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Let noble thoughts come to us from every side
Rig Veda

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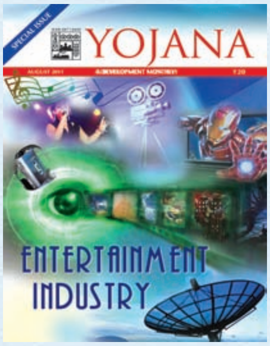
YOJANA

About the Issue



Since the dawn of civilization, human societies have developed indigenous modes of entertainment which have evolved in various forms, and developed and transformed over the ages. Among the traditional forms of entertainment we have circus, art, theatre, puppetry, folk forms of music and dance, sports etc. In modern day parlance however, entertainment industry encompasses films, TV, radio, music and print industry. Other key players emerging in this sector are gaming, animation and advertising.

Entertainment in India is one of the biggest revenue grossing industries. It is one of the fastest growing sectors in the economy and its segments have witnessed double digit growth in the last two years. The Indian entertainment and media industry is estimated to grow from Rs 58,080 crores in 2009 at a CAGR of 13 percent for the next five years. While earlier the media of communication were limited to print and visual forms, lately these have become one of the fastest growing industries and has exploded to include digitally produced and transmitted world of internet based entertainment. This has not only changed the nature of the industry but has altered the needs for content management and regulation too. Various issues have come up for debate and discussion, which need to be tackled at the levels of the producers themselves, and some at the level of the policy makers.

The present issue of Yojana focuses on the many modes of entertainment and highlights the dimensions associated with the industry. The articles provide statistical overview of the prominent segments of the entertainment industry-TV, print and films and examines the growth potential and barriers facing the Indian entertainment industry. Radio in India still remains the most affordable, accessible and one of the most popular forms of entertainment. It has matured with the changing times and reaches about 99 per cent of the Indian population. India ranks third in the world after USA and UK in publication of books in English. It is among the first seven publishing nations; publications are brought out in 24 languages. With a literacy rate of 74 percent there is great potential for growth in this industry and especially in view of the growing consumerist middle class in the country with greater purchasing power. The animation industry too has become one of the fastest growing segments. The Indian animation industry has gained significance as a destination for many international companies for quality and innovative work. The mobile entertainment industry is also witnessing significant growth with mobile operators offering services as mobile music, gaming and video/tv.

The entertainment and media industry continues to emerge and evolve due to shifting consumer preferences, evolving technology and convergence of traditional and new media. The nature of the captive mass media has changed, today's consumer is more demanding and engaged. This has been made possible due to new and interactive technology. In the coming years, convergence will play a greater role in the development of the Indian entertainment industry. This sector has everything going for it; it only needs to leverage on the opportunities available for its growth. The government on its part is playing an active role in providing a structural playing field. To conclude, the industry has all it takes to be a star performer of the Indian economy. ❑

The Media and Entertainment Industry in India

Smita Jha
Nishant Waghela

Indian media and entertainment industry is among the fastest growing sectors in the country. In the past few decades it has witnessed exponential growth

THE MEDIA and entertainment sector consists of many different segments under its folds. The key segments are television, print and films. Smaller segments include radio, music, OOH, animation, gaming & visual effects (VFX) and Internet advertising. Media and entertainment comprises of creation, aggregation and distribution of content through different channels. Advertising is one of the key revenue streams for many of these segments. Media and entertainment segments provide a means to the advertisers to reach the customers, interact with them and make them aware of their products and service offerings.

Indian media and entertainment industry is among the fastest growing sectors in the country. In the past few decades it has witnessed exponential growth. From a single state owned channel, Doordarshan in the 1990s there are more than 400 active channels in the country currently. Indian produces more than a thousand films in various languages and has over around 10,000 cinema screens.

Worldwide, 2010 saw the global economy begin to recover from a steep decline in 2009. Improved economic conditions in 2010 played a major role in a rebound in consumer spend, advertising spend and most importantly in the E&M spend. While India was not critically impacted by the downturn in 2008 and 2009, it demonstrated one of the highest growth rates this year and continued to outperform their global peers.

The authors are Consulting Head and Senior Consultant, Entertainment and Media Practice, PricewaterhouseCoopers India respectively.

According to estimates in PwC Indian media and entertainment outlook 2010, the industry is pegged at Rs 58,080 crores in 2009 as compared to Rs 35,650 crores in 2005 showing a CAGR of 13% from 2005 to 2009.

Television

The Indian television market continues to grow at a healthy pace. New channels are launched year on year and advertising growth is back to double digits after the slowdown in 2009. Niche channels are making its presence felt with major portion of the new channel launches in 2010 being niche channels.

With government focusing its attention on digitalization, TV distribution is taking a new shape. There are six DTH players, apart from the state-run DD Direct by Doordarshan, up from a single player in 2003. There are currently around 35 million DTH users in India and with present prediction; it is likely to overtake the US in terms of the largest DTH market in the world, by 2012. While growth of DTH has been a major positive for the Television distribution industry, digitization has been a major challenge too with digital cable not gaining momentum. The percentage of digital cable subscribers continue to remain quite low despite government setting guidelines for digitization across the country. According to new deadline, pan-India digitization is expected to happen by 31st December, 2014.

Addressable digitization, as and when happen, will provide transparency across the system and will help multi-fold growth of distribution revenues. Another challenge for the Television industry is Average Revenue Per User (ARPU). India is amongst the countries with lowest ARPU. As compared to developed countries like US and UK where ARPU is around USD 45 to USD 60, India has an ARPU of Rs. 160 (USD 3.5). It will remain to be seen how the ARPU levels are increased going forward.

Print

Unlike the global print industry, which is moving towards digitization and showing a negative growth year on year, the Indian print media industry is going strong and is expected to continue similarly. The print industry in India, with over 90 million copies in circulation daily, is one of the largest in the world, second only to China (130 million copies). It is not to say that there has been no effort towards digitization and conversion to online readership, but there has not been much progress. Most newspapers have an online presence and a growing view count on their portals, but hard copy still remains the preferred mode to access news.

The print industry saw good growth last year, on the back of a recovering advertising market and reduction in the gap between a ‘can read’ and ‘currently reading’ population. Increase in print penetration in tier-II and tier-III cities, supported by growth in literacy and purchasing power, aided growth in revenues.

Much of the entertainment and media segments are now focusing on growth in regional areas and smaller towns. 2009, a year when there was a degrowth in print segment due to economic slowdown, the regional print showed growth in local-to-local advertisement. In 2010, regional print further increased its share in overall print advertisement revenue pie. Additionally, with advertisers focus shifting to tier-II and tier-III towns, regional print will play a major role in reaching out to this audience. Regional papers give advertisers access to localised populations and their niche target audience, difficult to do via national broadcast media. Newspapers are now realising value in going a step further and launching area-specific editions of newspapers.

Magazines have not been at their best performance in the past few years. However, niche magazines are doing well and will continue to show positive growth.

Among the major challenges faced by this segment is newsprint cost. High newsprint prices continue to threaten profitability, particularly for English language and larger vernacular language newspapers, which consume larger quantities of imported newsprint. Newsprint forms a major component of the cost of publishing a newspaper (40 to 45% of total cost).

Film

Films are the most popular form of entertainment in India. The Indian film industry is among the largest in the world in terms of films produced. However, the Indian film industry has had two consecutive bad years in 2009 and 2010 and has shown considerable decline. Domestic box office underperformed largely due to lack of inspiring content, though the closure of many single-screen theatres, smaller release windows and the IPL season did play their part. An industry which depends heavily on good content had very few hits in 2010. Overseas box office which thrives on star-driven content or the traditional Indian family drama was also impacted due to lack of such movies.

One silver lining in this whole scheme of things, which will also impact the revenues in future, was the growth of multiplexes and especially the digital screens. Growth in digital distribution can be seen from the fact that the number of digital screens have grown from a mere 100 in 2005 to more than 3000 currently. Multiplexes also have shown considerable growth in that period and most players plan to open more properties going forward.

Piracy remains a major challenge for the industry. India is among the top five countries in the world, in terms of piracy. Piracy mainly happens through file-sharing networks. The number of portals providing films online for free has also increased manifold in the last year. Talent cost is other major challenge for the industry with top star charging huge premium for their services. This in-turn drives the overall film budgets to exorbitant levels and at times distributors fail to recover their investments on the same.

Radio

Radio industry in India was privatized in late 1990s. However, the true growth came in during phase II licensing. Phase II brought in newer players into the market. Most current radio players are part of larger media conglomerates. Radio penetration, which was initially limited to only Radio sets, saw a boom with increasing penetration of FM-enabled mobile phones. By the end of 2010, there were 245 active radio stations in India. With Phase III being recently cleared by union cabinet, Phase III privatization of radio FM is expected to add 839 new radio stations in 294 cities.

Measurement remains a key challenge for the radio industry. The industry has two major measurement tools in the form of Indian Readership Survey (IRS) and Radio Audience Measurement (RAM). IRS is not considered detailed and systematic enough. The low frequency of IRS data collection means that only ‘snapshot’ data is available and trends are lost. The IRS collects listenership data from houses and hence does not account for listeners who are not in the house and listen to radio while travelling to work, which is emerging as a sizeable segment. In case of RAM, the tool has limited coverage currently in the four major metros of Delhi, Mumbai, Bengaluru and Kolkata. Other challenges include availability of talent and lack of differentiated content. The later is expected to be addressed in Phase III as existing players get multiple stations in same city.

Others

Other segments in the entertainment and media industry include Music, OOH, Internet advertising and Animation, gaming and visual effects (VFX).

Music industry earns its revenue from five major streams viz. physical sales, mobile VAS, radio broadcast, online download and public performance royalty. A major portion of the music revenues in India comes from film music while the share of independent music albums is very small. With growing piracy and increasing online availability of film music, mobile VAS is the key segment for the music industry while physical sales in the form of CDs and DVDs have taken a backseat. In 2010, Mobile VAS surpassed the physical sales in terms of revenues to become the largest contributor to the music industry.

OOH industry has come a long way from traditional billboards to growing penetration of digital billboards. Upgraded street furniture as part of city beautification projects and renovated airports in Delhi and Mumbai has provided advertisers with new locations and better quality sites. If the issues around measurement mechanism in OOH can be sorted out, the industry will witness a healthy growth in future.

Bolstered by the growth in the economy, the rise in internet users and growth in mobile internet and advertising, the internet advertising industry has witnessed exponential growth. The internet provides advertisers with the option of controlling their advertising run-time depending on the response. Their decisions to continue or change advertising cost little. Online advertising remains a low-cost, yet important medium for targeting customers.

Animation and gaming industry in India has matured since its boom phase in 2004-05. India has become a throbbing outsourcing hub for animation and VFX work for Hollywood studios. The gaming industry in India, despite its challenges, continues to grow at a fast pace driven by mobile and online gaming. Social networking has been a boon for the gaming industry with online users becoming gaming addicts through this route.

Future Outlook

The rising penetration by smartphones and other Internet-enabled devices—supported by advanced infrastructure and enriched by a growing array of mobile applications, or apps—means the tipping point is fast approaching at which mobile content will explode as a revenue generator. In the next five years, the industry will need to meet and surpass consumers' demand for sophisticated, multifunctional devices that will keep them connected, entertained and informed in markets across the world.

Social networking today is becoming a craze and it is exceeding all expectations. It is transcending boundaries between all the entertainment and media segments. It is helping consumer become more aware today.

Looking at E&M advertisement market as a part of GDP, in comparison to other Asian countries like China and Japan, the E&M market in India is quite small. Advertisement as a percentage of the GDP in India is 0.53% as compared to 1.08% for developed country like US and 0.90% for Japan. This indicates that there is still a lot of scope for growth of the E&M industry in India.

The Indian E&M industry is estimated to grow from Rs 58,080 cores in 2009, at a CAGR of 12.4 percent for the next five years to reach Rs 104,080 billion in 2014. ❑

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Eightieth Year of Indian Talkies

Rafique Baghdadi

Thus, the Indian sound film of 1931 was not only heir of the silent film, but it had inherited something more powerful and broad-based

THROUGH ALL the high adventure and grinding endeavour covered over with starry-eyed romance, the development of the film industry has been a tale of interesting twists and incredible turns. Amidst all this, the name of Ardeshir Marwan Irani, the maker of the first Indian talkie will always remain a shining streak. He shares his birth year (1885) with the printing of the first photograph of a meteor shower, the premieres of operas *El Cid* in Paris and Gilbert & Sullivan's *Mikado* in London; this was the year also of the founding of the Congress Party in India. It would be another six years before Edison would come out with his motion picture camera (1891) and another twenty-five years by which Edison's phonograph would be available (1910-14).

By 1913, India had made its first move, thanks to the pioneering efforts of another stalwart, Dhundiraj Govind Phalke. But it was Irani who led India into the then elite group of countries which had the capacity to produce a talking film. Working against heavy odds, without any experience in the field, it was only his strong spirit of enterprise and his rousing leadership that brought about the release of the first Indian talkie: *Alam Ara* – which on its release at the Majestic Theatre in Bombay (as it was then called), necessitated the deployment of police to control the crowds! Tickets were sold at twenty times the printed rates. Of course it was the novelty that attracted the thousands but that does not detract us from the fact that it was the first talkie made in India.

The author is a feature writer/film critic and winner of 54th national award [2004] for best film critic.

What were the makings of this pioneering spirit? What was his motivation to work through the myriad problems? And what were his credentials for such a venture? In fact there was nothing spectacular. He completed his education in JJ School and began his career as a school teacher; he then drifted to the posts of a Kerosene Inspector and a Police Inspector before he joined his father's business of musical instruments and phonograms in Bombay. His foray into the film industry was by way of distribution of foreign films and in 1914 joined Abdulally Esoofally – a tent showman – and with him, acquired the Alexandra Cinema (Lohar Chawl, Bombay). Universal Pictures recognised the potential in this young entrepreneur and appointed him as their representative in India. While engaged in this activity he saw Phalke's silent films and a new spirit stirred in him – he set up his first company 'Star Films Limited' in 1922. With Bhogilal Dave (of Sharda Company) a graduate of the New York School of Photography for his partner, the company produced *Veer Abhimanyu* (with Fatima Begum in the female lead) and a few more mythological themes. Seventeen films down the line they dissolved the partnership and Irani floated another company called 'Majestic Film Company' in 1924 which in its single year of existence produced fifteen silent movies.

Then in 1925, Irani, in partnership with Mohammedally Rangwalla and his old associate Abdulally Esoofally, set up his most famous unit: Imperial Film Company, which made sixty-two films and introduced several new actors, including Prithviraj Kapoor and Mehboob Khan. But its most famous product was, and always will be, *Alam Ara*, the first Indian talkie.

What inspired Irani to venture into this uncharted field – where capital, technology, and the skills of the existing artists were a constant, heart-rending challenge? It could have been anything: the Warner Brothers production of *Don Juan* (1926) or the 1927 production of *Jazz Singer*; or *The Throw of Dice*, a film based on an Indian subject; or the short reels displayed around this time by way of recorded speeches, songs and dances; or the screening of *Showboat* at the Excelsior in Bombay; or the fact that the country eagerly waited for its first indigenous feature talkie. Whatever it was, Irani now 46, was fired up: though there were 24 other talkies produced in the year 1931 (besides three in Bengali, and one each in Tamil and Telegu), none created so much excitement as *Alam Ara* (translated freely as *Beauty of the World*) produced under the banner of Imperial Films, directed by Ardeshir M. Irani and released on the 14th of March, 1931 at the Majestic Theatre in Bombay.

Alam Ara boasted of a star-studded cast: Master Vithal, Miss Zubeida, Miss Shushila, Miss Jilloo, Elizer, Prithviraj and Jagdish as its stars, these being household names of the silent screen.

In the mean time there were hundreds of hurdles to be crossed before this raging success could become a reality:

There was the market to be considered: how many theatres in Bombay and across the film-going country had theatres that could afford to or otherwise accommodate the sound reproduction systems? In Bombay there were only six.

Cinema halls had projectors meant for silent movies – which were noisy! How long would cinema enthusiasts tolerate the irritation? Also, talkie projectors with sound amplifiers and appropriate loud speakers would have to be imported.

While the excitement of hearing actors talking reduced the interest in silent movies, a major question arose about the language for mass communication. Silent movies had a universal appeal insofar as there were no words to be heard and/or understood. Market segmentation took place by itself, giving each language a pride of place on its own. The south of India, for instance, which had hardly any presence in the 'silent' days, suddenly found its importance. Films came to be made in Hindi and translated into the South-Indian languages – but this turned out to be a costly enterprise. Studios therefore came to be set up in Madras and elsewhere. What was a problem for the Indian producers became, however, a total turn-off for foreign film makers and distributors.

It was not known at the time of these films whether songs as a major part of the entertainment would really be accepted. The introduction of 'sound' and the surfeit of songs interwoven in the story, it was feared, would undermine the value of the script/dialogue/story. But apparently, it was an unconscious tapping of a centuries-old tradition that had been lost along the way: *Jatra* and other forms of folk music for the lyrical propagation of teachings (*Ojapali* of Assam, *Jashn* of Kashmir, *Kathakali* of Kerala, the *Leela* of Orissa, the *Swang* of Punjab).

Thus, the Indian sound film of 1931 was not only heir of the silent film, but it had inherited something more powerful and broad-based. Into the new medium came a river of music that had flowed through unbroken millennia of dramatic tradition. Films as a new form of entertainment also killed the Jatras and other forms of drama; the new theatre almost wiped them out.

The songs were transformed through new instrumentation and largely western rhythms.

Then there was the equipment:

There were no sound-proof studios to aid production. The shooting had to be done at night. This meant huge lights. Irani is said to have managed with 'half a dozen lights'. His studio was near a railway track which meant he was forced to shoot during the off-peak hours when the frequency of trains was low. Sound recording staff also had the job of driving away all the pigeons.

Irani also brought in Wilfred Deming from the UK to help them in recording. Deming's work of assembling the recording machine and explaining its working cost them a prohibitive hundred-bucks-an-hour. The never-say-die Irani picked up the technique within a month and did the recording with the help of his colleague Rustom Bharucha.

The cameras were outdated and generated a lot of noise – which competed with the dialogue in shots loaded with emotions or softly spoken passages. Irani had to use quilts and *gaddas* to dampen the noise. Hiding the mike from the camera was another technique to be mastered.

And then there was the new technology:

The raw stock, lab chemical and all the spares would have to be imported – which would take time and small numbers required would make it commercially unviable. Fox Movietone had talkie-making equipment for newsreels in India and could be hired at night.

There were no technical devices like back-projection, dubbing, trolley shots, playback voices. Since there were no moviolas at that time even cutting was difficult. Early sound equipment was cumbersome and not very efficient.

And finally there were the artistes:

Actors working in silent films had good looks and could act but now the voice became an important additional requirement. After 1931 many of the Anglo-Indian actresses had to leave because of their inability of speaking in Hindi – the first and most outstanding casualty among them being Sulochana (Ruby Myers): one of the most beautiful and the highest paid in her times. *Singers* would be needed as well as *dialogue writers, music directors*. Everything had to be planned from scratch. Irani helped in selection and rehearsal of tunes – with the harmonium and tabla as the only equipment, sometimes accompanied by violins. In the absence of playback systems all songs were directly recorded along with the acting (they worked with the single-system 'Tanar' recording equipment in which the sound goes directly to the picture negative. In the more versatile double system introduced later, picture and sound are kept separate, to be combined in the lab as one of the final step in production, giving flexibility in editing).

There was also the need for utmost secrecy! When Irani started *Alam Ara* he was aware that Madan's in Calcutta were also working on their first talkie. It was a very unique race. And the secrecy was more than justified.

Irani and his team met all these challenges with practically no help from foreign technicians or consultants; and it was with a mixture of great anxiety and excitement that the film was released on the 14th of March, 1931 – one month before the Madan Theatre's : *Jamai Shashti*. It had taken all of four months to complete and the total cost came to Rs. Forty thousand. The film length was about 10,500 ft.

But the main question that remains is: Why *Alam Ara*? Actually it was an adaptation from popular stage presentation at that time; it had an *Arabian Nights* type aura and depicted the life of a sultan with two wives, one of whom was a slave girl. The original play was by Joseph David (affectionately known as Jeosab Dada), a person who was an incredibly talented personality, possessing equally facility in Urdu, Hindi, Gujarati and Marathi, well versed in Scandinavian, Greek, Jewish, Egyptian, Iranian, Chinese and Indian Mythology and Literature. He was also an authority on Indian dancing and was a Connoisseur of Indian classical music. By the time he wrote the screenplay for *Alam Ara*, he had written more than 100 plays, and here he has tried to create a fantasy that would appeal to all classes of people – so that the phenomenon of talking films could attain instant popularity.

Zubeida, the lead actress of the film and star of the times, was the daughter of the Nawab of Sachien and Begum Fatima, who is the first woman to become a film director in India in 1926 with her *Bulbul-e-Paristan* (The Nightingale from the Land of Fairies). Zubeida, who entered films at the age of 12, was 19 when she appeared in *Alam Ara*. Two years later, at the age of 21, she married the former Raja of Dhanrajgir. By that time she had acted in 36 silent films and 20 talkies.

Master Vithal who played opposite Zubeida was another top star of the day. He is said to have started off as an office boy and was given a break as a hero by Bhalji Pendharkar (Director). He later joined Sharda Films and became very successful, but as there were no monetary rewards for him there, he joined Irani's Imperial Film Company for which he was sued by Sharda Films. Master Vithal was defended by none other than Muhammad Ali Jinnah who won the case. Vithal had done 5 silent films before he was cast for *Alam Ara*. The irony of his role was that in the first Indian talkie Master Vithal was asked to play mute – as he kept muffing up his lines!

Wazir Mohd Khan had come to see the working of the recording machine and was among the many people invited to sing. Irani heard him out and asked to sing a Persian song also. He finally gave him the role of an old *fakir*. The song sung by him came to be one of the most popular parts of the film:

De de Khudaa ke naam pe, pyaare, taakat ho gar dene kii; kuchh chaahe agar to maang le mujhase, himmat ho gar lene kii.

Sadly, neither a recording of the song nor any part of the film is now available. The film had seven songs but later films by Madan Theatre had 41 songs (*Shakuntala*) and an astounding 71 songs (*Indrasabha*)! … a fairy tale era had ended yielding place to something far more exciting and challenging. In a couple of years all films were talking and singing.

The excitement of the time can be seen in the fact that the staid and sober Times of India asked its readers to give a write up on what they thought of the film, offering a prize of Rs. 25/- prize. ❑

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Organizing Census 2011 – A Himalayan Task

C Chandramouli

The nation is proud of them and we salute each one of them for their hard work, perseverance and patience

THE INDIAN Census has a rich tradition and enjoys the reputation of being one of the best in the world. Census 2011 is the fifteenth in an unbroken series since 1872 and the seventh after independence. It is remarkable that the great historical tradition of conducting a Census has been maintained in spite of several adversities like wars, epidemics, natural calamities, political unrest, etc. Very few countries in the world can boast of such a distinction. Participation in the Census by the people of India is indeed a true reflection of the national spirit of unity in diversity.

Census is much more than a mere head count of the population. It gives a snapshot of not only the demographic but also the economic, social and cultural profile of the country at a particular point of time. More often than not, it is the only available source of primary data at the level of the village and town (ward). It not only provides valuable information for planning and formulation of policies by the Government but is also used widely by National and International agencies, scholars, business people, industrialists, and many more. Any informed decision making that is based on empirical data is dependent on the Census. Democratic processes like the delimitation of electoral constituencies and affirmative action like reservation are also based on the basic data sets of the Census.

India is known the world over as the world's largest and most vibrant Democracy. There is an intimate link between the democratic processes and the Census. Delimitation of Parliamentary, Assembly and local body Constituencies is done on the basis of Census data.

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Given this background, participating in the Census is tantamount to participating in the Nation building process. Little wonder therefore that our Census is our future.

Historically speaking, there are references to Census in the *Rig Veda* (800-600 BC), the *Arthashastra* of Kautilya, the *Ain-e-Akbari* of the Mughal King Akbar etc. However the first systematic Census in India was conducted during the British Raj in 1872. Since then it has been systematically conducted in the country every decade. Census 2011 is the 15th since 1872 and the 7th since Independence.

Methodology

The Census of India is conducted once in a decade, following an extended *de facto* canvasser method. Under this approach, data is collected on every individual by visiting the household and canvassing a single questionnaire over a period of three weeks. The count is then updated to the reference date and time by conducting a Revision Round. In the Revision Round, any changes in the entries that arise on account of births, deaths and migration between the time of the enumerators visit and the reference date/time is noted down and the record updated.

In Censuses until 1931, a synchronous *de facto* method was adopted wherein the Census was conducted throughout the country on a single night. This method, besides being costly, required the deployment of an extremely large force of Census takers. This method was given up in the 1941 Census and the present method adopted.

Census 2011 has been conducted in two phases. In the first phase, known as Houselisting and Housing Census each building, house and other structures were systematically listed and numbered and those used for residential and partly residential purpose were identified. Besides, useful information on the amenities available to the households as well as the assets owned was collected. This exercise held between April to September, 2010 in different States/Union territories was used to draw up a frame for the second phase of Census 2011, known as Population Enumeration held in February 2011.

The work of Population Enumeration commenced on 9th February, 2011 and completed on 28th February, 2011. During this period about 2.7 million Enumerators visited each and every household for collecting information on every person living in these households. On the night of 28th February, 2011 the Houseless population was enumerated. Thereafter, in order to update the population with reference to the census moment, i.e., 00:00 hours of 1st March, 2011, the Enumerators undertook a Revision Round from 1st to 5th March, 2011, by revisiting the households and updating information on births and deaths occurring in the households.

Organisational Structure

In India, the population Census is a Union Subject (Article 246) and is listed at serial number 69 of the Seventh Schedule of the Constitution. The Census Act, 1948 forms the legal basis for the conduct of Censuses in independent India. Although the Census Act is an instrument of Central Legislation, in the scheme of its execution the State Governments provide the administrative support for the actual conduct of the Census.

The Office of the Registrar General and Census Commissioner, India is an attached office under the Ministry of Home Affairs of the Government of India. Its main responsibility is to conceive, plan and implement Census taking in the country. The organization is headed by the Registrar General and Census Commissioner, India. There are field offices in all the States and Union Territories (except the Union Territory of Dadra and Nagar Haveli and the Union Territory of Daman and Diu, which are attached to the office at Gujarat). The State Offices are headed by the Directors of Census Operations, who are responsible for the conduct of Census in their respective jurisdictions.

Planning for Census 2011

Freezing of Administrative Boundaries

The first step towards Census taking relates to preparation of a complete and unduplicated list of all geographical entities in the country, which includes States, Districts, Tehsils/Taluks/ Community Development (CD) Blocks and Villages/Towns at a particular point of time. For Census 2011 all administrative units in the States/UTs across the country were sought to be frozen as on 31st December 2009.

The finalisation of the Rural - Urban frame, by listing out

Statutory and Census Towns and categorising them as 'Urban area' and the Villages as 'Rural area' was completed as part of Pre Census activities. The demarcation of Out Growths of Towns and Urban Agglomerations was also taken up as a part of this exercise.

Cartography

The availability of accurate maps as per the latest administrative boundaries is a pre-requisite for Census. The Cartographic Division of the Census Organisation, entrusted with this work, has evolved over the years and is now the largest producer of thematic maps in the country. It has come a long way from the traditional manual cartographic methods used until 1981 and now utilizes the latest GIS software to produce digital Maps. The organization now has the largest repository of digital files of villages and towns. The latest addition in Census 2011 is the preparation of satellite imagery based digital maps at the street and building level in 33 Capital Cities of the country. These digital maps were used effectively to carve out the Enumeration Blocks in both phases of the Census.

47 new Districts, 466 new Sub Districts, 243 new Statutory Towns and several new villages have come up since 2001. Maps of all these Administrative Units have been obtained and updated. Extensive changes occurring in the boundaries of the existing towns have also been updated.

An added feature in Census 2011 was that printed maps of each and every Village/Town were provided to the Charge Officers to mark the boundary of the Enumeration Blocks on them. This was aimed at reducing the chance of any omission or duplication of areas.

Consultation with Stakeholders

As part of the Census preparations, the First Data Users' Conference was held in April 2008. In this conference, consultations were held with all stakeholders comprising representatives of various Ministries of Government of India and the State Governments, National and International Organisations, Population Research Centres, Statistical Institutions, Universities, eminent demographers and social scientists. Based on the deliberations of the Conference and other correspondences received a draft Questionnaire was developed.

Finalization of Questions

The draft Schedules were pre-tested in the field in all the States and Union Territories from 28th June to 17th August 2009. The results and the experiences of the pre-test exercise were discussed in a Conference of the Directors of Census Operations and a draft Questionnaires were finalized. These Schedules were then presented to and approved by the Technical Advisory Committee constituted for the purpose. These final Schedules on Houselisting and Housing Census and Population Enumeration were then put up for the consideration of the Government of India. On receipt of the assent the Questions to be asked in the two phases of operation were duly published in the Gazette of India.

Printing

A feature that makes the Indian Census particularly complex is that the Schedules are canvassed in 16 languages and the Instruction Manuals are developed in 18 languages for use by the Census Enumerators/Supervisors and other functionaries in the country.

The requirement is also mind boggling – 54 lakh (or 5.4 million) Instruction Manuals and 34 crore (or 340 million) Census Schedules. To add to the complexity, the Schedules had to be printed on special grade paper, the specifications for which were evolved in India for the first time in consultation with experts in scanning technology and paper technologists. The services of the National Institute of Design, Ahmedabad were utilized to upgrade the quality and aesthetics in the designing of the Schedules. The result is that the Indian Census Schedule is comparable with the best in class internationally.

Unique features that make it stand out are Bar Codes in each Schedule, Unique Form Numbers, Pre Printing of certain Location Particulars, Uniform quality of printing and colour dropout facility. This required printing in high end Presses having facility of digital printing and very high production capacity. That the entire quantity of material has been printed within the stringent timelines and with strict adherence to quality is a feat in itself. Approximately 12,000 Metric Tonnes of paper of various grades has been procured for this purpose.

Logistics

The task of making available all the materials required for conducting the Census–Enumerators Kits, Instruction Manuals and other training material, Census Schedules in the right quantity and in the right language to the Charge Officers (approximately 17,000 in number) as can well be imagined is a logistical nightmare. Adding to the complexity is the fact that each Charge may use material in several languages. The Census Commission availed the services of India Posts for transporting the material from the printing presses to the Charge Offices (i.e., Tehsil headquarters and Municipal authorities). For supervising and monitoring an elaborate web based management system was developed by them. Though there were operational problems, the precision with which the entire logistics operation was accomplished within a very short period of time, is remarkable.

Training

The need for comprehensive training of all functionaries, especially the Enumerators and Supervisors can hardly be underscored. A three tier cascade of training was devised for this purpose.

At the top of the pyramid were a group of National Trainers, 90 in number. This group was rigorously trained for 5 days at a residential training camp. They then trained 725 Master Trainer Facilitators (MTFs) at the State level. The MTFs in turn trained 54,000 Master Trainers (MTs) at the District level. The MTs ultimately trained the 27 lakh (or 2.7 million) Enumerators and Supervisors at the field level.

A new feature in Census 2011 has been the utilization of Non-Governmental Agencies in the massive training effort. In order to supplement the manpower for training by the Directorates of Census Operations of the States/UTs, trained manpower from the NGOs was also utilized. In addition, volunteers from NGOs working in the field of disability and gender were associated with Census 2011 for sensitizing the trainers at National, State and District level. Special efforts have been taken to improve the Instruction Manuals by including more illustrations and examples. For the first time in Census 2011 Training Guides were prepared showing the detailed minute-to-minute Agenda for each day of training. The Trainers at each level – National, State and District, have been given intensive in-house training and provided training aids, such as, PowerPoint Presentations, e-Learning Modules, script of Role Plays on difficult concepts and Practice Sheets. Special training modules have been developed to sensitize the trainees to understand the questions on disability and the issue of gender. Special Training Modules have also been developed for explaining the issues relating to disability and gender. It needs mention that the entire training strategy has been a collaborative effort between the UN Agencies (UNFPA, UNICEF, UNDP and UN WOMEN) on one hand and the Census Organisation on the other.

Publicity

All modes of Publicity - Mass media, Public Relations, Outreach activities and Digital media have been used to spread awareness and enlist the cooperation of all stakeholders. A scientific media plan was designed by a professional agency that also created the media content in both the phases of the Census. While the general theme was that of including everybody without omission, special emphasis was laid on the issue related to such vulnerable groups as women, elderly, disabled persons, infants and the homeless. Endorsements by different celebrities were also broadcast. Census messages on these issues were broadcast over All India Radio, Radio FM, Private Radio FM, Doordarshan and Private TV Channels. To reach different cross-sections of the society, particularly the younger sections, advertisements using such digital media as popular websites were used.

A unique feature of Census 2011 was the innovative use of social networking sites such as Facebook and Twitter. The enthusiastic response of the younger generation to this initiative and the very positive comments posted on the site are motivating. A photography competition was also launched in connection with the Census 2011 which saw very active participation.

A new initiative - “Census in Schools” was launched across the country. The purpose of this programme was to make all children aware about the ensuing Census 2011 and that they have a role in ensuring that the data for their own family is recorded correctly. The programme covered about 60 to 80 schools in each of the 640 Districts in the country and was specifically designed for participation by the students of the entire school in general and the students of class VI, VII and VIII in particular.

An innovative Logo was adopted for Census 2011. For the first time a Mascot was developed to represent the face of the Census 2011. A lady enumerator was chosen as the mascot in order to encourage and acknowledge the services of the real heroes of the Census - the enumerators.

Census Helpline

Help desks and help lines had been introduced in the last Census. The same was continued in this Census also. The help desks were established at the Charge level and were manned by Master Trainers. A Toll Free Number was activated at the National level and a Call Centre established at which calls could be received from the general public as well as the enumerators and supervisors in 14 languages. In a few Directorates, elaborate training videos were also produced and given to each enumerator.

Houselisting and Housing Census

The Census Operations in India are carried out in two phases - the Houselisting and Housing Census followed by the Population Enumeration. The objective of the Houselisting and Housing Census is to systematically list out and number all the buildings, houses and other structures in an Enumeration Block, identify houses which are residential or partly residential and collect information on households throughout the country for preparation of a sound frame for conduct of the population enumeration.

The Houselisting and Housing Census was conducted in different States and Union Territories during April-September, 2010. In addition to collecting data on characteristics of the house, information on availability of certain amenities and assets to the households were also collected in this first phase.

The Houselisting and Housing Census collected information on the housing and availability of amenities and assets to households. The items of information collected were same as in 2001 Census except that a few questions were modified to elicit more accurate information. These include modifications in collecting information on: Source of drinking water, Type of latrine, Availability of computer/laptop and mobile phone to households.

Population Enumeration

The Population Enumeration or the second phase of Census 2011 was held from 9th to 28th February 2011 throughout the country as stated above. In the snow bound areas this exercise was held 11th to 30th September 2010 with reference date as on 1st October 2010.

There were a few modifications and addition in the Household Schedule canvassed for collecting information on each individual residing in the country in comparison to Census 2001.

These included:

a) Pre-printing of Location particulars up to District level

b) Printing of Bar Codes/ Form Number

c) Colour drop-out in the Schedules to facilitate scanning

d) Linking of Houselisting data with Population Enumeration data

e) Tracking system in case of more than one form is use

f) Collection of information on the Institutional Households

g) Recording other Gender than male or female

h) Date of birth

i) Separate Codes for 'Divorced' and 'Separated' under Current marital status

j) More descriptive Codes to capture information on Disability

k) Separate codes for persons who have never attended any educational institution and persons who have attended earlier under Status of current attendance in educational institution. An additional code for recording persons attending special institution for the disabled has also been added.

l) Categorisation of Marginal Worker into two categories – those who worked for 3 months or more but less than 6 months and those who worked for less than 3 months

m) Including a category of ‘Others’ under non-economic activities to account for commercial sex workers and persons involved in illegal activities. A new code for ‘rentier’ has also been introduced.

Gender Sensitization

Gender disaggregated data is the basis for gender sensitive policy formulation and planning. The need for gender statistics in formulating policies and programmes can hardly be overemphasized. Conceptually, information collected at the census is gender neutral and compiled and tabulated for both men and women separately. The Schedules and Instruction Manuals for use in collection of information in the field have been carefully designed to avoid any bias on the basis of gender. The training of Census functionaries also focuses on this aspect of neutrality.

During Census 2001, special efforts were made to address gender concerns. Gender sensitization activities were initiated right from the stage of planning. In Census 2011, further concerted efforts were made to integrate gender sensitivity into the entire process of Census taking. In addition to the basic count, special efforts have been made to accurately net the socio-cultural, demographic and economic characteristics, which inter-alia would include correct netting of Head of the household, Age, Age at marriage, Marital status, literacy, and Economic activities in unorganized and unpaid work. Gender critical districts (262 in number) were identified on the basis of low gender parameters, such as, sex ratio (below 900), low female literacy (30 percent or less) and female work participation rate (less than 20 percent) at Census 2001. Special gender modules and training strategies were developed for sensitization of Census functionaries. Special publicity campaign was also initiated to focus attention on the issue.

Declaration of Provisional Population Results–Census 2011

After the completion of the Population Enumeration phase of Census 2011, the Provisional Population of the country and for each State was declared by the Census Commissioner, India within a month on 31st March 2011, a feat not known to have any parallel in the world. The Provisional Population Totals are arrived at by compiling the summary report (known as Enumerator's Abstract) from every Enumerator.

The salient points of the Census 2011 Provisional Results are as follows:

- The country's population stood at slightly over 1.21 billion as on 1st March 2011.
- The population of India increased by 181 million since the last Census in 2001, recording a growth of 17.6 percent compared to 21.5 percent during 1991 - 2001.
- This slowing down of growth in population is seen in most of the States including the large ones, like Uttar Pradesh (from 25.85 percent in 1991- 2001 to 20.09 percent in 2001-11), Maharashtra (from 22.73 percent to 15.99 percent), Bihar from 28.62 percent to 25.07 percent), Madhya Pradesh.
- The overall Sex Ratio of population, an index to measure the sex composition of the population and expressed in terms of number of females per 1000 thousand males, showed an increase from 933 in 2001 to 940 in 2011 in the country.
- However a matter of overwhelming concern is the decline in Child Sex Ratio (0 to 6 years) from 927 in 2001 to 914 in 2011, a drop of 13 points, lowest since Independence in the country.
- The overall Literacy Rate (of population above 6 years of age) reached 74 percent from 64.8 percent in 2001 Census in the country.
- It was most satisfying to find that the number of female literates (aged above 6 years) in the country have grown by about 49.1 percent in the last decade. The Female Literacy Rate has recorded an appreciable increase from 53.6 percent to 65.4 percent in 2011.

The heroines and heroes of Census 2011 have undoubtedly been the 2.5 million enumerators and supervisors who have spared no efforts to complete the arduous task in time. Three weeks to cover a vast and diverse country like India – a task looked at with awe by the world but accomplished by these humble women and men with sincerity and devotion to duty. The nation is proud of them and we salute each one of them for their hard work, perseverance and patience. ❑

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Film Music: The Paradigm Shift

Rajiv Vijayakar

Adapting to newer technologies is the keynote or secret that has within it the potential to make our music industry boom

SOCIETY AND social issues decide the cinema that is made in any era. And the cinema that is made decides the kind of music we hear in it. By inference, it is simple to state that the music we hear in films has a lot to do with what is happening in society.

So there is zeal and decisiveness in pre-Independence 1940s and neo-Independence, disillusionment by the mid 50s', a light vibrancy in the 60s when colour arrived in cinema and films became lightweight, rebellion and aggression in the '70s and '80s and huge receptivity to global content since the economy opened up from the 90s'.

Point two: a standard aspect of any commercial art is an element of calculation – a song or a score that becomes a huge success decides the kind of song and scores that are made in the immediate future. After all, returns of investment (called ROI in business circles) are important in any field where money has been put in, and some criterion is always needed for this element.

A third aspect is that cinema, though basically a creative art, is a medium of science and technology –it is about cameras, lenses, sound recording, music recordings, film and music editing, the final audiovisual mixing and much more. Less than a century old as an art form in the country and not much older even in the world, cinema as a technology is still evolving, for science and technology always evolve faster than art does, as it is not always culture-driven.

Every such change or advancement brings large new benefits, but as in the parallel case of the latest and most potent antibiotic, the side-effects or flipsides are soon seen too, and in

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that sense, such new developments bring new challenges. Thus, if change is axiomatic, so are the challenges that accompany it. And the basic rule is to adapt to changing times and if possible, remain one step ahead.

The beginnings of the music industry

Though the Gramophone Company of India Ltd., the Indian wing of His Master's Voice, arrived way back in 1902 with private recordings, the first disc of a film *Madhuri* was only cut 30 years later. But for many years after that, *every* film's music did not come out as a record, partly because the actors sang themselves and the songs were recorded 'live' during shooting, with a couple of accompanying musicians out of range of the camera.

The earliest primitive recording 'studios' were mere sheds in the compounds of film studios and came some years later. Because of the corrugated iron roofs or walls and the lack of soundproofing, reverberations of voices and instruments were battles that had to be fought at technical levels, not always successfully.

But talent always decides trends and even the quest for better infrastructure and technical advances. When the business of films was boosted by songs with the arrival of singing superstars like Shanta Apte and Kundan Lal Saigal, technology was sought and affordable equipment ordered. Music directors coming in from New Theatres in Calcutta with a background in Western orchestration also spurred the need for better recording studios. And later, the arrival of the playback system (where professional singers 'voiced' songs for stars on screen) in 1935 with *Dhoop Chhaon* consolidated this.

And yet the studios remained primitive. A single microphone was used for all singers, including any chorus, and the orchestra. This created a compromise in reproduction quality. While the audio track was a part of the talkie film's reel, a separate version also had to be recorded for the radio.

A few technically-oriented composers innovated, like Naushad laid thick mattresses on the walls and roofs of the studios to absorb echo in a kind of primitive soundproofing. But such cases were not common and progress was slow. When he used a 100-piece orchestra in *Aan* (1952), the 'sound mixing' had to be done in London.

It was Shankar-Jaikishan with their 1949 debut *Barsaat* who really changed the scenario forever, despite the mega-success of many earlier songs composed by others. Such was the hysteria the music created – and so hugely did it benefit the film - that for the first time a true-blue music industry could be conceived in the country.

Shankar-Jaikishan also initiated the truly modern Hindi film score that had an identity of its own in terms of melodic structure, lyrics, vocals, sound and orchestration that did not come across as folk, Indian classical or Western but had its own genre-creating sound. Thin-voiced light singing (Lata Mangeshkar, Mukesh and Mohammed Rafi) became the 'in' thing, enduring to this day.

Shankar-Jaikishan also initiated the concept of cerebrally-composed preludes and interludes, innovative counterpoints (music behind the main melody and instruments that was different and yet in harmony) and also many pioneering vocal, compositional and orchestral trends. These music pieces were often remembered and hummed by themselves. They also created grandeur in the background music and laid the foundation for scores in which all or almost every song among six to ten in a film were popular. In other words, they were not just the architects of modern film music but also laid the permanent blueprint that every proper music composer in cinema follows even today!

Shankar-Jaikishan, along with seniors like C.Ramachandra, S.D.Burman and Naushad and juniors O.P.Nayyar, Ravi, Kalyanji-Anandji, R.D.Burman and Laxmikant-Pyarelal were the main artistes who paved the way to making Hindi film music take the biggest pie of the Indian music industry. India is thus that unique market where non-Hindi film music, irrespective of whether it is *bhajan* or other devotional music, *ghazal*, folk, classical, pop and fusion and even regional film music have a very small share even today, both because of Hindi film music's pan-Indian appeal (now spread to several NRI-rich countries and more) and the effort and budgets employed in its promotion.

Key milestones and benchmarks

It was at the turn of the 1970s that the already-flourishing music industry saw a series of major new developments. In 1969, HMV (which had absorbed all small music labels till then into its fold) faced the arrival of its first major competitor, Polydor from Germany (now taken over by American giant Universal). In 1970-'71, Polydor came into its own with the smash-hit sales of the music of *The Train, Saccha Jhutha, Johny Mera Naam* and *Mera Gaon Mera Desh*.

In fact, 1971 was a true watershed year for music in general and film music in particular: Laxmikant-Pyarelal's *Haathi Mere Saathi* (1971) kick-started the recognition of record-breaking sales of gramophone discs as its sales crossed 50,000 Long-Playing (full soundtrack records on 33-1/3 rpm) records and qualifying for a Silver Disc. This was a huge achievement in those days when records were expensive for the common man. In the same year, Laxmikant-Pyarelal's *Jal Bin Machhli Nritya Bin Bijli*, a film by the technology-savvy V.Shantaram, became the Indian music industry's first-ever album recorded in Stereophonic Sound (that is, two recording tracks that allowed for a sense of space and movement in the music). Today, the digital era can theoretically permit 1000-plus tracks!!

The same composers' *Bobby* (1973) was the first to be treated with an echo effect and billed as "Electronically Reprocessed for Stereo" after a normal mono recording to make it sound modern without the need to spend on the then-expensive Stereo. It was the first album to cross a lakh in sales and was conferred the Gold Disc, with a huge write-up in *The Economic Times* listing it among the top ten sellers across the globe! The arrival of the first film shot with Stereophonic Sound, *Sholay* (1975), soon got Stereo music recordings more attention, especially by sound-savvy top-line filmmakers who could afford the then-expensive process.

Even as a large number of film albums touched huge sales, another feather in the cap for Laxmikant-Pyarelal was the first-ever Platinum Disc (2,50,000 – 5,00,000 LPs) for the 1978 *Satyam Shivam Sundaram*, an honour shared in the same year with Kalyanji-Anandji's *Muqaddar Ka Sikander*.

In the 80s, major player T-Series brought in cassettes at affordable prices to combat piracy, which had become rampant with the arrival of this format, so that HMV and Polydor had to do likewise. But sales went up as music could now be brought by the common man and even from the pavement and the neighborhood general store or even *paanwala*. Most albums by now were in Stereo, but Mono was still around.

L-P as a duo continued to lead in technology. Subhash Ghai brought in the first 4-track stereo recording for their song *Om shanti om* in *Karz* (1980) and the first-ever CD of a Hindi film soundtrack was their *Ram Lakhan* (1989). By 1989, HMV, which had almost shut shop due to losses, was brought over by the Indian company RPG and renamed Saregama and revived, with the huge sales of *Ram Lakhan, Chandni* and *Maine Pyar Kiya* consolidating its future. And more companies led by Venus and Tips had come in based on the aggressive T-Series business model.

The blitz continued into the early 90s' with sales of 3-5 million or more units (records faded out, cassettes dominated) of scores like *Aashiqui, Saajan, Khal-Nayak, Roja, Darr, Baazigar, Mohra, Hum Aapke Hain Koun…!, 1942 – A Love Story* and *Dilwale Dulhania Le Jayenge*.

Non-film music

Two more music phenomena happened in the decisive 80s' and 90s': The decline in musical calibre in film music with the arrival of trends like disco and cheap lyrics in the early 80s' led to the then-evolved masses seeking aesthetic gratification in light non-film Indian musical genres like *ghazal* and devotional music. For the first time, sales in this genres began to match or surpass that of the average film music scores. Jagjit Singh, Pankaj Udhas, Anup Jalota, Talat Aziz, Hariharan, Penaz Masani and Ghulam Ali from across the border became almost as big as the top names in Hindi film music.

In the early 80s, a few standout pop albums had also come in, like Nazia's and Zoheb Hassan's *Disco Deewane*, Runa Laila's *Superuna* and others, mostly by non-Indian artistes. The 90s' saw this 'Indipop' (as it was called) genre peak with Indian artistes like Alisha Chinoy (*Made In India*), rappers Baba Sehgal and Bali Brahmbhatt, folk-pop singers Daler Mehndi and Ila Arun and others. Another record-breaker in this genre was Sajid-Wajid-Sonu Niigaam's *Deewana* (2000). Pakistani singers also made more appearances, and Nusrat Fateh Ali Khan in the 90s' and Adnan Sami in the millennium made their marks.

Throughout the decades and even today, Indian classical music continued to have its own sustained market, even if it was for a niche target listener. Pandit Bhimsen Joshi, Ustad Bismillah Khan, Pt. Shivkumar Sharma, Pandit Hariprasad Chaurasia and many more were among the foremost luminaries in contemporary times.

Decline time

The decline began slowly from the later half of the 90s' and there was a rapid plunge of music sales by the early millennium. The factors cited were ongoing uncontrolled piracy, technological 'progress' that allowed easier piracy as well as downloads, and a lack of quality or uniformity in albums that made people listen to FM Radios and download only selected songs on PC, I-Pod and mobile-phone rather than buy physical forms of albums like original CDs and cassettes.

The rare albums that have sold well in the millennium were *Devdas* and *Raaz* (2002), *Tere Naam* (2003), *Main Hoon Na* (2004), *Aashiq Banaya Aapne* (2005) and *Dabangg* (2010). In non-film, the only high seller was Himesh Reshammiya's non-film album *Aap Ka Suroor* (2006). Otherwise from this period, non-film sales have come to a virtual standstill, because investment in them is no longer considered viable.

The digital doorway

There is an old saying that when one door closes, another opens. If the new technology is harnessed well, the music industry can not only get stabilized but also reach a new economic high.

The digital era has almost annihilated the physical music industry in India mainly because of factors unique to our country – anti-piracy legislation not being implemented, low public awareness of what piracy means to the industry's economy, skewed execution of Copyright issues (which is hopefully expected to be rectified very soon by an Amendment to the Copyright Act in Parliament), a disunited music fraternity that does not know its own rights, a low presence vis-à-vis the advanced countries of PCs and technological gadgetry and online business and, once again, the predominance of film soundtracks that make investors not show much interest in private or independent music across all genres. As a top composer who also does non-film music noted, "If Michael Jackson had been in India, he would not have become *the* Michael Jackson because no one would have marketed his albums well!

But the issue is not only about films versus non-film music. There is an uphill battle that has to be fought in many ways, and some enterprising 'soldiers' are doing it!

The music of Vashu Bhagnani's film *F.A.L.T.U.* was released only in digital format. We could download each song for ten rupees and all the eight tracks for Rs 40. This may look like a pittance, but if the music is good, the producer and composer get a surefire decent amount instead of being taken for a ride by music labels and also losing out what is due to them to pirates. A physical edition of the soundtrack is just out, in limited copies, so losses too are curtailed.

Several artistes across genres like the band Indian Ocean, Pt. Somesh Mathur and Kavita Seth are now going on this 'track', where you can release even a single, or any number of songs in place of the obligatory minimum needed to make a CD/cassette. And while the Pen Drive/SD (Mobilephone Memory Card) format failed to entice, we now have the phenomenon of digital publishers like Artistaloud.com and online music labels who are the modern counterparts of music labels like Saregama and T-Series. These facilitators also share revenues fairly (as software allows the number of hits and downloads to be tracked, unless physical sales) and even arrange Webcerts (concerts on the web) for artistes regularly.

The existing music labels are also having to toe the line: all leading music companies now have either their own sites or licensed partners offering customized downloads of their repertoires at nominal prices. And the ringtones-caller tunes business has already skyrocketed to the extent that most music labels are making more money from this new doorway than from physical sales.

Social networking sites and the Internet are also contributing their mites. They help in scouting new talents, online auditioning and even sourcing of music, with no geographical boundaries. Recordings even for films can be done across continents without loss of sound and voice quality.

And for those who are purists and traditionalists who prefer old music (termed 'retro') across genres, the re-issues can be digitally cleaned of hisses and unwelcome distortions so that the recordings by a Mohammed Rafi or an Ustad Amir Khan can sound as if they were done just yesterday in Stereo!

Adapting to newer technologies is the keynote or secret that has within it the potential to make our music industry boom. Of course the creative quotient must be there too, for at the end of the day, music, vocal or instrumental, is an art that should gratify the consumer. But to end on a positive note, artistes will naturally get greater creative freedom and space if the market is not dominated, as was the case in the physical era, by currency notes rather than musical ones. If the industry switches to the correct gear, the climb to the top will be easy. ❑

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The Indian Radio Industry: A Growth Story

Arundhati Nath

The Indian FM radio industry is poised currently at the precipice of uninterrupted growth and we hope to see this historic medium achieve immense success in the future

"LONG YEARS ago we made a tryst with destiny, and now the time comes when we shall redeem our pledge, not wholly or in full measure, but very substantially. At the stroke of the midnight hour, when the world sleeps, India will awake to life and freedom…" were the immortal words which began Pandit Jawaharlal Nehru's historic speech on the eve of India's Independence more than 60 years ago. A newly-created India listened, enthralled and transfixed, to a much-loved voice crackling over airwaves on All India Radio or "Akashwani",

In the past six decades, the Indian Radio industry has come a long way, amidst many challenges and advancements. Despite its much chequered history, radio in India remains the most affordable, accessible and one of the most popular forms of entertainment. It is the medium of the masses reaching out to 99 per cent of the Indian population.

Radio broadcasting started in British India in 1923 with the Radio Club of Bombay. All India Radio was established in 1936; it now has one of the largest radio networks in the world including the popular AIR FM. Till the 1990s when our economy was a closed one, no private players were allowed in the radio sector and Akashwani had the sole responsibility to cater to the wide and culturally diverse Indian consumer base. The Indian radio sector actually got a fresh lease of life with a lot of exuberance pumped into it when the economy opened up to allow privatization of FM radio stations in 1993.

With a large percentage of people in India, especially in

The author is Consultant, FICCI Entertainment Division, New Delhi. The views expressed in the article are personal.

the villages, still unable to read and write, it is impossible for them to read newspapers for local news and developments in the country. Electricity is not abundantly available in our remote villages either and television is a luxury for a country battling with crippling poverty. Thus for the poor and under-privileged, the only available medium of news and entertainment has always been the radio.

However, having said that, it is also important to stress on the fact that radio, as a medium, has had a substantial makeover in the post-liberalization era. With the advent and proliferation of FM radio stations and entry of private players, radio too has become "cool" for the hip college-going clientele of tier-I and II cities who speak the same idiom as the increasingly popular radio jockeys on FM and are not wary of airing their views and emotions on FM during the many interactive phone-in programmes now aired across India.

The industry got another major boost after the second phase of privatization in 2005. As part of Phase II, in July 2005, the Government of India announced the licensing of more than 300 frequencies in 91 cities across the country.

Radio in India has truly matured as a medium of communication and is growing in every way possible. Improvements in technology, competition and an increased reach of the Radio are all factors responsible for the growth of this vibrant industry.

In 2005 came in a revenue-sharing regime as formulated by the government wherein FM players paid four percent of their gross revenue as annual license fee to the government, apart from a One-Time-Entry-Fee (OTEF). Finally, private FM radio players, owned mostly by media conglomerates, could breathe freely and things began to look up further when advertising money started coming in and the sector began to grow.

In 2010, the radio industry had a market size of INR 10 billion. It registered a cumulative growth rate of 11 percent in the period 2007-2010. On the whole, the industry is projected to grow at a CAGR of 20 percent over 2010-15 (in terms of revenue) and is expected to reach a size of INR 25 billion by 2015, according to the FICCI-KPMG report of 2011.

Though the radio industry witnessed rapid growth, in terms of advertising revenues as well as in the funds generated for the government, a significant growth in listenership numbers was still to come. The growth in listenership so far had happened more on account of higher geographical coverage i.e. establishment of new FM stations as part of government's Phase II initiative. Overall, however, while the number of FM radio channels had grown from 10 to more than 200, the penetration of radio (number of listeners as a percent of the population) had only risen from 45 to 53 percent. An 8 percent rise was definitely not commensurate with the large increase in the number of radio stations. FM companies had long been clamouring for higher growth to be motivated chiefly by diversity in content and raising FDI in radio.

Though the radio sector subsequently hit a phase of slowdown, it managed to survive and fought to stay afloat. It has and will manage to cope with pitfalls. Its widespread reach, localization and cost efficiency are strengths no one can afford to ignore. Advertisers too realize that radio remains one of the most effective tools to directly reach out to their target audiences at costs significantly lower than television.

The Government of India's recent announcement of FM Phase III expansion has come as a boon for radio operators across the country. With this announcement, the government has enabled the addition of 839 new radio channels across 227 towns and subsequently increased the reach of radio in order to provide a wider range of choice to listeners across the country.

The government has also approved increasing Foreign Direct Investment (FDI) in FM radio channels to 26 percent from the current 20 percent. This increase in FDI from 20 percent to 26 per cent will definitely give a fillip to the sector by encouraging foreign investors and ensuring long-term gains for the industry.

In Phase III, the government has also removed restriction in networking of channels owned by a single operator; this move will definitely bring down the operational costs and improve radio's viability in remote and difficult areas.

Also, the freshly-minted multiple ownership of channels in a city not falling under D category will enable diversity in content aired and will allow operators to distinguish themselves from others to cater to niche audiences. This will also increase the overall listenership base and the listening time will increase the advertisement pie by making focused advertising possible.

The government has finalized e-auction bidding for Phase III, on the lines of the 3G auction in the telecom sector. Radio operators will need to bid keeping the economics of individual cities in mind.

Radio broadcasters have also been permitted to air All India Radio news bulletins on their stations. Further, in an attempt to help broadcasters air more "newsy" content, programmes featuring certain categories like information related to sporting events, traffic and weather, coverage of cultural events, festivals, coverage of topics pertaining to examinations, results, admissions, career counseling, availability of employment opportunities, public announcements pertaining to civic amenities like electricity, water supply, natural calamities, health alerts, among others as provided by the local administration, will be treated as non-news and current affairs and will be permissible on private FM radio stations. Broadcasters can view this endeavour as a beginning in the journey of being enabled to air news as part of their programming content.

The key private players in the FM radio industry are Entertainment Network India which operates Radio Mirchi; Reliance Broadcast Network which operates Big 92.7; Next Mediaworks of Mid-day Multimedia, Fever 104 from the Hindustan Times Group, Red FM from the India Today Group; Radio City 91.FM promoted by Music Broadcast Private Ltd. Most of these stations have vernacular channels too in order to cater to local audiences across states in a multi-lingual country.

The Federation of Indian Chambers of Commerce and Industry (FICCI) has been cheerleading the cause of the Indian media and entertainment industry for more than the past decade and the growth of the radio sector has been a priority in FICCI's agenda. FICCI began to play a significant role in the coming of age of FM radio when Dr Amit Mitra, Former Secretary General, FICCI, was appointed to spearhead the 2nd Phase of Privatization FM Radio Broadcast Policy Committee as its chairperson.

The committee made a list of key recommendations which the government deliberated and largely acted upon during the 2nd phase. Last year, the FICCI Radio Forum, on behalf of industry stakeholders, submitted another set of recommendations to the Ministry of Information and Broadcasting, pertaining to:

- Extension of license period
- Need to release additional frequencies in all markets; allow broadcasters to operate multiple frequencies in the same city.
- Tradability of licenses
- Automatic renewal of licenses at the end of the initial term of the license.
- News & Current Affairs in radio programming by the private operators
- FDI limit in Radio Broadcasting

It is commendable that all of these have been addressed by the government in its Phase III privatization policy. The Indian FM radio industry is poised currently at the precipice of uninterrupted growth and we hope to see this historic medium achieve immense success in the future. ❑

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Indian Publishing – A Giant in Slumber Ready to Bounce

Anand Bhushan

Indian Publishing is taking a great leap forward and is fulfilling its responsibility of providing books not only to Indian reading public but also to readers in all parts of the world

INDIA IS a country with an ancient civilization and a rich tradition of culture dating back to many centuries. Its philosophy, emanating from the Holy Vedas and propounded by the sages and seers with deep learning, has been handed down to us through the ages – first by oral renderings and later on by handwritten books – the only parallel to this being the great philosophers of Greece, the personalities of Socrates, Plato, Aristotle and the like. The craving for learning has been so great in India that the writers did not wait for the paper to be invented and started with writing on Bhojpatras followed by Tampatras. Of course, it was a limited edition of the text but copies were available none the less. A tradition, deeply inherited and cherished, flourished gradually to the age of modern books and has outwitted their counterparts in excellence in other parts of the world.

India is proud to have a pulsating world of book publishing in a number of modern Indian languages including English. As on date, we have 22 languages recognized by our Constitution including English. The history of Indian language publishing dates back to almost a century. India, today, is perhaps the only country in the world which publishes books in 24 languages and ranks third, after the USA and UK, in the publication of books in English. There has been an astounding increase in the number of titles being published in India. Out of the estimated 90 to 95 thousand new titles published every year, an estimated 25,000 are in Hindi, 20,000 in English language and the rest in other Indian languages. This engages about 19,000 publishers

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in India. Today, Indian publishing is one of the greatest in the world and India is among the first seven publishing nations. It is a great story and can be presented with pride. Today, India has a literacy rate of around 68% which gives a literate population of about 82 crores. This means that a great number of people are there who can read and write. On top of it, there is a whopping 550 million people below the age of 30, and with a vastly growing consumerist middle class, the need for publishing more books and sales in the country are bound to increase manifold.

Again, if we look at the figure of readership of books for which Indian publishers provide reading materials, it is mind-boggling. There are 336 universities including 100 deemed universities and 20 Central universities, 5589 colleges, 1,16,820 high schools, 1,98,094 middle schools, 6,41,695 primary schools and over and above there are lakhs of private centres which have never been enumerated. Then, there is the adult population of millions of people who read and buy all sorts of books. Indian publishers provide books not only for the organized educational sector as given above but also for neo-literates as well as, may I say, illiterates who do not read books by themselves but buy books to get these read out to them. This group is not small in number. We must also take stock of the large and hitherto unacknowledged segment of religious publishing which has always been an integral part of the publishing and reading scene of India, spread out into its far distant corners. India is the seat of eight major religions and a large section of the followers of all these religions live in the rural areas. They form a large chunk of readership in religious texts published all over by specialists in the field and marketed during the local fairs and festivals by pavement hawkers. Copies of holy scriptures like the Bhagavad Gita, the Ramayana, the Holy Quran, the Guru Granth Saheb, the Holy Bible and other adorn Indian homes and are read or heard by billions of devotees. These publications never reach the National Bibliography, even though they account for nearly 8 to 10 thousand books a year. If one were to take the quantum of the number of copies of these books, it would touch a figure in billions.

Another area which has yet to see the light of day is that of folk literature which, too, feeds the rural areas. India has an age-old tradition of folklore which are recounted by mothers to their offsprings as lullabies, around the banyan tree in community gatherings or around a campfire. These stories have been collected and printed for generations but find no mention in the annals of publishing even though they constitute a sizeable chunk.

Viewed in the light of this knowledge of the newly emerged realistic figures, we realize that Indian publishing is truly a colossus – a sort of giant in slumber which needs to be given its realistic status and true identity.

India is publishing books in various categories and subjects. Apart from the text books for schools and colleges, books are being published in the category of electronic publishing, paperback and hard covers, religious books, feminist writing, science, technology and medical books, law books and above all children books. It is not known to the world at large that with a huge reservoir of scientists, Indian publishers are bringing out a number of books in the field of science and technology. Similarly, we have published authentic law books for the last so many decades. Then, in the field of latest trends also, for example, feminist and mind, body & soul publishing, I think, India has made a name in the world. Many leading publishers have taken special interest in the publishing of books in these two vital areas. The year 1959 has a great significance for the book reading public and book publishing in India. It saw the great revolution of publishing General Trade Books in paperback in subjects of fiction, novels, poetry, travelogues, palmistry, religion, how to do books, translation of world classics, know-series like know your cities, temples, places of tourist interest, career-oriented books, alternative medicine etc. The list has been growing since then to engulf the whole gamut of new subjects like meditation, yoga, management, computer etc. This experiment was a great success and paved the way for publishers in the nineties from all over the world coming to India in large numbers and setting up joint ventures or giving translation rights or doing co-publishing.

The market for general books is immense and certainly there is a potential for huge turnover. The Indian publishing industry is, however, very price conscious though it has never compromised on the quality. The market compulsions in the field of general books have paved ways for innovations. The world publishing community is quite aware of the paperback experiment in India. The basic postulates for the success of paperback publishing in India are low prices, large editions and an efficient network of book distribution. Many publishers in English, Hindi and Indian languages have launched Book Clubs with mixed success. The net result of all this was that more and more people belonging to masses started reading books. One could see paperbacks in Indian languages in the hands of ordinary people to elite in every walk of life.

Now, let me look at some other perspectives relating to the field of book publishing. The British writer Malcolm Muggeridege once jokingly said that the last Englishman would probably be an Indian. He was absolutely right. In the global business of electronic publishing, at any rate, it already looks as if the real expertise for putting the English language into printable shape may make its final home in India. Major international book and journal publishers find it viable and it makes a sound commercial sense – a price advantage like 40 percent - to get typesetting, page making and digitization done in this country – either at their own Indian operations or through one of the electronic publishing agencies in India.

As I have mentioned earlier, Indian Publishing is taking a great leap forward and is fulfilling its responsibility of providing books not only to Indian reading public but also to readers in all parts of the world. India is producing high quality books which are being exported to over 130 countries of the world and our total exports are approx. Rs.800 crores. Still there are problems and challenges under which Indian publishers are working. To enumerate a few are the shortage of capital, high postal rates, lack of trained professionals, gaps in distribution, retail and marketing, nationalization of textbooks, shortage of bookshops etc. The demand and supply of books is totally mismatched with books not reaching all the potential buyers. One more challenge has come before the Indian Publishers during the last one decade and this refers to the unregulated entry of foreign publishers. Books pertain to the field of culture which the Government must spare like the Newspaper Industry.

The most important challenge which the Indian Publishing Industry is facing is the Nationalisation of School Text Books. This area of publishing is the foundation of publishing worldwide but the Indian Publishers are being starved of their due. In today's world, where liberalization and globalisation is the mantra of success, the Swadeshi Publishing looks forward to the Government of India to frame a suitable policy to undo the damage.

It was a long felt need that the Government of India should set up a Book Development Council to look into the malaise facing the industry. In September 2008, the Ministry of Human Resource Development had set up a National Book Promotion Council with a view to facilitate exchange of views on all major aspects of book publishing, interalia, covering writing/authorship of books for different segments of population for various age groups in different Indian languages and the quality and content of Indian books in general. After the first meeting of the National Book Promotion Council held on 25 September 2009 under the Chairmanship of the Minister of Human Resource Development, it was felt that there is need for a comprehensive National Book Promotion Policy in order to meet the challenges of Right to Education in the 21st century. After deliberations, it was suggested that a 12-member Task Force should be constituted to draft a comprehensive National Book Promotion Policy. The author of this article as President of FIP, is one of the twelve members of the Task Force and has played a major role in preparing a suitable document.

After considering the suggestions from various quarters including authors, publishers both public and private, universities, NBT, NCERT, Sahitya Academy etc. Shri Kapil Sibal, Minister of Human Resource Development, enumerated the following key issues which should form the basis of preparation of the Book Promotion Policy by the Task Force:

- A website may be created providing a platform to the interested creative persons to convey their interest in topics of subjects in which they would like to write books. This forum may be named as "In search of authors".
- The draft NBPP should also deal with pricing policy on books. However, this should not be mandatory in nature but advisory in nature.
- There should be Public Private Partnership in publishing of text books for school children. The National Policy should aim to improve quality and distribution of books.
- The NBPP should specifically focus on access to books by print disabled persons and physically challenged.
- Neighbourhood library system should be promoted and strengthened.
- Neighbourhood libraries should be integrated with panchayat, district and state level libraries and the states should subsidise these libraries.
- State Governments should be involved in the NBPP.
- Pre-school books should be encouraged.
- Availability and affordability of books for poor and ordinary people should be given importance.
- Culture of weekly book markets should be promoted in all localities in major cities and town.
- Book distribution system should be strengthened and incentives be provided for translation of books.
- Every small and market place should have bookshops.
- At least one hour in a week should be devoted for inculcating among students reading habits in school libraries.
- There should be more focus on e-books and digital libraries.
- Both public broadcasters and private channels should have regular programmes of book review in their respective channels.
- There should be a brand ambassador by involving celebrities to encourage book reading habits and to promote the NBPP.

The Task Force after wide ranging consultations and deliberations has come up with a draft policy which has been presented to the Ministry of Human Resource Development for approval. We are sure that the Government of India will adopt the policy and execute it to see that Indian Publishing becomes a vibrant force in the world.

The Federation of Indian Publishers which is the apex body and to which are federated all the Language Publishers Associations and which, in turn, is federated to the International Publishers Association, has played an active part in the formation of NBPP. Not only it has lent its active hand in the NBPP but has also helped and advised the Government of India on matters of Copyright, Piracy, Reprographic Rights, Rights of visually impaired, etc. We in the FIP are committed to fulfil our national responsibility.

I am confident that Indian Publishing is moving in the right direction and in years to come will become a force to reckon within the World Publishing. ❑

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Livelihoods in Bamboo

Shailendra Sinha

The success of the initiative can be gleaned from smiles on the faces of the Adivasis

FOR YEARS the Adivasis of Jharkhand have been forced to migrate seasonally to areas in Punjab, Assam and Bengal in search of livelihoods. For three months in the year, they make these lands their homes, for the remaining period of course, they stay on their lands and cultivate it. The last two years have been particularly bad with drought making the prospects of gains from the land, bleaker. This has triggered migration at a heightened pace.

Something is now changing for the Adivasis in the forests of Jharkhand They have found a homegrown answer to the periods of unemployment or under-employment that a typical agrarian economy invariably throws up. This answer has come through another home-grown item, bamboo. The slender, green shoots with its delicate, artistic leaves grows in abundance in these forests, a part of the natural environment that every Adivasi grows up and lives in. But they are now looking at this tree with renewed eyes. Bamboo is spawning a new cottage industry, which the Adivasis can easily be a part of and earn a cash income, which they need directly to supplement their earnings from cultivation and also to substitute their earnings from the seasonal migration.

For years Basanti Tuddu , living in Lavadih village, Shikaripada block, Dumka district used to break larger stones into smaller and still finer ones in stone quarries. So did her husband, Subhash Honsda. Over time, the fine dust they inhaled took its toll on the lungs and Basanti developed TB, forcing her to stop work. With a loss of their only source of income, failing health, the couple faced a frightening future. The shift to bamboo work was a boon. The handicraft industry in the area has been spurred by organizations such as Evangelical Social Action Forum. (ESAF). It turned out to be a lucky break for Subhash Honsda who had an inherent talent, which ESAF spotted and picked him up for training in Trishur, Kerala and was given training in crafting products from bamboo. He has shown exceptional talent and was awarded the Chief Minister Arjun Munda prize for his craftsmanship

After two months, Subhash became a master trainer and once back home in the Jharkhand forest turned his energies into building a small group of local villagers to further impart his skills. This kind of work has transformed the lives of Adivasis in the area in Ghasipur, Rampur, Lakhikundi, Pipra, Bargachi, Kendua, all searching for alternatives to boost their income, which would typically dry up during the lean seasons in the agricultural cycle. Over a period of time this has effectively stopped migration to other parts of the country by opening up this source of income close to their homes and fields.

Lal Tuddu, one of the group member says that he can make many different items with one bamboo. Danial Mohli too nods enthusiastically. Urmila Mohli is buoyed by the appreciation she gets for her craft. It simply makes her day! Often there is more than one member from a family involved, bringing considerable income into the household. Today some 200 men and women in 20 groups are involved in Shikharipada, Dumka district.

Laundry bins, dustbins, decorative items, even furniture are created, all of which find ready markets in urban centers, metros. The appeal and charm of eco- friendly products has captured the imagination of international markets and across urban India and there are many takers for the bamboo products of Jharkhand. Of course it is the carefully laid network of marketing and sales by ESAF that is putting these items on the shelves of classy, elite outlets like Fab India in Chennai, Jharcraft in Ranchi and other outlets in Kolkata. Craft exhibitions routinely held in metros also provide an excellent window for these products.

Across the state, in Giridih, Goda, Dumka, Pakud, Sahebganj and Jamtada, training-cum-production centers have opened up, providing livelihoods for some 2000 families. Craftspersons get compensated for their labour and are unconcerned with the rest of the marketing chain. This is quite different from local traditional crafts where the craftpersons often are in direct dealing with the markets through middle-men who lop off a major portion of earnings from the sale.

What is marvellous is how a natural forest produce like bamboo a part of the lives of tribal people for centuries has now found a new use. Today when livelihood options can open up through linking with markets, this has enabled tribal communities to move from traditional sources of income to modern market-based ones. Recently there has been a move and rightly so to include bamboo as 'Minor Forest Produce' allowing forest dwelling communities and Adivasis unhindered access to bamboo. This is the region, which has bamboo growing in abundance. ESAF has made a success of converting this natural wealth and human resources into new wealth of a different kind. If this can happen at Shikarpada, then why not in other areas in Jharkhand which has 23605 square km of forests of which 843 square km is bamboo? It could be a big idea waiting to happen.

Of course, there is no denying the social commitment in the initiative. This is amply evident not only in the larger mission of providing livelihoods but also in smaller steps to improve the quality of the lives of the community. One will find a medley of children playing and studying in 'Bal Shiksha Kendras' established near the production centers. This has prompted NABARD to come forward to support the initiative through SHG groups set up by ESAF. Clearly all this takes the bamboo initiative well beyond the contours of a commercial success, actually touching and changing lives. Infusing hope and more. A sense of pride in one's capability, a new-found security amidst the tough options of earning a decent livelihood. Sudhir Kumar, ESAF Manager-Business Development sums it up succinctly "The success of the initiative can be gleaned from smiles on the faces of the Adivasis". ❑

Charkha Features

(E-mail :charkha@bol.net.in)

J&K WINDOW

SPECIAL INDUSTRY INITIATIVE SCHEME

THE Cabinet Committee on Economic Affairs has approved the implementation of the Special Industry Initiative Scheme in Jammu & Kashmir recently. The Special Industry Initiative Scheme (SII J&K) will be a Central Scheme with 100% Central assistance in partnership with National Skill Development Corporation (NSDC) and any similarly placed institution identified for the purpose and the corporate sector. The Scheme proposes to cover all the districts of Jammu & Kashmir.

The Scheme is to be implemented in partnership with NSDC and the Corporate Sector. The identified companies will screen and select students from the State. After assessing the skill gap of the trainees and the need of the Corporate, the trainees will be trained suitably by the Corporate. The Corporate will be incentivised to absorb the trainee. A total expenditure of Rs. 1000 crore is proposed to be incurred under the SII J&K Scheme. The estimated expenditure is approximately Rs. 2.50 lakhs per trainee. The Central Government will make a provision of Rs. 500 crore in the next five years from 2011-12 onwards. The cost of travel, boarding & lodging and stipend will be borne by the Central Government.

The training cost will initially be borne by the Corporate. As an incentive to the Corporate, 50% of the training cost would be reimbursed if the trained youth are given employment in the company. In J&K 8000 youth are proposed to be trained annually. The total target in the scheme is to train 40,000 graduates, post graduates and professional degree holders over a period of five years.

The Scheme is based on the recommendations of an 'Expert Group' set up by the Prime Minister's Office on August 18, 2010, under the chairmanship of Dr. Rangarajan. The Scheme has been launched to enhance the employment opportunities in the State of J&K and to formulate a job plan involving both the public and private sectors, especially for the youth. ❑

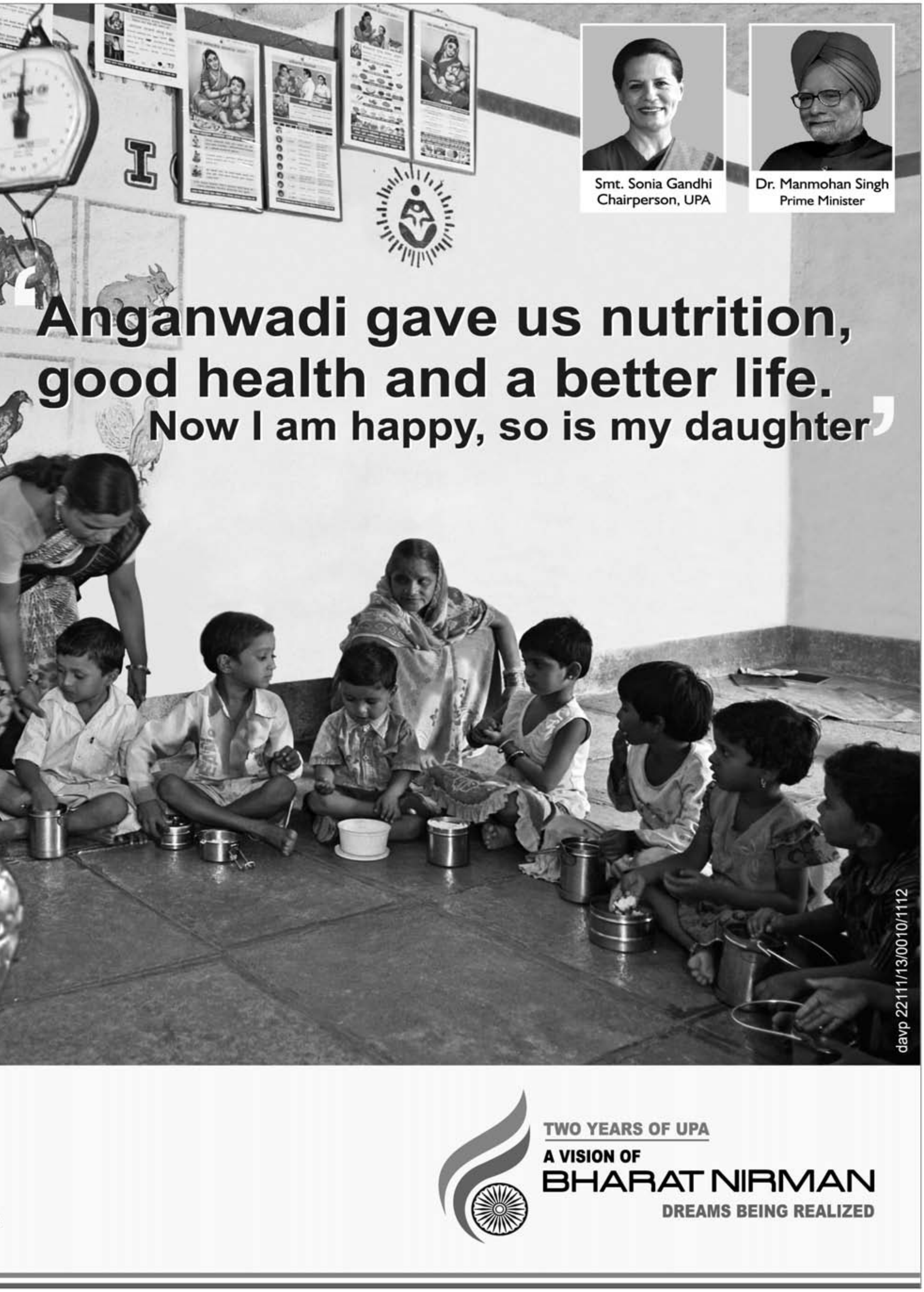
ROAD PROJECT IN JAMMU AND KASHMIR

THE multi-crore Mughal Road project, which has already received two extensions is now expected to be completed in March 2013, as the work on various bridges being constructed on difficult terrains is yet to be completed.

The 84 kms long Mughal road, connecting Kashmir valley with Jammu province of which 40 km falls inside valley and 44 km falls under wildlife sanctuary in Jammu province was proposed to be completed in March 2009, but due to difficult topographic terrains and unfavourable weather conditions, the project could not be completed on time and it is now expected that entire project would be completed within two years.

Rs 253.26 crores have been spent on the construction of the road project so far and efforts are being made to construct a parallel road line to Srinagar-Jammu national highway which usually remains blocked most of the time during winters. Similarly, people from Rajouri and other mountainous districts of Jammu region are thinking on similar lines. They are hoping that large number of tourists will prefer to visit through this traditional road considering its natural beauty and natural waterfalls.

The state government has already made it clear that some tourist development authorities would be established in various places for better infrastructure for the national and international tourists. They are hoping that Mughal Road will generate employment avenues for people in these areas and would uplift their economic status. The importance of the old Mughal Road is that it was the only entry point to the Kashmir Valley in medieval period. ❑



Smt. Sonia Gandhi
Chairperson, UPA
Dr. Manmohan Singh
Prime Minister
'Anganwadi gave us nutrition, good health and a better life. Now I am happy, so is my daughter'
davp 22111/13/0010/1112
TWO YEARS OF UPA
A VISION OF
BHARAT NIRMAN
DREAMS BEING REALIZED

Growth Potential and Barriers of Indian Entertainment Industry

A Abdulraheem

The industry needs to fight all roadblocks- such as piracy- in a concerted manner, while churning out high-quality, world class end products. The entertainment and media industry has all that it takes to be a star performer of the Indian economy

ENTERTAINMENT INDUSTRY in India encompasses the film and television industry. One of the fastest growing sectors in India is the entertainment industry. Initially there was a single television network owned by the state but now there are about 300 regional, national and local channels. The entertainment companies have pooled 6 million people for livelihood. Television and movies are a stress release booster and reaches out to about 100 million households in India. Therefore, this paper examines growth potential and barriers of Indian Entertainment industry.

India's Media and Entertainment: Growth Drivers

The industry's strong growth potential is attributed to factors such as:

- Growing potential of the regional markets
- Increasing media penetration and per capita consumption, and
- Rising importance of New Media (online media) driven by changing media consumption patterns
- The Government's thrust on digitisation and addressability for cable television, is expected to increase the pace of digitisation leading to tremendous growth in DTH and digital cable

In 2010, advertising spends grew by 17 percent to US$ 5.93 billion and accounted for 41 percent of overall industry size. Revenues from television advertising and subscription are expected to touch US$ 4.8 billion and US$ respectively during 2015, according to the report.

India's Media and Entertainment: Government Policies

The Minister of Information and Broadcasting considered setting up of a "Community Radio Fund". The issue will be taken up on a high priority with the key agencies such as the Planning Commission and

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concerned ministries. The setting up of such a fund would ensure the sustainability and enhanced outreach of the Community Radio Movement within the country. The modalities would be completed within a stipulated time frame. The Ministry has also set up a committee to assess the current rating system for television rating points (TRP) of TV programs and has expressed concern over this current system of evaluation. The MIB has recommended increasing the sample size and switching to a more scientific approach for accurate data. The I&B ministry has also endorsed the recommendation by the Telecom Regulatory Authority of India (TRAI) to enhance FDI ceiling for DTH TV, Internet protocol TV and teleport from 49 per cent to 74 per cent.

Government Reform policies

The Government has introduced some reform policies to trigger the growth of entertainment industry. They are:

- Allowing 100 percent FDI on advertising and film industry through regular channels
- Authorizing 49 percent foreign stake in DTH and cable TV
- Allowing establishment of uplinking destinations to private TV broadcasters for satellite uplinking from India
- Certifying the repute of an industry to the movie sector
- It has given its consent on the guidelines for Headend-in-the-Sky (HITS) operators, an equipment that will offer electronic cable content to Indian viewers
- Permitting Foreign Direct Investment (FDI) in FM radio industry with a 20 percent restriction
- Paving way for FM Radio functioning to the private sector
- Including development projects of film industry in its five-year plans and allocating US$ 50.13 million to it.

Performance and Growth Potential

The media industry can be categorized into the following categories; filmed entertainment, television, music, radio and print. As implied, many aspire to join this industry due to the high visibility and glamour associated with many of the top jobs. That said, the opportunities are many and varied, and not all focused on celebrity status, such as in the areas of mass communication, content development, animation, production and event management.

Performance

The industry has suffered a great deal during the economic recession, with U.S. top media companies managing flat revenues in 2008 and a 5 percent contraction in 2009 according to Ad Age reports. Many players, dominated by those in the print industry, have plunged into bankruptcy, primarily due to the shrinking revenues coupled with massive debt loads taken on in the market boom. Though certain digital media firms such as Google fared well (revenues up 23 percent), others such as Microsoft witnessed a flat top line.

Ad spending in the U.S. was also severely depressed, falling 4 percent in 2008 a further 14 percent in the H1 2009, according to WPP's TNS Media Intelligence. Despite this sorry state, newspapers, magazines and cable systems continue to operate and media companies have been trying to slash their crippling debt. Analysts believe the worst is over, and globally, the industry is poised to emerge with less debt and stronger balance sheets in the coming 6 months.

Growth Potential

The Indian entertainment and media sector is one of the fastest growing sectors in the economy, and its segments have all witnessed tremendous double digit growth in the last few years. The past 2 years were tumultuous, especially due to poor liquidity in the system for financing big projects for the big and small screen. However, with global indicators realigning themselves once again, the Indian media and advertising industry too looks poised to resume where it left off pre 1H 2008. According to a 2009 report jointly published by the Federation of Indian Chambers of Commerce and Industry (FICCI) and KPMG, the media and entertainment industry in India is likely to grow at 13 Percent CAGR over 2009-13, touching US$ 20 billion by 2013.

The key reasons favoring the rapid growth of the Indian entertainment and media sector are the demographic and economic factors buoying India's development; with a majority of the population below the age of 35, and increasing disposable income in Indian households, the average spend on media and entertainment is likely to grow, according to the 2009 edition of PricewaterhouseCoopers report. In addition, advances in technology, increasing penetration of communication mediums, policy initiatives of the Indian government to increase FDI and the increased participation of private media companies have been the other key drivers of the industry.

As per current estimates the television industry is projected to grow by 22 percent, filmed entertainment by 16 percent, radio by 18 percent and the Indian advertising industry 61 percent over the next 3 years. Given the lucrative prospects of this segment, international media giants are all vying for a stake in the segment. In addition to domestic growth, the growing popularity of Indian content in the world market and South Asia in particular, has encouraged Indian entertainment industry players to also venture abroad to tap this booming segment; according to a report by CII-AT Kearney, the share of international markets in total box office collections is estimated to increase from 8 percent in 2006 to 15 percent in 2010.

Future Prospects

The greatest opportunities naturally lie in those sub-areas that are expected to grow the fastest over the next few years, namely, in the development of digital distribution platforms for TV such as DTH, digital music platforms, digital media advertising (internet, mobile and digital signage) and global cinema content. For new graduates, the industry poses great prospects for achievement given its growth trajectory. On the flip side, it is extremely fast-paced and stressful as well. Additionally, being creative on a tight schedule can be emotionally draining, especially because most of the work includes long hours and meeting stringent deadlines.

Barriers to investment

A lot more investment can be drawn into the entertainment and media industry if certain sectoral policy barriers can be addressed. Some of the issues that need to be addressed which commonly impacts all segments and need to be addressed urgently include:

Piracy

The problem of piracy assumes a different proportion in a country such as India with an area of 3.3 million sq. km. and a population of over 1 billion speaking 22 different languages. It impacts all segments of the industry especially films, music and television. Most of the credible efforts today to combat piracy have been initiated by industry bodies themselves. On part of the government, lack of empowered officers for enforcement of anti-piracy laws remains the key issue that is encouraging the menace of piracy. This, coupled with the lengthy legal and arbitration process, is being viewed as a deterrent to the crusade against pirates. The current Copyrights Act too is dated in terms of technology improvements, and above all, it does not address the needs of the electronic media which has maximum instances of piracy today. The draft of the Optical Disc Law to address the need for regulating piracy at the manufacturing stage is still lying with the ministry for approval.

Lack of a uniform media policy for foreign investment

The sector currently lacks a consistent and uniform media policy for foreign investment. Some of the inconsistencies include different caps in foreign direct investment in various segments. This is enumerated below:

- Television distribution: DTH 49 percent (strategic FDI only 20 percent); cable 49 percent (ownership can only be with India citizens).
- Content (news): Television and print - 26 percent; radio-nil
- Content (non-news): Television and print-100 percent; radio 20 percent (only portfolio)

Level playing field with incumbents

Most sectors of the Indian E&M industry have traditionally operated under various agencies of the Indian government, which were later opened to the private players in various stages. FM radio is one such example where the incumbent All India Radio (AIR) was the sole player in the medium of both AM and FM radio broadcasting. Limited frequencies of FM broadcasting have been opened to the private players but with a license fee, which is not currently applicable to the incumbent AIR. Similarly, in television segment, all terrestrial broadcasting rights continue to be with the incumbent Doordarshan.

Content regulation

A long-standing debate continues amongst the industry members on regulation of content. Some of the issues that need to be addressed in this sphere include:

- Should there be a content regulator or should the industry be allowed self-regulation under a broad framework?
- If there needs to be one, should the content regulator be independent of the carriage regulator?
- Should the content regulations be consistent across all delivery mediums such as films, television, radio and print or

different sets of regulation should be evolved for each medium?

- What should be the working mechanisms of a content regulation in terms of enforcement, penalties for default from prescribed guidelines etc.?

Price regulation in the television industry

As per a notification issued by the TRAI, broadcast media pricing has been frozen for over a year now. Though TRAI did allow a 7 percent inflationary adjustment late in 2004, the inflationary adjustment of 4 percent in 2005 is under a legal dispute. Such price controls limit a broadcaster's ability to shape their business model, based on market demand and the competitive environment. Since the market has so far been efficiently regulated through competition, price regulation thus becomes a deterrent.

Cross-media ownership rules

Media integration is an important tool in the hands of the media industry which by its very nature could lead to anti-competitive behaviour hurting the entire value chain of the industry. The government has been mulling over evolving cross-media ownership rules for which even a public draft has not been evolved as yet. Most E&M sectoral policy documents have an in-built compliance clause, which states that companies have to abide by the cross-media rules. However, in the absence of any draft rules or an established time-frame for evolution of such rules, potential foreign investors can't evolve their long-term investment strategy for India.

Lack of empowered regulators

At present, the government has appointed an independent regulator – TRAI – for only television and radio. Here too, the role of the regulator has been restricted to providing recommendations on segment issues to the government; as a result the government has still not acted upon several recommendations by the regulator. Some of the key recommendations include 'issues relating to broadcasting and distribution of TV channels' of which 'addressability in distribution' forms a significant part impacting the largest segment of television. Other pending recommendations include 'digitalisation of cable TV', 'privatisation of terrestrial broadcasting', 'licensing of satellite radio' etc.

Merging of the FII and FDI caps

Some industry members are of the view that converting the current cap on foreign institutional investment (FII) investment to foreign direct investment (FDI) is not a very encouraging move by the government. FII is primarily considered "hot money" and is invested by foreign funds to make quick returns unlike FDI, which is longer term in nature and is actually invested into the business. FDI in several cases is also accompanied with expertise (such as technology) being brought into the country that helps in the growth and development of the industry. An FII invests like a financial investor with the prime motive of quick appreciation of its invested capital rather than taking a longer-term view of the business, whereas an FDI investor is more in the nature of a strategic investor and is in the business for the long haul. The new policy does not recognise the need for creating an environment that encourages strategic investors in making investments in the sector.

Tax treatment of foreign broadcasting companies

The tax treatment of foreign companies in the broadcasting sector in India is emerging as the single most important policy issue deterring foreign investment in the country. A major issue pertains to taxation of satellite segment usage fee paid by broadcasters to foreign satellite companies. Tax assessing officers have attempted to treat such a payment as royalty income and tax the same on source rule basis. Such satellite companies do not have any office or presence in India.

Another issue relates to foreign telecasting companies. These foreign telecasting companies do not have any office, business presence or operations in India. Tax assessing officers have been arguing that foreign telecasting companies must have a permanent establishment (PE) in India on account of their agents selling air-time space to India advertisers.

While various bilateral conventions for the avoidance of double taxation do offer a process for re-mediation of double-taxation issues, cases in past have dragged on for five years or more. The dramatic growth in the number of foreign broadcasting companies involved in double-taxation dispute cases in India is becoming well-known, and unless it is dealt with soon, it could become a major impediment to the Indian government's attempt to attract new investors.

Future outlook

With rapid advancements in technology, convergence will play a very crucial role in the development of the Indian entertainment and media industry where consumers will increasingly be calling the shots in a converged media world. Broadband access and Internet Protocol (IP) will be the technology enablers that will evolve this new breed of consumers. In the converged world of tomorrow, content and access will no longer be in short supply. Opportunities for consumers to access and manipulate content and services will not only be abundant, but overflowing. However, consumer time and attention will be limited. Thus, established approaches of pushing exclusive content through non-linear-channels or networks to mass or segmented audiences will no longer guarantee competitive advantage. Thus, following are the challenges and opportunities that convergence will bring to the industry:

Consumer needs are expanding beyond the mass media and segmented media to 'Lifestyle Media', a new approach that will help consumers maximise their limited time and attention to create a rich, personalised and social media environment. This approach presents many opportunities for the industry to create new avenues to generate revenue.

Knowledge of 'consumer activity' rather than exclusive ownership of content or distribution assets will become the basis for competition. Businesses that capture 'consumer activity' data and use it to inform business and advertising models will be positioned to succeed.

Media marketplace will provide a structure to capitalise on the Lifestyle Media opportunity. Pull-oriented media consumption models, such as a media marketplace, in which the consumer is furnished with robust search, research, customisation, configuration and scheduling tools will capture the opportunity associated with Lifestyle Media better than minor modifications to existing business practices. Participants in media market place must collaborate on this transformation.

Early movers in establishing media marketplaces will have a significant advantage over late entrants because of network effects, whereby the value of the market place increases as the number of participants increase.

Media market places will be economically viable only if operational efficiencies can be realised through consumer activity measurement capabilities and supporting systems.

Significant advancements in audience measurement technology will be needed to capture, analyse and standardise consumer activity data across platforms.

Though convergence will bring uncertainty, the ability to gather rich data on consumer activity will also lower the risks and costs associated with testing new revenue or advertising models.

Both content providers and advertisers will need to be more accountable for their performance because it will now be measurable.

While technology will make it easier to collect detailed consumer information, privacy concerns will rise amongst consumers, regulators and privacy advocates.

Convergence will thus require increased collaboration between value chain partners to drive new products and services to consumers. For content owners, conducting researches to understand the needs of the Lifestyle Media consumers will become crucial. They will need to develop strategies for owning social networks and capturing consumer activity information and will need to develop convergence-native content rather than concentrate solely on re-packaging existing content for multiple platforms. They will need to understand the complexities of content security and controls and incorporate them into the system and processes. In addition to the above, advertising agencies will need to invest in advertising ROI technology and processes that will lead to the creation of new viewing experiences that provide advertising opportunities beyond the traditional 30-second spot.

Conclusion

The Indian entertainment and media industry today has everything going for it - be it regulations that allow foreign investment, the impetus from the economy, the digital lifestyle and spending habits of the consumers and the opportunities thrown open by the advancements in technology. All it has to do is to cash in on the growth potential and the opportunities. The government, on its part, needs to play a more active role in sorting out policy-related impediments to growth. The industry needs to fight all roadblocks- such as piracy- in a concerted manner, while churning out high-quality, world class end products. The entertainment and media industry has all that it takes to be a star performer of the Indian economy. ❑

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Changing Media and its Role in Economic and Social Development

Rajamani Krishnamurti
Sharmila Banerjee
Mithun Roy

Media tells about the economic growth, local development, latest projects and government involvement all what is possible. The role of media cannot therefore be denied in the growth of the nation

INDIAN MEDIA-private media in particular - has been free and independent throughout most of its history. The three year period of emergency declared by late former Prime Minister Indira Gandhi, was the time when India's media was faced with potential government retribution.

Things have changed drastically since then. Media, the fourth pillar has become a commercial tool to make money, earn huge profits and influence people and government. The hard truth about Indian journalism currently is that proprietors matter, editors do not; money counts, talent does not.

The media industry in India is growing in leaps and bounds. It has gathered an unbelievable momentum and the credit goes to all the pillars – media, advertising, public relations, corporate communications, etc.

For a news media that is often in pursuit of the lowest common denominator of audience taste, the Radia tapes offered a story that had sensation in abundant measure. The story has been consigned to a black hole of neglect. The news media has increasingly been seen as a stenographer to power and an instrument for harnessing every form of dissent to dominant structures. The Radia tapes show that it has been actually engaged in a more sordid enterprise than stenography – it has been an active and eager participant in the abuse of power.

Of late, media is focusing more into sensation. It's all about hype, circulation figures and TRP game. There is perception between journalists that negative sells at least in India.

Is the media responsible for swine flu panic in India two years back?

Consider this. In June, TV channels started creating panic by airing that in next two days the water level of the Yamuna River in Delhi was going to increase, as water was being released from the Hathni Kund barrage in Haryana.

The water level of Yamuna had increased from 50 thousand to 1 lakh cusec. They did not say that upto 3 lakh cusec, is considered normal. Then, the water level came down to 26 thousand cusec. But a few channels continued creating panic. A day later, another channel claimed the water released from Hathni Kund barrage of the Yamuna in Haryana was about to enter Delhi even as the water level of the HK barrage was down to 18 thousand cusec. Some channels even used video clips of a breach in a canal named Dadu Pur Nalvi to hype their story.

On the other hand, millions of rural and urban Indians do not have decent sanitation and thousands die from diarrhoea, the issue is like an abandoned terrain that nobody wants to tread on and media is least bothered.

Why can't media houses keep up a relentless coverage on the unseen and ongoing disaster of hunger -- give voices and faces to the voiceless and faceless who live and die in our villages?

Ethics and business do have a turbulent liaison for quite some time. In the last two decades, the Indian economy has recorded an incredible and dependable growth, which has brought it to considerable global attention.

As India is the second largest world economy and growing rapidly just behind China, the business media is getting stronger in the current economic system. Even, business news channels have influence from different vested interest groups and there is rivalry between these channels for TRPs.

Like never before, the manner in which we communicate is in a state of change. The Internet has boomed, busted, and re-emerged with technologies and practices that are enabling new conversations that can start locally, and have a global impact. This fundamental shift has created a new landscape of influences and an entirely new ecosystem for supporting the dissemination of information. Monologue has given way to dialogue and in this new social media era of Facebook, Twitter and Google, consumers are in control. People react over these portals in the speed of light and it is almost impossible to predict the reactions.

This is high time when media should focus and act as a catalyst on economic and social development of the nation rather than circulation, TRP, hype and sensational.

It should focus more to reach the mass by taking the opinions from them on critical and important issues. The system has started, but needs to be aggravated on a larger scale. If media becomes a catalyst and acts as a real watchdog, then there is no requirement of a Lokpal Bill.

Though appointing a regulator for the sector would be highly counterproductive, yet the media itself should shoulder the responsibility of maintaining its high standards of objectivity and simultaneously extend constructive criticism to the Government.

Rather, media should develop a concept of having an issue dedicated to good news. Once in a while, it is a pleasant change to be acquainted with what is going right. All the stories should be positive, encouraging and full of hope. And very importantly, the stories should inspire. Even small efforts and innovations can snowball into larger initiatives.

Media has a larger role to play in India's social and economic development as in India, the progress of social-economic development among major states is not uniform.

Development is a multi-dimensional phenomenon. Some of the major dimensions include: the level of economic growth, level of education, level of health services, degree of modernization, status of women, level of nutrition, distribution of goods and services and access to communication

Media and socio-economic development are like two sides of a coin. The role of media is to evaluate the degree of percolation throughout the community.

Social media does play a role in taking India forward. Media helps in broadcasting things which we are unaware of. There is technology, and other advancements in trends. It can be a great way for progress which will help India grow in terms of learning, entertainment and employment opportunities.

Media does play an important role in bringing together the ethical values in us. Most of us watch television everyday and we learn things by watching it. In India, media plays an important role in affecting the mindset of the people. People watch television and they tend to adapt many things which they see on television. If this is used for beneficial purpose, it could bring positive changes in the people and thereby on the social system.

Media is responsible for the coverage of India's growth in all aspects. It tells about the economic growth, local development, latest projects and government involvement all what is possible. The role of media cannot therefore be denied in the growth of the nation. ❑

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Growth of Animation Industry

Gautam Benegal

India has gained significance as an outsourced destination for animation work due to low cost, skilled labour as its many advantages

THE ORIGIN of the commercial animation feature film in India very closely mimics the birth of cinema as a medium in this country. It is perhaps not surprising that the first baby steps in both cinema as a whole as a mass medium and its less distinguished offshoot, animation films, started with mythological tales, because those are the narratives that have resonated in our mass consciousness and been retold countless times over the millennia in words, songs, plays, sculpture, and art. Even when the Bombay film industry moved away from them, the robust regional language cinemas of South India produced grand mythologicals well into the 1970s. The first animation film to have mass appeal and to have been a commercial runaway success was Hanuman (2005) directed by VG Samant, India's first fully indigenously created animated feature, with a box office collection averaging around 85 percent. Just as *Raja Harishchandra* had swept the country off its feet in 1913 and paved the way for the Indian film industry, so did Hanuman for the animation film industry. A number of films followed: The *Return* of *Hanuman*, *Ghatotkach*, *My Friend Ganesha*, and others, but none have been as popular as the original Hanuman that captured the hearts of millions of Indian children or been able to replicate its box office success.

But the story of Indian animation began more than a half century before that.

Animation as a powerful tool of communication has been effectively used in India ever

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since the setting up of the Cartoon Film unit of Films Division in 1954. The government had just launched the first five year plan, a major building block of national planning, post Independence in 1947, for a country starved for development, means of expression and resources, Government of India wanted to tell the people what its plans were, what it aimed to achieve and about the benefits.

A number of renowned experts participated in this exercise and helped in using animation as a form of creative expression and also as a technique for conveying messages that were difficult to show in any other form. People like Jahangir Bhavnagri who came in as an expert and stayed with the Films Division of Government of India for a while, James Beveridge, who stimulated a spurt of creativity, as also Pramod Pati, trained in Jiri Trinca's studio in Czechoslovakia. Many outstanding short films carrying the messages of population control, family planning, social evils of alcoholism, drug abuse, smoking and dowry, inspirational films on national integration as well as ones sensitizing the general populace about malaria, leprosy and AIDS have been creatively and innovatively made in the Cartoon Film Unit of the Films Division since then. One can only hope that the private film producers will also take a leaf out of this historic chapter in Indian animation and imbue their films with similar messages of social relevance and significance while at the same time providing quality entertainment for the masses. The films of Rammohan, Bhimsain, Swami, Shaila Parulekar, VG Samant and Arun Gongade to name only a few are recognized fondly by Indian households to this day.

The medium has also been explored in many innovative and experimental ways by the National Institutute of Design, the Industrial Design Centre, Children's Film Society, India and a handful of independent animators. The legendary Rammohan, widely acknowledged as the father of Indian animation, left Films Division and joined Prasad Productions as the chief of its animation division in and later started his own company, Rammohan Biographics which made a slew of memorable animated ads from the seventies to the nineties. At that time Hindi feature films had just started using animation in their titles and certain portions of the script to convey messages in an attractive manner. Mrinal Sen's '*Bhuvan Shome*' (1969) was one of the first films where animation was used for the first time. Rammohan went on to do animation sequences for films like '*Hasina Man Jayegi*', '*Do aur Do Paanch*', '*Biwi O Biwi*' and songs sequences for films like B.R. Chopra's '*Pati Patni aur Woh*' and Hrishikesh Mukherji's '*Khubsurat*.' Satyajit Ray's "*Shatranj Ke Khiladi*." (1977) also had animated titles created by Rammohan. But till the advent of the nineties, the use of the medium was still limited to a few short films made by independent filmmakers, ads and film titles and a few serials. The one memorable serial completed in 1994 was *The Ramayana*, an Indo Japanese production, directed by Yugo Sako and co directed and supervised by Rammohan. Mention must also be made of the Meena films, a fourteen episode serial for UNICEF that Rammohan made on the issues facing the girl child in South East Asian countries, that became immensely popular in Bangladesh. These pioneering efforts introduced Indian animation to the outside world. Rammohan is currently chairman of Graphiti Multimedia Pvt Ltd, a leading animation company doing 2d 3d and CGI work and also which apart from running a school, the Graphiti School of Animation to train talented people to become Animation Professionals. Students that have passed out of Graphiti under his tutelage are now all over the country in Bangalore, Bombay, Delhi, Ahmedabad, Chennai and Hyderabad working in various animation studios – and training a third generation of animators.

By the turn of the century the number of studios that were doing contract work that was outsourced from abroad had grown. Over the years a number of animation companies and studios with state-of-the-art technology and highly skilled and creative artists have mushroomed in the country. Cities such as Pune, Mumbai, Hyderabad, Thiruvananthapuram and Chennai have become the hub for work outsourced from other countries. Some of the famous studios are Toonz India, Crest Communications, DataQuest, Prana, Visual Computing Labs, JadooWorks, Toonz Animation, Paprikaas Animation, Padmayala ZICA, CGI Mantra and Idea Studios, among others.

The animation industry though it had started late, is considered as one of the fastest growing segments of the entertainment and media industry. India has gained significance as an outsourced destination for animation work due to low cost, skilled labour as its many advantages. Recently Indian animation companies and animation studios had been moving up the value chain to create their own intellectual *property rights with Hanuman, Roadside Romeo* (which won the Swarnakamal in 2008 National *Film Awards), Greenchic* etc. and partnering with international studios to produce animated properties for the global audience. In addition, it was boom time for the Indian animation business with the entry of global giants such as Walt Disney, DQ Entertainment, IMAX, Warner Brothers, Sony and a host of leading cartoon channels in search of content from India and its rich cultural heritage. At the moment they are working closely together with big banners such as Yashraj, Pritish Nandy Communications and UTV to create animated movies for the global market.

The Indian animation industry in 2007 was estimated at USD 0.31 billion and is expected to grow at CAGR 24 percent to reach USD 0.94 billion by 2012.

(Source: Ficci-PwC Entertainment and Media report 2008).

"This (Indian) industry is expected to be worth $2.5 billion by 2013, clocking a compounded annual growth rate (CAGR) of around 35 per cent. The industry is growing in a big way," said Deloitte Touche Tohmatsu India Private Limited's Director Sandip Biswas, who recently authored a report on the animation, broadcasting and gaming industry.This income has mainly come about as a result of the growing reputation of India as a quality place to outsource animation work to. Production for films including the *Lord of the Rings*, the *Harry Potter* series, *The Chronicles of Narnia*, and *Spiderman* 3 have taken place here during the last few years.

Cartoons that were exclusively in the domain of Cartoon Network are now a regular feature of many channels including POGO, Hungama TV, Nickelodeon, Disney XD and Disney Channel. From merely being a country that helps Hollywood studios make animated films on the bottom rungs of the production chain, we are now witnessing several indigenous production houses taking interest in making such films.

Films like Walt Disney's *Zokkomon* and Krayon Pictures' *Delhi Safari*, the forthcoming *Arjuna from* UTV amid others are indicative of this trend. What also works in the favour of the growth of the animation industry is the anticipated phenomenal growth of an allied industry - the gaming industry - that is expected to grow by about 36 per cent in the next four years.

If that is the case, then this is a very favourable climate for students to enter the virtual world of animation. According to Philip Thomas, Regional Head - Kerala, IMAGE, the primary growth of the industry results from the increased volumes of outsourced work that the country's animation studios have received. "The primary reasons for growth are cheap labour as compared to the West, good knowledge of English and of course, experience and expertise in successfully handling and delivering animation projects. Since it's also a lucrative option, more people are investing in it," according to Vaibhav Kumaresh, Director, Vaibhav Studios.

It is also a two way traffic. India is also playing a leading role behind the triumph of global cutting edge animation. *Avatar* had become the highest-grossing movie of all times with 9 Oscar nominations, including one for the Best Visual Effects category. But very few know that this science fiction animated success had a strong Indian connection. Indian firm Prime Focus was commissioned by Twentieth Century Fox to create special effects in the film. Apart from contributing a number of VFX shots to Avatar, Prime Focus also created 80 percent of the visual effects for another Hollywood hit- *The Twilight Saga: New Moon*. *Alpha & Omega*, an animation film about two young wolves at opposite ends of their pack's social order has been entirely produced by an Indian company, Crest Animation Studios for Hollywood and even shortlisted for the Oscars. But there is a downside too.

Though a majority of the work done by the animation industry in India is outsourced work, this was expected to change in the future with increased demand from the domestic entertainment industry. Has this happened?

An industry expert opines, "The biggest challenge we face today is to shift our focus from catering to outsourced projects to creating our own indigenous films for the Indian audiences." Is the time ripe to build a strong animation culture within the country itself? Will anything outside the tried and tested formula of mythological films be acceptable to the audience? The recent box office disappointments of a number of animation features also have experts in the industry worried.

At a recent panel discussion on the inaugural day of India's biggest media and entertainment convention, FICCI Frames 2011, a number of CEOs of animation companies and animation experts gathered together and expressed grave reservations about recent trends. The topic under discussion was: 'Challenges of Creating Animated Content from Asia Pacific for Global Distribution'. Indigenous animation content broadcasting never really took off in the Indian context. Animation films have also failed to earn decent revenues at the box-office.

N. R. Panicker, Chairman of Accel Animation Studios said, "If you produce an animated series with a given amount, generally you recover only a part of your investment through the sale of broadcasting rights. We need to find more ways of getting revenues, as the Indian Animation Industry is struggling to survive,"

Along with Panicker, also discussing the state of Indian animation were Turner's Mark Eyers, Big Animation CEO Ashish Kulkarni (moderator), Golden Bridge Animation Studios' Agnes Li, Maya Digital Studios' Frank Foster, and Graphiti Multimedia's Munjal Shroff. Giving the example of his own studio, Panicker described how he has been collaborating with an European investor. "We need to look more on co-production treaties, which will help us in getting the content picked up for the universal market," he said. This statement is relevant in the light of the fact that indigenous animation content broadcasting never really took off in the Indian context. Animation films have also failed to earn decent revenues at the box-office. In reply to a question and highlighting the key factor one should consider before green lighting a project, Agnes Li said, "We would firstly look at the story and then the characters because it is the characters that help you a lot when it comes to revenue generation, especially in the form of licensing and merchandising revenues."

But at the end of the day, it is not just the corporate strategies, but rather the same spirit and sincerity and dogged devotion to hard work, and the determination to see one's vision come true on screen that one saw in the pioneering days of animation, that will decide the fate of Indian animation. This is the land of the *Panchatantra*, the *Hitopodesha* and the *Upanishads*, where the rich diversity of our regional cultures have given birth to thousands of folk narratives. Combine this with our natural sense of humour and aesthetics and one can say with certainty that animation will thrive and prosper. It is only a matter of time. ❑

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DO YOU KNOW?

WHAT IS DIRECT TO HOME SERVICE?

What Is DTH Service?

Direct To Home (DTH) service is a comparatively recent entrant as compared to cable transmission. It has certain technical advantages over cable operations. DTH is an addressable system and covers the entire country. In DTH service a large number of television channels are digitally compressed, encrypted and beamed from very high power satellites. The programmes transmitted through DTH can be directly received at homes by installing small dish antennas at convenient locations in the buildings. DTH transmission service does not require any commercial intermediary, since an individual user is directly served by the DTH operator. DTH Service refers to distribution of multi-channel programmes in Ku Band by using a satellite system, for providing TV signals direct to subscribers' premises. DTH provides subscribers the advantage of geographical mobility meaning thereby that once a customer purchases DTH hardware, he/she can continue to use the same unit anywhere in India. The idea behind DTH is to benefit the television viewer because it gives the individual dish at the home.

How DTH system works?

The satellites used in DTH are situated at around 35,700 kilometres above the earth in a geosynchronous orbit. Signals transmitted from the broadcast stations on the earth are received by these satellites and in turn re-broadcasted to the earth. The dish antenna fixed at the viewer's house receives the signal from the satellite and transmits it to the receiver placed inside the house. DTH service providers with such specifications as laid down by the Government from time to time. With passage of time, different technologies and standards have evolved for signal compression and transmission.

Till Aug 2007, there were about 3.2 million DTH subscribers with two pay DTH operators. This number grew to about 11.05 million subscribers with five pay DTH operators in Dec 2008 which has in September 2010 reached a figure of about 26.4 million subscribers with six pay DTH operators. The total number of DTH households is estimated to be around 26 million in the first half of 2010.

What are the forms of DTH technology?

Since different DTH players have entered the market at different point of times, they have brought–in with them the contemporary advanced technology in the DTH market in India. The technology in DTH is manifested in the following three forms:

i) Compression technology: The digital video/audio signals are compressed before transmission. This helps in saving the satellite transponder bandwidth as well as storage of data. The signals are de-compressed at the receiver end. There are different video/audio compression standards that have been widely adopted by satellite TV operators. The earlier entrants used MPEG 2 technology while the later entrants brought with them a more efficient version i.e. MPEG 4.

ii) Encryption Technology: In a scenario where TV content is priced and is made available for viewing to subscribers on subscription basis the role of efficient and reliable encryption/Conditional Access (CA) system is important. In this component, the bit stream is decrypted on the basis of keys made available by the Conditional Access system. It protects unauthorized viewing of the TV content. There are a number of CA service providers in the world that provide conditional access solutions on the basis of proprietary technology or algorithm. Prominent among them are NDS, Conax, Irdeto, Nagravision etc.

iii) Transmission Technology: The role of a transmission system is to ensure efficient and reliable transfer of data stream over the RF channel. In case of DTH, the RF channel comprises of radio link between earth station of a DTH operator to the satellite and from the satellite to the mini dish at the subscriber premises. The earlier entrants used DVB S technology while the later entrants brought with them a more efficient version i.e. DVB S2.

The technology combinations used by six pay DTH operators are as follows:

What are the benefits of the service?

DTH being a digital addressable system offers good picture quality, enhanced value added services, transparency in the system enabling its audit and monitoring thereby reducing litigations between the broadcaster and DTH operator resulting in better services to the consumers leading to structured growth of the sector. Thus DTH has given a stiff competition to the analogue cable TV sector which is also going digital eventually. From a scenario where 100% of the cable & satellite population was dependent on analogue cable services, DTH today commands more than 20 percent market share.

What is Prasar Bharati (Doordarshan) DTH Service?

Doordarshan is the world's largest terrestrial broadcaster with over 1400 terrestrial TV transmitters located throughout the country covering approximately. 90 percent of India's geographical area.

Satelite & coverage- Doordarshan is using New Skies Satellite INSAT4B Ku-band high power satellite with a footprint covering India and neighbouring region and located at 95° E.

Doordarshan's DTH Bouquet- Doordarshan's DTH platform is known as DD Direct Plus. This bouquet comprise of following TV channels.

Initially, it provide 33 channels and now added 26 more channels, Total 59 TV and 23 Radio Channels services are running on Doordarshan DD Direct Plus.

Ground Network-Doordarshan has deployed 10,000 DTH terminals comprising 120 cms, 90 cms and 60 cm antenna and associated hardware and also procured 8000 terminals of 60 cm and 90 cm size. ❑

Sr. No.	DTH Operator (year of starting operations)	Transmission standard	Compression standard	Conditional Access Services (encryption)
1	Dish TV (2003)	DVB-S	MPEG-2	Conax
2	Tata Sky (2006)	DVB-S	MPEG-2	NDS
3	Sun Direct TV 2007)	DVB-S	MPEG-4	Irdeto
4	Reliance BIG TV (2007)	DVB-S	MPEG-4	Nagravision
5	Bharti Telemedia (Airtel Digital TV) (2008)	DVB-S2	MPEG-4	NDS
6	Bharat Business Channel (Videocon d2h) (2008)	DVB-S2	MPEG-4	Irdeto

Mobile Entertainment in India

Vijay Thakur

Till now, Indian telecom operators have been focusing on localization of entertainment services. But with the 3G services the operators have started offering a plethora of services

FROM ITS inception in 1880 to 2012, Indian Telecom Sector has changed completely. No more a telephone is considered a mere talking device or telecom company mere selling voice calls-the Telecom Sector has forayed into almost all sectors—as a data transfer device. It has emerged as a new handy device for music and video entertainment, for banking services, for E-Governance, mobile health care, and for M-Commerce.

The Indian telecommunication industry is the world's fastest growing industry with 826.93 million mobile phone subscribers as of April 2011. It is one of the few sectors, which grew much more than government's projections. Even globally speaking, the exponential growth of Indian mobile sector matches no other sector in the world.

Today, it is the second largest telecommunication network in the world in terms of number of wireless connections after China. It is projected that India will have 1.159 billion mobile subscribers by 2013-which means that it would exceed the total subscriber count in China by that time.

According to leading global consultancies, Indian telecom Industry is expected to reach a size of Rs 344,921 crore by 2012 at a growth rate of over 26 per cent, and would generate employment opportunities for about one crore people during the same period. Leading analysts of the sector, says the sector would create direct employment for 28 lakh people and for 70 lakhs Indirectly.

Country's first Telephone exchange was started in Kolkata with mere 93 connections in 1980. It then expanded to all the major cities. Till 1948, total

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telephone connections all over the country were only around 80,000. The growth pace remained slow till 1990 with about 51 lakh connections. After the economic reforms were initiated and National Telecom Policy announced, Mobile services were first introduced in India in 1995.

Though the growth of the sector increased considerably, the actual exponential growth of mobile users started in 2003-04—and the growth surpassed all projections. Today the situation is that all major cities in the country has reached saturation point, and it is only the rural sector which is left for growth. And because of tough competition in the sector, the voice telecom tariff in India is probably lowest in the world. The increased commoditization of voice services and rapidly declining voice tariffs has resulted into diminishing voice ARPU (Average Revenue Per User) for Indian mobile operators.

To address this challenge and to earn additional revenues from existing customers particularly in urban areas, Indian mobile operators are trying to catch the vast untapped area of mobile entertainment. They are increasing their focus on data services, primarily entertainment services mainly mobile music, gaming, video and television.

Leading experts from the industry project mobile VAS (Value Added Service) as the major source of revenue for the telecom players in the coming years.The mobile entertainment industry in India has already witnessed a significant growth. It is estimated that the market would reach $4.9 billion in 2015 from $1.2 billion in 2009, growing at a CAGR (compound annual growth rate) of 26 percent in the period 2009-2015 (source Tavess—a leading research based consulting specialist offering comprehensive suite of telecom market research, research-based intelligence and strategy consulting services).

Among all mobile entertainment -services-Mobile music and gaming is most in demand service in India with ring back tones and ring tones being the most popular, followed by single track music downloads. As a result mobile operators are placing great emphasis on music and gaming streaming services.

According to a rough estimate, Music and gaming revenues for Mobile operators are expected to shoot up to six to eight percent in the mobile entertainment space this year. These two services are considered as biggest drivers of entertainment in the mobile value added services (VAS) space. Presently three to four percent of the mobile VAS revenues are driven by music and gaming on mobile handsets, but this still has to cross many roadblocks.

Today music has become the area of interest and innovation for the mobile industry. Telecom operators view mobile entertainment to have a strong base among the masses. As of now, mobile entertainment is contributing almost 62 percent of overall VAS (Value added services), and at present VAS contributes eight to ten percent of revenue for mobile operators. If we talk internationally, mobile entertainment has taken a new height. The total revenue from VAS in China is almost 20 percent, where in South Korea and Japan it is as high as 25 percent.

Penetration of mobile music can be made out from the fact that in 2005, the Indian music industry got about Rs 140 crore or 20 per cent of its legitimate revenues from mobile music. To catch the Indian music industry, even film producers are stressing on mobile marketing. A hit film might generate Rs 1-1.2 crore-about 5 per cent or more of an album's sale-on mobile revenues, Industry experts claim.

Even the big media firms-Star, Sony and BCCL, among others-have set up entire divisions to plug into these 8 crore mobile consumers. One can estimate the potential of the mobile entertainment industry from the fact that there are 10.8 crore TV homes and around 75 lakh internet subscribers. The Star CEO, Mr Peter Mukerjea, has stated in an interview that mobile telephony would eventually bring in 30 percent of the company's revenues. And Sony will set up its own backend for digital downloads this year. Next in line probably would be Mobile TV-though today it has little or no presence in Indian mobile market. The onset of 3G services would exponentially increase the demand of these services.

What makes sense for mobile operators to emphasise on mobile VAS is the shrinking ARPU, decreasing voice call tariff and thin margins. According to an estimate, a voice call on a mobile costs around Rs 0.87 to Rs 1.25 per minute, however, if we calculate DATA transfer price per minute, it is somewhere between Rs 3 per minute to Rs 30 per minute-depending upon the service and telecom operator.

According to a Lehman Brothers report says that as data share goes up to 60 per cent or more, the earnings before interest, taxes, depreciation and amortisation (EBITDA) from data revenue could go up to 65 per cent or more. Compare that to 30 per cent or so from voice.

But for entertainment industry, the mobile connection is more about interactivity and less about revenues. Radio Mirchi gets 40,000-45,000 SMSes a day. As a radio station, it is a great tool for engaging listeners. Ditto for TV, newspaper or outdoor companies. Even within this interactivity, there is some money to be made like Star did with KBC2. For media buying and planning firms such as Group M, all the work with mobile phones is "brand centric," says Tushar Vyas, its national director (interaction).

But despite the growth in the mobile VAS, it is yet to see its actual growth. Telecom players are optimistic on the spread of 3G services in India. This would open up new opportunities for mobile entertainment and marketing. 3G will revolutionize the mobile application market. With bandwidth issues out of the way subscribers will have access to seamless streaming of unlimited content. 3G is a high-speed mobile Internet service which provides seamless data transfer.

In a typical 3G environment, high quality mobile content can be streamed in less than a few seconds, leading to a richer user experience. With 3G it would be possible to stream music and video, better mobile gaming, downloads of short format and long format audio and video files which is also termed on mobile devices.

Till now, Indian telecom operators have been focusing on localization of entertainment services by offering video, music, and gaming content in several regional languages with regional flavor. With the 3G services the operators have started offering a plethora of services such as social networking, matrimonial services, astrology, mobile radio, religious chants, comic strips, mobile TV and are also stressing on demographically targeted services. ❑

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Interesting Facts about Hindi Film Industry

- Production-wise, Bollywood is the largest film industry in the world with over 1000 films produced every year.
- Its movies are watched by almost 14 million Indians everyday.
- Raja Harishchandra (1913) was the first silent feature film of India.
- 'Alam Ara' - the first Indian sound film was released in 1931.
- Kisan Kanya (1937) was the first coloured movie produced in India.
- 'Kagaz ke Phool' (1959) was the first cinemascope film of Bollywood.
- The first 70 MM film of Bollywood was 'Around the World'.
- The first 3D movie in Hindi was 'Shiva ka Insaaf '.
- 'Noorjahan' (1931) was the first Indian English film.

Film Censorship in India

Vinayak Azaad

FORM VI-A

भारत सरकार / GOVERNMENT OF INDIA

केन्द्रीय फिल्म प्रमाणन बोर्ड / CENTRAL BOARD OF FILM CERTIFICATION

THIS CERTIFICATE IS VALID FOR VIDEO FILMS ONLY

PART I

Nº 3139

Certificate No. V11/2/245/2007-Mum. Dated 23-5-2007 Category वी/अव V/UA PARENTAL GUIDANCE VIDEO

After examination of the film by the members of the Examining Committee ... the Board hereby certifies that the film is fit for public exhibition with an endorsement of caution that the question as to whether any child below the age of 12 years may be allowed to see the film should be considered by the parents or guardian of such child, and also subject to excisions and modifications listed in Part II ...

Further certified that the excisions and modifications imposed by the Board have actually been carried out.

for (VINAYAK AZAAD) Regional Officer

New makers are making path breaking bold films both in content and style. CBFC's responsibility lies in ensuring that certification should not become a hindrance in their creative freedom

THE MENTION of Censor Board evokes images of uptight people sitting with scissors and a lot of moral attitude, itching to make that cut in the next blockbuster. The 'Censors' have always been these mysterious group of people. Very little is known about them except for their names that appear briefly in the certificates displayed before the start of every film in the theatre.

To begin with, the official name of the Censor Board is 'Central Board of Film Certification (CBFC). It was changed from 'Central Board of Film Censors' in the year 1983, perhaps to stress upon the 'Certification' part. Nonetheless, for most people, it continues to be just 'Censor Board'. No film can be exhibited publicly without a certificate from the CBFC.

CBFC is a statutory body under the Ministry of Information & Broadcasting created through an Act of Parliament, the Cinematograph Act, 1952. headed by a Chairperson appointed by the Government. It has 24 Board Members, who are supposed to be eminent people from different walks of life. It has 9 regional offices, one each in Mumbai, Chennai, Hyderabad, Bengaluru, Trivandrum, Delhi, Kolkata, Bhubaneshwar and Guwahati. Mumbai is the headquarters of CBFC. The administrative apparatus of CBFC is looked after by a CEO. who is stationed at Mumbai. The Chairperson is usually an eminent personality from the field of cinema, art or culture. Presently Ms Leela Samson, who is an acclaimed Bharatnatyam dancer, is Chairperson of the CBFC. The term of the Chairperson and the Board members is 3 years and they can be reappointed.

Each region is headed by a Regional Officer, who is a career bureaucrat, selected by the Ministry of Information & Broadcasting.

The author is a Civil Servant and has worked as Regional Officer, CBFC, Mumbai.

Every region has a set of Advisory Panel Members (APM) who, again, are chosen from different works of life. It is the job of the APMs to examine films on a regular basis, alongwith the regional officer and give their opinion as to the category that a film should get, and if at all there should be any cuts. In doing this, they are guided by the guidelines framed under the Act and the Cinematograph Rules made thereunder. The term of the APMs is 2 years and they can be reappointed.

In a nutshell, the guidelines demand that the medium of film should remain sensitive to the values of society. By and large, the guidelines are general in nature. How they are interpreted, therefore, becomes crucial. For instance, the definition of vulgarity will differ from individual to individual and also from time to time. Needless to say that the people, who are sitting on judgment in the Board, need to be in touch with the pulse of the society. And in fact, this is what makes the job of certifying film tricky as well as challenging, given the fact that India is a country where vastly different worlds are existing simultaneously, at the time within the same space. The biggest challenge, thus, for the certifying body becomes that of giving a single certificate which will be acceptable to all segments and strata of society. This, obviously, is easier said than done. Hence, one often hears of concerns or complaints by the public with respect to the 'objectionable content' in films.

Here, it may be worthwhile to understand the basic methodology adopted by the Board in certifying films. Once a producer makes an application for a film(after paying the certification fees), the Regional Officer fixes a date & time for the screening of the said film. A committee for a full length feature film typically consists of two male and two female advisory panel members (the Act mandates that at least 50% of the committee members should be female) and a Regional Officer. While a film is being screened for the committee of the CBFC, no outsider, not even the Producer or the Director of the film are allowed inside the hall. Once the screening is over, the committee deliberates on whether the film is fit for public exhibition or not and if so then under which category, and also if the film deserves any cuts, in light of the guidelines.

Primarily, there are three main categories of certificates-'U', 'UA' and 'A'. There is another lesser known category called 'S'.

'U' stands for universal. It means that if a film is certified 'U', it is fit for viewing by all ages. 'U/A' means that a film can be seen by all age groups but children below 12 years of age require parental/ adult guidance. 'A' stands for adult only, and is given to films which, in the opinion of the Board, are not suitable for minors. 'S' category is meant for film that the Board feels is suitable only for a specialized profession. For instance, a film can be given 'S' certificate, subject to the condition that only personnel from the Armed Forces shall be allowed to see it. The 'S' category is very rarely given though. The Board can also refuse certificate to a film, if in its opinion, the film is not suitable for public exhibition.

If an applicant is not satisfied with the decision of the 'examining committee', he/she can appeal against the decision to a revising committee which can consist of 5 to 9 members and headed by either the Chairperson or one of the Board members, and will examine the film afresh.

If the applicant is still not happy with the decision of the revising committee, then he/she can appeal to the Film Certification Appellate Tribunal (FCAT) which is a part of the Ministry of Information & Broadcasting and located at New Delhi. The CFAT consists of a Chairman and 4 other members appointed by the Government. The members are supposed to be people who are capable of judging the effect of films on the public. The Chairman of FCAT is normally a retired judge of a High Court.

The applicant, if still not satisfied with the verdict, can appeal right up to the Apex Court. *Bandit Queen*, a film by Director Shekhar Kapoor, was one such film which went to the Supreme Court for a decision on the certificate after contesting all the lower forums.

While examining a film the members of the Board have to keep in mind the basic guiding principle of film certification, i.e., that "a film should be judged in its entirety from the point of view of its overall impact and is examined in the light of the period depicted in the film and contemporary standards of the country and the people to whom the film relates, provided the film does not deprave the morality of the audience." The objectives of film certification, as mentioned in the guidelines are that.

i) the medium remains responsible and sensitive to the values and standards of society;

ii) artistic expression and creative freedom are not unduly curbed;
iii) certification is subject to social changes;
iv) the medium of film provides clean and healthy entertainment;
v) as far as possible, the film is of aesthetic value and cinematically of a good standard.

The Board also scrutinizes the titles of the films to ensure that the they are not provocative, vulgar, offensive or violate any of the guidelines.

It may be mentioned here that CBFC is merely a certifying agency. The enforcement of the provisions of Cinematograph Act 1952 is entrusted to the State Government/ Union Territory Administrators, since exhibition of films is a State subject under the constitution.

Some of the common violations that are often noticed are, a exhibition of 'A' certified films to non-adults, re-insertion of cut portions of films, insertion of scenes which were never shown to the examining committee of the Board, exhibition of uncertified films with forged certificates, exhibition of films which were refused certificate ('banned' in common parlance) or exhibition of films without any certificate.

The offences with respect to these provisions are cognizable and non-bailable. However, it is often observed that this is not a priority area for the local police, burdened as it is with other law and order duties. Till a couple of years back, CBFC had hired private detective agencies to check such violations. The scheme was however discontinued subsequently.

Another frequent complaint that CBFC receives is that theatres often display obscene film posters. The Cinematograph Act does not directly deal with posters and these come under the common law of the land relating to obscenity, specially section 292 of the IPC.

After discussion with the film industry representatives, the Ministry of Information and Broadcasting decided that the film industry would deal with this matter on its own. Thus, Film Publicity Screening Committees were formed in each of the places where CBFC had its offices.

In this age where media has come to occupy a more prominent role questions have often been raised about the efficacy of film certification especially when no such restrictions exist on print and electronic media. In this context, a judgment of the Supreme Court of India in the case of K. A. Abbas V/s U. O I is of special relevance. The Supreme Court observed- "Film censorship becomes necessary because a film motivates thought and action and assures high degree of attention and retention as compared to the printed word. It has as much potential for evil as it has for good. It cannot be equated with other modes of communication. Censorship by prior restraint is not only desirable but also necessary". This observation is as much relevant today as it was thirty years back when it was made.

Films share a symbiotic relationship with the civic society. Certification is India has come a long way since independence. Gone are the days when the film '*Aag*' by Raj Kapoor got an 'A' certificate simply because two leading ladies Nargis and Kamini Kaushal did not wear a choli or when a scene was ordered to be deleted from a Film Division documentary showing the then Prime Minister's sister, Smt. Vijayalakshmi Pandit wearing a sleeveless blouse. In 1967, after the release of the film, *An Evening in Paris*, an organization called Cine Films Reforms Assosiation of India held out a huge protest against depiction of a leading heroine in "scanty dress". The same heroine, Smt. Sharmila Tagore was to later become one of the most successful and longest serving chairpersons of CBFC.

CBFC now allows films with bold and experimental themes. This trend is further reinforced by the emergence of the 'multiplex audience' which is ready to go and catch a flick which is not the regular masala or formula film. In fact, CBFC is more in new nowadays on account of what has been passed rather than what has been chopped. The Board is in an unenviable position in this regard as it has to strike a fine balance between the concerns of different sections of civil society and the creative freedom of film makers.

The matters confronting CBFC of late have not been as much to do with age old issues of sex and violence but with the so called 'hurting of sentiments' of different religions, caste, professional or linguistic groups. Often these groups indulge in 'Street censorship' at times causing financial loss to the film makers and exhibitors.

Steadily, Indian films are becoming major revenue earners for the country. New makers are making path-breaking bold films both in content and style. CBFC's responsibility lies in ensuring that certification should not become a hindrance in their creative freedom. At the same time CBFC has a huge civic responsibility where the general public expects it to be a guiding agency vis-a vis the audience. Hence, CBFC's job is cut out in delicately balancing the societal concerns and the freedom of expression.

Concern has also been raised with respect to the content being aired on cable television, particularly some serials and reality shows. While, CBFC certifies films, promos and songs, it does not certify other programs on television. Given the vast number of channels and their content, it will be logistically impossible for any one agency to certify each and every program that is on air. 'Self Censorship' thus appears to be the only way out of this scenario.

CBFC has also often been accused of being biased or towing the government point of view, when it comes to films or documentaries dealing with political issues. While CBFC is an organ of the government, its structure is designed to make it into an autonomous body with little or no interference from the government. It is of utmost importance therefore that the individuals who are appointed on its Board or on the advisory panel are completely neutral and above board.

Some of the other issues being faced by the CBFC of late have been concerning- smoking in films, use of animals during shooting, portrayal of homosexuality, and use of abusive language in cinema.

While at present there is no ban on smoking as such, the guidelines say that it should not be glamourized. Increasing number of lung cancer cases and other related ailments are a reason for worry in a country like India where public health system leaves a lot to be desired. CBFC rather than cutting the smoking scenes blindly, urges the filmmakers to don the cap of social responsibility given the gravity of the issue.

Cruelty towards animals has also been in the news recently on account of some NGOs protesting against their mistreatment of the sets. A Bombay High Court Order now dictates that all films which use performing animals will have to take NOC from the Animal Welfare Board of India (AWBI). This has caused some amount of hardship to the film makers as AWBI has only one office in Chennai and its members meet only after a certain interval to deliberate upon the scenes involving animals. On its part, CBFC has been informing and urging the film makers to apply to AWBI well in advance for the NOC.

Use of abusive language in films has also been talked about lately, particularly in the context of the film *Delhi Belly*. The film has been given 'A' certificate by the CBFC, however such issues are always controversial in the Indian society where vast differences exist between the way people react to matters such as these.

The Cinematograph Act 1952 is being revamped and a bill is likely to be introduced in this regard in the coming session of Parliament. Amongst other things, the new Act proposes to introduce two more categories of certification, i.e., 12+ and 15+. The idea is to make the process of certification more accurate and to serve as a consumer advisory to the audience. This will ensure that rather than the films being cut to fit into the limited categories available at present they can be categorized more accurately.

CBFC is also in a process of computerising its functioning and soon the producers will be able to file applications for certification of their films online. This is likely to reduce paperwork and bring about greater transparency. CBFC is also in the process of putting the details of all the films certified by it on its website, cbfcindia.gov.in.

Any kind of censorship or certification will always be an debatable issue. It is like sitting on judgment on someone's work of art. Obviously no artist would like someone else, least of all a body that they think claims moral high ground, to tamper with their work. However, consider a scenario where there is no regulatory mechanism at all. In such a situation there is bound to be anarchy, even violence in certain cases. In fact, almost every civilized country in the world has a ratings body meant for cinema. It differs in its composition and functioning from country to country. Nonetheless the core purpose remains the same. To call for abolishing the rating body itself will tantamount to throwing the baby out with the water. What is needed is for the government to appoint the right people in various capacities in the CBFC and then letting them do their job freely, without any interference. ❑

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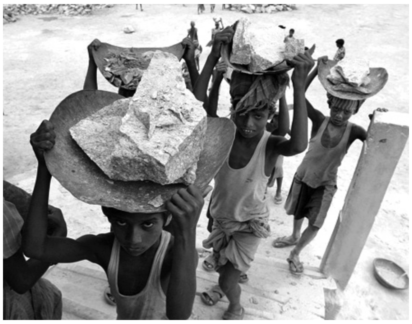
Communication for Development – A Catalyst for Implementing Welfare Schemes

Manoj Pandey



If the C4D strategy is properly planned and implemented, it can lead to a very salutary shift in people's response towards not only various schemes and facilities, but also development per se and the society

THIS YEAR'S central budget exceeds Rs. 12.5 lakh crore. While a part of it will be spent on maintaining routine services and creating infrastructure, a large portion would go towards creating and running welfare schemes and facilities for the people of the country.

Many experts have estimated that a substantial portion of the funds allocated for various schemes does not reach the targeted beneficiaries. The guess of Shri Rajiv Gandhi may still be true that only 15 paise reached the poor out of every rupee spent by the government for them.

One important reason for wastage and mis-utilisation of funds is the lack of public participation in the schemes. When the beneficiaries are not active participants in a scheme, a self-propelling vicious cycle starts: people do not demand results, oversee implementation or give feedback. Due to this, the implementation is poor and vested parties create and exploit loopholes. When the scheme is not implemented properly, real beneficiaries either use the same loopholes to get in or lose interest further. This results in more deficiencies in execution of schemes.

All efforts to implement a scheme even with the most meticulous planning and proper use of funds are, thus, not likely to yield maximum results unless the targeted beneficiaries own it.

If the beneficiaries of welfare schemes are only passive recipients of the benefits, the people at large are likely to be even more indifferent to public service activities that do not benefit them directly. These activities, like

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voting in elections, participating in census and surveys, filing tax returns, supporting senior citizens, caring for monuments and public property, etc cannot succeed at all without willing public participation.

Many factors lead to such a lack of participation on the part of the beneficiary, such as - lack of proper information and hand-holding support, no mechanism to resolve queries and redress grievances, hesitation borne out of bad experiences of dealing with the bureaucracy, and no emotional attachment with the objectives of the scheme. In Indian system, especially in rural areas, cultural resistance from within and from the society also discourages the poor from making use of facilities created for them and adopting better tools, technology, habits and attitudes.

Let the government talk to the people

At the heart of the problem of poor public participation is poor communication between the government and implementing agencies on one side and the public on the other. While more and more emphasis is being given to proper planning, implementation, monitoring and evaluation, communication has not been integrated in the planning process.

'Communication' is usually thought of as a marginal activity that may, at best, lead to better information about the services and products created by a scheme. In this avatar, communication would mean issuing press releases, advertisements and some sort of outdoor publicity, and does not deserve a role much bigger than what it is given in the present planning process. What is needed is a proper appreciation of 'communication' in the context of public participation, and integrating it with the planning and implementation process as its key component.

Let us borrow the phrase 'Communication for Development' from international vocabulary to refer to communication in the aid of social welfare, public facilities and economic development. For the sake of brevity, let's refer to it as C4D. This type of communication is what is required for better public participation rather than publicity, public relations, media relations and propaganda that are often supposed to be the prime form of government communication.

How can C4D bring about better public participation?

The most obvious role of C4D is to inform the target audience about the facilities available to them. It has been seen that beneficiaries often do not have adequate information about a facility / scheme, and if the information is available, it is not actionable: beneficiaries do not know whom to approach and how to get the benefit. They have no means to analyse relevance of a scheme to their situation and to calculate the likely benefits. This results in the benefits flowing either to only a few beneficiaries who happen to have the knowledge and wherewithal or to unauthorized people who fill the vacuum of demand. So, it is natural that if people are well-informed, they will (i) demand facilities that the government has created for them but are not available to them, and (ii) make use of facilities already available.

More than just informing, C4D strives to involve communities. It encourages dialogue and consultation rather than bombarding one-way messages from top. C4D spurs action. In societies beset with corruption, illiteracy, feudalism and other dis-empowering forces, people need to be provoked to dream of a better life and to have the confidence that it is attainable. They need to be enthused to participate for their own and public good and not remain passive. C4D can shape a positive, confident, productivity-oriented behavior so that people's energies are channelized into their own development and nation-building.

C4D is not the release of press handouts, broadcasting messages on radio and television, issuing advertisements and holding a fair to give out government information. These are some of the tools, but C4D does not take tools as an end. C4D is also not shooting ideas and products to a passive population and waiting for people to lap them up; it is a constant process of engaging people's minds. C4D does not communicate in vacuum; it seeks to build linkages between service delivery and communication teams. C4D does not take cultural specificities as obstacles; it uses them for getting the desired behaviour change.

Proper C4D also means that the government and its implementing machinery get feedback. Direct feedback at grass-root levels and a consultative machinery to resolve issues can ensure that grievances are redressed effectively, satisfaction level improves, deficiencies in implementation are removed and leakages plugged to the extent possible.

C4D in international planning processes

People's participation is recognized as an important aspect of the UN Millennium Development Goals (MDGs) and National Poverty Reduction Strategies (PRSPs). The UN and its associate bodies such as FAO and UNICEF promote communication as a potent tool for effective implementation of their developmental projects, albeit of much smaller levels than India's national schemes.

Integrating C4D in the planning process

Once there is appreciation of the potential of C4D in getting public participation and in turn catalyzing implementation of various developmental and welfare schemes, it would entail creating institutions and processes for its professional implementation.

What comes first and foremost in a sound C4D strategy is identification of the communication needs-on one hand, of the government and on the other, of the specific target beneficiaries and citizens in general.

For holistically assessing the communication needs of the government, all major stakeholders and communication experts would need to brainstorm and arrive at main areas needing focussed communication support. Similarly, to find the communication needs of the people, initially the government's communicators would need to draw from the meagre resources that are available internally and in consultation with public representatives, NGOs etc. Over time, the understanding of people's communication needs must be supported with research and survey based inputs.

Planning for different schemes / activities may need top-down and bottom-up approaches depending upon various factors. Whatever the approach, local, regional and national-level communication strategies will need to be made depending upon the scope of a scheme and differences in target audiences, budget, state participation, etc. in different parts of the country. An overall C4D strategy for a scheme would, thus, have a number of location/area specific projects. They would derive from local wisdom, local culture, local leadership, local communication tools and communicators in local languages.

The messages would also need to be local, though some information may be of universal nature. The required behaviour change would necessitate that messages are people-centric rather than scheme-centric, i.e. keeping in mind people's needs, aspirations, cultural barriers, etc. In fact, many schemes and activities will need very focused attention to specific ethnic groups, occupational categories, areas etc.

At pan-India level, C4D strategy would need convergence of communication efforts for all schemes. The synergy achieved would lead to better utilization of budget and effective communication. There could, thus, be a common C4D plan for the entire Five Year Plan, which would evolve from professionally crafted sectoral and ministerial plans.

For making C4D effective, a strong team of communication experts as well as teams for management, finance, monitoring and various support functions would be needed. For creating effective messages and communication strategies, inputs will also be required from experts from other fields such as behavioural economics, rural advertising, public health and agricultural extension. Communicators will need to be recruited / enlisted and organized into teams at local levels. All communication workers and managers would need to be adequately trained and sensitized for people-oriented communication.

As said before, C4D does not mean communication in isolation. An effective C4D strategy requires building linkages with the implementing agencies, different levels of governments, international agencies, NGOs, students, community leaders, self-help groups, extension services and the private sector.

Since a multi-sectoral C4D effort at all-India level has not been launched in India so far, the C4D agency will need strong R & D support in the form of theoretical inputs and sharing of experiences from communicators all around the world, research into concurrent communication activities and constant mid-course correction.

Budget for C4D should not be an issue. If only one percent of the budget for developmental activities and welfare schemes is kept for C4D, it would come to about Rs. 6000 crore per year. (Budget for publicity, PR, administrative and employment-related advertisements etc. are excluded.) Judiciously used, this fund has the potential to usher in a communication revolution in aid of socio-economic development in India.

The economic and social benefits accruing out of C4D would justify expenditure on setting up new infrastructure for this purpose. Going by India's economic and social realities, the need for C4D would remain in India for many decades and, therefore, the C4D infrastructure and expertise created would go a long way in better implementation of government's schemes and welfare activities. In some areas such as education, health, agriculture, child-care and social messaging, the impact of C4D may be phenomenal and the performance of schemes may improve significantly with C4D support. In future, new areas needing C4D support would keep arising due to new social, economic, technological and strategic developments. In fact, C4D might become indispensable in handling the complexities arising out of new forms of inequalities and exclusion being implanted on the existing ones.

In the '15 paise out of a rupee reaching the beneficiaries' situation, C4D might not make a direct and instant impact but it will catalyse the positive processes in the system for long-term gains. If the C4D strategy is properly planned and implemented, it can lead to a very salutary shift in people's response towards not only various schemes and facilities, but also development per se and the society. The rewards of this initiative can be immense. ❑

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Folk Arts in India

K A Gunasekaran

The playing of the musical instruments together with a heavy din of the instruments is the indispensable part of playing in the folk-dances

FOLK ARTS constitute one of the precious cultural materials of India. We have innumerable types of folk art forms in each and every state. Folk comprise arts like folk-dance, ballads, playing upon musical instruments, using types of musical instruments and having theatrical performances. They vary in accordance with the practices and the beliefs of the people. They can be classified such as:

- Regional presentation
- Communal and ethnic traits
- Linguistic or vernacular characters
- Cultural ambience
- Ritualistic variations

The folk dress pattern has a direct reflection upon climatic condition. The dress-style or the material of those people who have a sojourn in the Himalayan region, have a peculiar wear that could withstand the chilly weather, but whereas those people living in the arid region have a soft wear with even small sorts (costume). The dancers of Tamil Nadu who perform Kaavadi-attam and Oyil-attam do their performance mostly with bare-body which would be the convenient mode of dressing to let out perspiration.

There are two major divisions within arts such as tribal arts and folk arts.

The forms and nomenclature of folk deities vary in accordance with the place, ethnic pattern and distribution of the male and female deities. Folk performances are largely based upon the ritual design and beliefs of the people. The folk arts again fall into two categories, such as ritual arts and professional folks arts. Arts like bacchanalian dance/dance related to spirits or imps, Kummiattam (dance related to the beating of palms), Oyilattam etc. Kummiattam is usually performed by female folks reminiscing the

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glory of the female deities. The Tappattam, Karagattam, Kuravan-Kurathi attam, Raja-Rani-attam, Jimbala-kottu-attam are some of the exemplified professional arts. They are the outcome of the ritual arts which emanated from folk arts.

We find the widely prevalent mask-dances across the Indian sub-continent. Even within the folk mask dances; there are again two types of dances as pointed out earlier.

Some of the mask dances are as follows. They are bullock-mask-dance, dummy-horse-dance, monkey-mask-dance, bear-mask-dance, Pachakkali and Pavalakkali mask dance etc. Pachakkali and Pavalakkali dances have recently originated from ritual to professional dance, because of gaudy and attractive colours sported and daubed at places like the countenance, eyes, chest, hands and upon the panoply of arms. We can find the frequent occurrence of such arts in the Thanjavur and Tiruchirappalli districts. There is strong mythological trappings for this mask dance.

Professional mask dances do not have any mythological stories unlike folk art-dances. The folk arts musical players play upon the various instruments which belong to the same community. But in case of professional musical players usually artists hail from other communities. If there is any dearth of instrument players of the professional folk arts, then only they will be invited from other communities.

Naiyandi-mela-troupe

Tavil, Pambai, Urumi, Singi (Jalra), (Cymbals), Tamukku instruments (leather instruments) and Nadasvaram (wind instruments) occur in the case of Naiyandi-mela type of dance. The players of these instruments are totally indicated by the term, Naiyandimela troupe (set). The players upon these instruments sing variety of musics, such as Temmangu genre of music, Naiyandi music variety, Sindu music varieties, Kanni, Pallu etc. These music varieties will help to dance like Karagattam, Kaavadi-attam, Parai - attam, Dummy horse dance, kuravan-kurathi dance, Raja-Rani dance.

We can see two types of folk dances like circular dance and linear dance, in which dancers either stand while dancing in circular pattern or in standing in row.

The ethnic groups like Kottar, Irular, Kanikkaranar, Kurumban, Malasar and Pulaiyan have different types of musical playing which have certain uniqueness, but the formation of verses and dance-pattern have some kind of uniformity within the subtles differences.

The musical play and dance of those people living in the hilly tracts have a conspicuous uniqueness and traits which are quite unlike the folk-lore music. Besides, the uniqueness and individuality of each group can be identified with the way in which the Irulas and Kottar play.

In all the folk-arts and even those arts that occur in the hilly region uniformly follow or adopt the percussion instruments. The playing of the musical instruments together with a heavy din of the instruments is the indispensable part of playing in the folk-dances. The classical music has a strong flavour for mild musical notations, but whereas the folk opera is always backed up by loud and shrill voices or sounds. The classical musical performances are usually conducted below a roofed arrangement but whereas folk performances are taken place in an open-air theatre. The folk artists invoke village deities, those people who are present therein and at last the earth. The classical artists primarily offer worship to the Panchabhuta elements such as either, wind, fire, water and earth and other puranic deities, such as Siva, Vishnu and Sakti Goddesses.

The folk songs and their contents reflect largely about the human traits and characters, human relationships and natural gifts like the fertility of the soil and harvesting of crops. The folk art-forms like Temmangu, Sindu, Kanni, Pallu and Naiyandi are to be seen widely prevalent in Tamil Nadu, supported by musical performance and likewise one gets innumerable types art-forms in other parts of India. These art-forms must be fostered, studied and preserved for the sake of posterity, which shall be complementary to the development of classical art-folks.

The folk arts have a different forms of step-movements (adavu) and other nuances which have not been quoted or referred to by Bharatamuni in his Natyasastra. The receptivity of the people in relation to the development of folk art-forms have a direct bearing upon how much one bestows attention or involves. The creative aspects of the folk-art should be taken account for the understanding of the panorama of Indian Cultural richness.

Glorious Aspects of Folk- arts

Some of the aspects of folk-art-forms have appreciable and worthy features by which each and every individual can be proud of it. Some of the basic features are like.

- People in commune join together.
- Ethnic identity – reflection.
- Linguistic or vernacular identification
- Longing for naturalistic living.
- Belief-based approach
- Human warmthness and lovability.
- Retrieval from stress.
- Integral-approach and annul disparity.
- Human encouragement
- Rellish in traditionalism
- Tendency to preserve, emanation from traditionalism/ hereditary.
- The development of human imaginative cadence.
- Reflection upon cultural identity.

Koothu- (Dance-drama)

In Tamil Nadu, there are dance-dramas like Terukkoothu, Kaniyaankoothuu, Bhaghavadamela, Northevankudi Kadu-Koothu, Annamalaisami Kathai-Koothu, Raja-RaniKathai-Koothu. In a similar vein, there are umpteen number of dance-dramas prevalent in other parts of India. For example, in Kerala, Teyyam, Krishnan-attam, Mudi-yettu, Oottam-thullal are widely celebrated and conducted and in Karnataka, Yakshagana is popular.

The researchers in arts, art-connoisseurs and patrons of arts, should look into cultural aspects of folk art-forms and should not be downcast. These art-forms must be promoted and supported by all and should not be overlooked. ❑

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National Film Policy for the Country

The Ministry of Information and Broadcasting is in the process of formulating a national film policy for the world's biggest film producing Industry spread across the country. The aim of the policy will be to draw the contours of government intervention in an Industry that works largely unfettered, besides to reposition India as a global superpower – as films have been the best ambassadors for the country.

The Ministry has set up a 25 member working sub-group to prepare the policy and a 12th five – year plan roadmap for the industry entering its 100th year in 2013. The mandate of the group would be to leverage the existing government film institutions to encourage meaningful film culture in the country and make films as a viable career option.

Ironically, India produces over 1,000 films a year on an average and has grown into more than a $2 billion industry but still does not have the policy framework to guide its course. While commercial cinema has been thriving, meaningful, aesthetic, and regional cinema has been pushed to the fringes. Interestingly, the last time the government tried to frame a national film policy was in 1980.

Among the suggestions floated in formulating the policy includes supporting regional cinema, incentivisting the digitalization of the entire value chain-film production, distribution and exhibition; revising courses of film schools and bring them on a par with the best in the world; viewing censorship issues, technological advancements in film making; labour and trade practices; import and export and film equipment. ❑

The Indian Circus Industry

Jomon Mathew

In the absence of excess revenue, new developments and introduction of large scale projects cannot effectively be undertaken

CIRCUS INDUSTRY occupies a very significant place in the list of entertainment industries like music, film, comedy etc. The word circus is derived from the Latin word '*circus*' which was the Romanization of the Greek word, '*kirkos*' simply means 'circle' or 'ring'. Generally the word circus stands for 'a travelling company of performers, consisting of trained animals, acrobats, clowns, musicians, hoopers, tightrope walkers, jugglers, unicyclists, along with stunt oriented artists. The early form of circus had originated in ancient Rome where there were buildings for exhibition of horse and chariot races, staged battles, performance of trained animals etc. The first circus in Rome was known as *Circus Maximus*, a wooden building with a measured 400 meter length and 90 meter width, bearing the seating capacity of 250000 people. Later on circus as an art of entertainment flourished in Rome and gradually started spreading to other parts of Europe.

The modern form of circus is believed to have developed since the late 18th century. Philip Astley who is regarded as *the father of the modern circus* played very significant role in popularizing the modernising circus. He opened *Astley's Amphitheatre* which is a riding school in the year 1773 following the success of his invention of circus ring in 1768. A major contribution of Astley to the circus world was considered to be the bringing of trick horse – riding into a ring. It was John

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Bill Rickets, an Englishman who brought the first modern circus to the United States during the late 18th century. The influence of American circus brought about a considerable change in the character of the modern circus. The contemporary circus that combines the traditional circus skills and the theatrical techniques to convey a particular theme or a story is believed to have started developing during 1970s in Australia, Canada, United States and in the European countries.

Origin and development of Indian Circus

The circus tradition in India was known to be originated during the late nineteenth century. It was Vishnupant Chatre, a riding master and a singing teacher of Maharashtra who performed the form of circus in the tradition of old English riding masters. The great Indian tradition of circus began when *The Great Indian Circus* was founded by Chatre in 1882. Thus the Indian circus has a history of almost 129 years of great journey. Chatre continued his travelling with circus through out India and happened to meet Keeleri Kunjikannan, a martial arts teacher when his circus reached at Thalassery the Malabar Coast town of Kerala. Chatre together with Keeleri started training the artists and keenly worked for developing and popularizing circus. In the year 1901, Keeleri Kunhikannan opened a circus school in Chirakkara, a village near the city of Kollam and in 1904, one of Kunhikannan's students, Pariyali Kannan, created his own company known as the *Grand Malabar Circus*. Gradually Chirakkara circus school attracted the circus lovers and trained several circus artists. Due to such innumerable contributions, Kerala came to be known as the cradle of the Indian circus.

Thus circus flourished in India since the days of Vishnupant Chatre and Keeleri Kunjikannan who was popularly known as the father of Kerala circus. Their contributions and efforts attracted many others to this particular form of entertainment industry. Among them the most important personality was Damoo Dhotre who was the most famous animal trainer in the world. Later during the 1930s Prof. Damodaran, a showman with two pole tent touring from village to village, continued popularizing circus among the rural Indians. Prof. Damodaran was presented with a shield for his outstanding contribution to the entertainment industry by the then prime minister Jawaharlal Nehru. Due to the contributions of these and several other personalities, circus has attained a vital position in India's entertainment world.

Today, India has twenty three active Circuses, grouped in a national federation. We shall now have a look at the leading circus companies that are active in India today. The Great Royal Circus which is regarded as one of the oldest circus troupes in India came into existence in 1909. The Great Rayman Circus is another oldest circus company in India, founded in 1920 by Kallan Gopalan, a disciple of Keeleri Kunhikkannan, and one of the great Indian showmen of that period. Baburao Kadam founded the Grand Bombay Circus in 1920 which made circus tours in Sindh and Punjab provinces of today's Pakistan. Another famous company of independent India known as The Gemini Circus was created in 1951 by circus entrepreneur Moorkoth Vangakandy Shankaran a native of Thalassery in Kerala. He was popularly known as Gemini Shankarettan.

The Gemini Circus has built historical ties with the Indian film industry which led to the creation of popular Indian films like *Mera Naam Joker*, *Shikari* etc. Thereafter, in 1958, Rajkamal Circus was formed. It grew and attained popularity by travelling through out the country and even abroad. It is, perhaps one of the largest circuses of India today. The best known and the largest circus in India called 'Jumbo Circus' originated in 1977. In 1991, Rambo Circus was created by merging of four old Indian circuses known as Arena circus, Fantasy circus, Oriental circus and Victoria circus.

Problems faced by the Circus Industry

One of the biggest problems facing the modern circus is the prevailing misconception that it remains a medium only suitable for children. It has therefore, to regain the status of an entertainment art suitable for all groups of people. Another serious problem is concerned with its poor financial performance. In recent years, there has been a declining trend in profit and revenue earned by circus companies. In the absence of excess revenue, new developments and introduction of large scale projects cannot effectively be undertaken. During the past years there had been mergers and acquisitions in the circus field, which have reshaped the gaming industry. In fact, circus is facing increased competition from traditional competitors who are imitating some advanced business strategies. Other forms of entertainment like film industry, water theme parks, music programmes and television channels are gaining comparatively larger attention which in turn reduces the priority for circus.

Another problem faced by this industry is the hesitation of the new generation to enter into this sector. The lack of trained animals, animal trainers, circus training centers etc. are found to be the other severe challenges. Similarly, the circus has not been included in our national curriculum and interested youth are not getting a chance to develop their talents and enter into this promising industry.

India's first Circus Academy at Thalassery

In the context of the traditional values of circus and its growing significance as an art of entertainment amidst a lot of problems faced by the industry, the first Circus Academy (CA) was opened at Thalassery, Kerala. The first circus academy in the country was inaugurated at Chirakunni near Thalassery, the cradle of circus industry on 3rd August 2010. Thalassery is well known in the circus world by name of Keeleri Kunhikkannan, as the father of the Indian circus and is a region of ancient martial art form 'Kalaripayattu' and Theyyam another ritual art. It was Kunhikkannan's historical visit to the Great Indian Circus in 1888 that marked the beginning of the circus legacy of this town and nearby areas. Later, the disciples of Kunhikkannan founded great circus companies such as the Malabar Circus, Whiteway Circus, Fairy Circus, Great Rayman Circus, Eastern Circus, Oriental Circus, Kamala Three Ring Circus, Gemini Circus, Great Bombay Circus and Great Lion Circus. The Indian circus industry which has seen many leaps and bounds these days posing a threat to an age-old art form is greatly indebted to the villagers of Thalassery for their marvellous contributions.

By opening up of such an institute, the government has shown its interest and concern towards this entertainment form. Initially a permanent building for the academy over 10 acres of land would be constructed in the proposed location and the state government had already made a budgetary allocation of Rs 25 lakhs for developing the academy. The academy would definitely be a milestone in the flourishing of Indian circus by ensuring training and physical fitness of the children, facilitating the conditions for modernizing circus and preserving the greatness and popularity of circus to regain its traditional relevance. It also aims to achieve international standards by way of blending of circus with the innumerable possibilities of tourism in the country. The academy may also address the diversification of this sector which may in turn enable it to survive in times of changing global preferences and stiff competition. ❑

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Rain Water Syringe

Antoji's innovation is a low cost solution that harvests rainwater, recharges fresh water and meets the budget and aspirations of coastal inhabitants

ANTOJI LIVES in the coastal area of Cochin, where the ground water is saline and ground water level is almost same as sea water level. Once, while he was watering his garden the hose pipe fell down and pierced the soil up to 30 cm due to water pressure. This triggered a thought in him about developing a rain water harvesting technique using pressure of water. After doing several experiments he came up with his innovation. In his system the roof top rainwater is stored in a pressure tank and with the help of PVC pipes water is lowered to a depth below sea water level. The pierced water recharges and dilutes the groundwater. When required, the water can be pumped out from the recharged well.

Innovator background

K J Antoji, 56 years of age, hails from South Chellanam in Cochin town, Kerala. The son of an agriculturalist, he is the youngest among his five brothers and three sisters. He studied till class 12 and then started out as an electronics and TV technician. He lives with his wife and his only daughter is married.

Since 1998, after developing his unique rainwater syringe unit in his backyard, he has become the full time evangelist, architect and builder of rainwater harvesting units for over 160 installations in coastal Kerala.

In the early 1970s, there were no TV relay stations in Kerala. This prompted young Antoji to develop his own special antenna which could catch signals from Srilanka TV across the straits. Having gained confidence after building his own TV and antennae, he opened his workshop at Ernakulam, to repair electronic appliances.

One of his earliest innovations was a water distillation unit, which he built in 1988. Apart from distilling water, this could be used to extract the juices from fruits and medicinal plants.

This system is innovative when compared to any other rainwater system seen in coastal parts of India.

Genesis of innovation

Getting drinking water has always remained a problem in coastal areas. There are very few groundwater pockets that remain uncontaminated by saline water. Antoji stumbled on the germ of idea for this innovation, almost by accident in the mid 1990s.

It was evening time. Antoji was watering the plants in his lawn and had connected the hosepipe to the overhead tank. Hearing the phone ring in the house, he dropped the gushing hose and rushed in to attend the call. He finished the call in ten minutes and came out to find that the water from the hose had spread on the grass like a mat and not seeped into the soil. Out of curiosity, he took the hose and thrust it into the ground. He noticed that the water was overflowing and spreading on top surface and not going into the soil as expected.

He continued his experiments at various depths. When the depth exceeded 7 feet, he noticed that all the water went in and not much of it overflowed on to the top soil. This indicated that water was getting stored in a channel below this depth. Next, he tried to recover this water using a pump and was pleasantly surprised to find that the water pumped out did not have any saline water contamination. He surmised that there is a level below which one could store fresh water safely as there is no saline water ingress or percolation. The news of this discovery spread across the area.

Antoji decided to make further refinements and build a system to inject the water into the soil, store it securely and pump it out when required. First he worked out the pit dimensions, at 6 feet wide and 8 feet deep after making a few iterations. The pit was completed in summer, before the rains came and the empty pit was filled with sand, brought from the river.

Above the ground, the pit was lined with a border wall, 3 feet high and 2 feet deep. This portion above the ground was used as a tank and made leak proof. Next he inserted six pipes 16 feet in length into the tank going deep through the sand and soil below. The water from the roof of the building was then routed under pressure into these pipes to be transferred to underground storage. These pipes acted as the syringe pipes for injecting water into the ground.

This water was then pumped out using a motor or hand pump. He attached suitable valves to the exit pipes. He was overjoyed to find that the water that came out was crystal clear and fit for drinking.

Since water is injected to the soil with pressure, Antoji named his innovation as ‘rain water syringe”. After installing the system in several flats and neighbouring houses, he notes that this system could be used at various capacities and pump anywhere from 500 to 2000 litre of water.

Innovation details

Considering that the rainfall mainly happens between March and November, this unit consists of a tank with a minimum capacity of 500 litre with a daily dewatering capacity of 400 litre. It uses six dedicated PVC based syringe pipes of 2 inch diameter to inject water from overhead sources down into a storage reservoir at 25 feet below the ground.

It uses a 1.5 HP single phase, 230 V motor to pump up the stored water during dewatering. Individual foot valves are fitted to the three suction pipes of one inch diameter which are connected to the network for dewatering.

The foot-valves help in priming the motor and filtering out the solid particulates, sand and contaminants from the water prior to being pumped up during dewatering.

The rainwater syringe zone is built to generate an exclusive fresh water pocket at a water level below the sea level at low tide. Unlike other rainwater systems, this arrangement does not need the construction of open wells.

The arrangement of closely spaced vertical syringe pipes ensures a minimal footprint unlike the larger area taken up by horizontal feed systems such as VIRDA unit found in Banaskantha Gujarat.

Starting with a depth of 8 feet, the injected water can be used to recharge ground water upto a depth of 230 feet. The average installation cost of the unit is less than Rs 20,000.

Antoji's system is innovative when compared to any other rainwater system seen in coastal parts of India.

Applications

India has more than 7500 kilometres of extended coastline. From well developed coastal towns of Kerala to fishing villages in Saurashtra or the remote islands in Andamans, scarcity of drinking water is a perennial scourge for millions of countrymen living in coastal belts. Most of the available water has very high salinity due to contamination of underground water channels by seawater.

Costing Rs. 20,000 a piece, Antoji's innovation is a low cost solution that harvests rainwater, recharges fresh water and meets the budget and aspirations of coastal inhabitants. This model can be replicated in any coastal area using the existing housing plan without digging additional wells or ponds in the catchment area.

Antoji received an award from National Innovation Foundation in November 2009 for his Rain Water Syringe. ❑

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Impressive Growth in Tourism Sector

Foreign tourist visits to the country registered an impressive growth of 24.2 percent in the year 2010. Similarly domestic tourist visits also showed a growth of 10.7 percent last year. The number of domestic tourist visits to the States/ UTs during the year 2010 was 740 million as compared to 669 million in 2009 and 563 million in 2008.

The top ten States in terms of number of domestic tourist visits (in millions) during 2010 were Andhra Pradesh (155.8), Uttar Pradesh (144.8), Tamil Nadu (111.6), Maharashtra (48.5), Karnataka (38.2), Madhya Pradesh (38.1), Uttarakhand (30.2), Rajasthan (25.5), West Bengal (21.1) and Gujarat (18.9).The contribution of top 10 States was about 85.5 percent to the total number of domestic tourist visits during 2010. The percentage shares of top 5 States were Andhra Pradesh (21.0 percent), Uttar Pradesh (19.6 percent), Tamil Nadu (15.1 percent), Maharashtra (6.5 percent) and Karnataka (5.2 percent) .

The number of foreign tourist visits (FTVs) during the year 2010 was 17.9 million as compared to 14.4 million in 2009 and 2008. This shows an impressive growth of 24.2 percent over 2009 as compared to a decline of 0.1 percent in 2009 over 2008.

The top ten States in terms of number of FTVs (in millions) during 2010 were Maharashtra (5.1), Tamil Nadu (2.8), Delhi (1.9), Uttar Pradesh (1.7), Rajasthan (1.3), West Bengal (1.2), Kerala (0.66), Bihar (0.64), Himachal Pradesh (0.45) and Goa (0.44). The contribution of top 10 States was about 90.3 percent to the total number of FTVs in the country during 2010. The percentage shares of top 5 States were Maharashtra (28.5 percent), Tamil Nadu (15.7 percent), Delhi (10.6 percent), Uttar Pradesh (9.4 percent) and Rajasthan (7.2percent)

NORTH EAST DIARY

FM RADIO BROADCASTING SERVICES

The Union Cabinet has approved the proposal of the Ministry of Information and Broadcasting the policy guidelines on expansion of FM radio broadcasting services through private agencies (Phase-Ill). With special incentives for the North-east, the Centre has cleared FM Phase III, envisaging extension of radio services to an estimated 227 new cities in addition to the existing 86 cities.

The new policy guideline includes special incentives for North Eastern Region and Jammu and Kashmir (J&K) and Island territories. The incentives provided in the policy for North Eastern States, besides J&K would make the operations viable in these areas and are expected to result in better off-take of channels. The steps taken in the new policy will bring down operational costs and improve viability in general.

A significant aspect of the new guideline is that at least 11 cities in border areas of North-east, even though having a population of less than one lakh, have been included in the list for strategic reasons. Private FM radio broadcasters in North-east would be required to pay half the rate of annual licence fee for an initial period of three years from the date from which the annual licence fee becomes payable and the permission period of 15 years begins.

The revised fee structure has also been made applicable for a period of three years, from the date of issuance of guidelines, to the existing operators in these States to enable them to effectively compete with the new operators. Apart from the fee relaxation, it is further proposed that Prasar Bharati infrastructure would be made available at half the lease rentals for similar category cities in such areas.

The limit on the ownership of channels, at the national level, allocated to an entity has been retained at 15 per cent. However, channels allotted in Jammu & Kashmir, North Eastern States and island territories will be allowed over and above the 15 per cent national limit to incentivise the bidding for channels in such areas. ❑

FOOD GRAIN PRODUCTION IN ASSAM

Under foodgrains (category II), the Union Agriculture Ministry has given the best performance award for the year 2010-11 to Assam. There are a total of seven awards including three for the best performing States with highest foodgrain production in three identified categories in terms of production level. The other four awards are given for the highest production under rice, wheat, pulses and coarse cereal crops.

The reward amount for the highest foodgrain producing State is Rs 2 crore and Rs 1 crore will be given for individual crop category. Assam will utilize the reward amount to improve the working environment in the agriculture offices. Selection for the reward is done in two steps. Initially the States performance is assessed on a weightage card of 90 point on the criteria of highest production, contribution to national production, expenditure under agriculture development schemes, and human resource management.

The States are divided into three categories based on the highest production level of foodgrain achieved by a State in the previous five years. Assam came under category II along with other States like Orissa, Tamil Nadu, Gujarat, Chhatishgarh, Jharkhand, Uttarakhand, Himachal Pradesh and Jammu and Kashmir.

Last year, that is in 2010-11, Assam was able to produce 52.31 lakh metric tonne foodgrain as per third advance estimate. Likewise during the year, Assam produced a record all time high production of 50.86 lakh metric tonne of rice. This achievement has come to Assam due to proper implementation of different schemes like National Food Security Mission-Rice, Rashtriya Krishi Vikash Yojana, different irrigation and mechanization programme, newly introduced hybrid variety of rice etc. ❑