumini Sridhara Paul	HUNGAMA
Sujal Parekh	Finance Director – India and SAARC / WARNER
Sumit Vaswani	SOHO House & Co
Sushil Chhugani	Founder / STUB-BORN COMPANY
Vikram Mehra	SAREGAMA
Vivek Dudani	PERCEPT LIVE (so-cial/antisocial clubs)
Vivek Raina	Believe India

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