



ANNUAL REPORT

2023 – 2024

gamingsociety.in



IDGS is the

Voice of Indian Gaming Industry

#Gaming4Good

» PRESIDENT'S STATEMENT



Rajan Navani

President - IDGS, Founder & CEO
JetSynthesys

As we reflect on the past year, I am proud to share the significant strides and accomplishments we've made together as part of the Indian Digital Gaming Society (IDGS). The year 2023-2024 has been a remarkable period of growth, collaboration, and innovation for our community.

In 2023-24, our commitment to advancing the Video Games and Esports industry was evident through several key initiatives. We proudly supported the India Gaming Show, organizing our 6th International Gaming Conference in Pune, where we introduced the IDGS Technical Awards. At GSTAR in South Korea, our delegation showcased India's gaming talent, resulting in a pivotal MoU to establish a business corridor between our nations. Contributing to the Haryana AVGC-XR Policy, 2024, we convened a roundtable with DPIIT and industry stakeholders, fostering a robust ecosystem for sector expansion. Engaging with various government bodies, we facilitated crucial dialogues on policy matters. Promoting regional growth, we hosted the IDGS Gaming Conclave in Delhi and Bangalore and partnered with Karnataka at GAFX 2024 to develop relationship and contribute towards the Gaming Centre of Excellence. With a focus on enhancing membership and forming specialized working groups, we provided vital inputs to enhance competitiveness and shape future policies for the sector.

For the way forward, we are launching the GameForge Program to align skills within the gaming industry, combining esports activities and Industry expert lectures, to unlock the potential and highlight new 100 skills required in the video games and esports industry.

These accomplishments are a testament to the dedication and passion of our members. I extend my heartfelt gratitude for your continued support and contribution to our collective success.

As we move forward, I am confident that together we will continue to drive the growth & excellence of the Indian video and esports industry. Let us build on this momentum and look ahead to another year of innovation & achievement.

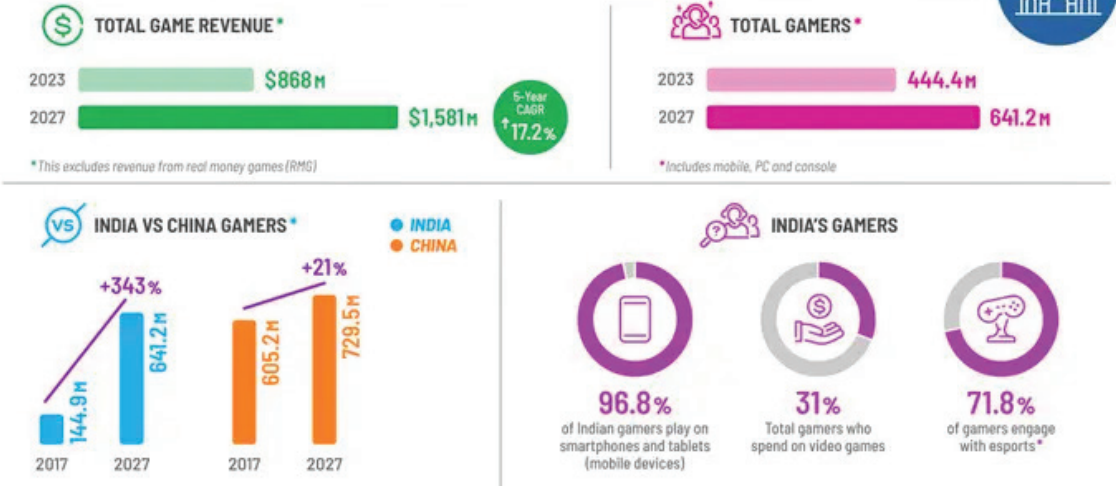
Warm Regards,

Rajan Navani

President, Indian Digital Gaming Society (IDGS)

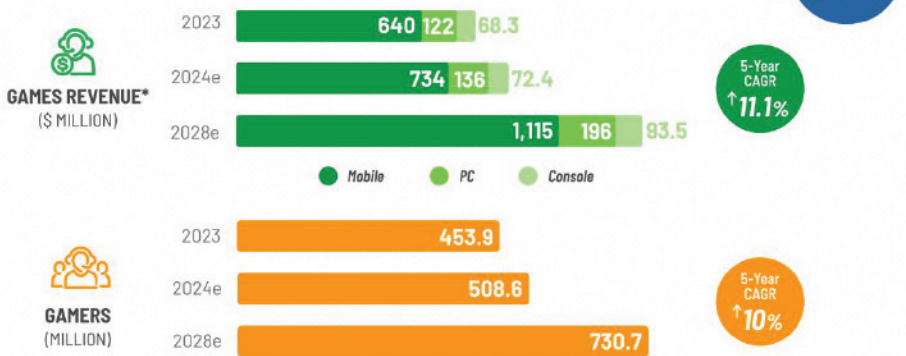
INDIAN GAMING MARKET 2024

INDIA'S VIDEO GAMES MARKET



India's video games market is experiencing significant growth, with total game revenue expected to rise from \$868 million in 2023 to \$1,581 million by 2027, reflecting a 5-year CAGR of 17.2%. This impressive growth excludes revenue from Real Money Gaming (RMG). The number of gamers in India is also set to increase substantially, from 444.4 million in 2023 to 641.2 million in 2027, encompassing mobile, PC, and console gamers. In 2017, India had 144.9 million gamers, which is projected to grow by 343% to 641.2 million in 2027. Comparatively, China's growth is slower at 21% over the same period. Notably, 96.8% of Indian gamers play on smartphones and tablets, 31% of gamers spend on video games, and 71.8% engage with esports, highlighting India's vibrant and rapidly expanding gaming landscape.

INDIA GAMES MARKET

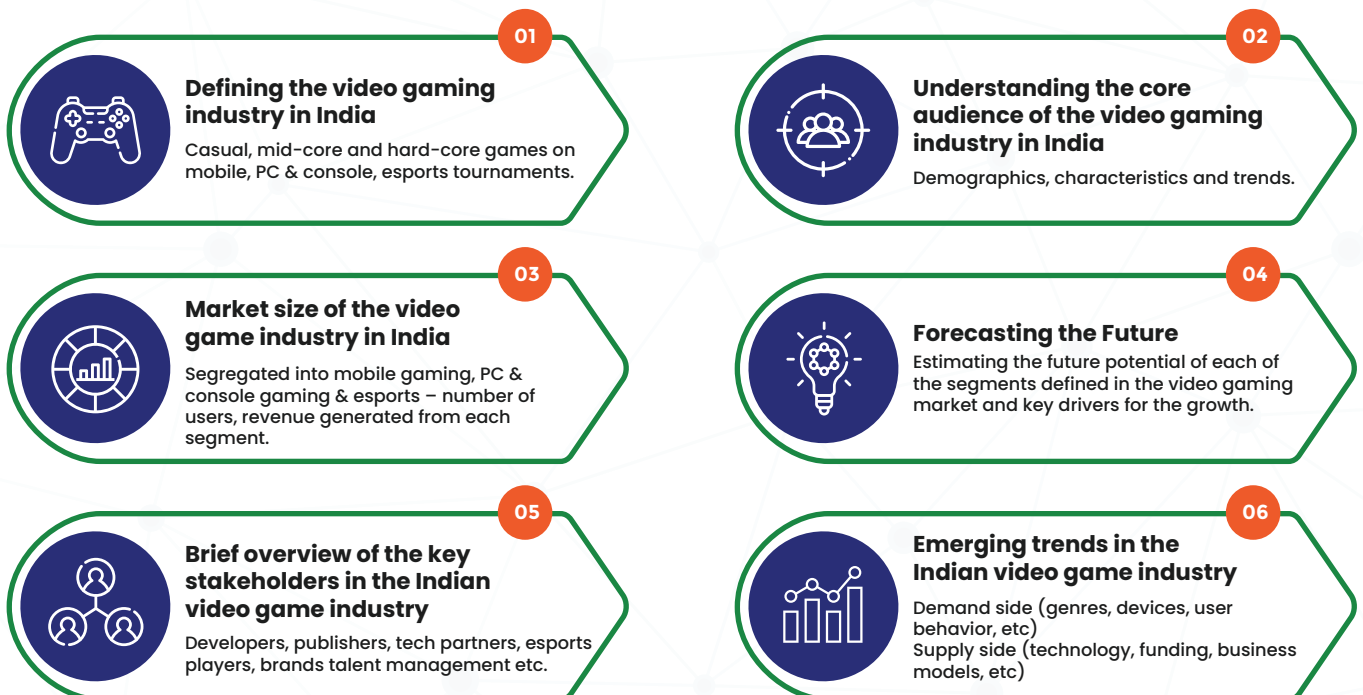


In India's games market, revenue is projected to grow from \$830.3 million in 2023 to \$1,404.5 million in 2028, a 5-year CAGR of 11.1%. Gamers will increase from 453.9 million to 730.7 million, a CAGR of 10%. This excludes revenue from exports and Real Money Gaming (RMG).

» UNVEILING THE DYNAMICS OF THE VIDEO GAMING INDUSTRY IN INDIA

First of its kind report for the Indian market which focuses specifically on the video gaming industry, giving a clear definition of what are the various elements and deep diving into each. The study will outline the demographics, characteristics, and trends of the core audience and break down the market size into mobile gaming, PC & console gaming, and esports, including user numbers and revenue. Further, future growth potential and key drivers for each segment will be estimated. The report will also give a brief overview of key stakeholders like developers, publishers, tech partners, esports players, and brands and conclude with insights into emerging trends affecting both demand and supply sides.

WHAT THIS REPORT WILL COVER?



» HIGHLIGHTS OF WORK IN 2023-2024

BY INDIAN DIGITAL GAMING SOCIETY (IDGS)

Building Relationships

IDGS actively engaged with key Indian ministries such as the Ministry of Information and Broadcasting, Ministry of Electronics and Information Technology, Ministry of Sports, Invest India, Start Up India, Meity Start Up Hub, and the Ministry of Skill and Entrepreneurship. These interactions were crucial for shaping policy recommendations for the gaming industry, ensuring a supportive framework for growth and innovation.

International Linkages

In FY 2023-24, IDGS significantly enhanced its global presence. We led an Indian delegation to GSTAR in South Korea, strengthening international connections. We signed MoUs with Korea, Japan, Indonesia, Australia, and Dubai, including 3 MoUs with the Korea Indie Game Society (KIGS), Korea Games Developer Association (KGDA), and Korea Association of Game Industry (KGAMES), aiming to boost bilateral trade in gaming, esports, animation, cosplay, AR/VR, and VFX ecosystems.

Domestic Linkage and Government Collaboration

We conducted a roundtable meeting with gaming industry members for DPIIT, presenting a comprehensive report supported by CII ASCON. We collaborated with the Karnataka Government for GAFX 2024 in Bangalore, working on a robust framework for the state's gaming sector. Additionally, we contributed to the creation of the Gaming Centre of Excellence and the formation





of a sectoral policy to promote the AVGC-XR industry in Haryana, aiming to make it an attractive investment destination and create employment opportunities.

Working Groups

IDGS constituted eight working groups focusing on various segments of the gaming sector. These groups are responsible for policy recommendations, membership drives, and activities aimed at industry advancement. Specific focus areas include game studios and developers, esports, academia, and gamification, playing a vital role in driving industry standards and fostering innovation.

IDGS Gaming Conclave

We developed the IDGS Gaming Conclave, a multi-city program in Bangalore and Delhi, to build community and strengthen relationships within the gaming sector. This platform allowed industry professionals to connect, share knowledge, and collaborate, fostering a supportive environment for growth.

Events & Conferences

IDGS actively supported and organized key events throughout the year, including the India Gaming Show 2024 and the 6th International Gaming Conference at IGS 2024 in Pune. The latter marked the introduction of the IDGS Technical Awards, showcasing the latest industry developments and providing platforms for knowledge exchange and networking among industry stakeholders.

» INDIAN DIGITAL GAMING SOCIETY SPOTLIGHT FY 2023-2024

IDGS Gaming Conclave

To strengthen the Video Gaming Community and build domestic network, multi-city conclave was organised at Bangalore and Delhi.

The Indian Digital Gaming Society (IDGS) is a pioneering organization dedicated to advancing the digital gaming industry in India. It aims to create a conducive environment for the growth and development of the gaming ecosystem, supporting game developers, enthusiasts, and other stakeholders. IDGS focuses on advocacy, research, policy formulation, and industry collaboration to promote India as a global gaming hub.

Bangalore Edition

Organized by The Indian Digital Gaming Society (IDGS) with support from CII, KDEM, and KITS, this groundbreaking event in Bengaluru attracted over 250 delegates, including industry leaders, game developers, and gaming enthusiasts. The Chief Guest, Mr. Sanjeev Gupta, CEO of KDEM, welcomed the gaming and startup industries to Karnataka. He announced the establishment of Karnataka's first Esports Arena and emphasized the state's focus on IP creation to support industry growth. The conclave facilitated a dynamic exchange of ideas, insights, and experiences among participants.



Delhi Edition

The Indian Digital Gaming Society (IDGS), with the Confederation of Indian Industry (CII) in collaboration with Invest India, organised IDGS Gaming Conclave on 24th August 2023 at Le Meridian, New Delhi.

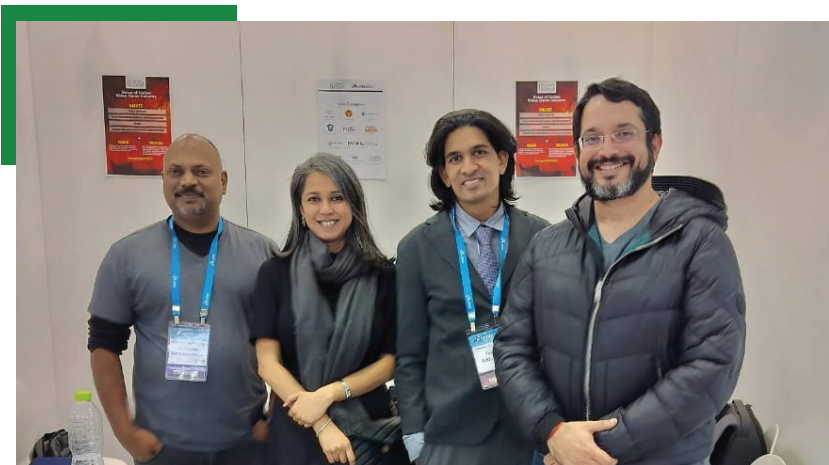
The Delhi edition of IDGS Gaming Conclave was graced by the esteemed presence of Mr. Vikram Sahay, Joint Secretary of the Ministry of Information and Broadcasting, who served as the guest of honour. Various sessions were organised to address various concerns of the Industry. The event saw industry leaders and government officials converge to discuss strategies for nurturing the sector and positioning India as a major player in the international gaming arena. Mr Vikram Sahay, Joint Secretary of the Ministry of Information and Broadcasting, emphasized the need for a dedicated fund to bolster the Animation, Visual Effects, Gaming, and Comics (AVGC) sector. He outlined India's potential, armed with a vast talent pool and innovative capabilities, to lead the global gaming industry.



IDGS @ G-Star 2023

India's gaming industry is on a trajectory of rapid growth, fuelled by a young demography, technological advancements, and a burgeoning mobile-based gaming market. As we look ahead, India's presence at G-STAR 2023 signifies a strategic move towards establishing itself as a global gaming powerhouse. With 'Make in India for the World' as the guiding principle and the right policies in place, India is poised to make a resounding impact on the global gaming stage.

IDGS led a delegation of nine members representing the Indian gaming industry at G-STAR 2023, a global gaming event held in Busan, South Korea, from November 16-19, 2023. The Indian delegation engaged in vibrant exchanges of ideas, collaborations, and partnerships during the event.



Domestic Linkage Meeting with State Governments

IDGS - President, Mr. Rajan Navani, met Mr. Priyank M Kharge, the Minister for Information Technology and Biotechnology (IT & BT) for Karnataka and delved into the exciting possibilities of forging a partnership between the IDGS and the Government of Karnataka. The discussion revolved around the importance of boosting skill development initiatives and nurturing gaming startups, recognizing their pivotal role in propelling India’s gaming industry beyond the \$4 billion milestone by 2025.



IDGS members made contributions to the current formulation of the Haryana AVGC-XR Policy, 2024. The specialized sectoral policy seeks to advance the AVGC-XR sector with the goal of building a strong ecosystem that would support the sector’s expansion & prosperity, attracting investments and generating jobs in the state of Haryana.

A framework to boost the gaming segment in Karnataka was discussed, and IDGS submitted a proposal to support this initiative.



With the proper governance in place, India has a unique chance to lead in the production of high-quality games and esports, not only meeting global demands but also promoting local products on a worldwide scale. It can serve as a platform for stakeholders, ranging from investors to governing authorities, to ensure responsible practices and the participation of small content providers, thereby pushing digital integration more efficiently.

R Dinesh,
President, Confederation of Indian Industry



Masterclass by IDGS on various aspects (Technical & Operational) of Video Games and Esports



» PUBLICATIONS OF IDGS

The Indian Digital Gaming Society (IDGS) initiated Newsletters last year to begin with a vision to foster and promote the gaming ecosystem in India. Since our inception, we've been dedicated to create a vibrant and well-informed community of gamers, developers, and enthusiasts providing comprehensive updates and insights through our regular newsletters.

These publications cover industry news, event highlights, policy developments, and much more, ensuring our community stays informed and engaged with the latest trends & advancements in the gaming world. Our newsletters also feature interviews with industry experts, success stories from emerging game developers, exclusive previews of upcoming gaming events and conferences.



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any updates!**

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EMBARK ON YOUR EPIC GAMING JOURNEY!



Working Groups

To take the initiative further, the society has constituted 08 working groups. The working groups are responsible for policy recommendations, membership drives and various activities for the improvement and enhancement of the industry.



Working Groups in action

<p>Academia WG</p>  <p>CHAIR: MR. BASAVARAJ PUJAR Founder Someshwara Software</p>	<p>Esports WG</p>  <p>CHAIR: MR GAUTAM VIRK Chief Operating Officer NODWIN Gaming</p>	<p>Game Studio WG</p>  <p>CHAIR: MR HARISH CHENGAIAH Founder, Game Director, Writer & Producer Outlier Games</p>	<p>Membership WG</p>  <p>CHAIR: MR ANUJ MANKAR Founder Nautilus Mobile</p>
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Other Working Groups that are in-progress

- Publisher WG
- Gaming Service WG
- Investor WG
- Hardware & New Technologies WG

Roundtable Meeting & Policy Concerns

The Indian Digital Gaming Society held a virtual round table meeting on September 18, 2023, chaired by Mr. Rajan Navani, with notable attendees from various key organizations in the gaming and esports industry.

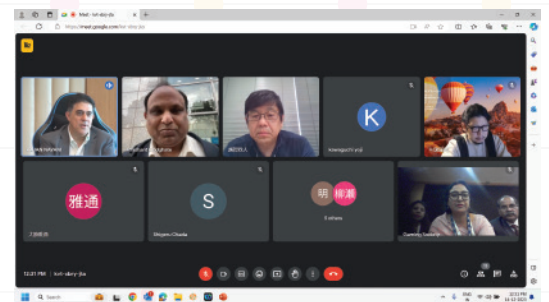
The discussion focused on the industry's considerable development potential in India, which is now valued at \$812 million and predicted to reach \$1.8 billion by 2026, with a player base expected to rise from 396 million to 630 million. Participants stressed the importance of investing in PC and console games, cutting import levies on development equipment, and enhancing talent development. The discussion also focused on the significance of regulatory support, such as incorporating game creation courses into educational institutions and offering specific incentives for gaming infrastructure.

The recommendations included developing an ecosystem for skill development, improving collaboration between gaming firms and educational institutions, and addressing legal and regulatory issues. It was shared with Shri Rajesh Kumar Singh, Secretary, Department for Promotion of Industry and Internal Trade, Ministry of Commerce and Industry.

Seminars

The Indian Digital Gaming Society (IDGS) organized an online seminar in collaboration with international partner organizations to showcase India as a lucrative opportunity for investment and collaboration in the gaming, video games, and e-sports sectors. The event received overwhelming response from this seminar. IDGS has collaborated with the following gaming associations and is expecting to sign MoU with them:

- Japan Esports Union JeSU
- Japan Online Game Association (JOGA),
- Computer Entertainment Supplier's Association (CESA)



Japan Online
Game Association



COMPUTER ENTERTAINMENT
SUPPLIER'S ASSOCIATION

International Linkage MoU Signing

We established an important connection and signed two memorandums of understanding with the Korea Association of Game Industry and the Korea Game Developer Association. These MoUs aim to create a business corridor between India and South Korea, fostering deeper collaboration and mutual growth in the gaming sector.



MoU Signing Between Korea Game Developer Association & IDGS



Joint Meeting of Association



Joint Association Meetings

IDGS engaged in joint association meetings with representatives from South Korea, Taiwan, Brazil, and Dubai. Key connections were made with various entities, including KGAMES, Smilegate Holdings, Taipei Computer Association, Taiwan Game Cooperation Development Association, Government of Dubai, Busan IT Industry Promotion Agency, Korea Creative Content Agency, Brasil Game Show, and Korea Game Developers Association. They were also invited to upcoming international events such as the Taipei Game Show 2024, the Dubai Game Show in May 2024, and the Brasil Game Show which will be held in October 2024. Mr Akshat Rathee, Treasurer of IDGS, extended invitations to these international game shows to participate in the India Gaming Show 2024, further strengthening international ties and promoting the Indian gaming industry on a global platform.

India Gaming Show

The India Gaming Show (IGS) has evolved as a platform for promoting responsible gaming with the campaign **#Gaming4Good** and fostering collaboration within India's growing gaming ecosystem. Marking a watershed moment in gaming, the 6th edition of IGS, held in Pune from March 14-16, was jointly organized by the CII and IDGS supported by the Ministry of Electronics and Information Technology, Invest India, Startup India, MeitY Startup Hub and Media Entertainment Skill Council, Government of India.

IGS 2024 witnessed an unprecedented surge in engagement, particularly from India's youth. Pune, with its vibrant demographic, emerges as a hub for gaming enthusiasts & industry players alike. The event underscores Pune's emergence as a nexus for gaming innovation and talent, with its burgeoning IT and creative sectors providing fertile ground for gaming's expansion.

As India's gaming community continues to burgeon, it presents a plethora of career opportunities across various domains, from game development to content creation. The industry's inclusive nature welcomes talent from diverse backgrounds, promising avenues for economic empowerment and technological innovation.

Indian Digital Gaming Society significantly contributed to the event by organizing engaging Cosplays, insightful conferences, Masterclasses and prestigious IDGS awards for the 1st time. This involvement highlights their commitment to fostering a vibrant gaming community and promoting excellence within the industry.



Ribbon Cutting Ceremony

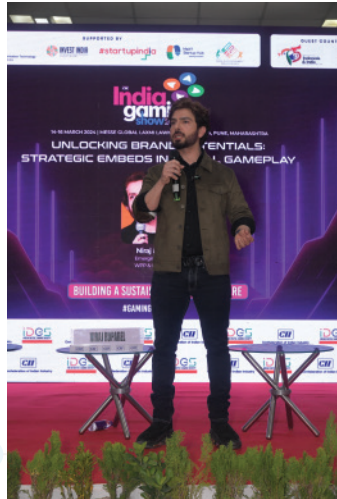
Mr Rajan Navani, President, IDGS, and Founder & CEO, JetSynthesys

Mr Eddy Wardoyo, Hon'ble Consul General of Indonesia in Mumbai

Mr Vishal Dhupar, Executive Council Member, IDGS and Managing Director, NVIDIA South Asia

ANNUAL CALENDAR FY 2024-25

Activity	Date	Venue
IDGS & GoK Meeting	15 April 2024	Virtual
IDGS & GoK – CoE Meeting	06 May 2024	Bangalore
IDGS & MIDC Meeting	14 May 2024	Virtual
Executive Council Meeting	10 June 2024	Virtual
Game Studio WG Meeting	25 June 2024	Virtual
Esports WG Meeting	21 June 2024	Virtual
Academia WG Meeting	5 July 2024	Virtual
IDGS AGM and IDGS Gaming Conclave	12 Aug 2024	New Delhi
Japan Roadshow	August 2024	Tokyo
GameForge Program at Vishwakarma University	August 2024	Pune
GameForge Program at Jio Institute University	August 2024	Navi Mumbai
GameForge Program at NTTF	August 2024	Bangalore
GameForge Program at VIT	Sept 2024	Nagpur
Executive Council Meeting	Sept 2024	Virtual
IDGS Gaming Conclave	Sept 2024	Bangalore
Hardware WG	Sept 2024	Virtual
GameForge Program at MIT	Sept 2024	Pune
Tokyo Game Show (Bharat Pavilion)	Sept 2024	Tokyo
GameForge Program at Symbiosis	Oct 2024	Pune
IDGS Gaming Conclave	Oct 2024	Mumbai
GSTAR (Bharat Pavilion)	Nov 2024	Busan, S Korea
Global Ent-Tech Show	Nov 2024	New Delhi
Global Ent-Tech Show - Conference	Nov 2024	New Delhi
Executive Council Meeting	Dec 2024	Virtual
India Gaming Show	Feb 2025	New Delhi
IGS Conference	Feb 2025	New Delhi
Executive Council Meeting	Mar 2025	Virtual



CONFERENCE



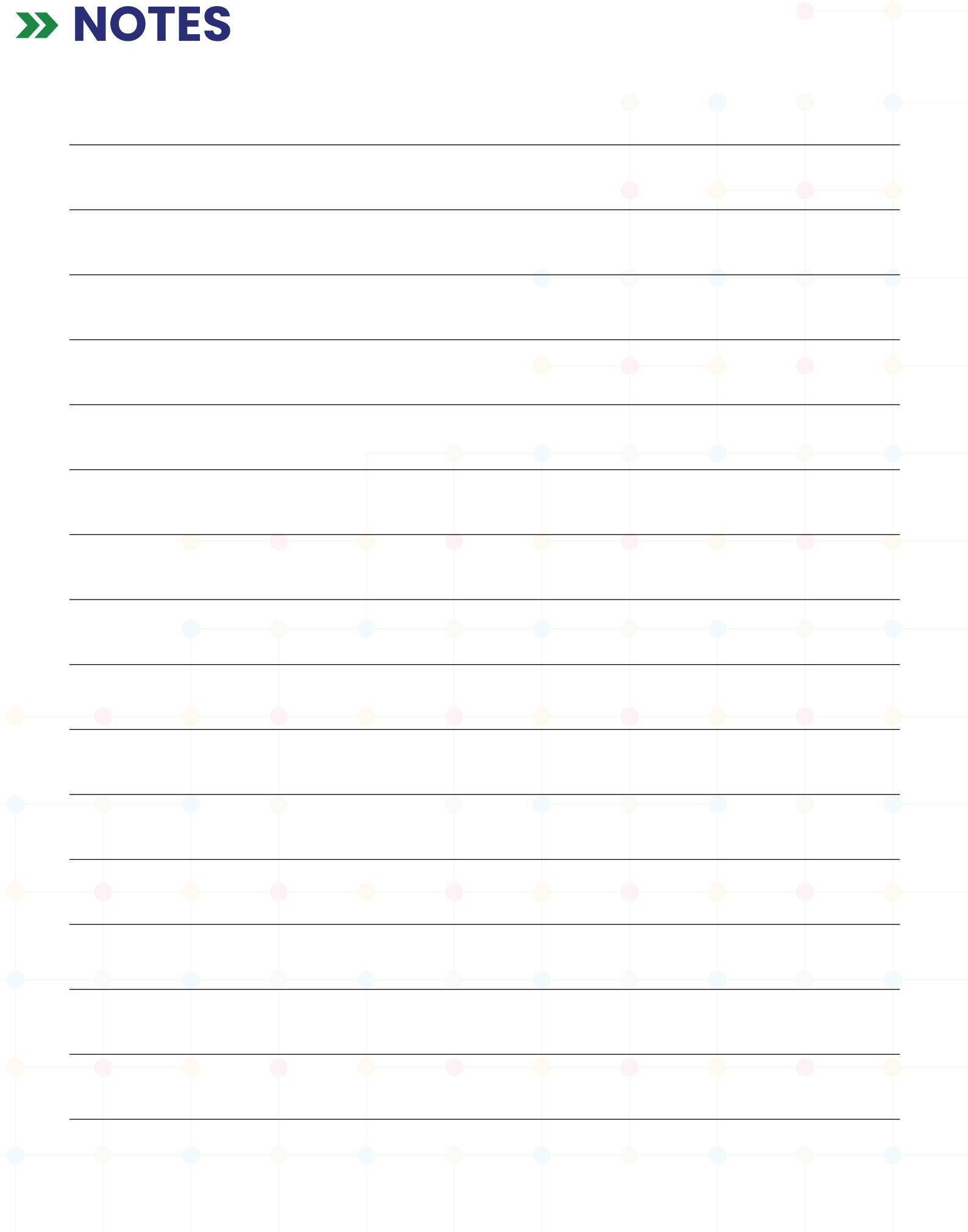
AWARDS



COSPLAY



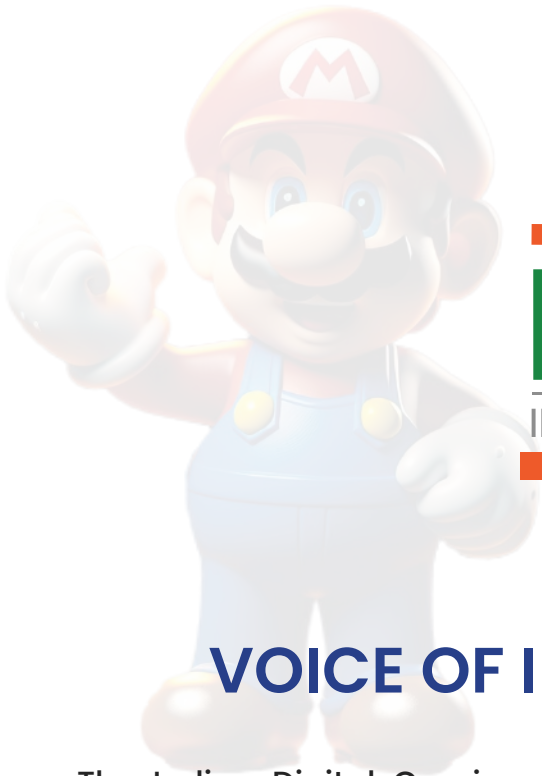
» NOTES





IDGS MEMBERS





VOICE OF INDIAN GAMING INDUSTRY

The Indian Digital Gaming Society (IDGS) is a non-profit umbrella organisation of various stakeholders in the Indian Digital Gaming Ecosystem. Formed under the aegis of the Confederation of Indian Industry (CII) in 2018, IDGS has emerged as a proactive advocate, promoter, and facilitator for the development of a healthy gaming ecosystem and the promotion of responsible gaming in India. The Society collaborates with industry and academic experts to optimise industry development capabilities and facilitate industry growth through Policy and Progress Advocacy, Market Research, Emerging Technology and New Opportunities, Export Promotion, Indigenization and Innovation, and Education and Skill Development.

Since its founding, the IDGS has focused primarily on organising India Gaming Shows, Gaming Conferences, taking part in Gaming Sessions, and publishing newsletters and reports. To take its ideas further, the Society has created eight working groups, which will be responsible for policy recommendations, conduct the membership drive and numerous other activities for strengthening and enhancing the Gaming sector.

For more details, please contact :

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