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Music Market Perspectives: **India**

Insights from EMEE's
mission to Mumbai.

EMEE, 2023

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EMEE foreword

Developing European Music Export Capacity

European musical talent and entrepreneurial spirit have demonstrated global competitiveness, however, European music markets and sectors remain fragmented.¹ Thus many European artists, creators, professionals and music companies, especially from smaller countries or from less developed music ecosystems, face significant hurdles in realising their full international potential.² To address these obstacles, music export organisations (MEOs) have been set up in most European countries. These MEOs provide services and support to the sector, helping to develop their international networks, career, and business opportunities.

In 2018, the majority of European MEOs formed a network called the European Music Exporters Exchange, or EMEE for short, with the mission to learn from each other and coordinate resources and actions to increase opportunities for European talent and entrepreneurs on a global level. Today, EMEE is a non-profit association made up of 32 national and regional music export organisations from 27 countries, with its registered office based in Brussels.

In 2019, the European Music Export Strategy was outlined in a study commissioned by the European Commission,³ providing a 6-step path for developing music export capacity on a European level, and a “toolbox” of actionable proposals to implement the strategy. In subsequent years and through several projects and pilots, EMEE has developed a comprehensive and strategic approach to international market entry with consecutive steps including conducting market studies, fact-finding, prospecting, and trade missions. These activities aimed to develop a thorough understanding of the target markets and establish relevant networks.

A general report on the Indian music market, including a fact-finding mission to Mumbai, was conducted by Margaux Demeersseman and Franz Hergovich in the spring of 2022 and will be published in 2023. A prospecting mission featuring a group of 10 European music export organisations was organised in April 2023. This study incorporates the findings of the first general report and captures the key learnings from the prospecting mission that followed it.

These steps are part of a larger strategic initiative to build stronger networks between European and Indian music professionals and create more opportunities for both European and Indian talent. As becomes clear also in the following study, developing music export is really always about developing an exchange of knowledge and opportunities as a “two-way street” approach is key to building successful long-term relationships.

1 European Commission, Directorate-General for Education, Youth, Sport and Culture, Smidt, P., Sadki, C., Winkel, D. et al., Music moves Europe – A European music export strategy: final report, Publications Office, 2020, data.europa.eu/doi/10.2766/40788.

2 *Ibid.*

3 The study can be found here: op.europa.eu/en/publication-detail/-/publication/d7de0905-68c5-11ea-b735-01aa75ed71a1.

1. Introduction

The EMEE prospecting mission to India and the delegation's feedback indicated that the Indian music market holds significant potential for growth and presents exciting opportunities. The delegation was impressed by the ease of communication with local music industry professionals, who were enthusiastic about sharing their knowledge and insights about India. This positive experience paved the way for potential collaborations in the future.

Research design and methodology

This present study is based on interviews and discussions during and following the EMEE prospecting mission to India which took place in Mumbai between April 11th – 14th, 2023. The report also follows up and builds on the wider general India market study authored for EMEE by Margaux Demeersseman and Franz Hergovich in 20224.

The first five sections of the study focus on different subsectors within the Indian music industry that captured the attention of the EMEE delegation during their visit to India. These subsectors offer potential opportunities for European music industry professionals, indicating a possible need for further development of export or collaboration activities in these areas.

Each section provides an overview of the insights gathered during the prospecting mission, and features interviews conducted with key industry professionals who actively participate in the respective subsector. These interviews provide valuable insights into the findings, offering concrete examples of emerging trends and opportunities within the Indian music industry. By including these interviews, the report gains depth, providing a comprehensive understanding of the current state of affairs in the industry. To summarise each section, key findings are highlighted at the end of the subsector analysis.

The final section presents an analysis of the key learnings derived from the EMEE prospecting mission, providing a higher-level perspective for European music industry professionals to take away. This analysis encompasses a broader understanding of the findings and their implications, enabling EMEE to make informed decisions and strategic choices based on the acquired knowledge.

The following Indian music professionals and EMEE members were interviewed for this report:

- **Petr Blažek**, Manager, Noisy Pots - Touring in India
- **Rafael Pereira**, Owner & CEO at Tinnuts, On Music Publishing in India
- **Alick Sethi**, Music Supervisor at Retox Music, On the Market for Sync
- **Henrik Tala**, Founder and CEO of Song Asia, On Songwriting Camps in India
- **Aniket Rajgarhia**, Senior Rights Manager & Marketing at Outdustry
- **Akhila Shankar**, Co-host The Indian Music Charts Podcast, Director - International at Luminary
- **Tanish Thakker**, Director at Gatecrash and Amplify Music Incubator
- **Ritnika Nayan**, owner at Music Gets Me High
- **Sovan Lal Saha**, Managing Director at Inreco
- **Riad Saha**, the CEO at Inrec

About the Author

Jani Joenniemi is a creative industry entrepreneur, producer, and strategy consultant. He specialises in project management, branding, digital media and market research, with a focus on Asian markets. He also manages the EARS - Europe-Asia Roundtable Sessions, an international creative industry conference, and has previously organised two editions of the conference in Mumbai, India. Jani holds an MA and MBA degree and currently works on developing communications and outreach initiatives related to intellectual property at the European Union Intellectual Property Office (EUIPO).

4 The EMEE study "Indian Music Industry. Market Report" will be published in 2023 and forms one deliverable of the project "Implementing steps to develop and promote European Music Export" (2021-2022). The project was implemented by EMEE and funded by the European Commission. Throughout this report it will be referred to as "EMEE's Indian music market report" (in the main text) or by authors Demeersseman, M. and Hergovich, F in the footnotes.

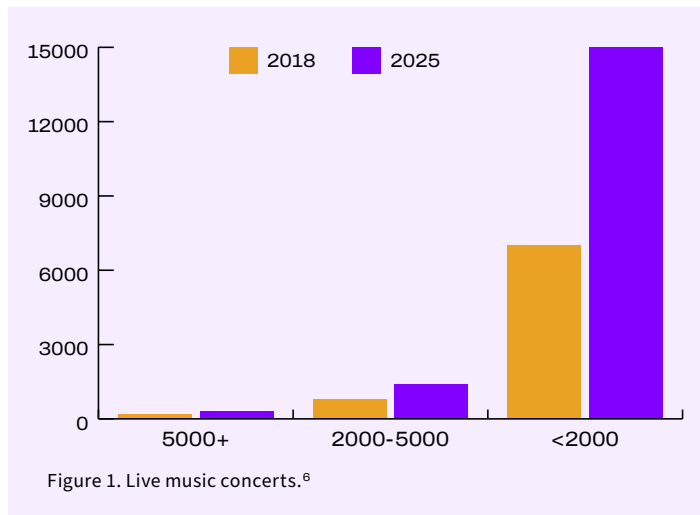
2. Live Music

2.1. What We Learned

Despite the pandemic putting a halt on live performances and musical concerts, there has been a significant resurgence in demand for these events following the end of lockdown. Music festivals have made a comeback, with a surge in festivals covering diverse genres taking place across the country, drawing in enthusiastic crowds.

The live music industry is growing fast but from a low base. According to a recent report by PwC, the live music industry's revenue decreased by two-thirds in the first year of the COVID-19 pandemic. However, revenue ticked up in 2021 to 48 million euros and is projected to reach 117 million euros by 2026, increasing at a 19,2% compound annual growth rate (CAGR).⁵

The ticketing market is dominated by one local company, BookMyShow, and most tickets are bought online via mobile.



During the EMEE Prospecting Mission, the Indian panellists in the live events panel highlighted that the festival season, traditionally spanning from October to March, is gradually expanding to cover the entire year.

India is increasingly becoming a destination for international music festivals, with major brands like Lollapalooza recently establishing a presence in the country. Organised for the first time in early 2023, the event drew 60 000 fans over two days, with 40 artists performing across four stages.⁷

Genre-specific festivals are also thriving, for example, Bangalore Open Air, a 3000-capacity heavy metal festival produced in partnership with Germany's Wacken Open Air, recently sold out.⁸

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
Jam-steady'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 1. A list of festivals.⁹

⁵ www.musicplus.in/indias-live-music-industry-revenue-pandemic-pwc-report/

⁶ Demeersseman, M., Hergovich, F. (2023). *Indian Music Industry. Market Report*, p 21. Based on industry discussions, IPRS, EY estimates.

⁷ www.iq-mag.net/2023/01/inaugural-lollapalooza-india-60000-fans/

⁸ www.iq-mag.net/2023/04/india-music-landscape-meteoric-growth/

⁹ Demeersseman, M., Hergovich, F. (2023). *Indian Music Industry. Market Report*, p 31.

As referred to previously in the EMEE market study on India, there is a need for more mid-sized clubs, bars, and venues in order to meet the rising demand. Other important challenges for international artists touring India include transport costs, low international artist fees, the highly regional structure of India, and its regulatory and logistic complexity.

From EMEE's Indian music market report: clubs, bars and auditoriums ¹⁰

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.

During the prospecting mission discussions, a vibrant landscape of the market was portrayed, emphasizing the thriving independent music scene and the rapid growth of music streaming services that are introducing international music to diverse audiences. As a result, there is now a substantial and continuously growing audience base for every music genre.

Succeeding in the Indian live music scene requires a long-term commitment and investment. Professionals participating in the panel discussions highlighted the importance for international artists to develop a long-term strategy that includes: Focus on creating a robust social media presence and short video content to engage with Indian audiences. This can help increase visibility and attract a larger fan base.

1. Collaborations with brands, media outlets, and local artists can be beneficial in gaining exposure and connecting with the Indian music industry. In addition, building relationships with local producers and artists can lead to new opportunities and collaborations.
2. Touring regularly in India, both by performing gigs at clubs and participating in festivals. This will allow for a wider reach and exposure to diverse audiences across the country.
3. Being prepared to work for lower fees as the artists establish themselves in the Indian market. This can help capture the interest of promoters and create opportunities for future growth.

Additionally, the panellists emphasised the importance of sharing artists' data, such as streaming numbers and social media engagement, with promoters in India. This information can serve as a strong starting point to capture the interest of promoters and demonstrate the artist's popularity and potential in the country.

From EMEE's Indian music market report: booking agents & promoters¹¹

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 Ashram

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

¹⁰ Page 30.

¹¹ Page 32.

2.2. Touring in India – an interview with **Petr Blažek**, manager of Noisy Pots.

Noisy Pots is an electronic music band from the Czech Republic, that has been to India twice.

“My impression so far is that it’s a very special market, an emerging market where things are changing rapidly,”
says Noisy Pots manager Petr Blazek.

The live music industry in India is developing at a fast pace and is expected to explode in the coming years, which is great for Noisy Pots, especially considering the rapid growth of the electronic music scene.

“The music industry scene in India seems relatively small, with a tight-knit group of main players who all know each other. The timeline and working style in India are very different from what Noisy Pots is used to; everything takes much more time,”
says Petr.

They had agreed to their last tour in India six months in advance, however, there was still uncertainty about what would actually happen once they arrived.

“But in the end, everything worked. It seems the industry is accustomed to working in the last moment.”

Initially, Noisy Pots was in talks with a major agency for exclusive bookings, however, they ultimately decided to go with a smaller agency that seemed to be a better fit. Unlike in Europe, it is unusual for an agent in India to assist with marketing and promotion. In the case of Noisy Pots, their Indian agent does that and has helped them get coverage in Rolling Stone India and other media outlets.

“The fees in India are lower but not terrible,”
says Petr.

They received support for travel costs from Czech organisations such as the Ministry of Culture and built the tour from there.

“The costs in India are relatively low, as everything is quite cheap, which helps.”

During their first visit to India, Noisy Pots performed at two gigs: one at the music conference “All About Music” and another at a club called High Spirit in Pune on a Sunday afternoon, with approximately 500 people attending. On their second visit, they performed in four cities—Mumbai, Kolkata, Ahmedabad, and Pune—and did five shows and workshops for music production students. The response was good. For example, the same club in Pune, where they had performed earlier, was completely sold out this time, with around 600 people attending.

While Noisy Pots has always visited India outside the festival season, their goal for the upcoming tour in November or December (which falls within the festival season), is to actively participate in festivals. However, they have not yet confirmed their participation at any specific festival.

“We still have half a year before the festivals, which in India seems like forever,”
says Petr.

Noisy Pots has also gained followers from India on their social media channels and although the numbers are not huge yet, they are increasing.

“The personal meetings and workshops with students and their word-of-mouth sharing among friends, I believe, helped. It’s not just about doing a show; it’s also about connecting with the audience and the scene on a more personal level,”
Petr notes.

Noisy Pots is also looking to collaborate with local artists and has received recommendations for collaborations. However, progress is slow, and they have to push to send vocals and other materials.

“But this is not unique to India. It’s also similar to our experience with our collaborations in Mexico,”
says Petr.

Their first planned visit to India for the All About Music conference was actually postponed for three years due to COVID-19. When they were finally able to attend the conference, in the first year after the pandemic, there were around 2000 Indian music industry professionals present, and only around ten people from Europe, with Noisy Pots being the only band. This worked out well for them and they greatly benefited from the attention.

“The response from the audience was great. Especially the remix Noisy Pots had made of a popular Punjabi song, left a lasting impression.”

2.3. Key Takeaways

- Festivals in India are becoming increasingly popular as people seek new and unique experiences.
- The festival season, traditionally between October and March, is gradually extending to a broader period.
- There is a shortage of mid-size clubs and venues in the country, highlighting the need for more suitable spaces for live performances.
- Accessing the Indian music market requires patience, with artists often needing to tour repeatedly and initially accept lower fees.
- Building collaborations with brands, artists, and media is essential in order to reach a wider audience.
- Connecting with audiences beyond concerts is also crucial, and workshops or master classes can be effective means to engage with fans and enthusiasts.

3. Publishing & Sync

3.1. What We Learned

3.1.1. Publishing

From EMEE's Indian music market report: music publishing¹²

India is ranked 36th in the world with ca EUR 20 million 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.

The Indian film industry, often referred to internationally as Bollywood, used to dominate the music industry and hold exclusive rights, resulting in limited opportunities in the music publishing market.

Although Bollywood still maintains a prominent position, its influence has somewhat diminished. The rise of non-film music, music streaming, and changes to the law have significantly expanded revenue streams within the music publishing industry.

It was only after the implementation of the 2012 amendment to the copyright act that the music publishing industry truly emerged in India. This new law prohibited full buyouts, ensuring that writers would receive upfront payments and their share of royalties throughout their lifetime. However, this change had a negative impact on publishers as they were no longer entitled to their share. In India, when a song is purchased by a label, they receive the publisher's share.

From EMEE's Indian music market report: the 2012 copyright law amendment¹³

- The Copyright Law was amended in 2012 to address changes in the music and film industry and update outdated sections of the Copyright Act.
- The amendment eliminated the unequal treatment between composers and lyricists.
- Authors owning copyrights can now claim royalties for their works and extend rights to performers and broadcasting organizations.
- The amendment prevents authors and composers from assigning or relinquishing their rights, focusing on securing royalties for the utilization of their work.
- It recognizes the difference between the usage of a composition in different mediums and reinforces the author as the owner of the copyright.
- Indian Collective Management Organizations (CMOs) play a larger role in collecting royalties from various exploitation mediums.
- Rates of royalty collection are now suggested by the Copyright Board.
- Performers are entitled to royalties for each type of exploitation of their work, a recognition that was absent prior to 1994 and India's accession to the TRIPS agreement.
- The amendment includes provisions to address the digital realm, widening the scope of reproduction rights to include electronic storage of works.
- It introduces digital rights management and allows the Indian Performing Rights Society (IPRS) to license its represented catalogue to digital service providers (DSPs) and collect the rights.
- The amendment also expands the scope of statutory and compulsory licensing provisions.
- Broadcasters can now broadcast prior published musical works by giving prior notice to the copyright owner and paying royalties at the rates prescribed by the Copyright Board.

¹² Page 33.

¹³ Page 34.

Following 2012, progress was initially slow, but in 2018 and 2019, the industry began to develop rapidly. The Indian Performing Rights Society (IPRS) was officially recognized by the government as a copyright society instead of an agency, becoming the sole copyright society for authors, composers and publishers. Since then the Indian Performing Rights Society (IPRS) has emerged as the world's fastest-growing Collective Management Organization (CMO), although it started from a relatively low base. Furthermore, international players and investors have become increasingly interested in the Indian music¹⁴ publishing industry.

IPRS currently has a court case pending against radio and TV channels, that was discussed during the prospecting mission, which could have a substantial impact on royalty collection in India. The following week after the EMEE mission, the Mumbai High Court ruled in favour of IPRS, stating that a major radio station must obtain an IPRS¹⁵ licence prior to broadcasting. Although this ruling is not yet the final decision in the case, it represents a step in the right direction.

From EMEE's Indian music market report: music publishers¹⁶

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.

3.1.2. Songwriting

As pop music in India becomes more globalised, there is a rising interest in collaborating with international producers and songwriters. The industry has responded by organising songwriting camps and co-writing initiatives. Warner Music has taken the lead in hosting some of these camps, and during the prospecting mission discussions, Netflix has also shown interest in partnering for similar songwriting events.

3.1.3. Sync

The use of music in the film and audiovisual industry has traditionally been composer-driven and localised. Studios have desired to own all the rights, and hiring a composer has been an inexpensive option. This trend is still prevalent in mainstream Bollywood.

However, mainstream video-on-demand (VOD) platforms, such as Netflix, Amazon, Hotstar, Zee, and others, offer potential opportunities for both international composers as well as licensing existing music. These VOD platforms cater to specific niche groups and young urbanites, rather than a broad audience. Consequently, they have the ability to incorporate a broader range of music styles and genres.

¹⁴ www.musicplus.in/international-music-publishers-find-potential-growth-in-india/

¹⁵ See for example: <https://www.livelaw.in/high-court/bombay-high-court/bombay-high-court-restrains-radio-channels-broadcasting-songs-without-equal-royalty-to-authors-copyright-ownership-227645>

¹⁶ Page 37.

3.2. Music publishing in India – an interview with **Rafael Pereira**, Managing Partner at TINNUTS



Photo: private collection

Rafael Pereira is the Managing Partner at TINNUTS, an intellectual property law firm based in Mumbai, specialising in serving the creative industries. A graduate of Berkeley Law, Rafael has established himself as an entrepreneur with multiple ventures in the Media and Entertainment sector in Asia. Additionally, Rafael holds positions as a board member in several other media & entertainment companies.

“Since November 2017, after The Indian Performing Rights Society (IPRS) was officially recognized by the government as a copyright society instead of an agency. As the sole copyright society for authors, composers and publishers, the development has been really fast,” tells Rafael.

“IPRS secured significant deals with platforms like Facebook and Spotify and expanded their licensing activities to cover public performances. Today, IPRS is considered the fastest-growing collective management organisation (CMO) worldwide”.

While the mainstream music industry associated with the film industry has become more attractive to songwriters than publishers, the rise of independent/non-film music presents a significant opportunity for international publishers.

“In this realm, music is not specifically composed for visuals, like in the audiovisual industry, but rather for music artists. Independent labels are increasingly interested in working with publishers and open to receiving song pitches” says Rafael.

The labels are primarily interested in the master recording rather than publishing rights. Leading labels like Warner have recently established operations in India and are at the forefront of this trend.

“To be completely honest, this is a brand new development, and prior to the pandemic, it didn’t exist,” says Rafael. *“There are also currently no established frontline publishers actively involved in signing and developing songwriters, as well as promoting and exploiting their songs.”*

As a second opportunity for European publishers, Rafael points to sub-publishing Indian catalogues in different European countries.

“As the knowledge of the publishing industry is still evolving in India, Indian labels are typically relying on a single major publisher like Sony Music Publishing. European sub-publishers can offer better deals by representing Indian catalogues in multiple countries,” says Rafael.

Sub-publishers can approach Indian catalogue owners, providing services such as seeking synchronisation opportunities and assisting with rights registration.

The third opportunity Rafael mentions is music synchronisation.

“Producers and directors of series, films, and advertisements on over-the-top (OTT) platforms are increasingly open to using music from libraries and catalogues, including international music.”

However, this trend has not yet extended significantly to Bollywood films, as they still heavily rely on music that is specifically commissioned for each film.

3.3. Synch market in India – an interview with **Alick Sethi**, Music Supervisor at Retox Music.



Photo: Marton Nemenyi

Alick Sethi first visited India in 2017 as part of a UK trade mission. The trade mission included a small conference for independent music companies, facilitating a 1-2 day exchange between the UK and Indian music industries. He decided to extend his stay by a week to set up meetings with local ad agencies.

During their interactions, Alick noticed that ad agencies in India weren't used to working with international professionals, including branches of international agencies. In India, the focus was more on creating original compositions rather than utilising existing music. Alick tried to explain that crafting music with the same level of care and high production value as existing tracks within a couple of days was impossible.

"A typical response I would get was "You don't understand India, Alick."

Eventually, Alick managed to connect with a few clients who recognized the value of using existing music and understood its irreplaceability. This became their entry point into the market.

"At that time, I was the sole active international music supervisor in India. Since then, a few more music supervisors have entered the market and are just starting out."

The majority of Alick's work in India has centred around ad campaigns. He hasn't explored Bollywood extensively due to its distinct operating structure, which prioritises owning all intellectual property rights to the music. However, Alick has been involved in various roles for television projects.

For instance, he is handling licensing for a Netflix documentary featuring an Indian hip-hop star. In this project, Alick acted as a liaison between the director and the composer. They also collaborated with an international composer from Los Angeles, which is quite rare in India. Additionally, Alick has been licensing incidental tracks used in the background of different scenes.

In another project with Netflix, a drama series set in the 1990s, which is Alick's first long-form project, the production has specifically searched for music from that era, predominantly Bollywood music. In this production, due to the limited understanding of Bollywood music Alick's role has mainly involved quality control and keeping the licensing within budget, with minimal creative input.

Bollywood has a significant influence on the entire music industry in India. It is a rather closed-off industry that has kept India isolated and has fostered a culture driven by bespoke composing for audiovisual productions. Films rarely use existing music, although VOD platforms tend to be more open to licensing such music. Nevertheless, composing still dominates, even in the advertising industry. "If Bollywood were to see a successful example of using existing music, they would likely follow suit. However, introducing change beforehand is challenging," says Alick.

"I have also worked in Russia before, and initially, sync there mostly involved big hits, stock music, or composing. However, the industry later became more advanced. I believe the same will happen in India—the market will grow and change," says Alick.

Music streaming has already brought about significant change in recent years, impacting the consumption of international music and creating a demand for using international music in India.

"The independent music scene in India is also growing rapidly, offering a wave of high-quality music options that will be hard to ignore. This growth will be bound to change the sync industry."

Alick's involvement with curating weekly playlists of independent music in India for music supervisors at Snapchat in Los Angeles has granted him a deep understanding of the independent music scene. He has noticed a significant shift in the behaviour of major labels and publishers, who are now actively signing independent artists and adjusting their catalogues accordingly, which was not the case when he initially began working in the industry. Ultimately, the decision to use independent music comes down to budgeting. As budgets increase, the share of independent music will also expand.

"Currently, budgets in India are very low. A decent composer can be hired for the entire series for around 30 000 euros, with potentially more for renowned names. Composing for a commercial can cost as little as 500 euros," explains Alick.

Budgets play a significant role in the development of the sync industry.

“International majors or regional majors set very high prices and refuse to come down in price, very aggressively, even when I give good reasoning as to why they should. Understanding of the market is very poor, and deals are more easily done between personal relations,” says Alick.

When working with European companies, Alick notes that it is possible to negotiate the price, as the approach tends to be more flexible. However, these companies also need to be cautious with their pricing, as the initial price they set in India establishes a strong precedent for future pricing. The best approach is to understand the client’s budget and quote slightly above that.

Ideally, everyone in the market should lower their pricing to some extent, especially the major labels. Adopting flexible pricing that grows in tandem with the market would encourage the culture of using existing tracks in films and series, notes Alick.

“There needs to be a mindset of growing together. I’ve found that in India, education is key—not only for clients but for the music industry as a whole. For instance, regional major labels could benefit from an understanding of why they charge such high prices.”

3.4. Songwriting camps in India – an interview with **Henrik Tala**, founder and CEO of Song Asia.



Photo: private collection

Henrik Tala is the CEO of Song Asia, a full-service music rights venture that aims to create, licence, and manage copyrights for the Asian market. The company was founded in 2020 and works with songwriters, producers, and publishers from around the world to pitch and place their songs in Asian music markets. While they were initially focused on Thailand, Korea, and China, Song Asia is now expanding its activities to Taiwan, Indonesia, and India.

Song Asia organises both online and offline songwriting camps in collaboration with local partners such as record

labels and publishers. These camps include flagship camps, where experienced writers who meet specific criteria are selected, as well as camps where new and less experienced writers are given opportunities. The company also conducts songwriting camps with schools, where they receive briefs from record labels and involve students in the songwriting process.

Song Asia has collaborated with notable institutions such as DIMA, Korea’s best pop academy and Musikmakarna in Sweden, which is considered one of Europe’s premier pop academies for songwriters. These partnerships have been instrumental in discovering and signing new writers, who are subsequently invited to participate in the flagship camps.

“In the songwriting industry, it’s all about relationships. When you have two publishers with equally great songs, the one with the strongest connections comes out on top,” explains Henrik.

Song Asia’s team has lived in the target markets, actively building strong relationships with partners in Asia and songwriters worldwide.

Song Asia operates under a business model that positions itself as an Asian publisher primarily focused on the Western markets.

“This allows us to work with any songwriter or publisher from the West without the need to be protective of our writers,” says Henrik.

For Western publishers, Song Asia offers opportunities in Asia, while in Asia, they elevate the quality of songwriting by bringing in international writers to work in the market.

The company’s roster of songwriters features a mix of Asian and European talent. Local writers from the target markets, who possess a deep understanding of local tastes and styles, are invited to participate in the camps. However, in markets such as China, finding skilled writers can be sometimes challenging.

“There’s still a generation gap where the youth, who have grown up with Western pop songs, are only now reaching adulthood,” Henrik says.

Instead, Song Asia works with many Korean writers who have lived in China for an extended period and possess a thorough understanding of both worlds - the Chinese market and writing modern pop songs.

One of the main challenges faced by Song Asia is navigating copyright issues. Markets with well-established royalty collection systems avoid exclusive licensing agreements in favour of royalties for writers and producers. However, in markets like Thailand and China, where royalty collection systems are not yet on par with European standards, songwriters often find the best deals through exclusive licensing agreements which include an upfront fee.

Recently, Song Asia has started working with writers from India.

“The overall experience was great, although it was evident that the concept was new to the Indian writers, so some basics needed to be clarified,” says Henrik.

The company is currently discussing organising India-specific camps and educational programs in collaboration with various partners and schools.

What Henrik finds intriguing about India is that the Indian Performing Rights Society (IPRS) is one of the world’s fastest-growing collective management organisations (CMOs).

“Even though there are some clear issues with royalty collection, it feels like there’s a genuine willingness and a history of respecting copyrights, which I’m told is because of Bollywood’s influence and the large Indian software industry,” explains Henrik.

Another advantage is the absence of language barriers.

“In the camps, it’s crucial for songwriters to be able to communicate with one another, and this has been a challenge when searching for songwriters in other Asian markets.”

Based on Henrik’s observations, it has been apparent that European and international writers can grasp the music style in India and create songs that align with it.

“In Asia, Japan has quite a reputation for being a challenging market when it comes to style. Writers really need to put their focus on capturing that specific style. However, writing for the Korean market is much easier in comparison. India seems to fall in the same category as Korea” says Henrik.

Moreover, Song Asia is fascinated by India’s vast diaspora and the potential for reaching overseas consumers.

“There also seems to be a mindset among Indian artists of aiming to conquer global markets rather than solely focusing on the Indian market.”

Indian artists, such as King from Warner, have already achieved success by reaching Spotify’s top 50 charts.

3.5. Key Takeaways

Publishing:

- The Indian film industry, known as Bollywood, used to have exclusive rights,
- leading to limited opportunities in the music publishing market.
- Non-film music, music streaming, and changes to the law have broadened the revenue streams in the music publishing industry in India.
- The rise of independent/non-film music presents significant opportunities for international publishers. Independent labels are also increasingly interested in working with publishers and are open to receiving song pitches.
- The 2012 amendment to the copyright act marked a significant milestone by enabling writers to receive upfront payments and lifelong royalties. Building on this development, in 2018, The Indian Performing Rights Society (IPRS) became the sole copyright society representing authors, composers, and publishers. Since then, IPRS has become the world's fastest-growing Collective Management Organization (CMO)
- A long-running court case involving IPRS against radio and TV channels has recently been leaning towards a win for IPRS. This outcome has the potential to significantly impact royalty collection in India.
- Sub-publishing Indian catalogues in different European countries is an opportunity for European publishers, as sub-publishing is not yet well understood and the market for this is a blue ocean.

Songwriting:

- As pop music in India continues to globalise, there is an increasing interest in collaborating with international producers and songwriters. This trend has sparked the emergence of songwriting camps and co-writing initiatives. Major companies like Warner Music and Netflix are paving the way with this movement.
- The widespread use of English makes it easier to establish co-writing camps with local writers in comparison to other Asian markets.

- The fast growth of royalty collections in India, coupled with the large Indian diaspora and the consumption of Indian music outside of India, makes the market intriguing for publishers and songwriters.
- There are currently no established frontline publishers actively involved in signing and developing songwriters in India
- The style of Indian pop seems to be accessible to international songwriters, making it easy to grasp and learn.

Sync:

- The film and audiovisual industry has traditionally been composer-driven and localised, with studios wanting to own all rights.
- Video-on-demand platforms like Netflix, Amazon, Hotstar, and Zee as well as advertising are now starting to present opportunities for international composers and rightsholders of existing music.
- The VOD platforms cater to niche groups and young urbanites, allowing for a wider range of music styles and genres to be incorporated, in comparison to Bollywood.

4. Labels, Streaming and Marketing

4.1. What We Learned

4.1.1. Labels

Indie music in India has witnessed a remarkable surge in popularity in recent years, resulting in the emergence of a new generation of musicians who challenge traditional industry constraints. This growth has also led to a rapid increase in the number of music labels across the country.

Independent music, which is also called non-film music in India, has been propelled by the growth of digital platforms like YouTube, DSPs like Spotify and JioSaavn, SoundCloud, and Bandcamp. With millions of daily users, indie musicians now have unprecedented access to vast audiences and can forge direct connections with fans.

These platforms have also opened the world of music to young audiences and contributed to the evolving music tastes among listeners. While Bollywood songs and commercial music still dominate the mainstream, there is an increasing demand for something different. Indie music caters to this appetite for uniqueness, offering a diverse range of genres including indie rock, pop, hip hop, and electronic music.

Especially during the Covid period, when film releases were halted and there was a lack of new film music releases to compete with, indie music in India gained significant prominence. It took over digital service provider (DSP) placements and received extensive media coverage.

From EMEE's Indian music market report: record labels¹⁷

- **T-Series:** The leading music record label in India, focused on Bollywood film-music production, with a massive YouTube presence and 113,4 million Indian subscribers.
- **Saregama:** The oldest music label in India, with a repertoire of film music, classical, devotional, and more, and offices in Kolkata, Mumbai, Chennai, and Delhi. Saregama is also involved in publishing, film production (Yodlee Films), and the production of multi-language television content.
- **Sony Music Entertainment (SME):** An established major label in India since 1996, with offices in Delhi, Mumbai, and Chennai. They have a strong focus on Bollywood and soundtracks and are expanding into hip-hop and regional music.
- **Universal Music Group (UMG):** UMG expanded their business in India in 2020, launched WYRL Originals, a non-film dedicated music label, and collaborated with Mass Appeal to establish Mass Appeal India, focusing on India's hip-hop culture.
- **Warner Music Group (WMG):** Warner Music India was launched in 2020, and oversees the rapidly growing operations in India, Afghanistan, Bangladesh, Bhutan, the Maldives, Nepal, Pakistan, and Sri Lanka.

Other Independent Labels:

- **Times Music:** A Mumbai-based label, and part of The Time Music Group. They were initially focused on devotional genres, but have now expanded to release regional, Bollywood, folk, traditional, and electronic music.
- **TIPS industry limited:** A Mumbai-based label involved in film production, promotion, and distribution.
- **Zee Music:** A subsidiary of Zee Entertainment Enterprises, a leader in film music in India, covering Bollywood and regional films.
- **Venus Records (Believe):** Founded in 1988, known for Bollywood and Indie Pop music, acquired by French company Believe in 2019.

¹⁷ Page 24-25.

As India's music industry expands, labels and streaming platforms are investing more into regional industries. This has led to the rise of regional labels and an increased consumption of regional music. Pop songs are now commonly released in multiple languages, and regional versions can occasionally become more popular than the original language version.

From EMEE's Indian music market report: digital distributors¹⁸

- **The Orchard:** the Sony-owned aggregator is the market 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.

4.1.2. Streaming

From EMEE's Indian music market report

The Indian audio-streaming ecosystem¹⁹ 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.

Social media²⁰

There are 467 million social media users in India in 2021 (33,4% of the total population and 42,6% of the population in the age of using 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's analysis also reveals that social media users in India increased by 19 million (+4,2 percent) between 2021 and 2022.

As mentioned in the EMEE Indian market report, music consumption in India primarily occurs on YouTube, DSPs and Instagram. Despite the well-developed TV and radio landscape in India, international and indie music can see only opportunities through social media and digital media. That is why it's especially important to have an effective social media strategy for breaking into the music market effectively. Building a strong presence, particularly in the realm of short-form videos, is crucial, as it has become the primary platform for music to gain widespread popularity. International platforms largely dominate the social media landscape in India, with the exception of TikTok, which has been banned. However, artists can explore alternative platforms like MX Takatak and Josh App to engage with a wide audience and create viral content.

4.1.3. Marketing and PR

During the discussions of the prospecting mission, Indian professionals reiterated the findings of the EMEE report, highlighting the strong connection between music and film consumption in India. As a result, Indians are more accustomed to watching music rather than solely listening to it.

From EMEE's Indian music market report: videos²¹

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.

Collaboration with brands holds a significant position of value and respect in the Indian music industry. Certain international brands, in particular, are actively involved in introducing international artists to the market and driving various music-related initiatives.

Collaborating with brands for live events, campaigns, or sync opportunities can provide valuable exposure, particularly when working with international brands that prioritise music-related initiatives.

Collaborations with local artists or performing alongside them can serve as excellent entry points for artists looking to establish themselves in the Indian music industry. Working with local producers or artists can also help overcome language barriers and foster cultural exchange.

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Additionally, partnering with music media is also seen as essential for breaking into the market effectively. Rolling Stone India is a leading music and pop culture magazine covering both local music and international music news, interviews, reviews, and articles. In addition to Rolling Stone India, there are genre-specific platforms like Wild City (for electronic music) and Indian Music Diaries (for independent and alternative music) that cater to specific music genres and showcase emerging talent.

From EMEE's Indian music market report: social media²²

Internet users in India favour WhatsApp (with 81,2% claiming to use this app every month), Instagram (with 76,5% using it every month) and Facebook (with 74,7% using it every month).

Everyone in the music industry speaks excellent English and the main online distribution platforms and the most popular social media channels are the same as in Europe (besides TikTok being banned in India).

As a result, Europeans can effortlessly communicate with their partners and audiences through the channels they are accustomed to. There is no need for translators or intermediaries in order to gain access to local platforms, as is often necessary in other Asian markets.

²² Page 39.

4.2. Label business in India - Interview with **Sovan Lal Saha**, Managing Director at Inreco, and **Riad Saha**, the CEO at Inreco



Photos: private collection

Sovan Lal Saha and Riad Saha are from a family of music - their father and grandfather Chandi Charan Saha started Hindusthan Records, India's second oldest music company in 1932. The Music label has a large repertoire of the top recording artists across all genres and languages of the past hundred years and some of the greatest names in music. Sovan Lal Saha started INRECO in 1976, which is the family's second label that focuses on regional music of India, and genres such as folk, devotional and children's music.

Riad Saha recently joined the family company as a CEO tasked with unlocking the value from the family's label's vast catalogues and creating new IPs. He has previously worked with Channel [v] India and MTV World, New York, where he was in charge of Programming and A&R and focused on creating programming for different Asian diasporas - South, Southeast, and East Asian diasporas. He launched MTV Desi (the first 24-hour TV music channel for South Asians in the US) and helped start MTV Iggy (an online music portal for global emerging artists). On his return to India, he launched MTV Roots, the first independent music show on Indian television. Until recently, he was the Head of Music & Talent for Viacom India Live and part of the core team for India's premium festival brands - Vh1 Supersonic in Goa.

When asked about the change in the Indian music industry, Sovan said:

"I've done this for 52 years, and I've seen everything from 78 rpm records to cassettes, to CDs, and now online. Everything has changed, but the content has prevailed; we're still selling the same content we made back in the day."

Riad mentions that the number of record labels is growing.

"For example, many Bollywood production houses have recently started launching their own labels. Traditionally, they've given them to companies like T-series, but this

time around, they want to see if they can hold on to them and syndicate the rights."

On the much-talked-about rise of non-film or independent music, Riad notes that the top 10 songs in India are still film songs and that any track attached to a film receives much higher attention and gets picked up by the media.

"Traditional music is push content, not pull content. We need to make an effort to promote it more."

The company collaborates with DSPs (Digital Service Providers) through a digital rights music licensing company named Phonographic Digital Ltd (PDL), of which Sovan was one of the founders.

Riad notes that the strength of the family of labels is that they work with regional music and have music in every language.

"For example, down south, music is very passionately followed, and it's mandatory for radio to play local content. The south plays a lot of non-film content, and we get our share of royalties there."

Sovan mentions that they are seeing a distinct shift in the regions, with very large market growth.

"Especially after the digital shift, it's been easier to access music, and people are choosing to listen to their own regions' music. Spotify has grown the markets exponentially in the last 3 years. The DSPs, Apple, Spotify, etc., have realized that all of the regions are coming to the fore, and that's a really big change. It is also a very welcome change for us," says Sovan.

Both Riad and Sovan note that since India's population is largely under the age of 25, there is not so much growth in traditional music. However, modernized music styles are prevailing regionally.

"Language is the more important factor. For example, personally, I will prefer to listen to Bengali songs because they are more palatable; it's my language. So that's what is leading the change."

Riad says that one of the company's strategies is to work at the crossroads of modernized and traditional music.

"We are looking for collaboration opportunities with regional hip-hop and pop artists for them to reinterpret our back catalogue, using samples from it. For example, finding a Marathi rapper to rap on an old Marathi track."

The company currently has a top ten hit in India - a track called "Chorni," which is a collaboration between one of the country's leading rap artists, Divine, and

the late famous Punjabi singer and rapper, Sidhu Moose Wala, who passed away last year.

“The track samples a song from our catalogue.”

When asked about Indian music’s opportunities to cross over internationally, Riad questions the concept of crossing over.

“When I was working at MTV, we were trying to build umbrellas with our programming. For example, to create a South Asian melting pot, people from Bangladesh, Sri Lanka, and India are under the umbrella of South Asia. We broke that period with A.R. Rahman, and he was the first one to play stadiums in the US, I think in 2007. But he was playing only to Indians and Pakistanis. Now there are more assimilations like second-generation Indians in the US. There are South Asians who grew up with Metallica. For example, Jpaul is a fantastic UK artist of Indian origin signed to Beggars Group. He played a sold-out show to a completely non-South Asian crowd. So what does crossing over mean? Indian artists playing for Indian crowds abroad or second-generation Indians playing for everybody?”

However, Sovan notes that international markets are a very important source of revenue and a strong focus for the company.

“Streaming has made it possible for us to reach markets abroad. 35% of our music sells in India, and 30% sells in Bangladesh because of the large share of Bengali music in our catalogue. The rest is in the UK, and then the US, Canada, and other markets.”

On international artists’ opportunities in India, Sovan notes that the market for international music is comparatively small as the local markets are so robust.

“The culture is so local and different. The different types of music that work for us. Devotional music sells, as does church music made in the Indian language. Then there’s the regional children’s market, spoken word - theatre, short plays, and traditional folk.”

Sovan reveals that the company is expanding its activities in the north and northeast of the country.

“The north and northeast are highly westernized. For example, in places like Nagaland, the artists sing in their own language but the tunes are Western. The reason for that is that the influence of the churches in the north and northeast is very high. The church has always propagated Western ambience in the music. That’s maybe an area where European artists could find opportunities.”

Riad talks about the company’s cooperation with the Czech Studio Orchestra.

“They reinterpreted Rabindranath Tagore’s music from our catalogue. It was a great experience, and we’re looking for similar collaborations with other philharmonic orchestras.”

Riad says he’s interested in receiving any press kits of artists planning to tour India.

“Depending on the artist, I can put my MTV hat on and see if I can connect you with the right people, and create opportunities for concerts or artistic collaborations. We also have our own studio that we can use.”

India can be a complicated country, but as general advice, Riad says that it’s best to talk to content owners and creators directly without middlemen.

“Lines get crossed easily; you have to make sure you make the right connections.”

4.3. Artist Development in India - Interview with **Aniket Rajgarhia** - Senior Rights Manager & Marketing at Outdustry



Photo: private collection

Outdustry operates in both India and China. The company has a publishing branch called Outdustry Songs, which specialises in song placements, song pitching, and sub-publishing for publishers like Reservoir and GL Music in China. In India, Outdustry primarily offers services like marketing for international and local artists, distribution and publishing.

“Over the past 4+ years, our artist services company has helped broaden the fan bases of various clients, including Dua Lipa, Major Lazer, and Lauv,” says Aniket.

“International music has a minority market share in India, and we help international artists expand their reach beyond the 10% English-speaking market.”

In India, Outdustry also serves as a publisher for Indian artists like Sez on the Beat and provides marketing support for his hip-hop collective, THE MVMNT, and the four rappers associated with the label.

“We focus on marketing their catalogue and growing their artists’ presence in the market,” says Aniket.

Outdustry also carries out marketing campaigns targeting DSPs (Digital Service Providers), social media, television, radio and the press.

Pitching to DSPs

“Spotify has emerged as the leading audio consumption platform, and it is the most important DSP we collaborate with. However, YouTube remains the top platform for overall music consumption,” says Aniket.

Gaana, a local service, and Resso, a platform originating from China, have recently transitioned to a paid-only model. These platforms are attempting to convert their audience to paid subscriptions, but it’s unclear how successful this strategy will be.

“I don’t think the Indian market is ready for them just yet. Resso was performing well in India due to its social elements, which set it apart from Spotify.”

Spotify has been aggressive in its marketing and gained substantial market share. Even the free version of Spotify offers a better user experience, with ads appearing only every 20 minutes, which is less frequent compared to competitors like YouTube.

DSPs now have dedicated label relations teams, and labels can no longer reach certain platform editors directly. Tracks need to be sent through an Artist Tool.

“This change makes the process more opaque but also more democratic, allowing artists without pre-existing relationships to have a chance,” adds Aniket.

Short-form Content

To achieve success, it is crucial to make music tracks trend on platforms like Instagram Reels and YouTube Shorts. Short-form content serves as the primary driver of conversions. Local short-form platforms like Mx Takatak and Josh are currently unlicensed for music, and the audience that listens to international music is not present on these platforms. Therefore, there is no need to focus extensively on them.

“Trends on international platforms like TikTok do not always translate into trends on Instagram Reels. Each platform has its own set of rules and trends, so it’s good to have a reel-specific strategy for India,” Aniket points out.

DSPs prioritise the success of short-form content, as it increases the likelihood of playlist placements. Building relationships with the DSP label relations team is important, as is having a strong social media strategy. “Simply sending tracks through the Artist Tool provided by platforms is not enough, as platforms also track social media success,” says Aniket.

Creative Collaboration

Outdustry has facilitated various collaborations, including a special Diwali-themed remix of Major Lazer’s “Light It Up” by electronic pop music producer-singer Ritviz and a Hinglish cover of Flume’s “Never Be Like You” by playback and pop vocalist Jonita Gandhi. One of the most notable projects was a remix of Dua Lipa’s “Levitating” by Bollywood composer Amaal Malik, featuring singers Sukriti and Prakriti Kakar.

“These collaborations helped Dua Lipa reach tier 2 and tier 3 markets and expand beyond the English-speaking market, which represents only 10% of the Indian music market,” explains Aniket.

The cost of collaborating with major Indian artists varies. If the collaboration is mutually beneficial, the costs may be limited to production expenses.

“Indian artists are very interested in expanding their brand through international collaborations. Since streaming rates in India are relatively low, artists focus on building their profiles on social media platforms, as a significant portion of their income comes from brand partnerships and live shows,” states Aniket.

Collaborations need to be well-thought-out and naturally fitting. Forced collaborations are easily discernible to the audience. A&R involvement is crucial to ensure that collaborations make sense both sonically and in terms of market reach.

“International visibility for local Indian artists through collaborations helps facilitate the collaboration process. Global, instead of local, releases assist in achieving this,” shares Aniket.

Bollywood and Actor Collaborations

Bollywood films are semi-musicals, where playback singers provide vocals for songs performed by actors in the movies.

23 See also: FICCI and EY (2023). *Windows of opportunity. India’s media & entertainment sector - maximizing across segments*, p 81: “Listeners are likely to not pay for music streaming on account of the following reasons: presence of YouTube, cost of streaming services, preference for the free tier, ability to download music from YouTube, tolerance for ads.” Available online: assets.ey.com/content/dam/ey-sites/ey-com/en_in/topics/media-and-entertainment/2023/05/ey-me-report.pdf

This tradition of film music consumption also influences non-film music, and sometimes music videos feature Bollywood actors without the actual music artist visible in the video.

Collaborating with a known actor or influencer in a song or music video can tap into their fanbase and expand the reach of the project. India has a hierarchical structure among artists, and even prominent English-language artists have a relatively small presence in the overall market due to English music accounting for only 10% of the total music consumed.

“It is best to prioritise language in collaborations, for example focusing on Hindi would guarantee the widest reach. The genre of music should be considered second,” advises Aniket.

Professional artists in India are eager to pursue international collaborations.

“The best way to initiate such collaborations is to research and identify artists with whom you would like to build relationships and then to directly message them. There needs to be a genuine human connection. An approach that will seem transactional is unlikely to resonate with the audience,” emphasises Aniket.

“An example of an artist we’ve worked with is Diplo. He is highly engaged with the Indian market and genuinely shows interest.”

Together with Diplo, Outdustry created a Diwali-themed remix that was a success.

“India celebrates numerous religious festivals, and integrating local customs into collaborations leads to better organic engagement,” shares Aniket.

“In general, artists don’t have to go to great lengths to showcase their interest in India. Simple posts expressing awareness will be enough, and the audience will return the love”

Language barriers are not necessarily an issue, especially when artists create fun and engaging social media videos. Audiences don’t need to understand the lyrics to participate and enjoy the content.

A track called “People” by Libianca has gained significant popularity in India, despite the fact that Libianca has less than 5k Instagram followers from India, according to Chartmetric. This is not specific to India, but a global phenomenon whereby the artist and the song have become disconnected. However, it can serve as a great starting point for an entry strategy.

“People recognize the artist’s sound, so the target should be to establish a connection between the sound and the artist, encouraging the audience to listen to the artist’s other songs as well,” advises Aniket.

4.4 Artist Development in India - Interview with **Akhila Shankar**, Co-host of the Indian Music Charts Podcast, Director - International @ Luminary



Photo: private collection

Akhila Shankar has a background in marketing and communications. She previously served as the head of marketing for the DSP Saavn and continued her work with JioSaavn after the merger. During her tenure, Akhila collaborated with numerous major labels and international artists seeking to enter the Indian market, including Chainsmokers, Bryan Adams, Ariana Grande, Marshmello and more. Akhila specialises in facilitating collaboration between Indian and international artists and assisting international artists in establishing their presence in India. Currently, she is involved in a number of projects in music and comedy. She works with the podcast network Luminary, the audio home to Dave Chappelle, Masaba Gupta, and Mo Amer to name a few. She also consults India’s fastest-growing ticketing platform Skillbox and is the co-host of The Indian Music Charts Podcast, which ranks amongst the top 10 podcasts in India on Apple.

Akhila says that during the early stages of her career, music consumption in India primarily revolved around YouTube and piracy. However, the emergence of streaming platforms provided an alternative, with app-based services gaining popularity, particularly in larger cities. Since English fluency is higher in urban areas, the consumption of international music, in those areas, witnessed rapid growth.

“Initially, users would search for specific artists or albums on these platforms. Over time, music discovery and consumption shifted towards playlisting, with users exploring music based on activities and interests in addition to specific artists or songs,” says Akhila.

When it comes to working with DSPs, Akhila notes that label-fronted collaborations are prevalent, mostly involving major labels. While a handful of international managers have successfully entered the Indian market and built relationships, their numbers remain limited.

“A two-touch approach has become common, wherein international artists collaborate with both an international DSP and a local DSP,” she adds.

Some platforms, such as Spotify and JioSaavn, have automated the process of song pitching, which has democratized the industry to some extent and created opportunities for artists without pre-existing relationships. However, Akhila points out that it’s important to note that these platforms also possess other properties like live events and social media platforms.

“You cannot pitch for live/social media properties via the artist tool, which means relationships are still crucial for developing a comprehensive strategy to approaching the Indian market,” she emphasises.

One notable project Akhila worked on with Outdustry involved promoting the artist Lauv for a year, with the aim of propelling him into the top 50 artists in India. Initially, playlisting was employed to gain sonic recognition, which was followed by collaborations. The multi-prong approach across DSP marketing and social collaborations culminated in a super fan event in Mumbai prior to his concert. This was one of the earliest examples of community-driven marketing for an international artist in the Indian market.

“Lauv did a reaction video to a music video by Indian artist Prateek Kuhad on social media, which successfully introduced him to the wide audience who already knew Prateek Kuhad,” says Akhila.

“Direct or indirect collaborations with local artists who share similar values, sonic identity and fan base is an important growth lever for international artists.”

Indian music is primarily consumed by the diaspora globally.

“Language poses a barrier to international consumption of Indian music, unlike for example Latin music, where language doesn’t impact international appeal,” says Akhila.

The major markets for Indian music outside the diaspora include the US, Canada, UK, Australia, the Middle East and Singapore.

Akhila highlights a few artists that have made strides internationally beyond the diaspora, such as Punjabi artist Diljit Dosanjh, who performed at Coachella and is rumoured to be collaborating with major international names like Diplo. Hindi hip-hop artist Divine, signed to Mass Appeal, who will be touring Australia as the first underground hip-hop artist to do so, but their international presence is still at an early stage.

“Metal bands like Bloodywood and Gutsliit have been finding audiences abroad for a while, performing at European festivals like Wacken,” says Akhila.

Traditionally, film music artists from Bollywood have been touring and finding success abroad since for them the films themselves serve as the marketing tool for building an audience.

“The management of film music artists in international markets primarily focuses on finding local promoters and managing ticketing. For independent artists, it is different, as building an audience through live performances is crucial,” Akhila explains.

“The independent music scene in India experienced huge growth during the pandemic when there were no film music releases. Because of this, independent music gained all the media coverage and DSP placements,” Akhila says.

In time, the burgeoning independent music scene will likely make an impact internationally as well.

As with any market, localization plays an increasingly important role in India. European artists seeking to enter the Indian market must build stronger connections since the market rewards artists who understand local nuances and strive to build communities. This entails finding like-minded artists and fostering collaborations.

European artists should also develop a local strategy that encompasses local DSPs, in addition to international DSPs.

“Relying solely on your international DSP contacts is not enough. Building the right relationships and working with consultants who have a local presence and expertise can be instrumental in navigating the Indian market successfully,” says Akhila.

Partners on the ground can assist in evaluating the appropriate artistic matches for collaborations and the proper nuances for effective communication.

“For independent artists, the festival circuit is crucial. Festivals provide excellent networking opportunities and artists should strive to come back and perform in India consistently over 3-4 years, gradually growing their audience,” highlights Akhila. Tapping into live audiences is essential for audience building.

Regarding short-form videos, Akhila points out that they offer great discoverability, but on the flipside have also contributed to the rise of one-hit wonders. Differentiating between being a fan of a song and being a fan of the artist becomes vital.

“Short-term fame can serve as a great entry point, but building lasting success requires continued effort in nurturing relationships and consistently returning to perform,” says Akhila.

4.5 Key Takeaways

- Music consumption in India primarily occurs on YouTube, DSPs, and Instagram. While Spotify is the leading DSP, YouTube remains the top platform for overall music consumption. From the DSP's Gaana and Resso are transitioning to a paid-only model in India, however, their success in converting audiences to paid subscriptions is uncertain.
- International artists often adopt a two-touch approach when it comes to DSPs, collaborating with both an international and a local DSP. A comprehensive approach to DSPs is crucial since automated song pitching may not encompass all platform properties, including live events and social media. Building relationships and developing platform-specific strategies is essential for adapting to the distinct rules and trends of each platform.
- There is a strong connection between music and film consumption in India, with Indians being more accustomed to “watching” music rather than solely listening to it.
- There's strong growth in the regional music markets.
- Short-form content on platforms like Instagram Reels and YouTube Shorts has become crucial for achieving success and securing playlist placements but has also led to the rise of one-hit wonders.
- International platforms dominate the social media landscape in India, except for TikTok, which has been banned. Alternative platforms like MX Takatak and Josh App can be explored for engaging with a wide audience and creating viral content.
- Collaborating with brands holds significant value in the Indian music industry, particularly with international brands that prioritise music-related initiatives.
- Collaborating with actors, influencers, and Indian music artists in music videos, remixes, and covers helps international artists enter the Indian market and expand into tier 2 and tier 3 markets. Language should be the first consideration in artistic collaborations, with Hindi guaranteeing the widest reach in India. Genre comes second.
- Building genuine human connections with artists and expressing interest in India and Indian culture is important for successful collaborations.
- English proficiency is widespread in the Indian music industry, allowing European artists to easily communicate with partners and audiences through existing channels without the need for translators or intermediaries.
- Partnering with music media platforms such as Rolling Stone India, Wild City, and Indian Music Diaries can be essential for effective market penetration.

5. Capacity building

5.1. What we learned

In the emerging market of India, there is a growing need for knowledge and expertise in various roles within the music industry. This is due to the limited public infrastructure available to support the development of the music sector. Supporting the growth of the music industry not only helps build relationships but also offers long-term business opportunities.

The areas highlighted by professionals during the prospecting mission were the following:

- Lack of music business education despite the presence of many music institutes.
- The need for a better understanding of music copyrights among Indian songwriters and artists.
- Overlapping of roles, with individuals taking on artist management, PR, and promoter responsibilities simultaneously.
- The demand for more specialised and qualified professionals to support the industry's growth and meet its needs.

- Lack of programs focusing on empowering women and other disadvantaged groups in the music industry. By providing training and support specifically for these groups, the industry can foster inclusivity and diversity while inspiring the next generation of music industry professionals.

Furthermore, it was repeatedly emphasised that international exchange programs serve as an effective means for educating individuals in the music business and fostering sustainable connections and business relationships between India and Europe. Local industry professionals recommended inviting Indian professionals to European festivals and conferences in order to gain a deeper understanding of the European music industry and explore potential collaboration opportunities. In the evolving Indian music industry, professionals often take on multiple roles, such as promoters, agents, PR agents, and managers. This multifaceted involvement provides an advantage when inviting them to Europe, as they have the capacity to establish a wide range of collaborations.

5.2. Fostering Know-how and Growth in the Indian Music Industry - Interview With **Tanish Thakker**, director at Gatecrash and Amplify Music Incubator



Photo: private collection

Gatecrash is a music agency based in Mumbai that specialises in organising high-quality concerts, promoting the live music scene, and developing education programs. Since 2021, Gatecrash has been running Amplify Music Incubator, an artist development program that aims to assist upcoming artists from various genres in building their businesses, enhancing their creativity, and establishing strong networks in the industry through comprehensive training and extensive interactions.

“Our main focus is on the business side of the music industry, with the aim of empowering artists to have long and sustainable careers,” states the director of both Gatecrash and Amplify Music Incubator, Tanish Thakker.

To date, Amplify Music Incubator has successfully completed four programs and raised funds for the next two taking place in 2023.

“Each program typically includes around 15 music projects, and by the end of this year, we will have worked with 75 projects,” says Tanish.

The program consists of five weeks of online sessions, followed by a sixth-week residency in Goa. The residency brings together all the participating artists for a week of collaboration, culminating with a showcase of their work. By conducting the majority of the program online, Amplify Music Incubator ensures that artists from all corners of India can participate.

“While we are genre-agnostic, we primarily focus on independent artists as the mainstream pop industry in India already has the necessary resources for development,” shares Tanish.

A key aspect of the program is the creation of a supportive environment where artists can learn from one another and establish meaningful connections, fostering a peer-to-peer learning experience. Numerous collaborations have already emerged among the participating artists, further strengthening the music community.

Amplify Music Incubator operates as a non-profit association, and they do not charge artists to be part of the program. Instead, artists are only responsible for covering their own costs.

“As of now, I don’t see anyone else doing anything similar in India,” says Tanish.

Initially, the launch of the program faced challenges as many industry professionals failed to grasp its purpose. Common questions like “Why are you doing this?” and “Why not become an artist manager yourself?” were frequently raised.

“Things are getting easier now, with more artist managers, labels, distribution services, and lawyers supporting the program, along with artists who have benefitted from it. The funding situation has also improved, allowing us to focus more on marketing and scaling the program,” says Tanish.

Looking ahead, Tanish envisions establishing a think tank for the independent music industry in India, similar to CNM in France.

“I’ve lived abroad for a long time, and I’ve seen how deeply embedded music is in the culture of other places. Our goal is to create a space for something similar to develop in India,” expresses Tanish.

This comprehensive vision includes facilitating policy development, conducting capacity-building programs, and establishing an online information centre, all under one roof. Having an artist fund would be a significant milestone, as it would provide artists with the necessary financial support to scale their projects. However, such a fund does not currently exist in India.

In the near term, Amplify Music Incubator plans to organise more boot camps and workshops across different cities in India, catering to diverse genres and sectors of the industry, including programs specifically designed for artist managers. Exploring the possibility of organising a small showcase festival is also under consideration. While having a physical space for these activities is a goal, the challenge lies in finding an affordable location in Mumbai, given the high real estate prices.

“We may have to consider other cities, but the music industry is in Mumbai, so that’s a challenge,” says Tanish.

“India would really benefit from having more performance spaces since they provide artists with better opportunities to perform and develop, as well as build audiences.”

Currently, government support in India is challenging to obtain, and everything is driven by private organisations.

“My business partner, Emma, and I decided to set up an India booth at Jazzahead. We started reaching out to the government for support or partnership a year and a half ahead of time. However, we didn’t receive any response. It seemed like they didn’t quite understand what we were trying to accomplish. We hope that by gradually following the example of setting up associations and organisations, as has been done abroad, the government will start to take our initiatives more seriously,” says Tanish.

Amplify Music Incubator has actively collaborated with European organisations by inviting international professionals to participate and speak in their programs, and they are continuing to expand these collaborations. So far, Amplify has had around 30-40 people from countries such as the UK, Canada, and France involved in their programs.

“The international professionals speaking at the programs also become members in the alumni network we are building,” adds Tanish.

Amplify and Gatecrash would also like to gain a better understanding of how similar organisations operate abroad through discussions and capacity-building initiatives.

“Capacity building is crucial in creating specialised roles within the music industry, as artist managers are currently overloaded with responsibilities. More segregation of roles is needed to streamline the industry,” says Tanish.

Looking ahead, Indian musicians are becoming increasingly export-ready, and Tanish envisions a wave of artists making their mark internationally within the next five years.

“ To support this wave and create more opportunities outside the country, we will need the necessary networks, infrastructure, and know-how,” concludes Tanish.

5.3. Music Business Education in India - Interview with **Ritnika Nayan**, owner of Music Gets Me High

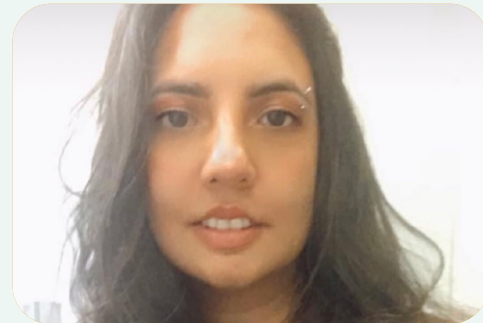


Photo: private collection

Ritnika Nayan is the owner of Music Gets Me High, a company that offers a range of services including operating a music studio, organising live events, providing festival consulting, and offering consultation services to international companies like Fuga and CD Baby. While Ritnika was previously involved in artist management, her focus has now shifted to education, with it becoming a significant part of her business.

One observation Ritnika made in India is the general lack of knowledge about various music business topics, with many individuals being unfamiliar with concepts such as publishing. To address this gap, she wrote a book titled “India 101” on the music business in India, aiming to provide a resource for people to refer to instead of repeatedly asking her the same questions.

“But I found that music industry people are not so much into reading books, so the questions never stopped”, she laughs.

Subsequently, Ritnika launched a music business course, which is currently the only one of its kind in India. The course was created in response to the observation that, despite the presence of numerous art colleges in India offering courses on playing instruments, music software, and music production, there was a lack of available options for studying the music business. To fill this gap, she partnered with SACAC Arts College to jointly introduce a music business course.

Recognizing that there wasn’t significant demand for a comprehensive music industry course and considering that Indian parents were not fully supportive of their children pursuing music careers, Ritnika designed a two-month weekend course. Conducting classes on weekends allowed individuals with jobs or college commitments to attend. Due to the COVID-19 pandemic and her relocation to Goa, the classes were moved online, which proved beneficial in reaching a wider audience, including aspiring musicians from smaller cities.

In the music business courses, Ritnika covers various topics such as publishing, marketing, distribution, touring, and securing shows in India and abroad. Guest speakers and past graduates are invited to share their experiences, fostering an active network of music professionals. The degree is granted through the arts college. Ritnika also organises standalone courses on subjects like basic management and music distribution.

One of the challenges Ritnika faces is that many artists fail to recognize the importance of understanding the music business. Some tend to rely on managers without realising the scarcity of qualified managers in India. Similarly, artists often assume they need a label for distribution, even though it may not always be necessary.

“Artists really need to take more responsibility for the business side of their careers,” emphasises Ritnika.

European assistance has been valuable for Ritnika in terms of capacity building. Delegations of Indian music industry professionals sponsored by countries like Germany, France, and Switzerland have provided opportunities for exposure and networking.

“As you know, local music organisations in India primarily focus on promoting traditional music and generally do not provide support for initiatives like these. So, there is a clear need for such initiatives from abroad. Unfortunately, it seems that there are fewer of them happening recently,” she points out.

Ritnika had the opportunity to attend Co-pop in Germany with her artists, where they gained visibility and experience through performances, while she participated in workshops and networking sessions, leading to numerous opportunities and long-term relationships. Masterclasses could also be an in-demand form of capacity building if they feature renowned instructors who are well-known both in India and abroad.

For cross-cultural education and courses, starting in major cities is recommended, as language becomes a challenge outside these urban areas where English may not be the primary means of communication.

Ritnika has been involved in programs for women in music, for example, she served as a mentor for Spotify’s AmplifiHer initiative which aimed to mentor and promote women artists. The initiative was promoted via the women’s magazine Femina and Rolling Stone.

“There have been many of these initiatives, but unfortunately, they haven’t had much continuity,” says Ritnika.

She also notes a need for capacity building among other disadvantaged groups, including LGBTQ individuals, as well as aspiring musicians from smaller towns who lack access to industry circles.

5.4. Key Takeaways

- Areas highlighted during the prospecting mission include the lack of music business education, the need for a better understanding of music copyrights, the overlapping of roles, and the demand for specialised professionals to support industry growth.
- The limited public infrastructure and funding for the music sector in India create a need for education and expertise from the private sector and international sources. European organisations can play a crucial role in filling this gap by offering support and resources to facilitate the development of the music sector in India.
- Music business education and music industry incubator programs are starting to emerge in India, as can be seen with private initiatives like Amplify Music Incubator and Music Gets Me High. These kinds of initiatives offer European professionals the chance to teach, conduct masterclasses, and build connections and networks in India.
- Inviting Indian professionals to European festivals and conferences is recommended for sustainable collaborations. In the evolving Indian music industry, professionals often take on multiple roles, which gives them an advantage when invited to Europe as they can establish a wide range of collaborations.
- Launching physical cross-cultural education and courses in major cities, where English is more widely spoken, is beneficial. Additionally, online educational activities are highly recommended as they offer the advantage of reaching a broader audience and providing accessibility to professionals from smaller cities.
- More capacity building is needed for disadvantaged groups, including women, LGBTQ individuals and aspiring musicians from smaller towns who lack access to industry circles.