



मानव पर्यावरण
मंत्री सचिव
MINISTRY OF
INFORMATION AND
BROADCASTING



AVGC Promotion Task Force Report: Annexure D

Draft Model State Policy for Growth of
Animation, Visual Effects, Gaming, Comic &
Extended Reality sector in India

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1.

Guidance Note: To Formulate State Policy for AVGC-XR Sector

1. Guidance Note: To Formulate State Policy for AVGC-XR Sector

The Animation, Visual Effects, Gaming, Comics and Extended Reality (together termed the AVGC-XR Sector) has shown steady growth in recent years and has emerged as a sunrise sector. The AVGC-XR sector has the potential to produce powerful content and Intellectual Property, it has immense potential to contribute to India's Exports and GDP growth, besides disseminating rich cultural heritage and generating quality employment.

To give the right impetus to the AVGC-XR sector, Ministry of Information and Broadcasting, Government of India, is hereby releasing this guidance document in the form of a **Model State Policy on AVGC-XR** for the states to draft their own policies for the sunrise sector of AVGC-XR.

To use this Guidance Document effectively, it is recommended that the following may be taken into consideration.

1. Understanding the structure of this Draft Modal State Policy on AVGC-XR

It may be noted that this document is a guidance document that has been developed to assist States in drafting a State policy to promote the growth of the AVGC-XR sector in the State. The document is divided into various sections, each focusing on different aspects of the policy. While drafting the policy, States are advised to refer to guidance notes outlined in each section.

2. Assessing the local context of AVGC-XR Sector in the State before drafting the policy

Conducting an initial assessment to understand the context and stage of development of the AVGC-XR sector in the State is of paramount importance at this stage. This assessment will prove helpful in determining the objectives of this policy and relevant policy measures to benefit the industry. Dedicated consultations should be carried out with diverse cohorts of stakeholders to understand the requirements of the industry, including academia.

While considering the local context, it is important for the State to ensure that the provisions of this policy are in accordance with those mentioned in several Central and State laws.

The State is advised to implement the policy in accordance with governing Union and State Laws and Policies, including but not limited to:

- The Factories Act, 1948
- The Shops & Establishments Act, 1988
- The Contract Labour (Regulation & Abolition) Act, 1970
- The Payment of Wages Act, 1936

- The Minimum Wages Act,1948
- The Employment Exchanges (Compulsory Notification of Vacancies) Act,1959
- Various Labour Codes

3. Drafting a framework for the purpose of implementation of this policy

The States are advised to draft an implementation framework for the purpose of effective implementation of their policy. The framework among other sections, may also comprise details of:

- nodal body which will be the custodian of the policy
- department/s which will play an active role in the implementation of this policy
- various resources that may be linked to policy, such as, human, financial, legal aspects etc.
- procedural formalities for availing benefits under this policy
- tools for effective monitoring of the policy being implemented.

4. Evaluation of the State AVGC-XR Policy

At a later stage, the States may also undertake the exercise of evaluating the design and implementation of this policy to assess whether the intended outcomes were achieved.

5. Maintenance of this policy

This stage involves maintenance of the policy by keeping it up to date with latest trends in the sector. It is important to carry out periodic revisions with various identified cohorts of stakeholders and assess the global and national context of the AVGC-XR sector to ensure the policy is updated and is touching upon areas of Global and National importance in the sector, alongside mentioning priority areas and actions for the State.



2. Overview

2.1 Background

The section may include information:

- *Global and Indian landscape of the AVGC-XR sector*
- *Key growth drivers for AVGC-XR in India*
- *Sectoral analysis of each sector in A-V-G-C and it's growth potential by 2025*
- *Demographics of the State – Percentage of working population, Sunshine sectors, M&E sector in the State, employment scenario etc.*
- *Market size of AVGC-XR in the State: An overview of the last decade*

The Animation, VFX, Gaming, Comics and Extended Reality (together termed the AVGC-XR sector) has emerged as an important growth engine of the Indian economy. It has shown steady growth in recent years and has emerged as a highly promising sector. The AVGC-XR sector has the potential to produce powerful content and Intellectual Property that can contribute to India's GDP growth and employment.

The AVGC-XR sector has witnessed unprecedented growth rates in recent times, with many global players expressing interest in the Indian talent pool to avail offshore delivery of services. Further, the Media and Entertainment (M&E) Industry is expected to grow at an 8.8% CAGR by 2026¹, as per a report on Global Entertainment and Media Outlook. India is now seen as the primary destination for high-end, skill-based activities in the AVGC-XR sector.

The sector has the potential to disseminate Indian culture to the world, connect the Indian diaspora to India, generate direct & indirect employment and benefit the tourism & other allied industries.

The AVGC-XR sector has been on the rise both globally and in India. India possesses the necessary ingredients to become a major contributor to the global AVGC-XR sector.

Animation Sector

The Indian animation sector is growing fast and with an increasing number of animated series and features being produced in India; some of it has attracted global audiences. The demand for animation expanded with the increase in children's broadcasting viewership, availability of low-cost internet access, and growing popularity of OTT platforms. According to the FICCI March 2022 report, the animation sector has grown by 24% in 2021 to reach USD 370 Mn² in India. Further,

- India's animation and VFX industry was valued at around 83 billion Indian rupees in 2021³.
- A report estimates that the animation sector will grow to 39.7% in 2022 from 30.5% in 2021⁴.
- The growth of children's channels' viewership led to an increased demand for animated content.
- OTT platforms, too, continued to invest in Indian animated IP.
- Increased demand spurred investments into India.
- Converging production pipelines opened new avenues.

VFX Sector

The Indian VFX industry has been gradually making progress with adaptation of world-class techniques and innovative technology. The content creators are experimenting their storytelling with high-quality VFX advancements.

The VFX industry grew 103% in 2021 to reach USD 462 Mn⁵. It was estimated that the industry would be worth almost USD 1.7 Bn by fiscal year 2024⁶, indicating a significant growth potential. The Indian Animation and Visual Effects industry has the potential to reach 20-25% by 2025, according to the latest media and entertainment industry Report⁷. VFX & Animation can be the next IT-BPM boom for India and play a fundamental role in India becoming a USD 100 billion M&E industry by 2030⁸.

It is expected that around 50% of Indian Animation and VFX studios will adapt to real-time technology or virtual production by 2025⁹. For smaller studios, this could be a challenge because of the high capital investments involved in adopting these technologies, and their use will be limited to high funded projects only.

Gaming Sector

FICCI's Media and Entertainment Report 2022 highlights that the online gaming segment grew 28% in 2021 to reach USD 1.2 Bn¹⁰. This exceptional growth is fuelled by demographic factors, change in media consumption habits, as well as innovations by the industry during the past few years. Further, the COVID-19 pandemic has led to a long-lasting shift towards digital means of entertainment, which has resulted in exponential growth of the gaming industry during the pandemic.

India is expected to become one of the world's leading markets in the gaming industry. Growing steadily for the last five years, it is expected to reach 3 times in value and reach USD 3.9 billion by 2025¹¹.

The Hon'ble Prime Minister of India, speaking on the announcement of the AVGC Task Force in the Union Budget 2022-23, highlighted that India is one of the top 5 markets in the world for mobile gaming¹². The gaming industry is at the core of the AVGC sector, and drives growth across its entire ecosystem. In 2021, the online gaming sector has overtaken films to become the fourth largest segment of the M&E industry in India.

Comics Sector

With the Indian economy opening in 1991 and major changes in satellite television market, Indian comic readers were introduced to a plethora of international characters in mainstream media. The industry now has a host of new players which tapped into the India artist pool to come up with the new generation of Indian comics. The genres vary from superhero, mythology, folklore to many other social segments.

The comic book industry is a well-recognized part of Indian popular culture, having produced many familiar cultural icons like, Suppandi, Chacha Chaudhary, Tenali Raman, Detective Moochhwala, Shikkari Shambhu, Mayavi, and Akbar-Birbal. The industry was at its peak during the late 1980s and 1990s, when it flourished with a record number of sales.

In 2021, this sector witnessed the acquisition of many comic book characters which will eventually be turned into animated series, films, or shorts.

2.2 Growth drivers of the AVGC-XR sector in India and in <state>

- ***Identifying enablers in AVGC-XR specific to the State***
- ***Leveraging existing policies/schemes to boost AVGC-XR in the State***
- ***Defining a roadmap of growth for AVGC-XR in – academia, skilling, research & development, industry partnerships.***

The AVGC-XR (Animation, Visual Effects, Gaming and Comics) sector has witnessed unprecedented growth rate in the recent times, with the global market size of the AVGC-XR sector estimated at around USD 800 billion¹³.

India too has not stayed behind and has seen a never-before growth of this sector. Some key trends that have emerged in the AVGC-XR sector's growth in India are:

Emerging key growth drivers: Local Intellectual Property (IP), creations and outsourcing work for western studios, increased consumption of VFX and digital post production in film and TV, increased 2D to 3D conversion, increased mobile and internet penetration and rise of social media gaming are the key drivers of growth for the AVGC-XR sector.

- ***Increase in captive centres across India, leading to access to top international filmmakers:*** International studios are becoming more interested in either opening their own studios in India or

investing in existing Indian companies. This is not only bringing in investments, but also adding to the creative and technological talent pool in India.

- **Growing audience base:** TV viewership has grown in India over 2019, with about 762 Mn viewers recorded per week¹⁴. India presents one of the largest audience bases in the world and thus offers a large potential market for the AVGC-XR sector.
- **Young population:** ~ 63% of the population of India is between the ages of 15-64. . In 2022, the median age in India was 28 as compared with 38.4 in China and the US, and 49 in Japan¹⁵. This very strong demand base supported by the growth of gaming companies in India is projected to provide a very strong sustainable growth for India's overall gaming ecosystem.
- **Rising smartphone growth:** The number of smartphone users in India was expected to reach 932 Mn by 2022¹⁶. Currently, India has ~500 Mn active internet users which is one of the highest in the world¹⁷. India continues to be the world's second-largest internet market after China and this presents significant growth potential in the AVGC-XR sector.
- **Affordable data:** India has one of the most-affordable mobile data plans worldwide¹⁸. This cheaper data cost has promoted internet penetration in rural India. In FY19, rural India had ~227 Mn users, which was higher as compared to urban users at ~205 Mn¹⁹.

The animation, visual effects, gaming, comics and extended reality (AVGC-XR) sector as emerging sectors have recently witnessed unprecedented growth rates as demand for skilled resources grows.

At this stage of sectoral maturity, the sunrise sector of AVGC-XR requires targeted interventions by both, Government and Private sector.

This sector has a high probability of effectively capitalizing the demographic dividend being created by India. Today, India is one of the youngest nations in the world with more than 62% of its population in the working age group (15-59 years) and more than 54% of its population below 25 years of age²⁰.

A brief section may be added here with focus on the status of the AVGC-XR industry in the State including the current status of policy measures that State has taken for economic growth in general and AVGC-XR in particular. The section will also call out the status of the various growth levers in the State. This section will set the context for the State policy framework.





3. Draft Model State Policy for AVGC-XR

3.1 Need for Policy

The below paragraph explains the need for an AVGC-XR policy in the State.

The AVGC-XR (Animation, Visual Effects, Gaming and Comics) sector has witnessed unprecedented growth rate in the recent times, with the global market size of the AVGC-XR sector estimated at around USD 800 billion. India has also seen tremendous growth in this sector, in line with the global standards.

With the right set of interventions, India has the potential to capture 5% (~USD 40 billion) of the global market share by the year 2025, with an annual growth of around 25-30% and lead to the creation of over 1,60,000 new jobs annually

²¹. Besides this, AVGC-XR sector is expected to have a greater impact on society – fostering creativity at grassroots level and acting as a medium to communicate Indian values to the next generation. The Animation, Comics and Gaming segments have tremendous potential to present Indian mythological content, culture, values and traditions to children and youth of India.

- The policy shall serve as a guidebook, focusing on the growth of the AVGC-XR sector within the State.
- The policy may help the State understand their specific challenges in AVGC-XR and help design interventions to address the identified gaps.
- Each State policy needs to ensure that it is specifically tailored to the strengths and weaknesses of that State.

The policy shall address the demand-supply gap in the sector by making it easy for new players to enter the market and promote AVGC-XR as a profitable sector.



3.2 Responsibility matrix for the purpose of this Policy

The following have been envisioned as State's Role and Responsibilities pertaining to AVGC-XR industry.

The State will form a new AVGC-XR cell under its <Department of Information Technology/ Industries/ etc.>. The department will be the official custodian of the policy and will take adequate measures to oversee the policy's implementation.

To give the right impetus to AVGC-XR industry, the State shall form a dedicated committee comprising members from:

The State Level AVGC-XR Committee, headed by <xxx>, Department of Industries/IT and comprising representatives of related Ministries and AVGC-XR organizations in the State. This committee will steer the growth of the State AVGC-XR sector in its entirety. The Committee's responsibilities are, but not limited to, the following:

- i. Develop the State as a regional AVGC-XR hub, leading to an increased export revenue and creating employment by strengthening the support system.
- ii. Ensure equal gender representation across all components of the AVGC-XR sector in the State.
- iii. Promote skill development to raise skill level and create a pool of Indian designers and artists.
- iv. Develop AVGC-XR education and capacity building in the State through Centers of Excellence (COE).
- v. Oversee the creation and functioning of COEs in the State.
- vi. Set up AVGC-XR incubation centers, animation labs, plug and play facilities, postproduction labs, etc.
- vii. Create a legal framework for IP creation, registration, and protection.

<names of members>





3.3 Definitions for the purpose of this Policy

All the general and sector specific terms used in reference to the AVGC-XR industry in the document may be defined in this section. This shall ensure ease of understanding for the reader. Definitions of more terms maybe added to the list. .

Terms	Definition
Animation	Animation is the technology of displaying frames in succession to create an illusion of motion. It is used in entertainment, education, design, game development, simulations, etc. Animation is the method of showing movement by using a series of drawings, computer graphics, or photographs of 2D or 3D objects that create an illusion of movement when viewed in succession. Animation includes 2D animation, 3D animation, clay animation, paper animation, stop motion, shadow animation, etc. They can be recorded on either analog or digital media. Animation is increasingly finding use in mobiles, software applications, visual effects, visual communication, and advertising.
Visual Effects	Visual Effects (VFX) and postproduction refers to imagery created, manipulated, or enhanced for any film, or other moving media that does not take place during live-action shooting. It is also known as CGI (Computer Generated Imagery). Visual effects include computer-generated imagery using the industry's most advanced 3D and compositing software and plugins.
Gaming	A game is an electronic game that involves human interaction with a user interface to generate visual feedback and immersive experiences on a device that shall include 2D, 3D, video, handheld devices, mobile, virtual, console, etc. The online skill gaming industry can be categorized into – casual games, real-money games (fantasy sports, card games and other RMG games) and Esports.
Comic	It is a publication that consists of comic art in the form of sequential panels that represent chronologically laid scenes that are used to tell a story or a series of stories. It extends to comic strips published in magazines and newspapers, and graphic novels that are long-format, standalone stories

	with more complex plots or a collection of short stories that have been previously published as individual comic books. This segment does not include novels or magazines.
Virtual Reality	It is an artificial environment that is created with software and presented to the user in such a way that the user suspends belief and accepts it as a real environment. On a computer, virtual reality is primarily experienced through two of the five senses: sight and sound.
Mixed reality	Stands for Mixed Reality. It sometimes referred to as hybrid reality, is the merging of real and virtual worlds to produce new environments and visualizations where physical and digital objects coexist and interact in real time.
Augmented Reality	It is the integration of digital information with the user's environment in real time. Unlike virtual reality, which creates a totally artificial environment, augmented reality uses the existing environment and overlays new information on top of it.
Extended Reality	Extended reality is a term referring to all real-and-virtual combined environments and human-machine interactions generated by computer technology and wearables. It includes representative forms such as augmented reality, mixed reality and virtual reality and the areas interpolated among them.
AVGC-XR sector	The AVGC-XR sector is represented by companies, joint ventures, focus groups, consultants, and creative professionals engaged in the business of conception, production, post- production, media and intellectual property rights management, publishing and marketing of animation, visual effects, special effects, editing, digital game development including mobile, console, desktop games (excluding gambling) and comics content. They also actively promote the products and related services such as the development of software used in pre-production, production and postproduction pipelines, education and advanced research, development of AVGC-XR subjects, related technology, and its business management.
AVGC-XR Company	Any company in the AVGC-XR sector as defined above.

4.

**Current landscape of
the AVGC-XR sector in
the State**



4. Current landscape of the AVGC-XR sector in the State

The section may comprise information on: -

- *Technology landscape of State*
- *Evolution of AVGC-XR in the State*
- *Existing policies/schemes to boost AVGC-XR in the State*
 - *Ease of Doing Business*
 - *Start-up India*
 - *Invest India*
 - *Any State specific scheme*
- *Employment and workforce landscape*
- *Status of AVGC-XR academia in the State*
- *AVGC-XR and Investment*

Draft Model State Policy for Growth of AVGC-XR sector in India

5.

Key Interventions Undertaken So Far





5. Key Interventions Undertaken So Far

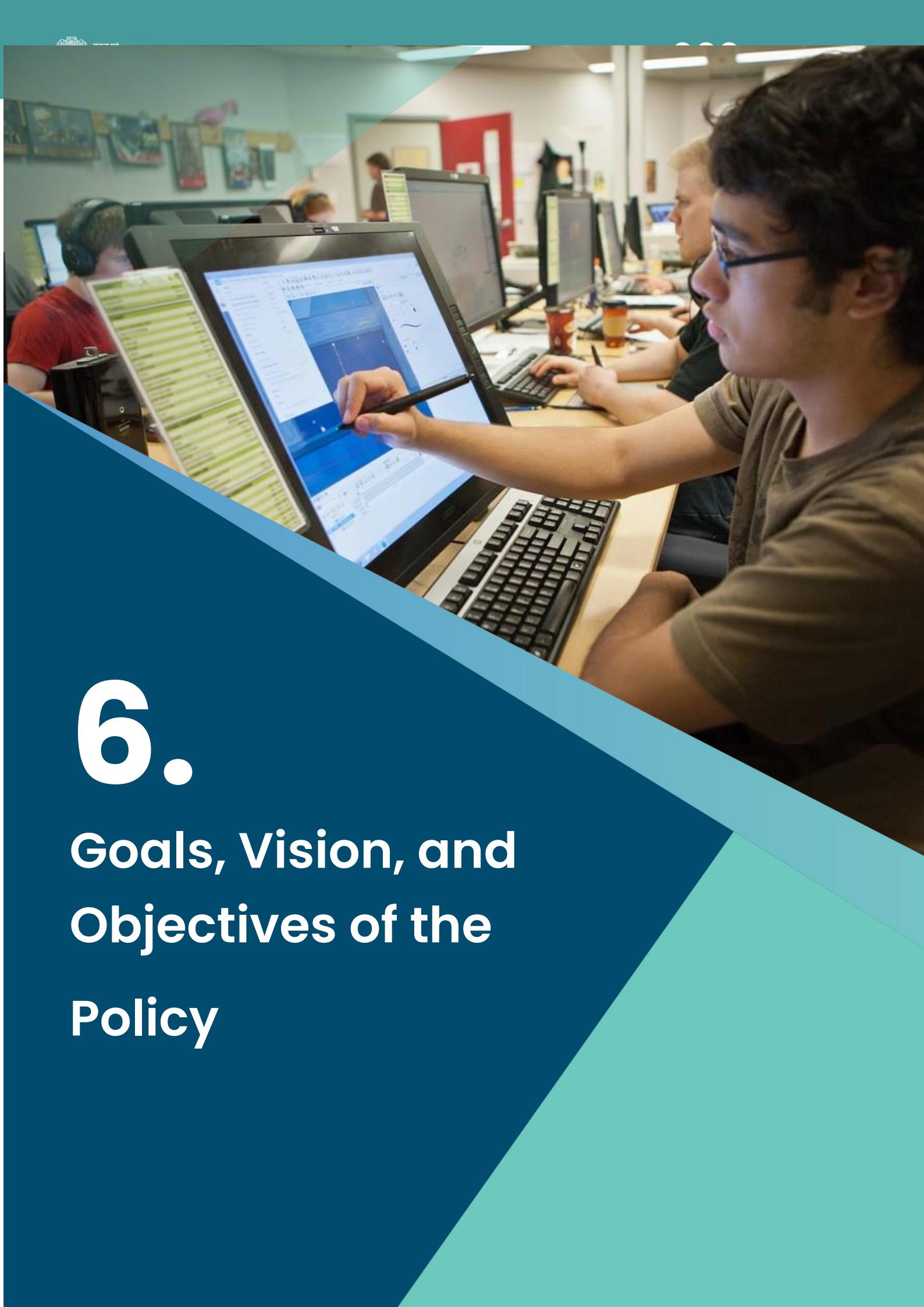
The section may highlight details on:-

- Existing schemes/policies for AVGC-XR sector development in the State. This may also cover existing incentives being given under the following schemes:
 - Pradhan Mantri Mudra Yojana
 - Credit Guarantee Trust Fund for Micro & Small Enterprises (CGTSME)
 - Financial Support to MSMEs in ZED Certification Scheme
 - Credit Linked Capital Subsidy for Technology Upgradation (CLCSS)
 - Design Clinic for Design Expertise to MSMEs
 - Schemes under Stand-up India, Start-up India
 - Market Development Assistance Scheme
- Listing down current initiatives if any in AVGC-XR, in the area of –
 - Academics
 - Skilling
 - Financial & Fiscal incentives
 - Tax Rebates
 - Infrastructure
 - Technology
 - International Partnerships
 - Research & Development
 - Incubation Facilities
 - Small Businesses & Start-Ups
 - Employment opportunities in AVGC-XR



6.

Goals, Vision, and Objectives of the Policy





6. Goals, Vision, and Objectives of the Policy

6.1 Vision

The vision of the policy shall focus on the ultimate end goal. It may briefly touch upon the following points: -

- Enhancing the strengths and offerings of the State in relation to AVGC-XR.
- Making the State a preferred destination for global AVGC-XR investment.
- Develop at least one city in the State as a hub and a preferred destination for the AVGC-XR industry
- Promote creation of indigenous content and entertainment for mass audiences.
- Encourage creation of IP from State's AVGC-XR companies
- Facilitate growth of Indian AVGC-XR startups and entrepreneurs
- Support local industry through progressive policies complemented with provision of high quality infrastructure
- Promote skill development through creation of a Centre of Excellence dedicated to AVGC-XR sector.
- Create a link with best practices undertaken at both National and State levels.
- Promote the local art forms in India

6.2 Goal

The goals of the policy are a statement of desired outcomes that it hopes to accomplish over a specific time frame. Some of the points that might be considered while defining the goal are as follows: -

- Stimulate growth of at least <xx> AVGC-XR companies in the State, including <xx> reputed companies in terms of projects and size of operations.
- Create <xx> new jobs in the AVGC-XR sector within the State

- Increasing employability of professionals working in the AVGC-XR sector
- Bringing regional artists to the forefront
- Making the State the preferred destination for AVGC-XR related investment
- Standardization of AVGC-XR services (Education, skill development, infrastructure provision) across the State.
- Identify the local art forms & the region of their influence
- Identify artists and importing training

6.3 Objectives

Objectives are defined as specific, actionable targets that need to be achieved to realize the goal of the policy. Some of the suggested objectives are as below: -

- Developing the State as a global AVGC-XR hub to increase export revenues and create employment by strengthening the support ecosystem
- Ensuring equal gender representation across all components of A-V-G-C in the State
- Creating a diverse ecosystem for AVGC-XR in the State and ensuring equal opportunities for all genders
- Promoting skill development to raise skill level and creating a pool of Indian designers and artists
- Developing AVGC-XR academia in the State through COEs
- Setting up AVGC-XR incubation centres, animation labs, plug and play facilities, postproduction labs, etc.
- Creating a legal framework for IP creation, registration, and protection.
- Stimulating growth of already existing AVGC-XR companies by offering fiscal and financial incentives
- Supporting the State AVGC-XR industry by creating local infrastructure and software





7.

Development of

AVGC-XR ecosystem

in the State

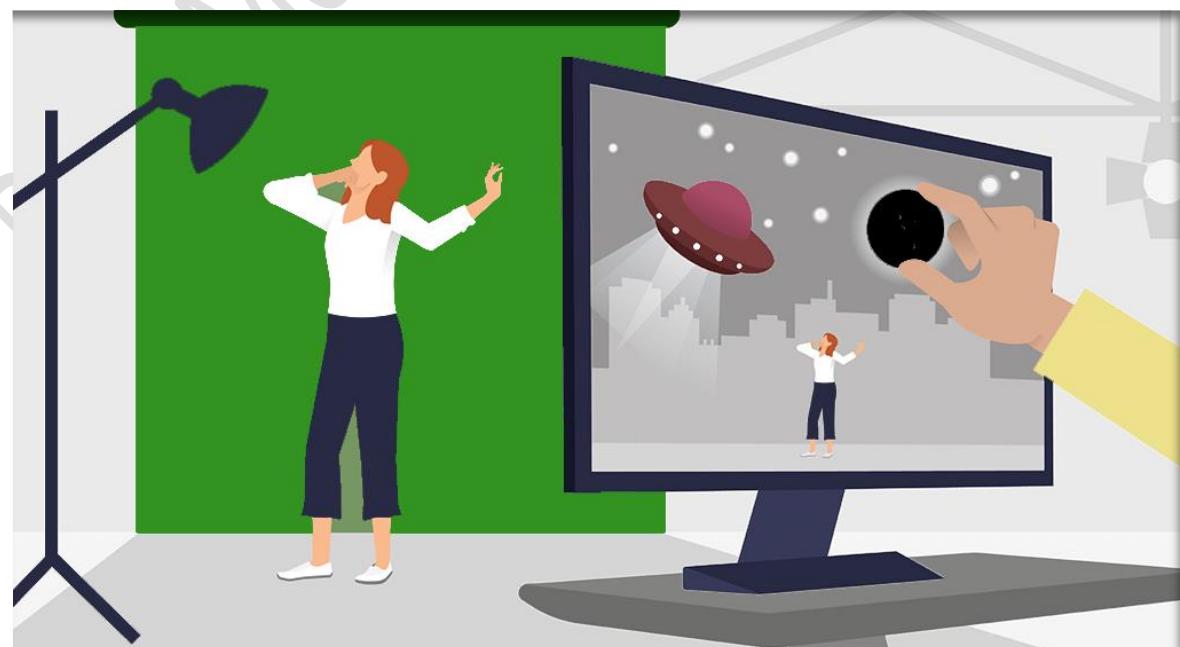
7. Development of AVGC-XR ecosystem in the State

The section may briefly touch upon the key areas of interventions that have been identified post the assessment of existing State AVGC-XR policies and international best practices.

The section may suggest interventions specific to the below mentioned sub-sectors: -

- Access to robust Infrastructure
- Access to Technology
- Market Access and Development
- Talent and Skill Development
- Enhancing Export potential
- Promoting Local content
- Support to MSMEs and Start-Ups
- Collaboration & Partnerships
- Diversity, Equity and Inclusion
- R&D and Innovation
- Financial Assistance and Incentives
- Information, Education and Communication & Outreach

The interventions and specific incentives will be defined by the State as per its local context and resources





7.1 Access to Robust Infrastructure

Identifying infrastructure as an essential component of AVGC-XR sector and a major driver for attracting investments, the State of <name of the state> is committed to providing high quality infrastructure to the industry.

7.1.1 Setting up of AVGC-XR Clusters across the State: To catalyse economic development resulting from AVGC-XR sector, it is being proposed to set-up dedicated AVGC-XR Clusters across the State. The Government of <name of the state> and the <department supporting AVGC-XR in the state> will undertake the exercise of developing designated AVGC-XR Clusters in the State. These AVGC-XR Clusters will be developed under the below philosophy:

1. Catering to various types of AVGC-XR entities (production houses, gaming companies) to enhance State's contribution to growth of AVGC-XR sector by introducing skilled resources, inputs (Raw materials, technology etc.), connectivity, market etc. This will also ensure assistance in access to adequate infrastructure in the form of land, power, connectivity etc
2. Treating services imported from Special Economic Zones at par with FTA/PFTA countries to provide a level playing field.
3. Greater autonomy to serve both international and domestic market
4. Incentives based on factors like investment in technology, job creation, and investment committed.
5. Stability in law and policy with effective and fast track dispute resolution mechanism and consistency across different statutes.
6. Easy entry and exit process from the AVGC-XR cluster

The State therefore, proposes to set up dedicated AVGC-XR clusters in:

- <Region 1>
- <Region 2>
- <Region 3>

The clusters are proposed to be equipped with the following:

- The AVGC-XR Clusters are proposed to have various Digital AVGC-XR Labs to encourage the adoption of the latest digital post-production technologies such as motion capture, 2D & 3D animation, and high speed rendering across AVGC-XR producers and IP creators, a common infrastructure facility will be set up and be made available on a pay-per-use basis at a reasonable price. This facility will also provide training on state-of-the-art equipment and house, incubator and co-working space to support start-ups working in the animation and game development sectors.
- These clusters will also have availability of,

- **Power:** To ensure seamless connectivity, the State will ensure reliable power for the sector. It is also recommended to adopt of a solar power backup plant with a one-time subsidy of <xx>% of the capital cost for setting up of in-house solar backup plant. Further, there will be admissibility of Industrial Power category tariff for Animation, Visual effects, Gaming & Comics Companies. This incentive is eligible for Mega Projects, or whichever the State may decide
- **Data bandwidth:** The State government will provide adequate Data bandwidth for AVGC-XR industries. It is also proposed to create common facilities like Data centre / Render farms / Performance capture / Volumetric capture etc.
- **Transport Connectivity**
- **Housing and Commercial setup**

7.1.2 Allotment of Industrial Corporation Land within the cluster: Allotment of appropriate extent of Government/ Industrial Corporation lands subject to fulfilment of prescribed obligations on employment, investment, and terms & conditions of allotment, will be undertaken for eligible Animation, Visual effects, Gaming & Comics companies for their expansion and setting up of their own facilities.

- Prescribed criteria for eligibility for land allotment include:
 - Fulfilment of an employment obligation of employing <xx> Animation, Visual effects, Gaming & Comics professionals per one acre of land allotted
 - Construction of <xx> Sq. Ft. Office space in <xx> acre of land allotted
 - <3> years for completion of the project and fulfilment of obligations mentioned above from the date of taking over possession of the allotted land
 - Filling the above criteria, however, does not guarantee allotment of land to the beneficiary, and shall remain the decision of the State government

7.1.3 Subsidy on lease rentals: <xx>% subsidy on lease rentals up to INR <xx> per annum (maximum) up to a period of <xx> years, for built up office space of up to <xx> sq ft. leased by Animation, Visual effects, Gaming & Comics companies. Eligibility as per operational guidelines.

7.1.4 Setting up a Center of Excellence for AVGC-XR: To keep up with the growing demand of latest technology and high quality talent, and provide the budding entrepreneurs in this sector with the right tools and thinking, the State will undertake an exercise of setting up a Centre of Excellence to support the AVGC-XR (Animation, Visual Effects, Gaming and Comics) sector in <name of the state>.

The suggested NCoE will provide latest State of the art infrastructure such as digital post-production AVGC-XR labs, post-production technologies such as motion capture, 2D & 3D animation and high-speed rendering along with state-of-the-art hardware and software technology. The working model of this NCOE, will be defined at a later stage by the <department supporting AVGC-XR in the state>, Government of <name of the state>.

The Centre of excellence set up will operate in collaboration with National Centre of Excellence (NCoE) to ensure uniformity in service standards across the sector.

The proposed centre will endeavour to:

- Serve as the driver for AVGC-XR promotion and act as a mentoring institution for the industry to guide the policies for growth of this sector
- Establish standards for AVGC-XR education in India
- Actively collaborate with industry and international AVGC-XR institutes
- Enhance the global positioning of the Indian AVGC-XR industry
- Strengthen AVGC-XR start-up ecosystem through provisioning of high-end incubation labs

7.1.5 Development of AVGC-XR Sub-clusters on PPP mode: Reputed private developers with proven track record, will be welcomed by the State to develop dedicated AVGC-XR Clusters in PPP mode. The structuring of these projects may be taken up on case to case basis.

7.1.6 Capital investment subsidy: <XX>% Capital investment subsidy limited to INR <XX> for fresh investments made post declaration of the said policy. This is a one-time subsidy for an investment of above INR <xx> and creating new employment of <xx> employees and above (subject to the company being in operation for the last <xx> financial years).



7.2 Access to Technology

AVGC-XR is a technology intensive sector. Further, with rapid changes in technologies, the sector not only needs to keep pace with the global innovations, but slowly emerge as a hub for technological innovations.

7.2.1 Facilitating access to Technology: The State Government recognized Industry associations will sign agreement with global technology vendors.

- These agreements will potentially cover the following:
 - Contracts will include subsidized versions of their products and services for meritorious students, awarded start-ups and independent developers, etc.
 - Discounted dedicated training programmes for users of their products
- The dedicated AVGC-XR clusters will be large scale Government backed facilities. These facilities will act as plug-and-play spaces, and provide semi-customizable and modular options to startups and SMEs with flexibility of operations
- The industry will also be encouraged to create technology and innovation sharing platform, promoting Industry driven mechanisms.

7.2.2 Building technology hubs for AVGC-XR in the State: It is being proposed that AVGC-XR clusters will have various digital AVGC-XR Labs to encourage the adoption of the latest digital post-production technologies such as motion capture, 2D & 3D animation, and high-speed rendering across AVGC-XR producers and IP creators, a common infrastructure facility will be set up and proposed to be available on pay-per-use basis at a reasonable price. This facility will also provide training on state-of-the-art equipment and house, incubator, and co-working space to support startups working in the animation and game development sectors.

7.2.3 Facilitating dedicated investments in technology for AVGC-XR

- To further develop the ecosystem and improve the ease-of-doing business, a dedicated AVGC-XR cell will be provisioned in the State, housed within <department that looks at AVGC-XR in the State>, for promoting and facilitating various policy initiatives.
- Also, within the <xx> year/s of the policy, a portal will be commissioned, to serve as a single point for incentive/subsidy/grant applications for all AVGC-XR companies in the State. It will have provisions for uploading of documents as well as tracking of application process within defined timelines.

7.3 Market Access and Development

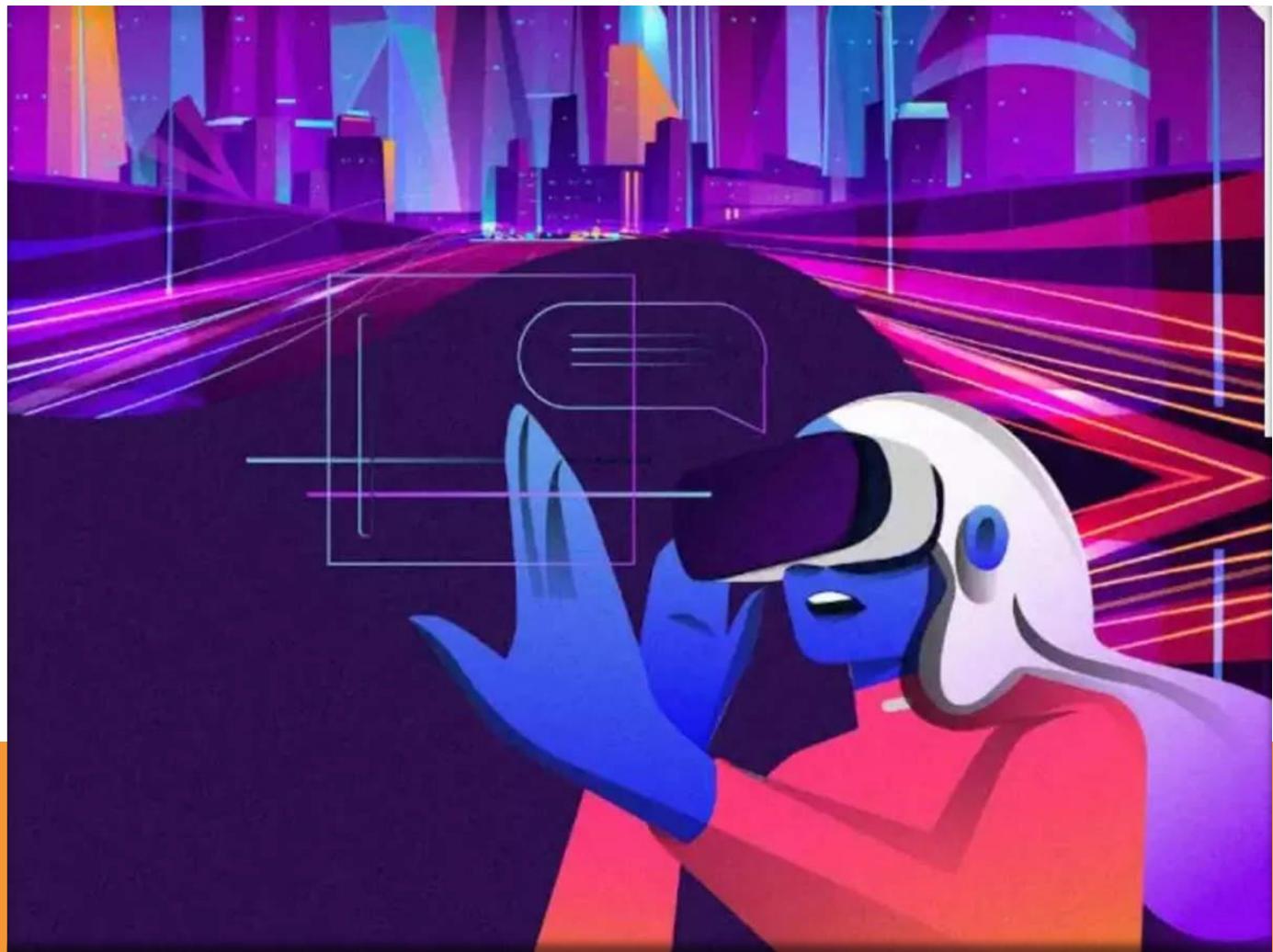
7.3.1 Creating awareness and conducting market development activities for AVGC-XR

- Dedicated market development events: The State of <name of the state> will encourage and actively host and participate in market development mechanisms such as hosting events, conferences, and competitions in the AVGC-XR sector.
- This will have a cross cutting impact not only on co-production between Indian and foreign firms and easing access to technology, also acting as a mentorship experience for professionals.
- The policy will offer support to AVGC-XR companies, associations, and SMEs by providing financial grants to attend top global AVGC-XR events, exhibitions, conferences, and festivals. This will help State's AVGC-XR companies especially SMEs to access global markets, learn about global business insights and to sell and market their products and services. It will also help professionals from State's AVGC-XR companies to attend top global AVGC-XR conferences and enhance their creative, business, and technical skills.
- The delegation from the State, in association with Government of India, will be powered by Indian industry leaders, gamers, top professionals, and research institutions may participate in various global gaming events.
- Registered AVGC-XR companies of the State will be provided reimbursements of 30 percent of the actual cost incurred in
 - International marketing, sales promotion etc.
 - Trade show participation
 - Publications
 - Subscription to market research material

The incentive will include registration, travel, boarding and lodging expenses, and exhibition stall rentals, for up to a maximum of INR <xx> per year per company. They can apply for the same on a half- yearly basis, within six months of the expense incurred.

- For creating public awareness and promoting Animation, Visual effects, Gaming & Comics industry, Government of <name of the state> will conduct state-of-the-art national / international scale events, conference & exhibitions on annual basis. Further, it will also support & participate in national / international conferences and exhibitions conducted by the industry to promote this sector. This initiative will help in showcasing local industry about the products & services and aid in attracting investments in AVGC-XR sector.

- To promote Indian AVGC-XR start-ups, the Government of <name of the state> may implement a suitable regulatory framework that enables start-ups to achieve success and sustained growth and improve their ease of doing business. The framework should also be easily compatible with the State's other policies and global best practices.



7.4 Talent and Skill Development

Skilling in this sector will open national and international avenues for the skilled manpower and become the backbone of media and entertainment industry.

- Identifying skilling target professionals viz – artists, artisans, etc.
- Encouraging the local art forms
- Importing professional training to artists





7.5 Promoting local content

It is known that homegrown stories, characters, and domestic content will enable the studios to transition from service mode to IP ownerships of original content. This industry is also giving the country and the State an opportunity to narrate stories from its rich culture, globally. To promote local content in the State, the State will take the following initiatives:

7.5.1 AVGC-XR Production Grant: AVGC-XR production grants have been designed to promote both domestic and international AVGC-XR productions made within the State. In establishing these grants, the Govt. of <name of the state> recognizes that large budget productions and Post Digital and Visual Effects (PDV) activity contribute to the State's overall development by providing valuable economic, employment and skill development opportunities. These grants will ensure that <name of the state> remains competitive in attracting large budget productions and PDV activity from across the globe.

Eligibility Criteria for availing Production Grants

- The applicant is incorporated in India, or is a partnership firm registered in India and is registered as an AVGC-XR company in the State
- The applicant must be the entity responsible for all activities involved in making the production in the State. Only one entity per production can be eligible for the grant
- At least <xx> percent of the qualified expenditure on the project should be incurred in the State by using locally employed talent
- Applications for co-productions are allowed but one of the applicants must be a producer from the State.
- The claim amount should be in proportion to the budget and/or the contract value of the production

Qualified Expenditure

- Costs and expenses incurred by the production house or content creator during the pre-production / production / post-production activities would be considered as Qualified Expenditure, subject to the following definitions –
 - cost of personnel working on the project/production
 - costs incurred for hire of studio and office space and utilities
 - hire of equipment / subscription fees for software used for the defined activity

The qualified expenditure should have been incurred within the State within the policy period.



Additionally, production houses that are applying for international grants should ensure that the AVGC-XR company or its local subsidiary should be contracted by the international production house or content creator to execute the project. The international production house or content creator will receive the benefit of the incentive from the State's AVGC-XR company or its local subsidiary as the case may be.

An applicant seeking the grant will not be eligible for other film finance or tax incentives from the Govt. of the State in relation to the same screen production or as decided by the State Government

7.5.1.1 Reimbursement of production cost for animation films: <xx>% cash back of the project cost if <xx>% of the production cost of that project is incurred in <name of the state> by using <name of the state> talent. This incentive is applicable to animation companies that have produced Animation Films (90 minutes & above) - "Animation Theatrical Released film." The total reimbursement will be up to a maximum of INR <xx> per film for one company, per annum, if produced on their own and marketed in their brand name. The allowable production costs are human resource cost, materials & print and professional services.

7.5.1.2 Promoting creation of original Indian themed Content

- *For animated episodic series produced with Indian Themed Content:* Registered State AVGC-XR companies that have produced an animated episodic series of <xx> episodes and above, for TV/VOD/SVOD platforms, will be eligible to apply for a reimbursement of <xx> percent of the qualified expenditure. This incentive is applicable for either content produced by the company and marketed in their brand name (in which case it must have been telecast once), or for content produced for another production house under a defined service contract.
- The total reimbursement cap will be up to a maximum of INR <xx> for one company in a year, with a limit of <xx> sanctions per company per year. However, this is subject to a limit of a maximum of INR <xx> for a single sanction.
- *For movies produced with Indian Themed Content:* Registered State AVGC-XR companies that have produced animation films of <xx> minutes and above, will be eligible to apply for a reimbursement of <xx> percent of the qualified expenditure. This incentive is applicable for either content produced by the company and marketed in their brand name, or for content produced for another production house under a defined service contract. Limit of one sanction per company per year.

Registered State AVGC-XR companies working on projects involving VR/AR/VFX work for domestic productions, where the contract value of the project is above INR <xx> Lacs, will be eligible to apply for reimbursement of <xx> percent of the qualified expenditure. This incentive is applicable for either

content produced by the company and marketed in their brand name, or for content produced for another Indian client / production house under a defined service contract.

The total reimbursement will be up to a maximum of INR <xx> Lacs for one company in a year, with a limit of <xx> sanctions per company per year. However, this is subject to a limit of a maximum of INR <xx> Lacs for a single sanction.

7.5.1.3 Reimbursement of production cost for animation cartoon series: <xx>% cash back of the project cost if <xx>% of the production cost of that project is incurred in <name of the state> by using <name of the state> talent. This incentive is applicable to animation companies that have produced Animation Cartoon Series (<xx> episodes & above) for TV and telecast on TV channel. The total reimbursement will be up to a maximum of INR <xx> per series for one company per annum if produced on their own and marketed in their brand name. The allowable production costs are manpower cost, materials & print and professional services.

7.5.1.4 Reimbursement of GAME production cost: <xx>% cash back of the project cost if <xx>% of the production cost of that project is incurred in <name of the state> by using <name of the state> talent. This incentive is applicable to gaming companies which have developed online, mobile, console Game. The total reimbursement will be up to a maximum of INR <xx> per Game for one company per annum if produced on their own and marketed in their brand name. The allowable production costs are human resource cost, materials & print and professional services. Units /companies to be eligible for said incentives should showcase <xx lakh> collective downloads on IOS, Google Play or windows or the Game should be award winning /nominated at National / International repute Gaming Conclaves.

Registered State AVGC-XR companies that have developed online/mobile games will be eligible to apply for reimbursement of <xx> percent of the qualified expenditure. Companies to be eligible for this incentive should showcase <xx Lacs> collective downloads on iOS/Google Play/Windows or the game should be award winning or nominated in reputed gaming conclaves like NASSCOM Game Developers Conference.

The total reimbursement will be up to a maximum of INR <xx> per sanction for one company if produced on their own and marketed in their brand name, with a limit of <xx> sanctions per applicant per year

7.5.1.5 Production Grant for International production

The Govt. of <name of the state> proposes to extend financial incentives and concessions to attract large, reputed international AVGC-XR productions to the <name of the state>. Projects or productions that are extended financial incentives should help raise the profile of the State's AVGC-XR industry. They should also bring in substantial international business into <name of the state> and help create and sustain employment in the State's AVGC-XR industry.

For international PDV activity (excluding games)

International projects undertaken by registered AVGC-XR companies in areas of animated feature films, animated TV series (with minimum of <xx> episodes), direct to DVD, CG ride films, VFX projects, and content creation for VR/AR/MR will be considered. This will be applicable for either content produced by the company and marketed in their brand name, or for content produced for another production house under a defined service contract.

Multinational companies and Indian subsidiaries of global (international) companies will be eligible to claim reimbursement for projects or only portion of projects qualified as 'high value chain work', such as -

- VFX / VR Projects (features as well as commercials): end to end shot work, modelling and surfacing of primary assets of the project, lighting, effects, matte painting and compositing.
- Animated Feature Films: end to end sequence work (layout to final renders) amounting to more than <xx> minutes of footage, or a department specific work amounting to at least <xx> minutes of footage (e.g. contracts for either animation or lighting or compositing or effects). Standalone projects for just modelling and texturing will be eligible for reimbursement for only the primary assets of the film.
- Animated Episodic Series: minimum <xx> episodes of end to end work (layout to final renders) with each episode cost of more than INR <xx>.
- Direct to DVD / Special Projects / Ride Films: end to end work (layout to final renders), or portions of the film/project, amounting to at least <xx>% of the footage, for projects with a total cost of more than INR <xx> Crores.

Additional conditions for this grant include:

- Minimum project value of INR <xx> to qualify.
- For projects valued above INR <xx> but below INR <xx>, <xx> percent of their qualified expenditure will be reimbursed, up to a maximum of INR <xx> per project.

- For projects valued above INR <xx>, an additional <xx> percent of their qualified expenditure will be reimbursed, which means <xx> percent reimbursement up to a maximum of INR <xx> per project.
- An additional <xx> percent uplift may be given to <xx> select projects during the policy period, amounting to a total of <xx> percent reimbursement. The selected projects will have resulted in additional economic benefits to the State, over and above those accrued due to the qualified expenditure. Only projects valued above INR <xx> Crores will be considered for this purpose.
- The total reimbursement will be up to a maximum of INR <xx> Crores for one company in a year, with a limit of <xx> sanctions per company per year.

For game art development projects

This grant is only applicable for international projects in the area of game art and development. The various conditions for this grant include:

- Minimum project value of INR <xx> to qualify.
- For projects valued above INR <xx> but below INR <xx>, <xx> percent of their qualified expenditure will be reimbursed, up to a maximum of INR <xx> per project.
- For projects valued above INR <xx>, an additional <xx> percent of their qualified expenditure will be reimbursed, which means <xx> percent reimbursement up to a maximum of INR <xx> per project.
- An additional <xx> percent uplift may be given to <xx> select projects during the policy period, amounting to a total of <xx> percent reimbursement. The selected projects will have resulted in additional economic benefits to the State, over and above those accrued due to the qualified expenditure. Only projects valued above INR <xx> will be considered for this purpose.
- The total reimbursement will be up to a maximum of INR <xx> for one company in a year, with a limit of <xx> sanctions per company per year.

7.5.2 Distribution of original content:

Government of <name of the state> shall take up with Government of India at appropriate level, to implement the reservation of at least <xx>% - <xx>% of airtime on channels (both foreign and domestic) to promote locally created content to provide a level playing field for domestic content development and foster competition between domestic players, foreign companies that set up base in State as well as start-ups. This will also ensure that quality content goes on air.

7.6 Diversity and Sustainability

To promote diversity and inclusion in the AVGC-XR industry, the following incentives have been detailed out:

SC/ST Entrepreneurs

AVGC-XR Company having a stake of more than <xx>% shareholding of SC/ST entrepreneurs in the company/unit.

Women Entrepreneurs

AVGC-XR Company having a stake of more than <xx>% shareholding of women entrepreneurs in the company/unit.

Fiscal Incentives for SC/ST and Women Entrepreneurs

- Capital Investment subsidy
- Reimbursement of production cost for Animation Theatrical Released film
- Reimbursement of production cost for animation series
- Reimbursement of GAME production cost
- Subsidy on lease rentals
- Reimbursement of duties
- Reimbursement of levies
- Industrial Power category
- Recruitment assistance
- Quality certification expenditure
- Exhibition rentals
- Internet bandwidth charges

Promoting use of Renewable Energy

In accordance with existing provisions, the States will develop an incentive structure for promoting use of renewable energy in the sector to reduce the sector's Green House Gas emissions.



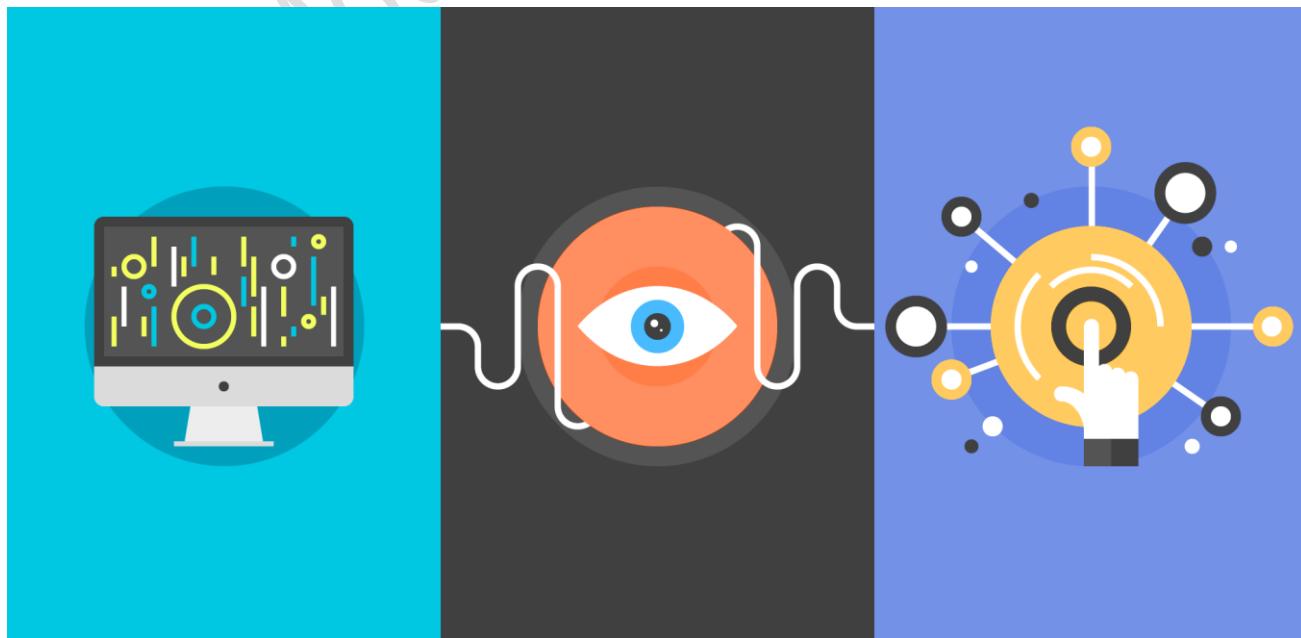


7.7 R&D and Innovation

7.7.1 Patent Registration Incentive: Registered AVGC-XR companies in the <name of the state> will be eligible for reimbursement of the actual costs, up to a maximum of INR <xx> for filing a domestic patent; and up to a maximum of INR <xx> for filing an international patent, provided such patent is filed or granted within the policy period.

Eligible expenses for a patent filing include filing fees paid to the patent office, attorney fees, search fees, and maintenance fees.

A single company will be eligible for a maximum of <xx> reimbursements (inclusive of domestic or international patents) during the policy period. These patent filing incentives provided by the Govt. of the <name of the state> will be in addition to any existing scheme of the Government of India.



7.8 Financial Assistance and Incentives

Eligibility for availing financial support

Only AVGC-XR registered in the State can apply for the subsidies/incentives/grants available under this policy.

Location: The company or entity should be registered in the State under its Shops and Commercial Establishment Act or any other similar Act, or any Act which may be newly enacted for the AVGC sector

Employment: Company employs at least <xx> percent of its total workforce in the State, not including contractual employees.

Eligibility Criteria for availing Production Grants

- The applicant is incorporated in India, or is a partnership firm registered in India and is registered as an AVGC-XR company in the State
- The applicant must be the entity responsible for all activities involved in making the production in the State. Only one entity per production can be eligible for the grant
- At least <xx> percent of the qualified expenditure on the project should be incurred in the State by using locally employed talent
- Applications for co-productions are allowed but one of the applicant must be a producer from the State.
- The claim amount should be in proportion to the budget and/or the contract value of the production

Qualified Expenditure

- Costs and expenses incurred by the production house or content creator during the pre-production / production / post-production activities would be considered as Qualified Expenditure, subject to the following definitions –
 - cost of personnel working on the project/production
 - costs incurred for hire of studio and office space and utilities
 - hire of equipment / subscription fees for software used for the defined activity

The qualified expenditure should have been incurred within the State within the policy period.

Additionally, those production houses who are applying for international grants should ensure that the AVGC-XR company or its local subsidiary should be contracted by the international production house or content creator to execute the project. The international production house or content creator will receive the benefit of the incentive from the State's AVGC-XR company or its local subsidiary as the case may be.

An applicant seeking the grant will not be eligible for other film finance or tax incentives from the Govt. of the State in relation to the same screen production.

For international PDV activity (excluding games)

International projects undertaken by registered AVGC-XR companies in areas of animated feature films, animated TV series (with minimum of <xx> episodes), direct to DVD, CG ride films, VFX projects, and content creation for VR/AR/MR will be considered. This will be applicable for either content produced by the company and marketed in their brand name, or for content produced for another production house under a defined service contract.

Multinational companies and Indian subsidiaries of global (international) companies will be eligible to claim reimbursement for projects or only portion of projects qualified as 'high value chain work', such as -

- VFX / VR Projects (features as well as commercials)
- Animated Feature Films
- Animated Episodic Series
- Direct to DVD / Special Projects / Ride Films

Additional conditions for this grant include:

- Minimum project value of INR <xx> to qualify.
- For projects valued above INR <xx> but below INR <xx>, <xx> percent of their qualified expenditure will be reimbursed, up to a maximum of INR <xx> per project.
- The total reimbursement will be up to a maximum of INR <xx> for one company in a year, with a limit of <xx> sanctions per company per year.

For game art development projects

This grant is only applicable for international projects in the area of game art and development. The various conditions for this grant include:

- Minimum project value of INR <xx> to qualify.
- For projects valued above INR <xx> but below INR <xx>, <xx> percent of their qualified expenditure will be reimbursed, up to a maximum of INR <xx> per project.
- The total reimbursement will be up to a maximum of INR <xx> for one company in a year, with a limit of <xx> sanctions per company per year.

7.8.1 Reimbursement of duties: <xx>% reimbursement of stamp duty, transfer duty and registration fee paid by Animation, Visual effects, Gaming & Comics companies on sale / lease deeds on the first transaction. This incentive is available for Mega Projects also. This incentive is not available in case Government land is allotted.

7.8.2 Reimbursement of levies: <xx>% reimbursement of stamp duty, transfer duty and registration fee paid by Animation, Visual effects, Gaming & Comics companies on sale / lease deeds on the second transaction. This incentive is available for Mega Projects also. This incentive is not available in case Government land is allotted.

7.8.3 Power category: Admissibility of Industrial Power category tariff for Animation, Visual effects, Gaming & Comics Companies. This incentive is eligible for Mega Projects.

Additionally, AVGC company will be permitted to avail renewable energy under open access system after paying a nominal fixed cost component to DISCOMs as fixed by ERC, subject to a maximum of one third of their total power requirements.



A photograph showing a person's hands holding a white video game controller, specifically a Microsoft Xbox One model. They are playing a racing game, as evidenced by the blurred screen of a television or monitor in the background which shows a car on a track. The person is wearing a dark t-shirt and a silver metal bracelet on their left wrist.

8.

Convergence with existing Schemes and Policies

8. Convergence with existing Schemes and Policies

In India, the Media and Entertainment industry is transforming into a key driver of economic growth, both domestically and internationally, while simultaneously employing a significant portion of the population. In order to carve out the next growth story from India, an integration of educational, cultural, social, institutional, and economic infrastructure is essential, while focusing on policy initiatives.

Achieving successful implementation of this policy requires long-term vision and convergence among Central and State Government departments such as Ministry of Education (MoE), Ministry of Electronics and Information Technology (MeitY), Ministry of Skill Development and Entrepreneurship (MSDE), Ministry of Commerce and Industry (MoC), etc. Many of the Government schemes converge to establish a robust & holistic environment for the AVGC-XR sector to achieve its expected growth potential.

Schemes	Ministry/ Dept.	Convergence
Fund of Funds with a Corpus of INR 10,000 crore	Startup India, DPIIT	Funding Support through Fund of Funds for Start-ups (FFS) of INR 10,000 crore shall be released over two Finance Commission cycles, that is, by the year 2025
Tax Exemption on Capital Gains	Startup India, DPIIT	Exemption shall be given to persons who have capital gains during the year, if they have invested such capital gains in the Fund of Funds recognized by the Government. This will augment the funds available to various VCs/AIFs for investment in Start-ups
Pradhan Mantri MUDRA Yojana (PMMY)	Department of Financial Services (DFS)	Loans up to Rs 10 lakh can be availed under the MUDRA scheme. MUDRA loans are disbursed in three categories as below: <ul style="list-style-type: none"> • Shishu - covering loans upto 50,000/-, interest subvention of 2% for period of 12 months • Kishor - covering loans above 50,000/- and upto 5 lakh • Tarun - covering loans above 5 lakh and upto 10 lakh

Tax Exemption to Start-ups for 3 years	Startup India, DPIIT	This fiscal exemption shall facilitate growth of business and meet the working capital requirements during the initial years of operations. The exemption shall be available subject to non-distribution of dividend by the Start-up
Start-up India Seed Fund Scheme	DPIIT	Start-up India Seed Fund Scheme (SISFS) has been introduced with an outlay of INR 945 Crore to provide financial assistance to start-ups for Proof of Concept, prototype development, product trials, market entry, and commercialization
Support for International Patent Protection in Electronics and & Information Technology (SIP-EIT)	Ministry Of Electronics & Information Technology	SIP-EIT is a scheme to provide financial support to MSMEs and Technology Start-up units for international patent filing to encourage innovation and recognize the value and capabilities of global IP along with capturing growth opportunities in ICTE sector
Procurement and Marketing Support Scheme (P&MS) Procurement and Marketing Support Scheme (P&MS)	Ministry of Micro, Small and Medium Enterprises	The scheme encourages Micro and Small Enterprises to develop domestic markets and find new ways of promotion of new market access initiatives. It will also cover activities required to facilitate market linkages for effective implementation of Public Procurement Policy for MSEs Order of 2012.
National Skill Certification & Monetary Reward (STAR scheme)	Ministry of Skill Development and Entrepreneurship	The scheme is for encouraging skill development among the youth by providing monetary rewards for successful completion of approved training programmes
Pradhan Mantri Kaushal Vikas Yojana	Ministry of Skill Development and Entrepreneurship	The objective of this Skill Certification Scheme is to enable a large number of Indian youths to take up industry-relevant skill training that will help them in securing a better livelihood. Individuals with prior

learning experience or skills will also be assessed and certified under Recognition of Prior Learning (RPL)

Atal Innovation Mission (AIM)	NITI Aayog, GoI	<p>AIM has taken a holistic approach to ensure creation of a problem-solving innovative mindset in schools and creating an ecosystem of entrepreneurship in universities, research institutions, private and MSME sector</p> <ul style="list-style-type: none"> • Establishment of sector specific Incubators including in PPP mode • 500 Tinkering Labs • Pre-incubation training to potential entrepreneurs in various technology areas • Strengthening of incubation facilities • Mentoring of Start-ups • Seed funding to potentially successful and high growth Start-ups
Micro Exporters Policy	Department of Commerce	<p>The Small Exporter's Policy is basically the Standard Policy, incorporating certain improvements in terms of cover, in order to encourage small exporters.</p> <ul style="list-style-type: none"> • 12-month insurance policy • Premium payable will be determined on the basis of projected exports on an annual basis subject to a minimum premium of INR 5000 for the policy period. No claim bonus in the premium rate is granted every year at the rate of 5%. • For shipments covered under the Small Exporter's Policy ECGC will pay claims to the extent of 95% where the loss is due to commercial risks and 100% if the loss is caused by any of the political risks

Market Access Initiative (MAI)	Department of Commerce	The scheme is formulated on focus product-focus country approach to evolve specific market and specific product through market studies/survey. Assistance would be provided to Export Promotion Organizations/Trade Promotion Organizations/National Level Institutions/Research Institutions/Universities/Laboratories, Exporters etc., for enhancement of exports through accessing new markets or through increasing the share in the existing markets
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- ¹ <https://www.outlookindia.com/business/indian-media-entertainment-industry-likely-to-touch-rs-4-30-lakh-crore-by-2026-pwc-report-news-204166>
- ² FICII M&E Report 2022.
- ³ <https://www.statista.com/statistics/627855/india-market-size-of-animation-and-vfx-industry/>
- ⁴ FICII M&E Report 2022.
- ⁵ FICII M&E Report 2022.
- ⁶ <https://www.statista.com/statistics/795277/india-market-size-of-animation-and-vfx-industry/>
- ⁷ <https://www.animationexpress.com/animation/indias-avgc-sector-can-seize-up-to-25-per-cent-of-global-market-share-by-2025/>
- ⁸ <https://indiaexpo2020.com/news/india-eyeing-usd-100-bn-from-media-entertainment-sector-by-2030>
- ⁹ As per NITI Aayog estimates
- ¹⁰ <https://in42.com/buzz/gst-council-defers-decision-on-raising-tax-rate-for-online-gaming-to-28/#:~:text=According%20to%20a%20FICCI%20and,over%2070%25%20of%20segment%20revenues.>
- ¹¹ <https://economictimes.indiatimes.com/news/international/business/big-bang-growth-of-indias-gaming-industry/articleshow/92053190.cms>
- ¹² <https://bwgamingworld.com/india-among-top-5-global-markets-for-mobile-gaming-pm-modi/>
- ¹³ <https://www.businesstoday.in/opinion/columns/story/the-avgc-sector-how-a-holistic-vision-here-can-make-india-a-global-content-leader-336784-2022-06-08>
- ¹⁴ As per FICCI estimates
- ¹⁵ As per FICCI estimates
- ¹⁶ As per FICCI estimates
- ¹⁷ As per FICCI estimates
- ¹⁸ As per FICCI estimates
- ¹⁹ As per FICCI estimates
- ²⁰ As per FICCI estimates
- ²¹ <https://www.businesstoday.in/opinion/columns/story/the-avgc-sector-how-a-holistic-vision-here-can-make-india-a-global-content-leader-336784-2022-06-08>

Draft Model State Policy for AVGC