



Government of Karnataka

ANIMATION, VISUAL EFFECTS, GAMING & COMICS



**INVEST
KARNATAKA
2016**

GLOBAL INVESTORS MEET

February 3-5, 2016
Bangalore Palace, Bengaluru





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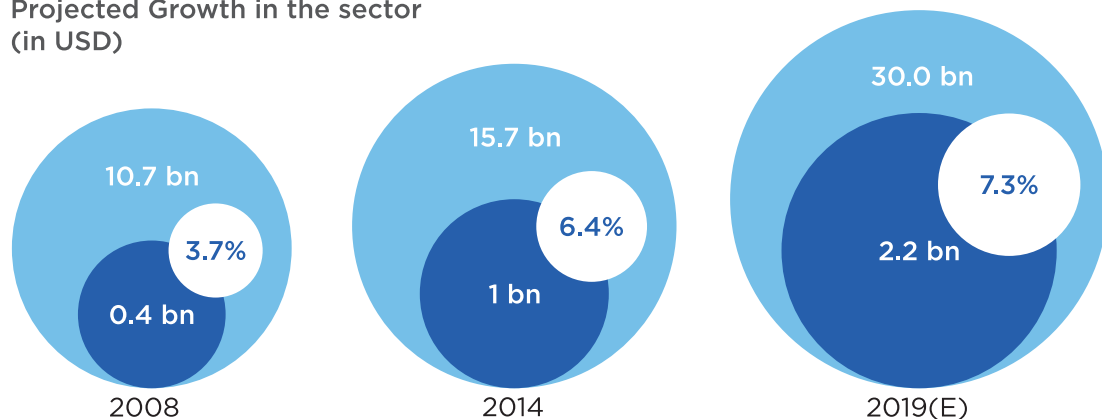
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Investment Opportunities

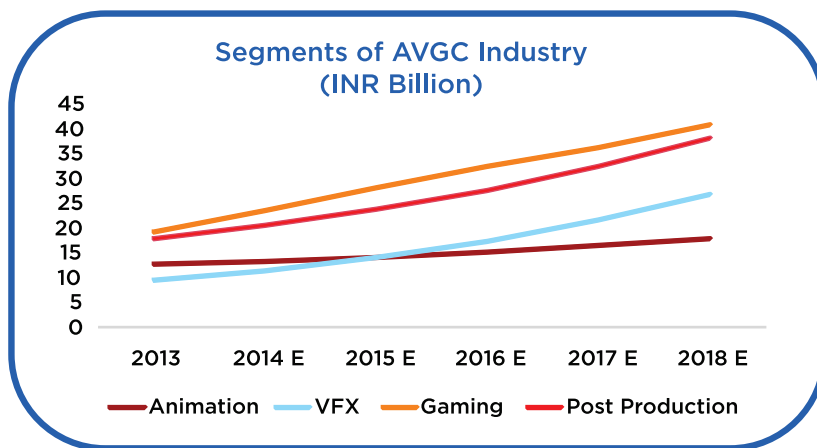
Sector Snapshot

AVGC is a sunrise sector in India, and is expected to grow substantially

Projected Growth in the sector
(in USD)



● Animation, VFX & Gaming
 ● Media & Entertainment Industry
 ○ Percentage Share

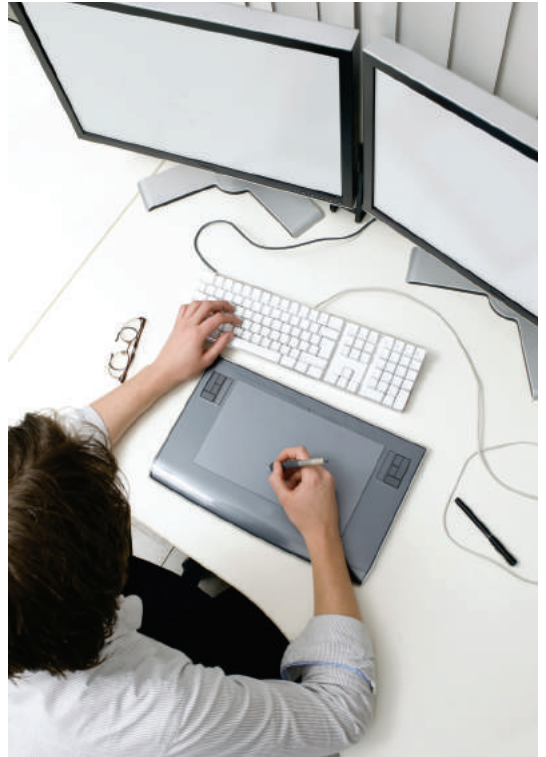
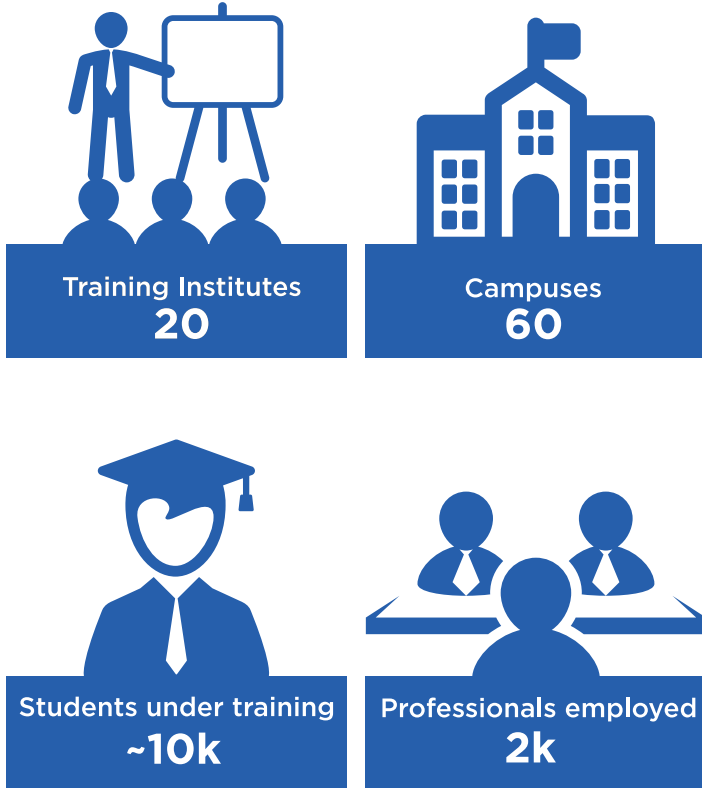


India accounts for more than 6% of global production in animation, VFX and post production processing

Employment to increase almost 4 times in next 5 years from ~10,000 currently

Indian animation, VFX and post production market has grown 20% in 2 years from INR 4,200 crore in (USD 700 mn) in 2013 to INR 5,040 (USD 840 mn) in 2015

Karnataka has the strongest presence of AVGC industry among all Indian States



Presence of Major Suppliers

AMD HP NVIDIA

Presence of Prominent Players

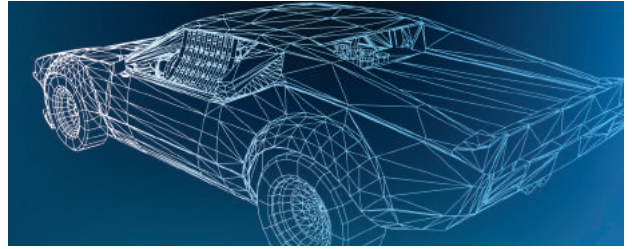
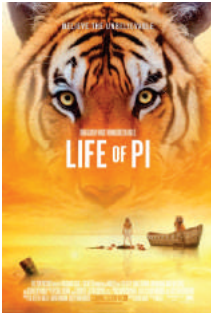
DREAMWORKS STUDIOS technicolor
zynga PRIME FOCUS EA
TATA ELXSI engineering creativity

Karnataka's Unique Advantage

Highly skilled workforce



Bengaluru based companies have contributed to Academy Awards winning movies



GoK initiatives for Skill Development in association with ABAI (The Association of Bengaluru Animation Industries)

Train the Trainer

- Enhance effectiveness & productivity of talent pool in the AVGC industry
- Free 3D animation training to individuals
- Placement assistance extended on completion of TTT programme

Digital Art Center

- Make Karnataka a place for digital learning
- 7 Fine Arts colleges being assisted in Phase I
- Remaining Fine Arts colleges to be covered in subsequent phases

Finishing School

- Aimed at developing skill sets at entry level to make students industry-ready
- Skill enhancement of fresh graduates through industry internship & apprenticeship

Government Initiatives and Policy Support

Karnataka Animation, Visual Effects, Gaming, and Comics Policy 2012

- Make Karnataka the most favored destination for AVGC
- Encourage and support appropriate manpower development, infrastructure development and business development
- Attract top global companies in the field of AVGC to Karnataka
- Set up a “CENTER OF EXCELLENCE” with state-of-the-art facilities to act as a catalyst for the AVGC industry
- Set up multiple AVGC parks on SEZ model

Fiscal Incentives and Concessions

1. AVGC sector in State eligible to avail fiscal incentives and concessions under KAVGC Policy Industrial Policy i⁴ Policy Startup Policy 2015-2020
2. Anchor Unit Subsidy for the first two major enterprises
3. Special package of incentives and concessions for Mega Projects

KAVGC Promotion

- Annual fests sponsored/conducted drawing wide International participation from Industry giving networking and mentoring opportunities
- Outreach programs in schools and colleges for generating awareness



First State to roll out a policy specifically for the AVGC sector

Investment & Partnering Opportunities

KAVGC Parks

- Land earmarked for AVGC industry in the proposed ITIR near Kempegowda International Airport, Bengaluru
- Land earmarked in existing Devanahalli IT Park, near Kempegowda International Airport, Bengaluru

PPP for Support Infrastructure and Common Instrumentation Facilities

- Digital Media City Project
- Digital Post Production AVGC Lab

PPP for promotion of Fine Arts Schools

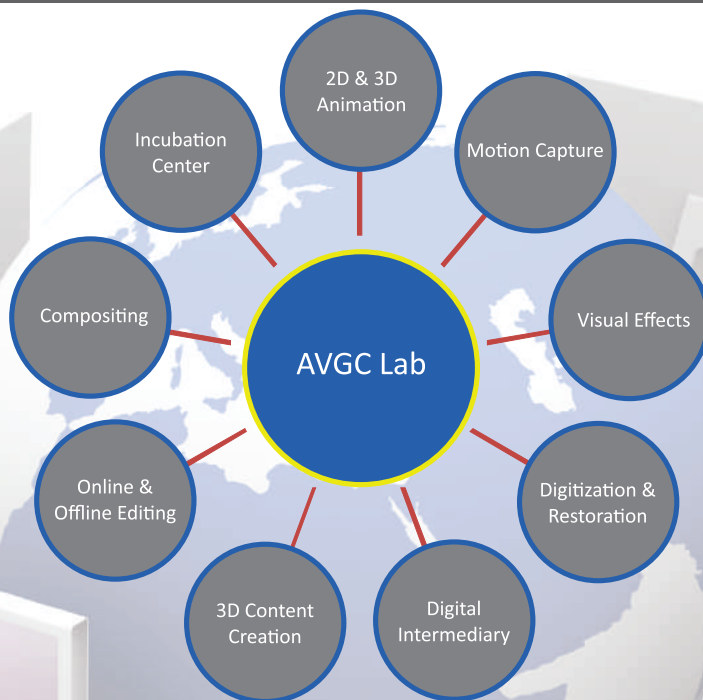
- Fine arts schools to be developed as Digital Arts Centres (DACs) to provide training for a career in digital arts and animation industry

AVGC Finishing Schools

- Finishing Schools to be set up in partnership with industry to churn out best talent in the AVGC segment through apprenticeship
- Technicolor, MPC, DreamWorks have already expressed their interest to partner



State supported AVGC Lab in Bengaluru



Benefits of AVGC Lab

Plug and Play state of the art facilities

End to end solution

Cost Advantage

SMEs save CAPEX

Internship Lab

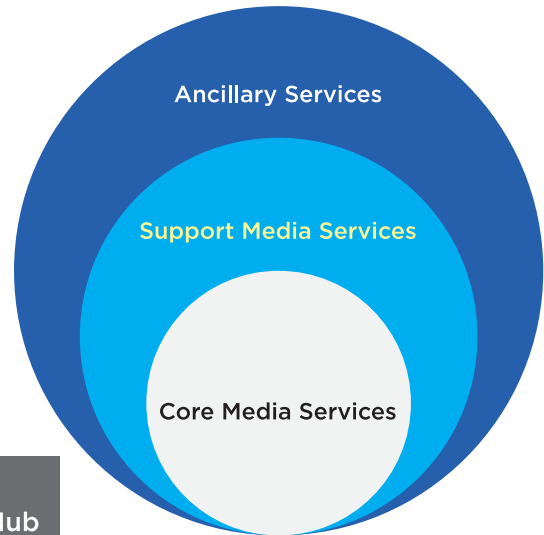
Training facilities

Availability of highly technical expertise locally

- Cost of Project- USD 5 Mn
- Government to partner with Global leaders in the field of Media and IT services on PPP basis

State supported World Class 'Digital Media City' in Bengaluru on PPP

- Government support for Building 5 lakh sq. ft State-of-the-art dedicated facilities
- Provide core media services catering to entire value chain
- Strong ICT back-end to be the differentiator
- Create an ecosystem by attracting support media services & ancillary service providers
- Plug and Play with media centric services under one roof



Core Proposition Services

Digital Media Offices Hub and Services Hub

1

SPV to be formed

2

Dedicated area with hardware for hosting services Eg. Render Farms

3

Channel partners for other services including high-end bandwidth and power

4

Cloud Services (computing, storage, PaaS, IaaS, etc)

5

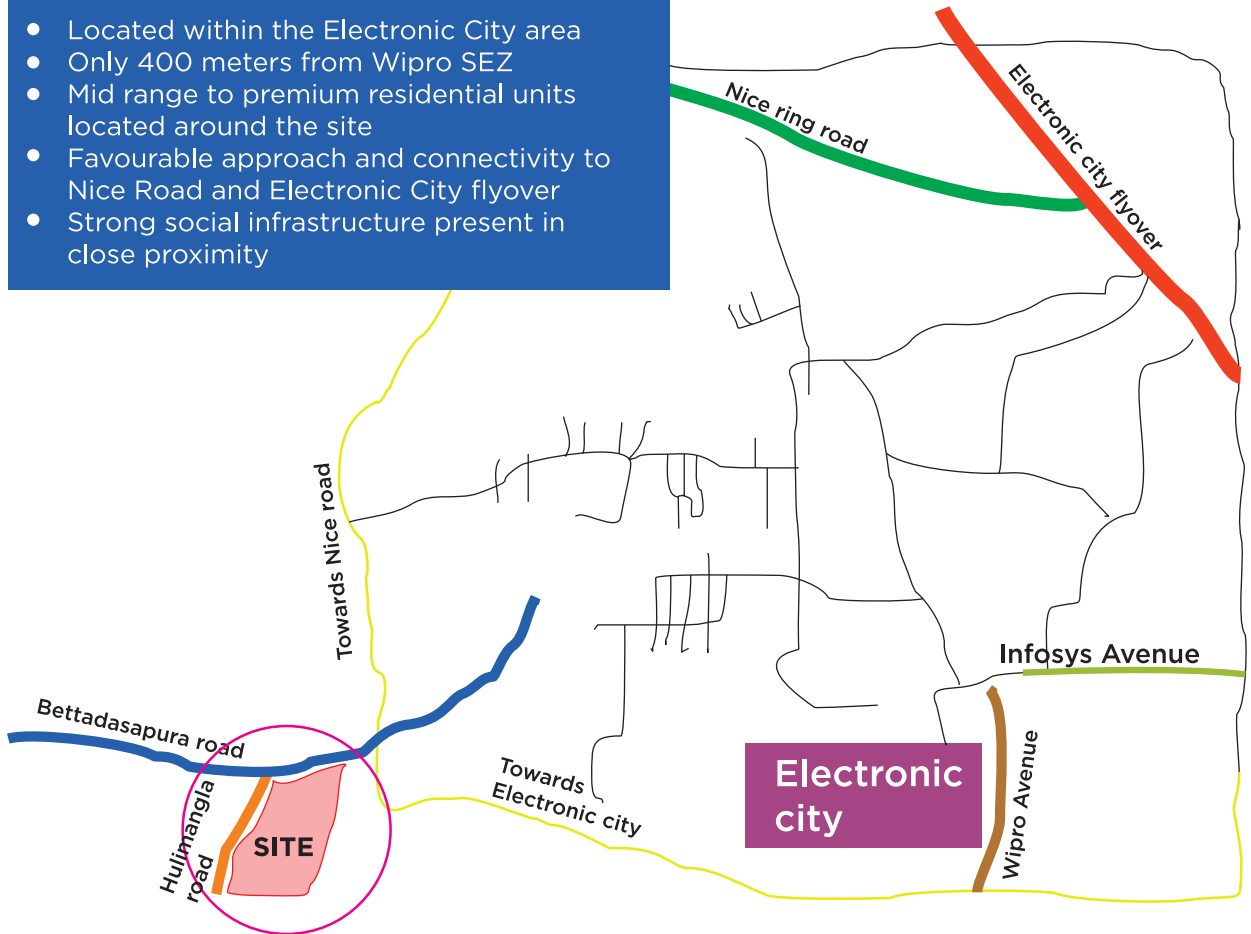
Full Suit Model

6

Digital Startup ecosystem

State supported world Class 'Digital Media City' in Bengaluru on PPP

- Located within the Electronic City area
- Only 400 meters from Wipro SEZ
- Mid range to premium residential units located around the site
- Favourable approach and connectivity to Nice Road and Electronic City flyover
- Strong social infrastructure present in close proximity

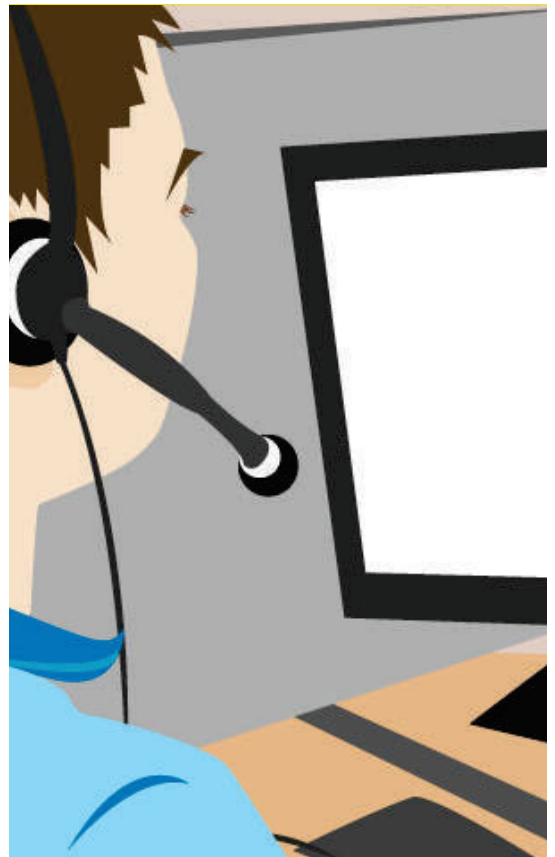


- 10 acres of land identified in Electronics City, Bengaluru
- Estimated cost of project- USD 100 mn

Seeking Global partners in the field of Media and IT Services

Investment Facilitation

- Karnataka Biotechnology and Information Technology Services (KRITS) was established in the year 2000
- KRITS provides secretarial services to the State Level Single Window Clearance Committee and State High Level Clearance Committee, for speedy clearance of the Information Technology and Biotechnology Projects in the State
- KRITS administers incentives and concessions to Information Technology and Biotechnology companies
- KRITS is the single point contact on behalf of the State Government for providing all the basic information to investors to facilitate the establishment of Information Technology and Biotechnology Industries in the State





Government of Karnataka

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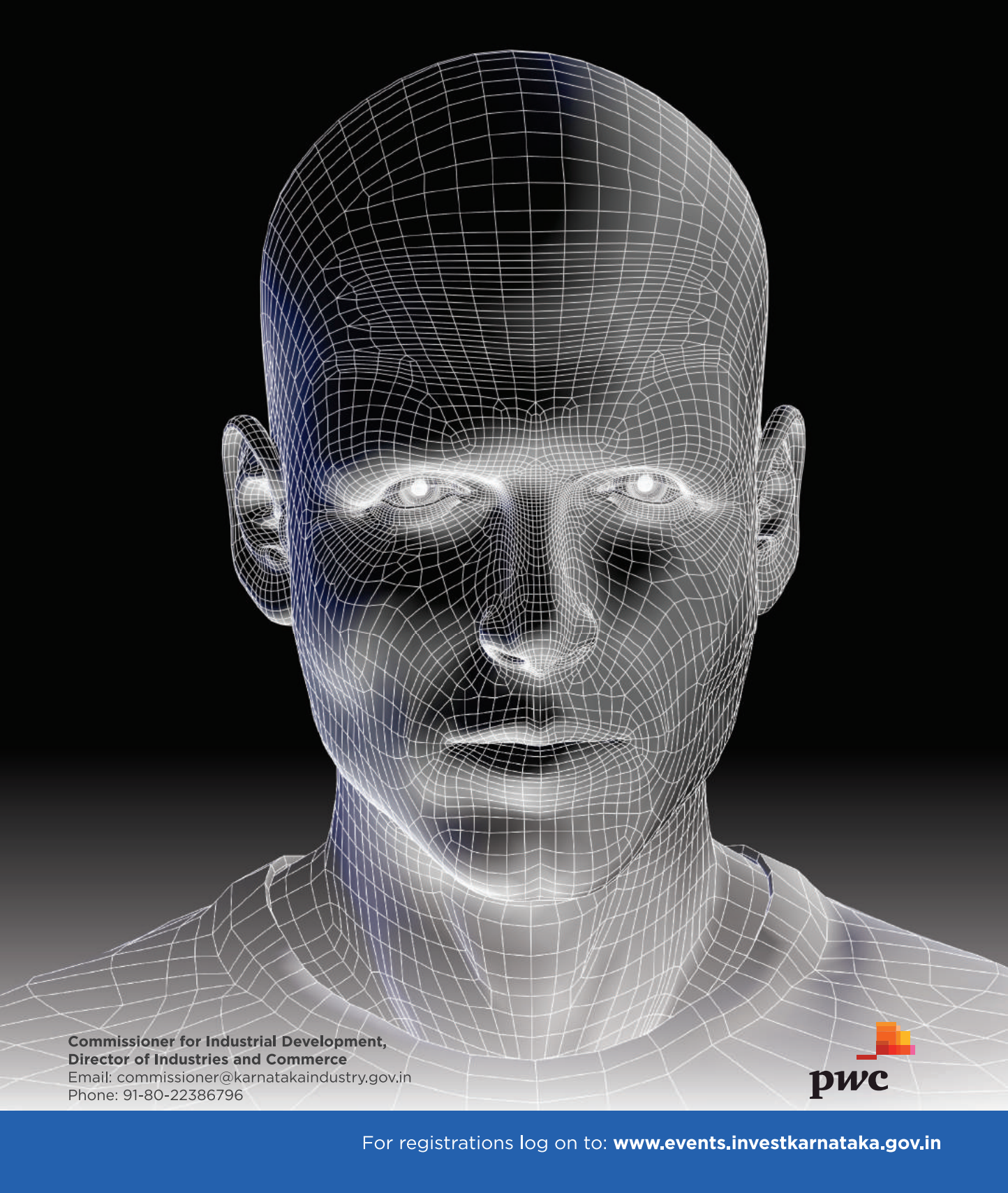
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