



Confederation of Indian Industry



Ministry of Electronics and Information Technology
Government of India



INVEST INDIA
NATIONAL INVESTMENT PROMOTION
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INDIAN DIGITAL GAMING SOCIETY

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**India gaming
show 2024**

International Gaming, Animation,
Esports & Infotainment Event
14-16 March 2024
at Pune, Maharashtra

www.gamingshow.in



INDIA GAMING SHOW 2024 IN PUNE

14-16 March 2024 | Pune, Maharashtra

#GAMING FOR GOOD

VOICE OF VIDEO GAMES AND eSPORTS INDUSTRY

RETROSPECT



HIGHLIGHTS
IGS
PUNE 2024

INNOVATION MEETS COLLABORATION

The India Gaming Show (IGS) 2024, held from March 14-16 in Pune, marked a pivotal moment for India's burgeoning gaming industry.



Record Participation

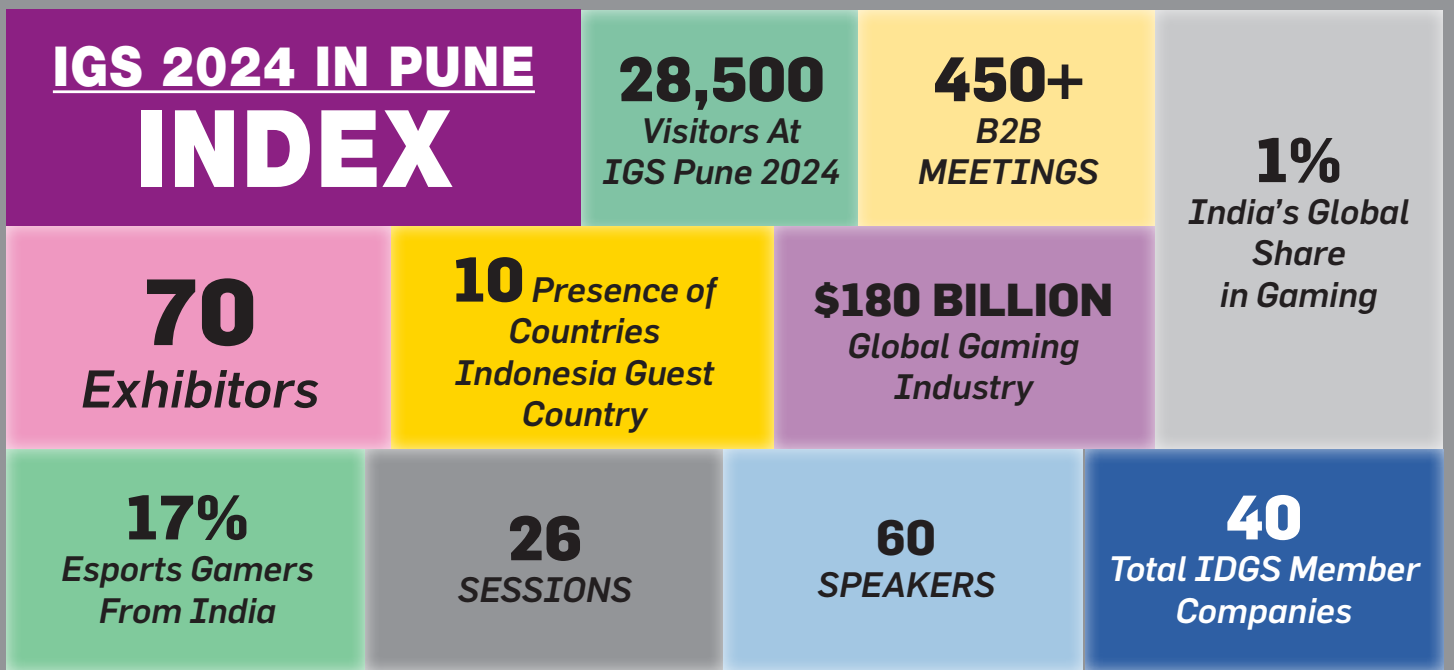
Jointly organized by the Confederation of Indian Industry (CII) and the Indian Digital Gaming Society (IDGS), and supported by the Ministry of Electronics and Information Technology, Invest India, Startup India, and the Media Entertainment Skill Council, IGS 2024 brought together industry leaders, aspiring developers, and gaming enthusiasts to celebrate and explore the future of gaming in India. IGS 2024 saw an unprecedented turnout, with over 28,500 attendees and 70 exhibitors from 10 countries, including Indonesia as the Guest Country. This participation underscores the global interest and growing significance of India's gaming industry.

Diverse Exhibitions

The three-day event featured a wide array of exhibitions showcasing the latest in gaming technology and trends. Renowned brands such as Krafton India, JetSynthesys, Samsung, Nodwin, Bushiroad, Philips, TPV Technology, Western Digital, OnePlus, Sony PlayStation, MSI, Omen, and Sky Esports captivated attendees with innovative products and solutions.

International Conference

A major highlight was the International Conference, which included 26 sessions and 60 speakers covering topics such as skilling, Extended Reality



(XR), Artificial Intelligence (AI), game development, and investments. These sessions provided valuable insights and sparked discussions on the future of the gaming industry.

eSports Tournaments

Pune's vibrant youth culture and thriving IT economy made it an ideal setting for eSports tournaments, drawing gamers from diverse backgrounds. These tournaments showcased the transformative potential of eSports in driving economic growth and talent development.

IDGS Technical Awards

The introduction of the IDGS Technical Awards added another layer of recognition, celebrating innovation and excellence across the gaming industry. This initiative highlighted the achievements of industry leaders and set a benchmark for future developments.

Master Classes and Networking

Industry experts conducted special master classes, offering invaluable insights into career opportunities and advancements in the gaming sector. Numerous B2B meetings and networking events facilitated collaboration among industry stakeholders, startups, and academia.

Focus on Responsible Gaming and Diversity

IGS 2024 emphasized the importance of responsible gaming practices and the role of

diversity in the industry. The Indian Digital Gaming Society (IDGS) has been at the forefront of advocating for increased female participation, reflecting the reality that 41% of gamers in India are now female.

Global Opportunities and Economic Impact

Industry leaders highlighted India's potential to generate up to 100,000 jobs annually in eSports and game development. Pune's position as a global hub for gaming innovation was reinforced, with a focus on fostering indigenous content creation and technological integration.

Strategic Collaborations and Policy Advocacy

CII and IDGS played crucial roles in uniting stakeholders and advocating for policy initiatives that promote responsible gaming and innovation. This collaborative effort aims to create a sustainable and thriving gaming ecosystem in India.

Academia and Startups Participation

The significant involvement of academia and startups underscored the importance of collaboration and innovation in advancing the gaming industry. Their contributions enriched the event's dynamism and highlighted the role of education and entrepreneurship in driving industry growth. IGS 2024 Pune successfully showcased India's potential in the global gaming sector, celebrating current achievements and laying the groundwork for a promising future.





Glimpses from
INDIA
GAMING SHOW
Pune 2024



LEADERS SPEAK



R Dinesh

The Then President, Confederation of Indian Industry and Chairman, TVS Supply Chain Solutions Ltd

The Indian gaming industry opens up tremendous prospects for content generation and value addition, both of which require the presence of the right governance mechanism in place. India has a unique potential to take the lead in developing the correct games and eSports for the sector, allowing not just global products in India, but also Indian products to be globalized.



Chandrajit Banerjee

Director General, Confederation of Indian Industry

The India Gaming Show stands out in many respects and is organized by the Indian Digital Gaming Society (IDGS), supported by CII. We are incubating a large number of institutions for the future. IDGS, which has been in existence for some time, embodies a vision for future tech-related institutions. It seeks to instill responsibility by crafting policy frameworks that advocate for a responsible gaming industry.



Rajan Navani

President - Indian Digital Gaming Society & Founder-CEO JetSynthesys Pvt Ltd

IGS 2024 has exceeded all our expectations...Pune, being a youthful city, draws in a significant student population, and it's fascinating to note that it's a hub for IT talent and creative minds. This surge in talent has fueled a drive to foster more content creators and businesses leveraging content, contributing to the growth of the creative industry at large. Despite India's small share in the \$180 billion global gaming market, comprising only 1%, our nation boasts a staggering 70% of gamers in a 3 billion-strong global gaming community. This highlights immense growth potential...There's a wealth of Indian content waiting to be showcased worldwide.

LEADERS SPEAK



Vishal Dhupar

Member Executive Council of IDGS and Managing Director of NVIDIA India

We live in an era where we no longer have to view gaming solely through the lens of the game. You can go beyond games and create universes based on your own ideas that are as vivid and tangible as the entire cosmos. Build your own world using two forces: your imagination and the technology known as artificial intelligence. Because of generative AI, you have an advantage in that you can have a co-pilot for the creative and a guide for game. More crucially, you can create a bridge to realms that have yet to be imagined.



Eddy Wardoyo

Consul General of the Republic of Indonesia in Mumbai

This is Indonesia's first participation, and I believe that our participation in the India Gaming Show 2024 would promote collaboration between the Indonesian and Indian gaming industries. It is a huge opportunity for us to bring to you insights from the heart of Southeast Asia's gaming hub, where creativity meets innovation, and where the digital dreams of tomorrow are being crafted today.



Nivruti Rai

Managing Director, Invest India

I envision India taking center stage in the gaming industry. It's astounding to note that India leads the charge in gaming consumption. This presents a significant opportunity for us to drive hardware and software innovations and collaborate on policy frameworks to further bolster this burgeoning industry. India's youthful vigor is poised to take the lead in shaping the digital gaming landscape and adding value to this imaginary world.

IGS EXHIBITION

A GLIMPSE INTO GAMING'S FUTURE



The three-day event, themed “Building a Sustainable Gaming Future,” showcased the latest advancements in gaming technology and trends, with renowned brands like JetSynthesys, Krafton India, Samsung, Nodwin, Bushiroad, Philips, Western Digital, OnePlus, and Sony PlayStation taking center stage.



With a staggering 28,500 visitors, 70 exhibitors, participation of 4,500 gaming enthusiasts and industry professionals besides representation from 10 countries, the IGS Pune 2024 exhibition showcased the latest in gaming universe from cutting-edge technology showcases to immersive gaming experiences. The exhibition provided a comprehensive overview of the gaming landscape's breadth and depth. The exhibition served as a melting pot of creativity, collaboration, and commerce.



This year's India Gaming Show 2024 saw a substantial increase in business-to-business (B2B) meetings, reflecting the event's critical role in fostering industry collaboration. Companies from across the globe engaged in productive discussions, exploring new partnerships and co-production ventures.





With participants from 10 countries, including Indonesia, Japan, and Korea, the event transcended borders, creating a vibrant ecosystem for knowledge exchange and collaboration. The presence of international delegates enriched the show with diverse perspectives and expertise.





Gaming Console Providers offer latest tech in their arsenal



The India Gaming Show 2024 in Pune saw gaming console makers drawing significant attention with their latest offerings. Exhibitors showcased state-of-the-art consoles, emphasizing superior graphics, enhanced performance, and innovative features designed to elevate the gaming experience. These consoles, tailored to meet the demands of the modern gamer, highlighted advancements in technology and user experience. The event underscored India's emerging role in the global gaming console market, attracting gamers and industry professionals alike.



AR/VR grabs attention at IGS 2024

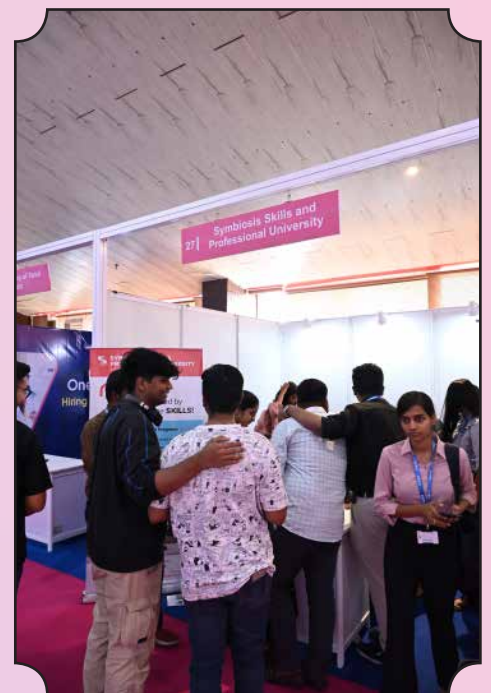


At the India Gaming Show 2024 in Pune, AR/VR gaming companies captivated audiences with cutting-edge technology. Homegrown innovators displayed immersive experiences, allowing gamers to explore new realities. These companies highlighted the transformative potential of AR/VR in gaming, offering attendees a glimpse into the future of interactive entertainment. The hands-on demonstrations showcased how AR/VR is revolutionizing gameplay, making it more engaging and lifelike, and underscored India's growing prowess in the global gaming industry.





Gaming Education Focus @ IGS PUNE 2024



IGS IN PUNE: A CATALYST FOR INDUSTRY ADVANCEMENT

Rajan Navani

President-IDGS,
and Founder
& CEO of
JetSynthesys



Rajan Navani, President-IDGS, and Founder & CEO of JetSynthesys, issues a call to action, urging all stakeholders involved to work together and incorporate India's gaming industry into the global economy. He draws attention to India's gaming ecosystem's inventiveness and potential for global competition

THOUGHT LEADER

Today marks a historic moment for Pune as we gather for an event of unprecedented magnitude, said Rajan Navani, President-IDGS, and Founder & CEO of JetSynthesys while welcoming gaming enthusiasts at the 6th edition of the India Gaming Show. He reflected on the trajectory leading to this momentous occasion. With a focus on industry transformation and youth empowerment, Navani set the tone for the day's proceedings.

He commended the collaborative efforts of industry players and participants, recognizing their role in propelling the gaming sector forward. "Let's take a moment to applaud the collective efforts of the industry and each one of you for bringing us to this pivotal juncture," Navani said.

The journey of gaming in India had humble beginnings, but Navani was among few who recognised its potential back in 2016-2017. "We engaged with stakeholders in government and industry to unearth the possibilities of an industry that has evolved over six decades. From the rudimentary games of the '70s and '80s to the era of smartphones, where

gaming is accessible to nearly every individual, the landscape has transformed dramatically. With an average of 1.2 phones per person, the potential for gaming to flourish was inevitable," he said.

He underscored the industry's potential as a driver of employment opportunities for India's youth. "India is a nation teeming with vibrant youth, hungry for opportunities. Gaming isn't merely about entertainment; it's about forging an industry that promises livelihoods for many," he added.

Navani emphasized the instrumental role played by industry initiatives such as the Indian Gaming Show and the Indian Gaming Digital Society. These platforms have served as catalysts for industry growth, fostering a thriving ecosystem with over 500 million gamers in India.

In a call to action, Navani urged stakeholders to collaborate and integrate India's gaming sector into the global landscape. Citing examples like Jet Synthesis, he highlighted the innovative prowess within India's gaming

ecosystem and its potential to compete on the world stage.

"India's integration into the global gaming ecosystem is imperative, with countries like the US, China, Japan, and Korea leading the charge. With a burgeoning talent pool and a burgeoning audience, India stands poised to not only excel in gaming but also to contribute significantly to the global gaming landscape," said Navani.

Navani extended a compelling invitation to attendees, urging them to seize the abundant opportunities presented by India's burgeoning gaming industry. Emphasizing the alignment of passion with profession, he underscored the transformative potential of the sector for both individuals and the nation as a whole.

"For many of us, this is just the beginning—a chance to not only play games but also to shape the future of gaming. So, I invite each of you to embrace this opportunity, align your passions with your profession, and join us in propelling the Indian gaming industry forward," he said.

Vishal Dhupar

Managing Director of NVIDIA India

UNVEILING FUTURE HORIZONS OF GAMING



Vishal Dhupar, Managing Director of NVIDIA India highlights how advances in real-time ray tracing and generative AI pushed the boundaries of what was previously thought to be impossible in gaming

Showing the path to an exhilarating future in which gaming defies limits, pushed by the synthesis of human creativity and advanced technology, Vishal Dhupar, Member Executive Council of IDGS and Managing Director of NVIDIA India, captivated the audience at the India Gaming Show 2024.

“We live in an era where we no longer have to view gaming solely through the lens of the game. You can go beyond games and create universes based on your own ideas that are as vivid and tangible as the entire cosmos. Build your own world using two forces: your imagination and the technology known as artificial intelligence. Because of generative AI, you have an advantage in that you can have a co-pilot for the creative and a guide for game. More crucially, you can create a bridge to realms that have yet to be imagined,” said Dhupar.

Beginning with a nostalgic reflection on the inception of gaming technology, reminiscing about the landmark year of 2006 when the GTX 800 series revolutionized gaming realism,

the Managing Director of NVIDIA navigated through the annals of technological innovation, highlighting milestones which propelled gaming into the realm of artificial intelligence and realism.

“In 2018, a groundbreaking technology was introduced in computer graphics known as real-time ray tracing. Ray tracing represents a significant advancement in the field, allowing for the simulation of complex lighting physics and enhancing realism in virtual environments. This innovation was complemented by the introduction of tensor cores, which are essential components in AI frameworks. By leveraging both technologies simultaneously, developers achieved remarkable results, such as the lifelike reflections seen in iconic films like Star Wars,” he added.

Prior to the advent of ray tracing and tensor cores, achieving similar visual effects required the use of multiple data center graphics units.

Moreover, Dhupar championed the paradigm shift brought

forth by hybrid AI, harnessing the synergies between cloud computing and personal devices to unlock new dimensions of gaming experiences. He emphasized the democratization of AI-driven tools, empowering gamers and developers alike to create and explore immersive worlds with unparalleled ease.

Dhupar emphasised the gaming industry’s tremendous growth and potential in India, with a focus on future technologies such as virtual reality (VR) and augmented reality (AR). NVIDIA supports innovation and the gaming environment with initiatives like the Deep Learning Institute (DLI) University Ambassador Programme, which provides free training and certification to engineering students.

NVIDIA’s Deep Learning Institute (DLI) University Ambassador Programme provides free training and certification for engineering students. DLI Ambassadors get access to high-quality, hands-on training materials, as well as a fully built, GPU-accelerated workstation in the cloud. These workshops are given remotely through a virtual classroom at no cost to educators.

THOUGHT LEADER



KEY TAKEAWAYS

KNOWLEDGE

SESSIONS

Rajan Navani, President-IDGS, and Founder & CEO of JetSynthesis, issues a call to action, urging all stakeholders involved to work together and incorporate India's gaming industry into the global economy. He draws attention to India's gaming ecosystem's inventiveness and potential for global competition



Recognition and Growth

The government's acknowledgment of the gaming and eSports sector signifies its potential as a significant contributor to India's economy. Despite challenges like the GST impact, the industry is resilient and continues to thrive, with strategies in place to address regulatory hurdles.

Game of Skill vs. Game of Chance

The distinction between games of skill and games of chance is crucial, especially concerning taxation. The current tax structure, where both are taxed at 28%, poses challenges for startups and investors. Advocacy for a more nuanced approach to taxation, akin to international standards, is necessary for industry sustainability.

Self-Regulatory Bodies (SROs)

The debate between establishing SROs versus government regulation underscores the need for effective governance structures. While SROs offer industry expertise and flexibility, government oversight ensures compliance and consumer protection. The delay in formalizing SROs highlights the complexity of aligning central and state regulations.

Technological Advancements and Legal Challenges

As online gaming incorporates AI and generates new forms of content, legal frameworks must adapt to address emerging issues like IP ownership and data protection. Revisiting existing laws, such as the IT Act, becomes imperative to accommodate evolving technologies and safeguard user rights.

Support for Startups

Startups in the gaming industry require robust support mechanisms, including tax benefits, mentorship programs, and regulatory guidance. Collaborative efforts between industry players, government agencies, and educational institutions can nurture talent, foster innovation, and ensure a conducive environment for startup growth.

Policy Recommendations

To foster a thriving gaming ecosystem, policymakers must prioritize industry feedback, streamline regulations, and incentivize innovation. Initiatives like IP facilitators programs and incubation centers can empower startups and position India as a global gaming hub.

Rise of Media Revenue

Panelists emphasized the significance of media rights as a lucrative revenue stream for esports tournament companies. With the ambition to establish esports as a prominent sport in India, securing media partnerships is crucial for expanding audience reach and engagement.

Mainstream Brand Involvement

The discussion highlighted the increasing interest of mainstream brands in esports sponsorship. As esports continues to gain momentum, there is a growing opportunity for brands beyond the gaming industry to invest in esports events and initiatives.

Community Building and Publisher Support

A critical aspect for the sustainable growth of esports lies in community building and publisher support. Panelists discussed the need for game publishers to view esports as a community-building exercise rather than solely a branding opportunity, fostering stronger partnerships with event organizers.

Expansion into 3D Animation

The transformation of beloved 2D characters into vibrant 3D universes offer players a new level of engagement and immersion.

Exploring New Revenue Models

The panel explored potential avenues for revenue generation, including fan payment models. Experimentation with innovative monetization strategies, such as paywalls and subscription-based models, may play a significant role in shaping the future economics of esports in India.

Predictions for the Future

Looking ahead, panelists predicted a surge in mainstream brand involvement, further exploration of media revenue opportunities, and continued experimentation with new revenue models like fan payments. Collaboration among stakeholders and a focus on creating compelling, audience-friendly content are expected to drive the growth of esports in India.

Legacy of Bollywood IPs

There is an enduring popularity of Bollywood intellectual properties among children and now they've become a cornerstone of gaming and animated content.

Successful Collaborations

Strategic partnerships with game development companies like Reliance Games and Excel Entertainment are leading to the creation of immersive gaming experiences based on iconic characters.

Engagement Beyond Entertainment

The characters are used not only for entertainment but also for educational and societal purposes, fostering connections with audiences across various platforms.

Cross-IP Collaborations

Successful crossovers between iconic characters is resulting in expanded universes and enhanced storytelling opportunities.

Opportunities for Collaboration

Collaboration with game development companies and creators can be leveraged to gain the immense popularity and cultural significance for Bollywood IPs in the gaming industry.

Indonesia's Gaming Industry Growth

In 2024, Indonesia is projected to reach a gaming revenue of US\$1,232.00 million, with an expected annual growth rate (CAGR) of 7.32% (2024-2027). By 2027, the market volume is anticipated to be US\$1,523.00 million with a user base of 53.8 million.

Future Prospects in Gaming

Look ahead to the future of gaming as a platform for further engagement and expansion of Bollywood IPs, which highlights the vast potential for growth and innovation in this dynamic industry.

Fostering Gaming growth

The Government of India is establishing specialized AVGC CoEs, introducing incentives, and streamlining regulatory policies. Events like the India Gaming Show provide vital platforms for stakeholders to collaborate and strategize, driving the industry forward. Invest India reaffirms its commitment to supporting industry partners and investors, paving the way for India's gaming industry to become a key economic contributor in the nation's journey towards innovation and digital advancement.

Evolution of Regulations in Online Gaming

As online gaming continues to grow, regulatory frameworks evolve to address emerging challenges such as player safety, gambling concerns, and content moderation. Striking a balance between fostering innovation and protecting consumers, governments worldwide adapt policies to ensure a fair, transparent, and sustainable gaming ecosystem.

Gaming More of Science Than Art

Gaming has shifted from being solely artistic expression to a scientific endeavor, with data-driven insights driving game design, mechanics, and player interactions. The marriage of creativity with analytics enhances player experiences and fosters innovation in game development.

Science for Understanding Gamers

Incorporating insights from neurosciences, psychology, and behavioral economics, game developers gain a deeper understanding of player motivations, preferences, and behaviors. This interdisciplinary approach enhances game design, leading to more immersive and emotionally resonant gaming experiences.

THE RISE ESports

The Future of Gaming in India: Esports emerges as a dominant force in the Indian gaming landscape, attracting a growing audience and investment. With professional leagues, tournaments, and infrastructure on the rise, India establishes itself as a global hub for competitive gaming, offering new avenues for players, teams, and sponsors.

Gamification of Skilling & Education

Opportunities Ahead: The gamification of skilling and education presents vast opportunities to revolutionize learning experiences. By integrating game mechanics into educational platforms, institutions can enhance engagement, retention, and skill development, paving the way for more effective and accessible learning solutions.

Gen AI the New Buzzword

The rise of Generative Artificial Intelligence (Gen AI) is reshaping gaming, generating dynamic, personalized experiences for players. With AI algorithms creating content on the fly, games evolve in real-time, offering unparalleled immersion and engagement.

Spotlight on India

Invest India has spotlighted India's burgeoning gaming industry, citing its 400+ million gamers and 5 million software developers. India's gaming market is rapidly emerging on the global stage, offering significant opportunities for game developers and publishers worldwide. With IPs like Raji and Indus gaining international acclaim, India's game development talent, blending technology, art, and culture, is at the forefront of innovation.



Takeaways from India Gaming Show (IGS) Pune 2024

Global Participation and Industry Resonance

The India Gaming Show (IGS) Pune 2024 attracted a remarkable 28,500 visitors and 70 exhibitors from 10 different countries, emphasizing the event's global resonance.

Economic Growth and Job Creation

The Indian gaming industry holds immense potential for economic growth, with the capacity to generate up to 100,000 jobs annually in esports and game development. This expansion provides numerous employment opportunities across various roles, from game development to esports management.

Role of Women-Led Development

Women's participation in the workforce is crucial for achieving gender equality and sustainable development worldwide and gaming industry offers great opportunity to promote women-led development in this sector.

Pune as a Global Gaming Hub

Pune has emerged as a significant hotspot for gaming innovation, leveraging its vibrant youth culture and fostering indigenous content creation. The city's potential as a global hub is further bolstered by the rise of mobile gaming, which drives sector innovation and growth.

CII and IDGS Collaboration

The Confederation of Indian Industry (CII) and the India Digital Gaming Society (IDGS) played pivotal roles in uniting stakeholders and advocating for policy initiatives that emphasize responsible gaming and innovation. Their collaboration highlights the importance of a strong governance structure to ensure the industry's long-term growth.

Introduction of IDGS Technical Awards

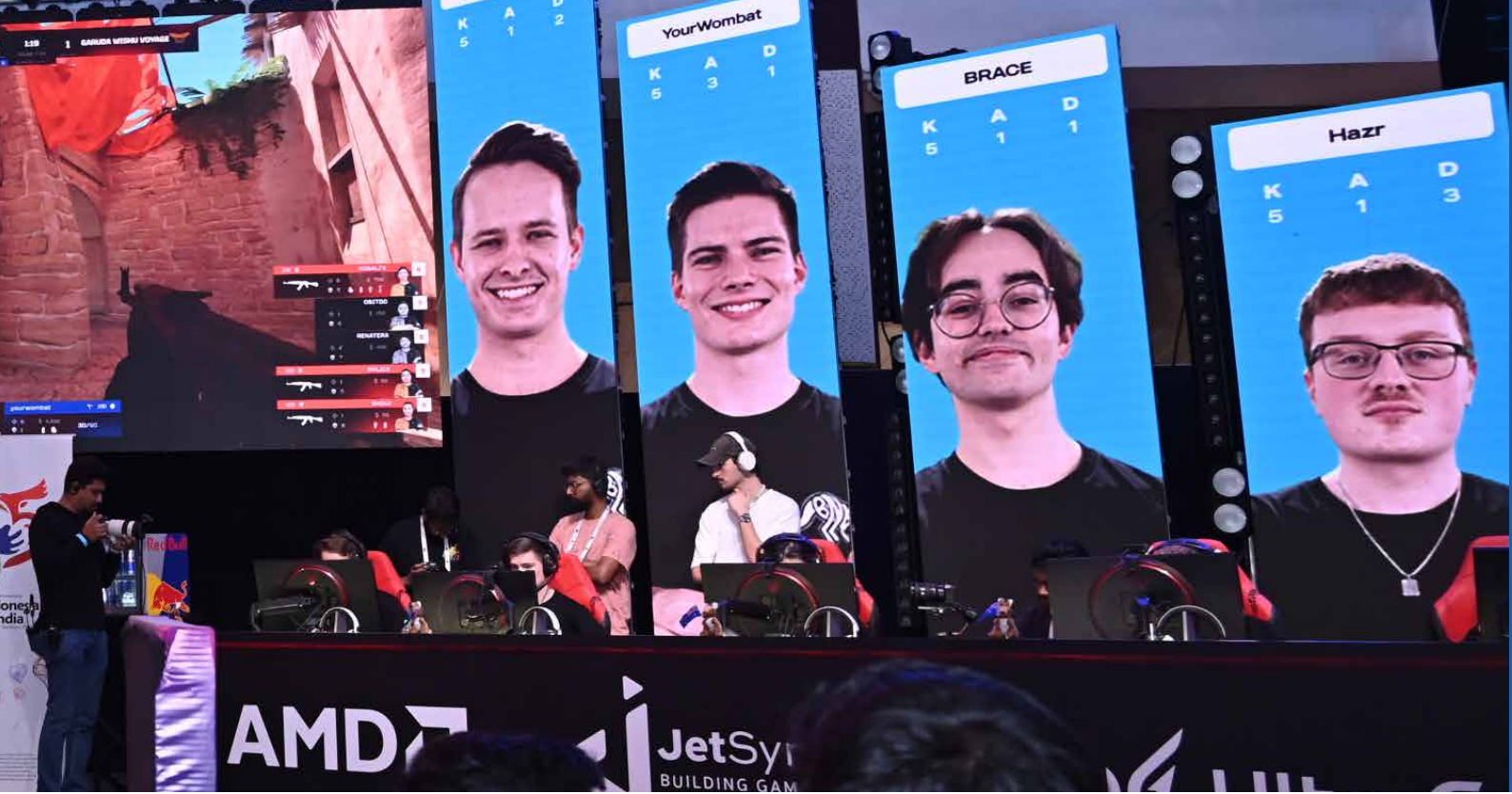
The introduction of the IDGS Technical Awards highlighted the achievements and advancements within the gaming sector, promoting a culture of continuous improvement.

Academic and Startup Participation

Increased participation from academia and startups at the event underscored the critical role of collaboration and innovation in advancing the gaming industry. This involvement is crucial for fostering new ideas and technological advancements.

Industry Heavyweights and Aspiring Developers

IGS 2024 gathered industry heavyweights and aspiring content developers, exceeding all expectations. The event served as an ideal setting for esports tournaments, further cementing Pune's reputation as a thriving hub for gamers and industry professionals.



Platform for Responsible Gaming

IGS has evolved as a platform that promotes responsible gaming and fosters collaboration within India's growing gaming ecosystem.

Commitment to Collaboration

IGS 2024 demonstrated IDGS's commitment to encouraging collaboration among industry stakeholders, policymakers, and technological experts. This collaborative approach is essential for promoting responsible gaming standards and fostering diversity within the industry.

Opportunities for Local Content Creators

India's dominant position in the global gaming sector provides numerous opportunities for local content creators and developers to achieve international recognition. The event highlighted the importance of content production and valuation, paving the way for global success.

Foreign Participation and Cross-Cultural Exchange

Foreign participation at IGS 2024 marked a significant milestone in the event's global reach. Representatives from 10 countries, including Indonesia, Japan, and Korea, showcased their expertise and fostered cross-cultural dialogue, enriching the event's ecosystem.

Generative Artificial Intelligence (Gen AI)

The rise of Generative Artificial Intelligence (Gen AI) is reshaping gaming by generating dynamic, personalized experiences for players. AI algorithms create content in real-time, offering unparalleled immersion and engagement.

Interdisciplinary Approach to Game Design

Incorporating insights from neurosciences, psychology, and behavioral economics, game developers gain a deeper understanding of player motivations and behaviors. This interdisciplinary approach leads to more immersive and emotionally resonant gaming experiences.

Rise of Esports in India

Esports is becoming a dominant force in the Indian gaming landscape, attracting a growing audience and investment. With professional leagues and tournaments on the rise, India is establishing itself as a global hub for competitive gaming.

Gamification of Skilling and Education

The gamification of skilling and education presents vast opportunities to revolutionize learning experiences. By integrating game mechanics into educational platforms, institutions can enhance engagement, retention, and skill development.



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