

THE INDIAN
IMI
MUSIC INDUSTRY



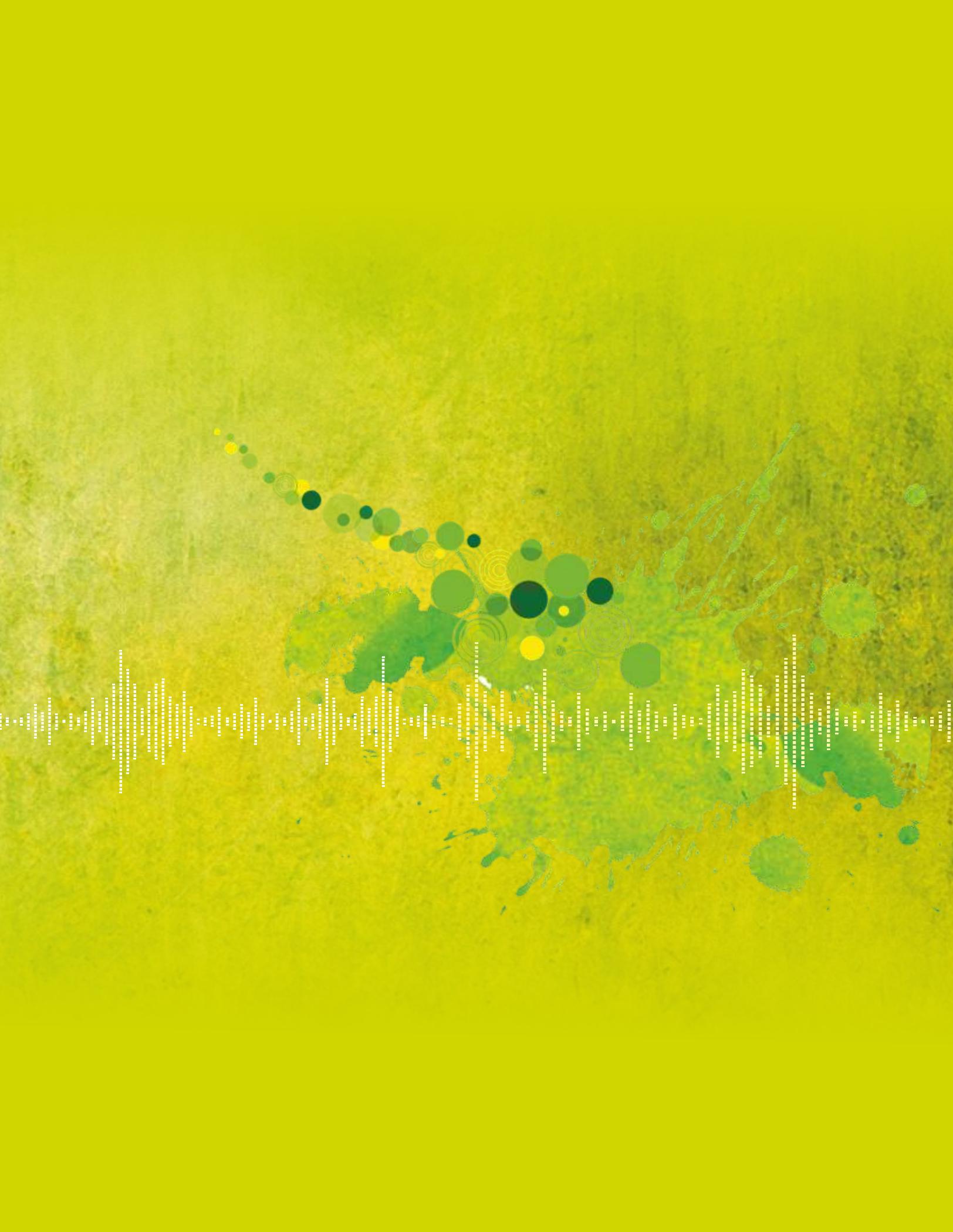
VISION 2025
The Show Must Continue





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Showcasing India's Regional Diversity in Music

by Vikram Mehra, Chairman, IMI,
delivered at All About Music 2021

Last 12-18 months have been tough, not just for you and me, but for people at large, people in India, people globally and the entertainment industry is no exception.

We have had a tough time; our business has taken a hit. The film producers have not been able to release their films with the theatres shut. Many of the artists have not been able to go out and get their gigs, which is a very big source of revenue for them.

As music labels since there are no functions happening all around, no parties happening, our revenues from public performance and licensing have taken a hit. So it's been a tough 12-18 months for all stakeholders of the music and entertainment.

But as they say there's always a silver lining to any dark cloud. I will tell you the silver lining that took place during these 18 months and as a label, we are seeing it every day.

Digital was a playground for younger people, and not for people like me. People in their twenties and thirties, who were the pioneers of this digital world, used to go out there and consume content through digital. People in their fifties, sixties and seventies were still very apprehensive about adopting digital technology. They still preferred,

their good old world of physical, with their kids side-loading content on their mobile devices on which their comfort levels were higher. There was a fear of technology, a fear of apps.

During this lockdown, many of these parents and grandparents were locked in the house with their children and grandchildren with no access to the outside world. Even walks were not allowed for most people, for most part of these 18 months.

People got forced to start consuming content through apps on their devices, and not just music but also short-format and long-format videos. If you go by the subscription numbers that are being spoken about on various video OTT apps, they have gone up substantially during the lockdown and the reason was simple, there is a new audience that has come into this digital bandwagon, people who are slightly older. Which is great news, because, all the things that went wrong for us - gigs not taking place, theatres not opening, public performance not happening, all are reversible changes. 2022, hopefully, we will all be happy, that everything has gone back to normalcy. But the positive change that happened of older people jumping on the digital bandwagon is an irreversible change. We have a new audience



VIKRAM MEHRA
CHAIRMAN, IMI



The positive change that happened of older people jumping on the digital bandwagon is an irreversible change. We have a new audience out here in front of us, a much larger audience, which means that many more streams and views for whatever content we produce.



out here in front of us, a much larger audience, which means that many more streams and views for whatever content we produce. This is great news for creators as well as producers and the people who monetize.

The music industry globally has been there on an upswing, for very similar reasons, if you go by the data published by various authorities, you're looking at numbers between 11-14 per cent growth patterns, coming from various countries. It's a shift that the customer has made from pirated content all the way to a legitimate way of consuming content, which is great news. With people moving from a browser version world to an app world, it has become easier for content and Intellectual Property (IP) owners to police any infringement that used to happen earlier. Earlier somebody used to pirate from a server based in countries where we had no jurisdiction, but in the app world we go out there to our partners, who control the app world and talk to them and put our case of how infringement is going on and we look up to the people like Apple and Google to help control this piracy. They have been very helpful for all of us to ensure that infringing apps are thrown out of their stores immediately

The big growth drivers in India according to me :

1. There are 500 to 700 million of us, who have got a smartphone in their hands, and each of these smartphones is equivalent to a television or computer.
2. Data is really cheap in our country. Courtesy, the revolution that Jio brought in. Now we see all around that Jio, Airtel, Vodafone Idea, all of them have maintained a very healthy pricing for data. Even if

the prices go up a bit, it still remains at the lowest pricing, and more importantly, over the last 36 months, they have got every Indian hooked onto consuming data by consuming video and audio.

I often give this example to people - When you go for your morning walks or evening walks, while walking look at all the autos and taxis that are parked on the side and check if they are free. You will never see the taxi driver or the auto driver sleeping or just staring at the sky. All of them are constantly glued to the phone.

We as Indians have forgotten how to get bored. Every time we get free we immediately take out our phone and start consuming something, which means that there is a very big market, both for audio and video building up.

On the piracy front, I have to thank the state governments and the central government, for all the help they have extended to IMI, to control piracy, both in the physical and digital form. We look forward to working with government authorities in the days to come to further reduce the incidents of piracy in the smaller towns. You will agree earlier prevalent practice of everybody listening to music through pirated CDs and watching movies through pirated DVDs is reducing. Both the carrot and the stick policy seem to be working here.

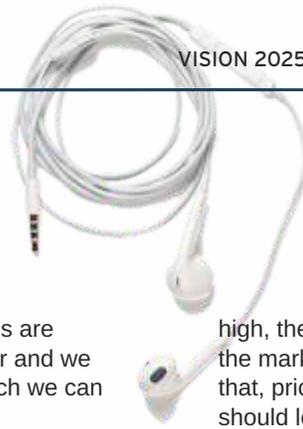
The great part is that the music sector as a segment is getting recognition world over. There was a time that people had written off the music segment saying there is no monetization model around it. Digitised world which was initially responsible for the destruction of the music industry due to uncontrolled piracy, has now come to the rescue of the music industry and has been propelling its growth

steadily world over. The listing of Universal Music Group, on the stock exchange and the valuation they have been able to manage, we congratulate them and I think it's great news for everyone. Universal is the largest music label in the world and anything great that happens to them, will have a trickle effect for all of us -the other labels, the creators of content, everybody is going to benefit because world over there is a bigger recognition for the music industry.

The present looks good but what are the levers for ensuring continued growth.

I said it last time and I will repeat it, I think the biggest thing that we need to do, is to ensure that all stakeholders work together. We need to understand, a label can't work without an artist, and an artist can't work without a label. A label can't work without a digital platform, a digital platform can't work without a label. We are all interdependent on one another. If there is one weak link and if there's somebody who is not making money, this entire value chain is going to crumble. All stakeholders have to work together and ensure that the other parties also, get the rightful share of the created value.

Let me start with labels and artists. For the longest time there were acrimonious debates happening between publishers, composers and lyricists. We all came together in 2017, as part of IPRS and see what's happened there. Have we won the war out there? No! There's still a long way to go, but you have to come to the internal meetings of IPRS and see how various stakeholders sit together and instead of debating on who gets what, they are all trying to grow the publishing market and that's the trigger for the massive growth that IPRS has been able to bring in.



The management team of IPRS now gets a clear mandate from the board as to which direction they should move and they are doing a fabulous job. This is the magic when everybody comes together. Similarly we have every reason to believe that we will have a similar level of bonhomie and working relationship between sound recording owners and the singers. We need to ensure once again that we work together in a way which is fair to both the parties.

Another area that needs work is the relationship between streaming platforms and music labels. The former are under commercial pressure because their business model is predominantly based on advertising revenue, which is growing slowly. Similarly the music labels have their own commercial stress due to increasing cost of new content creation and marketing. The only viable commercial solution for both parties is to work towards a subscription driven streaming business. Because only then, will there be money flowing in both for the platforms and the labels. As labels earn more, they will be able to invest in new content and artistes even further. Net net it cannot be label versus platform anymore, it has to be both of them coming together.

About the video sharing apps that have come out - I think it's great news and it has turned every Indian into a content creator and content consumer. We want to find a model which makes sense to both the parties. Currently most of these apps are working on a fixed fee model with the labels, which was ok to start with. As these apps mature, we expect them to develop a robust advertising model, and share a percentage of that revenue with the content owners which in turn incentivises them to invest more in

quality content. All parties are dependent on each other and we need to find ways in which we can work together.

The second figure I touched on earlier is subscription. We cannot be so dependent on advertising revenue alone; the television world has taught us that. TV channels in India used to earn 80%-90% of their revenues from advertising, and only 10%-15% used to come from subscription. But things have changed now. It is 50-50 or 55-45 kind of a revenue share, happening between subscription and advertising. As Music Industry, we also need to work with all Indian and global partners, and find ways in which subscription revenue goes up.

This belief that the customer does not want to pay for music is just a myth. Just check out the number of paid subscribers globally, which are roughly around 470 million. Saregama as a company has sold millions of Carvaans at INR 6,000.

It tells you that people are ready to pay, we just need to get our strategy right. This cannot be done by the platforms or labels alone, we need to work together to ensure that platforms are able to increase their subscription revenue which means greater revenue flowing across to labels which means greater revenue coming to artists.

We need to have a fair market place. It's a give and take between all the stakeholders. A big song is a big song and should be valued at a higher price, and a flop song does not get the same amount of pricing. You cannot have a flat price going, it's not a commodity. Every song is different and I think we should have the pricing flexibility as content creators, as content owners and platforms to price it in the right fashion. If somebody is pricing it too

high, then they will get affected and the market forces will also ensure that, prices get corrected. We should leave it to market forces to get the right pricing to both creators as well as owners.

The next point is something very dear to my heart. The next round of growth that is going to be coming in this country, in the digital space, may not come from Mumbai, Delhi Bangalore, Chennai, Kolkata of the world. It will be coming from the smaller towns, it will be from the Warangals, Bareillys, Banaras and Ajmers of the world. The industry should note that the customers staying in the heartland of our country are far more comfortable consuming content in their native language. Everybody loves great Hindi, Punjabi songs but they prefer music in their native language. It's like your mom's food. You may like to eat all kinds of fancy food, but your comfort food will always be what your mom used to make when you were young. Similarly the comfort music is the music which is in your own language.

India has 22 official languages and around 19,000 dialects. We need to ensure that more and more music is being made in regional languages because next round of digital customers will really enjoy it.

A good example is the Haryanvi song, 52 Gaj ka Daman. The song's fairy tale journey to becoming one of the biggest hits ever is incredible. Who would have expected a Haryanvi song to do it? Because a good song is a good song and people liked that song and then the song became very popular at the national level. I think we should all look very seriously at the regional markets but the important part is if you are looking at the regional market, you need to have the right play. You can't run this sitting in Mumbai and Delhi. You need to



have language experts running the show operating from the local markets. Music is again something that needs to be able to capture the local sensibilities. Just because one is good in Hindi, doesn't mean that one can also become a very good judge of an Assamese or a Haryanvi song. If we are investing in regional content, we need to ensure that we are deeply rooted in those markets, work with the local artists out there, understand what works better locally, and then put it out.

Often when one thinks of South India, they think that Tamil, Telugu, Kannada, and Malayalam are the same, similarly when you think of North India, you think that Bhojpuri, Gujarati, Hindi, Haryanvi and Punjabi will be the same. No, they are very different. People even think that Punjabi and Haryanvi are the same. They are as different as chalk and cheese. My request to everybody is please go out there and understand those markets before you start creating music. Otherwise, it may just be wastage of money.

To the product platforms, they need to understand that if you want to get into the regional markets, the product functionality and user interface that you are developing for smaller towns has to be different keeping in mind that these are not the most digital savvy people. They are not today's 25-year-olds. A 40 or 50 year old living in Ujjain who will never be as savvy as today's 25 year old living in metro. You need to have a balance which is done in the functionality if you want to talk to these smaller towns.

We are very bullish about the Government of India's broadband initiatives; I think there's lot of serious thinking behind it. This will ensure that in smaller towns, data will not be a problem and more and

more people will jump onto the music streaming bandwagon. And if we provide them content in their language, I think there is money to be made for everyone.

Another great thing that happened during lockdown is we opened our eyes to non-film music in the space of Hindi. Non-film music was always big in Punjabi, Bhojpuri, Gujarati and Marathi also, but non-film music becoming that big in the space of Hindi is amazing. Whether it's a Badshah or Arjun or Neha or Jubin, I think these artists have done an amazing job during this time and given us some great music which has been given a thumbs up by customers at large and has opened us to the possibility of non-film music taking off in a big fashion in India. I think film music is very much there to stay but there is now an alternative source of music that has risen.

Lastly I will recommend each of you to start investing in data analytics. Understand how your content is getting used today, who is using your content, which medium is your content doing better on and it may also throw valuable insights as to what works and what doesn't. With hundreds of songs being launched on a daily basis, the current practice of song selection being done basis 'senior management gut calls' may not be sustainable. We will have to increasingly rely on data analytics to help us here. If nothing else, it will refine the gut calls all of us take on a daily basis. I am not saying entertainment should be made left brained. Entertainment is a right brain activity, gut calls are very important. But do use data to refine your gut call.

I believe that the music industry which currently is between INR 1300-1500cr should become a 10,000 Crore industry in the next three to five years. We should be

seeing a very rapid growth coming in, not the growth that was moving at 12-15%. I think if we make the right move, we can actually hope to make this industry a 10000 Crore industry.

As the industry will grow, artistes are going to become bigger, labels are going to make more money, platforms are going to become much bigger and will generate that much more revenue for everyone. But one thing that's always going to remain static is that we will always look up to All About Music to ensure and unequivocally understand what the Industry is saying because this is the only platform where all stakeholders come together and talk to each other in a unified voice.



This is a transcription of the speech delivered at All About Music 2021 held on a virtual platform on 27th September, 2021.







Foreword

The mid-July ban by the Ministry of Electronics and Information Technology (MEITY) on TikTok, the Chinese short form social media app, on account of national security, was also the trigger for domestic innovation. After the ban over half a dozen domestic short form video apps and domestic platforms with integrated short form video features have been launched and seen exponential growth - alongside global apps.

Short form video apps are used by 45% of the 600 million internet users in India. Local short form video apps are also riding the Digital India investment wave, with millions of dollars pouring in.

Given that TikTok is currently valued at \$50 billion (INR 3.75 Lakh cr) and the Chinese entity Kuaishou Technology received a valuation of \$60.9 billion (INR 4.56 Lakh cr), the valuations party has just begun for short form video apps in India.

SHORT FORM VIDEO APPS TO GROW 16%

Short form video apps are also expected to grow 16% in terms of total number of users and four times in terms of minutes spent within 5 years.

This growth comes at the cost of the creative community which comprises performers, authors, composers, and investors by way of music labels.

The platforms are at liberty to deny copyright holders royalty payments or pay royalties at their own discretion creating a value gap. This occurs because the apps can claim to be "Intermediaries" under the Information Technology Act of 2000 (IT Act) which shields them as they host user generated content.

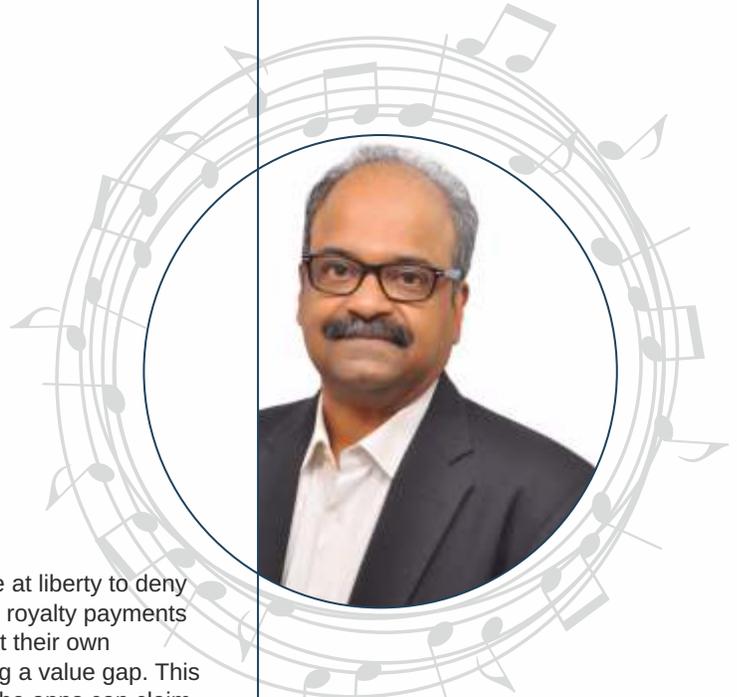
A THOUSAND CUTS TO CREATIVE TALENT

Meanwhile, user generated content uploads go on unabated with lakhs of videos uploaded daily and a high number of videos viewed by users per day. The increasing engagement and content creation will further boost the valuations and bottom lines (through advertising) of these short form video apps.

While a thousand TikTok clones bloom, a thousand cuts are delivered to the creative talent and the record labels in the Indian recorded music ecosystem.

INR 200 CRORE LOST BY WAY OF ROYALTIES

Around INR 200 cr. annually is lost by way of royalties thanks to the protection accorded by Section 79 of the IT Act. Big Tech also takes cover under the same section - even while the estimated or declared revenues of FB and Alphabet in India were INR 1,277 cr. and INR 5,593 cr. respectively in FY20. The pay-outs to record labels by the Big Tech are not



BLAISE FERNANDES
PRESIDENT & CEO, IMI



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commensurate with the huge revenues earned by them through copyrighted music causing an estimated loss of INR 739 cr. annually.

The platforms are at liberty to deny copyright holders royalties payable to them or if the platforms do pay royalties, the royalty amounts payable at the discretion of the platform. This occurs because these short format video apps hide behind the garb of "Intermediaries" under the Information Technology Act of 2000 (hereinafter referred to as IT Act) which shields the platforms. This creates what is described as a Value Gap, where local legislation gives the licensee the upper hand over licensors during negotiations.

RECORDED MUSIC INDUSTRY BLEEDS

Even in the US, a report by the copyright office on a similar intermediary liability provision in the Digital Millennium Copyright Act of 1998, noted that the "the scale of online copyright infringement and the lack of effectiveness of section 512 notices to address that situation remain significant problems."

Without immediate attention, the recorded music ecosystem will continue to haemorrhage. This will have a massive impact on the livelihoods of an estimated 53 million households. The INR 19,100

crore Indian film industry will suffer too, as the first investors in any film project are record labels who license the soundtrack of the film.

LEGISLATIONS IN OTHER COUNTRIES

The administration should borrow a leaf from copyright reforms enacted in the EU via the Digital Single Market Copyright Directive which makes online content sharing platforms liable for copyrighted content hosted on their sites. The Australian Parliament, followed by the Canadians, also recently amended its copyright law to provide copyright owners with additional tools to enforce their rights against online infringement, including injunctions to block domain names.

If Section 79 of the IT Act 2000 is not repealed it seems inevitable that the Indian recorded music industry, along with its creative community, will sink into an abyss. Currently the recorded music industry including the creative community lose around INR 1500 cr which is a 100% leakage of revenues.



Keynote: GLOBAL VIEW: Investment Opportunities in India

by Frances Moore, CEO, IFPI,
delivered at CII Big Picture Summit 2020



FRANCES MOORE
CEO, IFPI

I am pleased to have the opportunity to talk to you today about the investment opportunities in India and how we can build confidence in the music market for the future. There's no doubt about it, the love and passion you have for music in India and the way it helps form the very foundations of your country's religions and cultures and the identity of your people is recognised all over the world.

Yet even with India's incredibly rich music heritage, I would argue there has never been a better time to access and enjoy music in your country.

We have seen across the industry a roll out of affordable and plentiful Internet access from mobile providers, such as Jio, leading to widespread online engagement. This in turn has helped kick-start music streaming in India in a big way. Today Indian music streaming services such as Gaana, JioSaavn, Wynk compete alongside the global players such as Amazon Music, Spotify and YouTube, and these services cater to thousands of genres in over 25 languages. The result is Indians can listen to more of the music they love, whenever and wherever they wish to do so.

Furthermore, India's young population having fully embraced social media, are finding different ways outside of the traditional

media channels to discover new music, engage with artists, and share content with friends. This has been leading to the rise in new Indian genres and the emergence of original and exciting artists such as Raja Kumari, the female Indian hip-hop artist.

The major international record companies have recognised this alignment landscape and as you know are now fully engaged in India.

Excited by the opportunities, not only to bring global artists to new audiences here in India but also, to invest in a new generation of Indian artists. These Indian artists have the potential to reach beyond India and find a global audience of their own. A case in point is the Indian artist, Divine, appearing on an enormous billboard in Times square, New York City.

It's also important for us to recognise the economic contribution music makes. We've recently published a study in Europe, that found that the music sector supports two million jobs and contributes €82 billion annually to the EU economy. Imagine the contribution the music sector can make in India, a country with a population roughly three times of the European Union, if its music market functioned in a similar way.



Excited by the opportunities, not only to bring global artists to new audiences here in India but also, to invest in a new generation of Indian artists. These Indian artists have the potential to reach beyond India and find a global audience of their own.



India's on a journey, in the last two years, India has jumped from the 20th largest music market in the world, to the 15th largest, with revenue growth of 49% that was driven by streaming. I believe in the next 5 years, with the right conditions of course, India has the potential to become a top 10 global music market.

However, there are a number of problems that need to be fixed in the Indian market and quickly if this is to happen and I'm going to highlight just four of the important ones.

ISSUE NUMBER 1 - the need to build investor confidence in the Indian music market. If companies are looking at various countries in Asia, they are going to look at the environment in which they are going to be operating. I know of an example only a couple of years ago, where a major investor, a music company decided, Indonesia rather than India. We can't have that happening going forward.

We see around the world, the growth of successful digital markets

are underpinned by investments from record companies. Investment that goes into the local workforce, the infrastructure, and of course, crucially into the artist and their music. For this to happen, there needs to be a legal framework that allows all right holders to secure fair value for the usage of music.

For a digital industry such as the recording industry today, this means that right holders must be free to license their music to digital services in fair market conditions and importantly without interference. This enables a virtuous cycle of investment with returning revenue being put back into the market to drive further development and growth

The main threats to the positive developments in the Indian music market is the attempt to extend the statutory license under Section 31D of the Indian copyright act to online music streaming services. This statutory licensing mechanism is arguably not needed even for radio and TV broadcasters it is meant to cover, but to extend it to online

services will have a devastating effect. It will seriously undermine the music industry's ability to operate and invest in India. It will also be incompatible with India's obligation under the international copyright treaties that it has signed up to.

While the courts themselves, have rightly rejected the interpretation, online streaming services could fall on 31D statutory license, we urge the Indian government to remove any ambiguity over this issue once and for all and to withdraw the DPIIT official memorandum published in 2016. Do not scare off foreign direct investment that you need to grow, by extending archaic laws.

ISSUE NUMBER 2 - Online liability rules and creating a fair marketplace, a further problem and this is not unique to India. It is the overbroad and often unclear provisions limiting the copyright liability of certain online services. Such unclear liability rules often called safe harbour rules have enabled popular user upload



services to either avoid licensing music and never paying for it or to just do so under different rules than other streaming services.

Last year, the European Union passed the world's first legislation to address this issue and in order to even out the playing field in the digital content market in Europe. India should follow suit, review its online liability laws to ensure that all online services using music negotiate licences with rightholders and under the same rules.

ISSUE NUMBER 3 - the need for fair value for all music uses. We talked about digital music revenues as a driver for the industry's growth, but fair value must be returned for all uses of music in India. This country has a thriving commercial radio industry, which uses music to drive its revenues. IFPI's own research has demonstrated that music is the key to a successful radio station, it's the glue that holds everything on the radio together and ensure listeners stay tuned.

Yet under the last copyright tribunal decision, radio stations have been paying only 2% of their net revenues to sound recording right holders. There are on-going proceedings to look at these rates and I strongly hope the outcome represents the true economic value of music to Indian radio.

ISSUE NUMBER 4 - the need to tackle copyright infringement. Beyond widespread use of traditional piracy methods such as BitTorrent or MP3 download sites, we know that India also has one of the highest rates of stream ripping. 58% of Indian internet users use services that illegally rip music from YouTube video streams and offer them as a permanent download. Operators of these stream ripping sites are often established outside of India, they generate vast profits from making music available

illegally and pay nothing to artists and right holders, it's essential that we have effective tools to prevent these services from operating in Indian markets.

There are already great precedents from the Indian courts ordering Indian internet access providers to block access to illegal foreign sites. These procedures must be scalable and applicable to all types of illegal services, including stream ripping services.

To conclude, India has all the ingredients to be one of the world's leading music markets. It's incredible, rich, and diverse music cultures, increasing access to digital services, a young population, engagement and investment from major record companies both domestic and international and crucially a strong and deep love of music. However, we need to ensure that the legal framework that underpins it is fit for purpose and provides clarity and fair market conditions for those creating and investing in music. Only this will inspire investor confidence and will make them choose India next time and not Indonesia. If we are able to achieve this, then India could be a world leader in music and in the very near future. Thank you very much.

This is a transcription of the speech delivered at the CII Big Picture Summit 2020 held on a virtual platform on 17th December, 2020







A Case For Free Market Economics In The Indian Recorded Music Industry' Paper 2021

Summary by Mridula Dalvi and Dema Therese Maria

(Excerpts from 'A Case For Free Market Economics In The Indian Recorded Music Industry' Report 2021)

Cinema & Recorded Music in India are twins separated at birth at the village fair that always end up meeting on the silver screen. That is the symbiotic relationship between Indian Cinema & Recorded Music. 70% of recorded music in India is film-based; the other 30% is largely classical, devotional, folk and independent. If one goes to India's southern and eastern states, about 90% of the local music is film based. Since 70% of recorded music in India is film-based, the growth of the film industry should have led to the growth of the recorded music industry. However, despite this symbiotic relationship, today the film industry is valued at INR 19,100 cr., while the music industry is valued at a mere INR 1,500 cr.



Archaic laws compounded by unwarranted and unnecessary regulatory interventions, especially in the rapidly developing digital marketplace as well as exemptions from Public Performance Rights, due to policy lacunas point to the wide revenue gap between the recorded music and film industry. We estimate around INR 2,016 cr. to INR 2,791 cr. annually is lost by the recorded music industry due to obsolete laws eroding the fair value of the copyright, safe harbor provisions under Section 79 of the Information Technology (IT) Act, 2000, leading to a value gap between the copyright holders and platform and exemptions from Public Performance Rights that continue to debilitate the growth of the recorded music industry in India.



REVENUE SOURCE	RECOMMENDATION	CURRENT REVENUES (IN ₹ CR.)
PUBLIC PERFORMANCE FM Radio Broadcasting	<p>Allow for free market practises to determine the license fee for use of sound recording by Private FM Radio broadcasters. Withdrawal of Statutory Licensing is the way forward. Historically, private Broadcasters were at an infancy stage of the operations. Today the private Broadcasters have revenues of ₹3,100 cr. vis-à-vis the recorded music industry at ₹1,277 cr.</p>	75

ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)
300	NA	225	266	NA	191	238	NA	163

REVENUE SOURCE	RECOMMENDATION	CURRENT REVENUES (IN ₹ CR.)
PUBLIC PERFORMANCE Establishments	<p>RoC should grant PPL status as a copyright society; this will strengthen the hand of PPL when dealing with establishments using copyrighted content. Establishments, even reputed brands, refuse to entertain PPL as they are not recognised as a society. If these establishments do entertain PPL then PP revenues could potentially be ₹421 Cr. An emerging market like Brazil earns ~₹496 Cr. (US\$ 70.5 mn) from PP including radio royalties compared to India ~₹130 Cr. (US\$ 18.5 mn) including radio royalties. India is part of the BRICS grouping, hence the benchmark with Brazil.¹</p>	55

ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)
421	NA	366	366.1	NA	311.1	319	NA	264

¹ IFPI GMR 2020



REVENUE SOURCE	RECOMMENDATION	CURRENT REVENUES (IN ₹ CR.)
PUBLIC PERFORMANCE Wedding Events (Non-Traditional)	RoC should withdraw the Public Notice issued in August, 2019, which exempts PP license fees for usage of sound recordings at weddings.	0

ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)
1000	NA	1000	850	NA	850	723	NA	723

REVENUE SOURCE	RECOMMENDATION	CURRENT REVENUES (IN ₹ CR.)
General Piracy, Stream Ripping, Cyberlockers	More administrative blocking and setting up of digital cybercrime units such as MCDCU and TIPCU across India	0

ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)
300	NA	300	255	NA	255	217	NA	217

REVENUE SOURCE	RECOMMENDATION	CURRENT REVENUES (IN ₹ CR.)
Value Gap between Tech Cos that own UGC apps like YouTube and the Recorded Music Industry	Revision to Intermediary Liability provisions, Section 79 of the IT Act	300

ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)	Total Potential Revenue Size (in ₹ cr.)	Value Gap (in ₹ Cr.)	Fair Value (in ₹ Cr.)
1000	700	NA	895	595	NA	806	506	NA



REVENUE SOURCE			RECOMMENDATION			CURRENT REVENUES (IN ₹ CR.)		
Short form content copyright infringement on UGC apps			Revision to Intermediary Liability provisions, Section 79 of the IT Act			0		
ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)	Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)	Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)
200	NA	200	170	NA	170	145	NA	145

REVENUE SOURCE			RECOMMENDATION			CURRENT REVENUES (IN ₹ CR.)		
Streaming (Audio)			Ambiguity caused by the DPIIT memo of 2016 is hampering additional domestic and international investments into music content. Global DSP's are also holding back the globally accepted subscription model full throttle roll out in India, with a Smart Phone base of 448 million and a middle class of 386 million with data the cheapest average price in the world @ US.09 per GB, 100 million paid for subs in India is the base case, withdrawal of the Office Memorandum dated 5th September, 2016 is recommended which would impact approximately 53% of the recorded music industry revenues			674		
ESTIMATED REVENUES								
HIGH			MEDIUM			LOW		
Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)	Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)	Total Potential Revenue Size (in ₹cr.)	Value Gap (in ₹Cr.)	Fair Value (in ₹Cr.)
Cannot be determined	NA	Cannot be determined	Cannot be determined	NA	Cannot be determined	Cannot be determined	NA	Cannot be determined



EXPERTS SPEAK



‘Looking From The Outside: Investment Opportunities in India’ at CII Big Picture Summit 2020

17th December, 2020

MODERATOR

Mr. Blaise Fernandes - President & CEO, IMI

PARTICIPANTS

Ms. Frances Moore - CEO, IFPI

Mr. Benjamin NG - Regional Director for Asia Pacific, CISAC

Ms. Jenny Wong - Regional Director for Asia Pacific, IFPI

Mr. Tom Simpson - Senior Vice President, APAC, Ad Colony Singapore



Introduction

The panel focuses on the Investment opportunities in India and the pathways to success in the music, film and television industries in India with insights from South Korea. These insights centred around strong government support and conducive policies for the growth of the aforementioned industries on both domestic and international levels. Given the resources India possesses with respect to the increasing smartphone consumption, high advertising expenditure and the favourable demographic dividend, India has immense potential to increase incoming investments in the music and entertainment industries. In light of this, the panellists also brought out the flipside - the challenge faced by rights holders with regards to fair remuneration from Indian broadcasters. Further, the session also entailed international comparisons with India on the online music landscape and advertising fronts. These subject areas along with the importance of creating a level playing field in the international market have been elaborated on in the subsequent sections.

SOUTH KOREA

South Korea has seen tremendous success in music, film and television. This success is the result of long-term strategic planning and support from the government.

A. THE GOVERNMENT'S FIRM COMMITMENT TO FOSTER AND DEVELOP THE CULTURAL INDUSTRIES - THE KOREAN COPYRIGHT MISSION.

The Korean Copyright Mission is an agency handled by the government and is spread across Asia in countries such as China, Hong Kong, Philippines and Vietnam. One of the key responsibilities carried out by the body is engaging with other governments around the region to talk about the importance of copyright and promote Korean content at the same time. Support is also provided in the form of funding for trade shows and concerts. This is being translated into increased support for Korean content both from domestic as well as international bodies - South Korea has grown about three times in the last 20 years as per IFPI's Global Music Report.

B. STRUCTURED ORGANIZATION DEDICATED TO THE INDUSTRY

South Korea is one of the few countries in Asia that has a dedicated Ministry of Culture, Sports and Tourism (MCST) with several agencies under each of them to ensure a smooth functioning of art, gaming, film, television and music. Recently, the government also offered a new office under the MCST dedicated to the Korean wave.

EXAMPLE:- The TV industry in Korea is exporting many TV dramas and music. This is reflected through content such as Parasite that won at the Oscars and the increasing popularity of K-Drama in Asia, Europe and America. Coming back to the efforts of the Korean Government, the government has also taken a holistic approach to promote the cultural sectors; this can be seen through the success of K-Pop with BTS which is no.1 on Billboard. Moreover, the benefits spill over other sectors as well. One by-product of the success of this industry has been an increase in tourism in Korea. Given similar landscapes - India's rich Bollywood culture, for example, India can learn from Korea's experiences.

C. ACTIVE COPYRIGHT ENFORCEMENT

Korea has also seen tremendous success in the implementation of administrative site blocking that has resulted in increased protection of online content. The country is now engaging in conversations with other countries to encourage increased use of this method to tackle pirated sites. For the past 20 years, there have been more than 8 copyright related legislative amendments within Korea, with a series of improvements in the law. These frequent revisits to the law are one of the important things that supports effective copyright enforcement. In Korea the ISP (Internet Service Provider) liability is also seen as coming to the forefront to improve the law and combat policy. A good legal infrastructure along with effective enforcement is important on this front.



SECTION 31D - CHALLENGE TO RIGHTS HOLDERS

The main threats to the positive development of the Indian music market, is the attempt to extend the statutory license under Section 31D of the Indian Copyright Act to online music streaming services. The statutory licensing mechanism is arguably not needed even for radio and TV broadcasters, but to extend it to online services will have a devastating effect.

The key is to ensure fair remuneration is given to each rightsholder. This will keep the market sustainable and provide more channels to support this industry.

INDIAN PERFORMANCE RIGHTS ORGANIZATIONS (IPRS).

A. IPRS' SUPPORT TO INDIAN COMPOSERS FOR OVER 50 YEARS.

The IPRS (Indian Performing Rights Society) continues to help their members. Reforms within IPRS has enabled it to grow quickly while catching up with opportunities in online markets. This is reflected in the amount of collections throughout the members and the achievement of collecting \$22.5 million in 2019.

B. IPRS AND PUBLIC PERFORMANCE.

A majority of IPRS' collection comes from public performance. However, the reason for the high proportion of public performance collections by IPRS is because of the problem with the low broadcasting collections in India and the on-going disputes with radio broadcasters. With regards to online collection, DSP's (Digital Service Providers) need to pay their dues to the rights holders. This will result in benefits for both the rights holders and the market.

CREATING A LEVEL-PLAYING FIELD FOR ALL PLAYERS IN THE MARKET

There was an imbalance in the overall music marketplace in Europe due to the presence of gatekeepers. It was difficult for rightsholders to build their businesses in a digital environment and hence the EU felt the need to create a level-playing field for everyone in the market. In this regards the EU adopted the Directive on Copyright in the Digital Single Market. This directive was originally aimed towards uploaded content services like YouTube. The EU further introduced the Digital Markets Act (DMA) to lay down rules and regulations on the platforms on how to deal with harmful and illegal content.

THE ONLINE MUSIC LISTENING LANDSCAPE

There are around 150 million online audio listeners in India and 85% of those are non-subscription listeners. In the United States, broadly 80 to 85% of digital audio streams are subscription supported. Taking the example of a DSP (Digital Service Providers), when Spotify earns a revenue of 10 billion, around 75% to 80% comes through subscriptions.



INDIAN DIGITAL AD MARKETS - WAY FORWARD TO ATTRACT INVESTMENTS

In 2025, India is predicted to reach \$16 billion in advertising. It is predicted to double in the coming years. With this growth, digital ad spends will account for 30-35% of the total advertising share.

However, the Indian Ad market is still a traditional market. The Indian Ad market is around \$11 billion. However, the digital ad market contributes around 20-25% of the ad market. In comparison, 65% of advertising spends are through digital channels in UK (similar to Australia and USA). Moreover, 40% of Ad spends in Indonesia is already coming via digital channels. Indian ad market advertisers, brands and agencies tend to put their money into tried and trusted channels like Radio and TV. About \$0.5 Billion of

ad spends go to Radio channels. YouTube and Facebook are also widely used for advertising in India.

The Indian market is unique with its drive for performance which is prevalent here more than in any other market. The inflection point for the Indian market will be when Indian advertisers understand that it is possible to deliver big brand spends into the markets via digital channels without thinking of it as a performance spend which must result in e-commerce outcomes. It is important for the audio ecosystem where music listeners are not going to make an immediate purchase. Rather the aim should be to build brand awareness. The change in mindset will be the inflection point.





Breaking India International Music's Journey at All About Music 2021

28th September, 2021

MODERATOR

Mr. Roochay Shukla - Senior Marketing Manager (India), Outdustry

PARTICIPANTS

Ms. Dema Therese Maria - Lead-Charts & Certifications,
Sr. Research & Operations Associate, The Indian Music Industry (IMI)

Mr. Arjun Sankalia - Sr. Director International Music, Publishing and Analytics,
Sony Music Entertainment India Pvt Ltd

Mr. Ed Harris - Manager, Blue Raincoat Artists

Mr. Jay Mehta - Managing Director, Warner Music Group

Mr. Padmanabhan NS - Head of Artist & Label Partnership, Spotify India



Introduction

The panel discusses the trends, room for growth and the current state of international music in India. The panel explores the different ways in which music listeners in India consume international music content considering the wide demographic of the country. It also touches upon the ways international artists perceive India as a market and the influence international music has on Indian music charts. The panel brings to light the room for growth of international music in India, not just in Tier 1 cities but also in the Tier 2 and Tier 3 cities.



ARJUN SANKALIA

DEMA THERESE MARIA

ED HARRIS

JAY MEHTA

PADMANABHAN NS

ROOCHAY SHUKLA

INTERNATIONAL MUSIC ON INDIAN CHARTS

1. On the Spotify India Charts there are close to 40 international tracks in the Top 100, and in the Top 200 there are around 80-85 international tracks. At Spotify, a balance of international and Indian music is being noticed. There are however a lot of spikes that take place when there is a big Indian release and when there are big international releases. For example – On the Spotify India charts in July, the charts witnessed a huge spike in international music whereas in August, it witnessed a spike in

Indian music due to the release of the movie 'Shershaah'. In the month of June, it witnessed an increase in Punjabi music on the chart due to Sidhu Moose Wala.

2. If you take the Top 20 artists in the world, India will be one of their Top 5 or Top 10 markets currently, and this is the first time this has happened. This could be attributed to the introduction of Spotify in India.
3. The IMI International Top 20 Singles chart launched in June of 2021 and the charts are rolling

out in phases with the international charts that released first. The charts take into consideration any track that is in a non-Indian language and data for the chart is acquired through 3 major international platforms – Spotify, Apple Music and Amazon Music. Currently YouTube is not included in the chart as IFPI is working on a global framework with YouTube on the inclusion of data. However, including YouTube data for the charts will be very interesting considering the reach of YouTube in India.



INTERNATIONAL MUSIC TRENDS IN INDIA

1. International music contributes to approximately 13% of overall audio music consumption in India (excluding YouTube). Over the last 3 years the contribution of international music in terms of percentage has decreased however, in terms of volume has increased, which signifies the following:
 - A. With every new expansion to Tier 2 and Tier 3 cities in India, a new consumer consumes either Hindi or a regional language as his/her primary language and consumes English as a second language, so there would be an increase in consumption but may not be at the same intensity as it used to be for total contribution.
 - B. The influence of short form video apps for the discovery of an old song or a catalog song (eg. Stereo Hearts) that released a long time ago has now arrived on the charts.
 - C. Around 50% of the population in India is under the age of 25 and in the last two years India has seen the highest number of English medium schools arrive. The expansion of brands such as Mango or Zara for example, have reached a number of cities in India. These brands also include cafes like Barista or Starbucks Coffee. These cafes have shot up in Tier 2 and Tier 3 cities. Hence it shows that in terms of lifestyle upgrade, more cities in India are evolving and are getting exposed to the western world.

In 2018-19, Ed Sheeran was one of the most traveled artists and his song 'Shape of You' was recreated in 13 languages in the country and that gives an indication that if that was the case back then, if an artist's music travels to those many cities now, international music like a lot of international brands will only grow.



EVOLUTION OF INTERNATIONAL MUSIC IN INDIA

1. Around 20-30 years ago there were three main issues:
 - A. **AWARENESS:** Discovery was dependent on music channels, and they were impactful to a certain extent but from a numbers perspective they did not have a high or significant reach. International music within these channels was 50% then dropped to 30% and then further dropped to around 20%. In the days of physical releases, 85-90% of international music was sold mainly in Mumbai, Bengaluru and Delhi.
 - B. **AVAILABILITY:** When an album was set to release, the main question that needed to be addressed was – will I meet the minimum order quantity? If you went to a shop to buy an album, sometimes the album that you are searching for would not be available.
 - C. **SPENDING:** The industry was dependent on the consumer to spend INR 150-500 for a CD which could have perhaps been used for something else.
2. Currently there is no awareness issue because of the 4 global platforms present – Spotify, Instagram, TikTok and YouTube. Everyone is discovering music through these platforms.
3. The availability problem has also been addressed and so has the spending problem currently. A consumer is either an ad-supported consumer or a paid subscriber. Today's Top Hits has got around 30 million followers, and even if you take 2-3% of these 30 million, there is still a large number of people that are discovering a song.
4. The definition of international music has changed over the years, from English at one point to various non-Indian languages currently. In the last 2-3 years, the wave of Latin music, and very recently the Sinhalese track – Manike Mage Hithe, topping charts, all are testament to the fact that international music is pushing boundaries in India. India is also among the top three countries for all the top Korean artists today.
5. Initially a lot of the curation done on DSP's (Digital Service Providers) was human based and there was a lot of influence as per the choice of the editor. Now international apps have moved to machine learning and an AI Based recommendation engine. Spotify has grown more than 400% since the pandemic started in terms of number of streams and there has been no decline of international music on that platform. Atleast one-third of the streams are coming in from international tracks.



INDIA- A MARKET FOR INTERNATIONAL ARTISTS

1. The data that is present for international artists from YouTube or Spotify shows that there is a much wider spread. All the DSP's (Digital Service Providers) and social platforms have allowed international music to proliferate. For example, the band 'Cigarettes After Sex', is a band that broke out in India before Spotify had even entered the market and it was mainly due to YouTube. That eventually translated very well to Spotify.
2. Before the pandemic, the number of international stars travelling to India for concerts was significant. Dua Lipa, Katy Perry played at Indian music festivals. Alan Walker and Major Lazer are other artists as well that have travelled to the country multiple times. If Covid were removed from the picture, India could have had more international concerts like these. It has allowed artists to also get closer to the Indian fans and at a much faster pace. Artists are also marketing specifically for India, for example, Dua Lipa taking over an Indian curated playlist was unheard of before.
3. International acts like Cigarettes After Sex have made an effort to connect with fans in India before they arrived in India for the music festival and they sold the tickets for their headline show at the Opera House in Mumbai in one minute which was a record sale for Insider Ticketing.

PLAYLISTS ON DSP'S (DIGITAL SERVICE PROVIDERS)

1. On Spotify, Editorial playlists are just a part of the puzzle. 20% of the streams of a track come from editorial playlists whereas the remaining 80% come from various other sources like algorithmic playlists, user playlists etc.
2. The algorithm is very strong in identifying the listeners behaviour and at the same time the algorithm constantly tries to make the listener listen to something new. On Spotify, the listener is almost forced to listen to new artists that they will like.
3. In playlist culture today, if a top artist releases a song and that song is being consumed through a playlist, the listener will essentially be consuming four other songs and that might be from various other labels from various other artists.



GROWTH OF CATALOG SONGS IN INDIA

1. Catalog songs essentially can be defined as cultural movements. Earlier cultural movements were created by TV commercials and it was through a screen. Right now, that screen is your phone and these movements are created in an instant and uploaded. Hence, it has not really changed over time. The beauty of UGC is, the narrative is in the hands of the creator.
2. In the initial stages of the IMI Charts, the terms that the charts committee agreed on to be highlighted through the charts were discovery and dynamism. The reason these were of priority was because more than 50% of the tracks would be older than a year and a half. The charts committee had to find a way to make the charts representative but also promote discoverability and this is reflected in the charts policy. These policies are the USP of the IMI Charts.

NEXT BIG MOVEMENT FOR INTERNATIONAL MUSIC IN INDIA

The Indian sound going global is going to happen very soon. Music having a language barrier is going to break. The streaming population is going to grow to hopefully those from 7 years to almost 40 years as the core, so those consumers that have grown up listening to music will help develop a great frontline as well as great catalog consumption.



Position Paper on Public Performance Royalties from Non-Traditional Events in Wedding Ceremonies in India

Interview with Dr. NS. Sreenivasulu, Professor of Law, NUJS, Kolkata by Blaise Fernandes

AN OVERVIEW OF THE PAPER

We did a paper on copyright issues connected with use of recorded music in weddings and associated events in India. The Primary focus was on assessing how recorded music is used for entertainment in weddings and how the same is economically impacting the music industry.

In the process of research we observed how weddings and associated social events are taking place in India and how use of recorded music in weddings is increasing social gatherings making weddings as events that get organized through professional wedding and event planners which is now a big enterprise in itself. Compared to the previous decades weddings in India especially in rich and growing middle class have become organized events consisting of various activities including cultural and social events like use of recorded music for entertainment and extravaganza.

We analysed the law at national level that is Copyright Act in India and also at international level including conventions ranging from Berne convention, Rome Convention, WIPO copyright treaty, TRIPS agreement and the Marakesh Treaty to trace out the law on the point of legality and

validity use of recorded music during weddings without the authorization of the copyright owners of such recorded music.

We have also gone about analyzing how use of recorded music during weddings is economically hurting the music industry and its stake holders who are the actual authors and owners of the recorded music used in weddings. As per the law any copyright owner and the author deserves royalty if his or her music is used by anyone else. If the use is meant for commercial purpose and entertainment purpose they deserve royalty because the commercial and entertainment event could become possible because of their intellectual efforts in the form of recorded music.

As mentioned when weddings have become organized events through professional wedding planners who earn revenue through weddings where recorded music is used. Therefore logically and legally they should either take permission from copyright owner or pay royalty. Further when recorded music is used for entertainment and extravaganza purposes copyright owners should get royalty because the entertainment could possible because of their recorded music.





However, the law in this regard is not completely clear and evolved which we highlighted in our paper recommending for considering weddings as planned and professional events where revenue is earned and entertainment is guaranteed through use of recorded music which should result in payment of royalty to the owners of copyright over such recorded music.

HAS THE INDIAN WEDDING CHANGED, AND HOW HAS IT CHANGED AND WHAT HAS BROUGHT ABOUT THE CHANGES?

In the post liberalization era organization of weddings have gone through tremendous changes. From being a family and cultural event it has now grown in to a social and entertainment events through the involvement of professional wedding planners who organize weddings as gala events for social gathering and entertainment which are beyond traditional and cultural events that form part of actual rituals in the process of marriage.

ARE THE LAWS AND RULES KEEPING PACE WITH THE SOCIOLOGICAL AND ECONOMIC CHANGES THAT ARE UNDERWAY WITH THE WEDDING SCENARIO IN INDIA?

Of course, laws and rules are not keeping pace with the sociological and economic changes that are influencing weddings in India. Infact law needs to be updated and upgraded as when it is required and reasonably appropriate. Since weddings have become extra cultural and non traditional events that include social gathering and using recorded music for entertainment purpose becoming a reason for revenue generation for wedding event planners and revenue loss for music owners law needs to balance this uneven placing of stakes here.

FINAL THOUGHTS PLEASE?

My thoughts are with the millions of people in the creative sector who are deprived of an important source of revenue . The commercialisation of weddings is now a US\$ 50 billion dollar enterprise what wrong have

the creative community and copyright holders done to be deprived of the commercialisation of weddings . The one who created something out of his or her sweat of the brow should deserve reward and as such copyright owners of the recorded music used in weddings organized by enterprises (as wedding organization has become an industry and enterprise in itself) should get their due. As it is becoming very clear that use of recorded music is done in weddings which are now great social and entertainment events and wedding event organization is itself an enterprise and using recorded music for enterprise and industry purpose. Therefore the copyright owners of the recorded music used for enterprise and entertainment purpose should get their dues.





Bridging The Generation Gap, Tips Industries Ltd

Interview with Mr. Kumar Taurani, Chairman and Managing Director, Tips Industries Ltd. Board Member, IMI and Mr. Girish Taurani, Chief Operating Officer, Tips Industries Ltd by Team IMI

HOW DO YOU BOTH SEE THE FUTURE OF THE RECORDED MUSIC INDUSTRY IN INDIA (ANY NUMBERS OF YOY GROWTH) AND WHY ?

Mr. Kumar Taurani: The music industry in India has a very bright future. We have a population of around 125 Crores and over the last few centuries, our culture has been involved with music. It has always been a part of our lives. The birth of a child, birthday parties, weddings, or any other such events always have music playing in one form or another. Spiritual music even plays during the death of a loved one. There are so many genres of music, and in so many languages in the country, and hence I believe that it is a huge market that still has room to explode.

On a year-on-year basis, I truly believe that 25-30% growth for the industry is possible. There should not be any difficulty in achieving this.

Mr. Girish Taurani: I too agree. The industry has a lot of potential. Now that we see the pandemic slowly fading away, we will see Public Performance revenues increase and a lot of people will want to spend money on music and entertainment and hopefully this should carry on to the following year.

WHAT AREAS DO BOTH OF YOU DIFFER IN, IN YOUR APPROACH TO THE RECORDED MUSIC INDUSTRY?

Mr. Kumar Taurani: Our differences only appear with the creation of music. There are arguments about what should be released through Tips and what should not be released. As I have been involved in the music industry for a longer time, I am able to understand what will work in today's market and gauge the potential of a track. However, I do respect the younger generation's view as it is independent to ours and I do give that chance. I do advice Girish to listen to me, but ultimately the decision lies with him as he is the COO of the company and he handles the business on a day-to-day basis. In this way, we have to give the younger generation and the future generation some space. In all probability, they will make the correct decision, but even if they make the wrong decision, that is fine because they are learning. To summarize, there are differences on the creation of the music but when it comes to the business side, we are always in sync.



MR. KUMAR TAURANI
CHAIRMAN &
MANAGING DIRECTOR,
TIPS INDUSTRIES LTD.
BOARD MEMBER, IMI



MR. GIRISH TAURANI
CHIEF OPERATING OFFICER,
TIPS INDUSTRIES LTD.



HOW ARE THESE DIFFERENCES RESOLVED?

Mr. Girish Taurani: According to me, there is essentially no resolution that is needed. We have to treat them as two different approaches. While Kumarji's primary focus is Hindi Film, Hindi Non-Film and devotional music, I am looking over the regional languages such as Punjabi, Bhojpuri, Marathi, and Gujarati.

So we do not normally cross paths, however if Kumarji suggests a song in the regional languages, I analyse it and the decision lies with me and the same works the other way.

As it is a father-son, 'Guru-Shikshak' relationship and I respect the chair that Kumarji sits in and he reciprocates the same, there is never any clash. There is always a sense of reverse mentoring involved.

ARE THERE ANY EXAMPLES OF SUCH DIFFERENCES YOU CAN HIGHLIGHT?

Mr. Girish Taurani: If I have to take an example, our project – 'Tribute to Jagjit Singh'. I felt that it did not deserve the kind of time that Kumarji had devoted to it and to setup the project. But at the end of the day, the project is not only about money but it is also about the branding and positioning of the company. While we may not have met eye to eye on the commercial aspect, the branding had turned heads and a lot of appreciation has been pouring in for Tips with respect to this project and the project eventually turned out to be very profitable.

WHAT ARE SOME OF THE THINGS BOTH OF YOU AGREE ON FROM THE WORD GO BESIDES MAKING TIPS THE #1 AND MOST HAPPENING MUSIC LABEL?

Mr. Girish Taurani: Our aim is to increase shareholder value. For both of us, the company comes first and nobody is bigger than the company. If I have a certain value in mind and

Kumarji has a certain value in mind that is higher, I will go by his gut instinct, because that is where the profitability and company benefit is prevalent.

WHO IS THE ULTIMATE BOSS THAT RESOLVES ALL GENERATIONAL GAP ISSUES WHEN IT COMES TO TIPS MUSIC?

Mr. Kumar Taurani: We always consult professionals regularly. We have a great set of lawyers and a great team. Apart from Girish and I, we have all the department heads and a number of lawyers who consult us. Our business has become highly legal and we face challenges all the time. In 2017, we received a notice from Wynn. They were aware that internet services are not under the purview of 31D. They did not leave us any option but to take this to court. We fought the case in court. All the OTT companies at the time thought Tips was a midsized company and the OTT companies could overpower us. However, they were not aware of the true power of Tips. There were renowned lawyers that supported us such as Ravi Kadam Sahab, Rohan Kadam, Venkatesh Dhun Sahab and others, and we filed a case against them. Ultimately in 2019, after 2 years of struggling we had the best order, and we won on all counts. My agenda was to come to a decision at the end and not involve any money related matters. It was all in all, a big win for the industry as a whole. Currently, Airtel has appealed and this is in front of the bench. Hopefully, it should go in our favour. Our business is becoming increasingly legal. In our industry, from the artists to the producers, everyone is being challenged. However things are changing for the better in the industry, and people are starting to respect rights.

WHAT IS SOMETHING THAT BOTH OF YOU ADMIRE FROM THE OTHERS GENERATION WHEN IT COMES TO THE RECORDED MUSIC INDUSTRY?

Mr. Girish Taurani: The hardships that Tips has faced being a midsized company, and the ability to overcome all of those obstacles is something that I really admire. They value partnerships. There are certain things that do not fall under the purview of a paper. There is this honour amongst the older generation and also the virtue of patience, that perhaps my generation does not have. Our generation tends to like everything ready, however what I really admire from my father's and uncle's generation is they are the one's that like cooking the deal.

Mr. Kumar Taurani: In 2002-2003 there was a transition from physical to digital. At the time only 1000 tracks were registered in IPRS and PPL and these tracks were only our top songs. I had specifically appointed someone from my company to transition the company from physical to digital by organising the catalog and library and we managed to transition around 18,000 songs. After Girish joined Tips he has taken this further to another level. Our catalog consists of around 30,000 songs and in the last 5-6 years, around 12,000 songs from our catalog have gone through this transition.

To cite an example, from the movie Rang, we had uploaded a video around 10 months ago and we had owned the rights for around 25 years but we had never exploited this. In the last 10-11 months that video has had around 6 Crore views. We are updating our content on a regular basis and we still feel that there is about 5%-10% of this left. This just goes on to show the power of Tips' content and the amount of content that Tips has.



THE ARTIST VOICE

**Artists Perspective of the future of the
Indian Music Industry**



BADSHAH

The artist, content, music label and the DSP (Digital Service Providers) ecosystem is evolving and changing rapidly. In the last few years, India has witnessed a big change in consumer taste and preferences shifting towards the artist-centric music more popularly known as non-film music. The film soundtrack music is culturally embedded and will continue to co-exist. As a successful artist who has received so much of love and respect from fans across the globe, I believe that few things are likely to happen in the music ecosystem in India.

- Building a fan-army is going to be as important as delivering HITS. Delivering good music is no longer sufficient for an artist to build a fan army. Good music is merely a hygiene factor.
- Just as music labels keep investing in content, it will be incumbent for both the artists and the music labels to invest in building the artist as a BRAND.
- With the artist ecosystem developing, there will be more genres of music e.g. Hip Hop, Dance, R&B, etc. there is a dearth of good quality content offering across music genres in India.
- Data and insights will play an integral role in building a successful career for the artists.
- Management companies will evolve and have a far greater role to play in an artist career beyond just generating revenue opportunities through live shows and brand endorsements.
- The concept of playback singers is likely to become less relevant. Good singer-songwriters with distinct style and approach are likely to see far greater success compared to just playback singers.

Having said that, I think this is the most exciting phase in the history of the Indian music business and very soon the Indian artists and their music will be competing for the top spot globally.





SRINIVAS

All I've ever wanted to do was sing, for as long as I can remember. I was so obsessed & passionate about music, that my obsession, worried my parents. This was in the 1960s, when our country's economy was still in its infancy and there was little to no clarity about what one might do with arts or music as a hobby, let alone create a career out of it.

I would frequently listen to and sing along to RD Burman's iconic compositions and daydream about becoming a famous musician. It was not a yearning for success, but rather a wish to devote my life entirely to music.

I grew up in a regular middle-class family, and as someone who desired to break stereotypes and pursue his passions, I did just that. I majored in engineering, from a prestigious university. While my hopes of becoming a major star in the music industry remained, I wanted to prove it to my parents that I was capable of something. I relocated to Bombay to pursue a degree in chemical technology, where I continued to daydream about meeting Kishore Kumar and becoming an overnight celebrity. I recall skipping classes to go to the hostel and listen to Kishore Da & Mehdi Hassan's beautiful melodies.

While my desire remained unquenchable, I was unaware of a path to the profession and lacked the chances accessible today. I made the difficult decision to enter the corporate world to earn a living. The thought of abandoning my aspirations prickled me, but I didn't have an option as I needed to support my family. Although, I took up the corporate job, my strong desire to perform and sing remained. I could have settled for a fancy corporate lifestyle, but my passion compelled me to pursue something greater.

Then came a period that would alter the course of my life. The Messiah of Music's entrance with Roja had opened the doors of music to any aspirant who is both passionate and skilled. Soon enough, I had left my corporate job to get a chance to work with the music legend. I believe that it was my obsession and unwavering dedication to the art of music that gave me the courage to pursue music. Earlier, getting into the industry was a task, but once we got the opportunity, our chances of success were significant. Film songs were plenty and could be leveraged to the artist's potential. The song situations were complex, and the singer's role was to smoothly bring forth the actor's emotions through his voice.



Additionally, the singer had the actor's backing, which has the potential to transform one's career if successful. I had the biggest opportunity and break of my career when I got to sing for the legendary Rajnikanth.

Perhaps I was fortunate in the past. Today's films contain fewer songs, but the battle for talent has increased. Today's age brings with it a great deal of strife, but also a great deal of optimism. You are the master of your own life in today's world. All that is required is technology and an unwavering commitment to the work at hand. Currently, anyone from anywhere around the globe, can grab attention by posting a video demonstrating their talent, no matter where you originate from. A single music video that has gone viral or has been viewed by the masses can assist in identifying emerging talent in ways that have never been possible before. A music video, gone viral or watched by the masses can help recognize young talent in ways that were never possible before. With the proliferation of OTTs and social media platforms, today's generation has an abundance of opportunities to create content and carve out their own niche. The next five years hold an exciting opportunity for labels and independent musicians alike. Unfortunately today music has been

reduced to a promotional tool, sacrificing its emotional component. It is a tremendous opportunity for record labels to do music scouting, sign independent musicians, and reintroduce the good old days, much as they did in the 1990s. This can result in the development of high-calibre artists while also developing their unique personality in the industry.

Not many speak about the importance of financial stability when you get the career of your dreams. I've never looked at money that way, and it was my sheer passion that drove me to pursue this career. Although, it is important to step out of the bubble that you've created for your own identity and look at the world with real lenses. All of that fame and success can be exceedingly fleeting if not accompanied by a solid financial foundation. In the western world, an artist only needs one hit to earn enough royalties to support themselves for the rest of their lives. Music companies and artists must work together to foster a symbiotic partnership in which royalties can flourish. I've spent almost 3 decades in the industry, but I always wake up feeling excited to see what's coming next. I'm looking forward to the next decade of music with bated breath.





AMAAL MALLIK

If 2021 has taught me anything - it is to keep an open mind and to be on my toes, ready for change – the past year has been a year of fast-track learnings, the present is ever evolving, and there are times when I wish there was a crystal ball that I could turn to for answers regarding my future. The music industry itself has become increasingly creative – it's a whole new ball game for artists to put their music out there and reach out to their fans. I've recently made the crossover from being a Bollywood composer to an independent singer – composer, releasing non – film music for the first time. It's been a steep learning curve which continues to grow.

Peeking into my past year, here's a few important trends that I feel are here to stay and grow in the next 3 to 5 years. What's important is for us to recognize that these trends are ever evolving and it is important for one to be flexible – be open to learning and adapting to what life throws your way!

1. Consumption of music has never been so easy - When music turned digital, it was a game changer for the entire industry. Streaming platforms opened a world of music on our mobile phones that one couldn't even dream existed. Digital music has changed the way we consume and react to music like never before. However, in the last few years, music sampling has

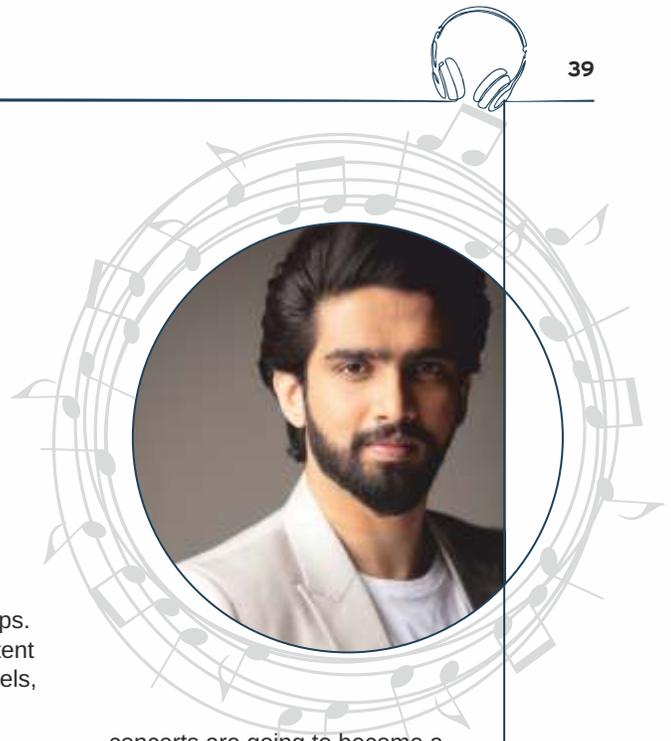
gone beyond the streaming apps. With the rise of short form content on platforms like Instagram Reels, the 15 - 30 sec audio clip is turning out to be the most convenient and the most effective sales pitch for a track. Popularity of a track on short format content apps like Reels and Tik Toks have been behind the biggest hits of 2021 – this is regardless of the track being backed by a label, followers of the artist or the marketing budget of the song. Catalogue tracks have re-emerged in public conscious, indie music has crossed over to mainstream and sometimes even popular social media clips get converted to full length songs. It's a world of opportunities and we have only scratched the surface so far!

2. Alternative avenues for artist - fan interaction - I've always had a very open relationship with my fans. I value their feedback, and nothing makes me happier than reading their comments and posts. The past year has made people turn more to their phones - with the restriction of live concerts and physical meet & greets, digital platforms are fast becoming the go – to venue for fan interaction. While promoting my new track, 'Pyaar ...Ek Tarfaa', I realised just how widespread the opportunities are – whether it be one – on – one comment interaction on a streaming app, LIVES on YouTube and Instagram, Twitter conversations and more. Digital

concerts are going to become a mainstream staple in an artists' repertoire and AI and VR is only going to enhance the viewer experience. In my opinion, the ease with which people have adapted to these methods only goes to show that the trend is here to stay.

3. Music genre/Artist crossover

- The past few years have been an extremely stressful period for everyone across the globe. In these times of uncertainty, music has played an integral role in people's lives – by supporting them emotionally and bringing people together from different backgrounds, cultures, and countries. This has created a confluence of music genres that has been unprecedented. The “algorithm” allows one to consume songs regardless of language, culture, and genre preferences. You don't even have to understand the song, but if the music speaks to you, then adding it to your playlist is just a click away. This convergence of music has unlocked opportunities for artists to experiment with their style, take risks, educate themselves and collaborate with others on a whole new level. The ease of this is only going to increase in the future as labels and platforms notice and facilitate the process.





PICTURE ESSAY

India Goes Global: Indian Performers on the billboard at Times Square, New York City



DIVINE²



SUKRITI KAKAR AND PRAKRITI KAKAR³



² https://www.instagram.com/p/ClqH8rxBnDr/?utm_source=ig_embed&ig_rid=f2e830b3-3f55-48e3-9162-d54f4b6907f4

³ <https://www.instagram.com/p/CV0ElfjISce/>



ARMAAN MALIK⁴



SHALMALI AND SUNIDHI CHAUHAN⁵



⁴ <https://www.thehindu.com/entertainment/music/armaan-malik-on-times-square-billboard-for-his-english-single-control/article31179751.ece>

⁵ <https://www.mid-day.com/entertainment/bollywood-news/article/shalmali-and-sunidhi-chauhan-make-it-to-the-coveted-times-square-billboard-23171079>



REGIONAL TRENDS

A Diverse India



EAST - Kolkata, West Bengal:

Interview with a Music Label, Kristi Creation

(with Ms. Sweta Gupta, Owner, Kristi Creation) by Aarya Gadkari

WHAT IS THE ONE FEATURE WITHIN THE RECORDED MUSIC INDUSTRY THAT IS UNIQUE TO THE EASTERN REGION?

Rabindranath Tagore and his legacy carries the music from the east. He is the hallmark of Bengali compositions and is a true representation of the people from the region. His works are what sets the eastern region apart in the music industry. His music appeals to all types of lifestyles.

WHICH GENRE, ACCORDING TO YOU, IS AN EMBODIMENT OF THE MUSIC FROM YOUR REGION, BOTH PAST AND PRESENT?

Folk Music is a true representation of the music from the region. The listener should get a sense of his/her land when listening to music and the mother tongue plays an important part in the song. The song immediately grabs the listener's attention.

FROM THE TRENDS THAT ARE TAKING PLACE WHEN IT COMES TO MUSIC CONSUMPTION, WHAT HAS BEEN THE MOST POPULAR TREND IN YOUR REGION?

There are currently a lot of remixes of folk songs that appeal to the audience from this region. The reason this has worked is because the audience is already familiar with the track and the remix is essentially a way to modernise these traditional tunes and cater to the current trends. This is one trend we have noticed in the region.

WHY DO YOU THINK THE TREND DESCRIBED ABOVE HAS CAUGHT ON SO MUCH?

Most traditional folk songs from the east of India are very melodious and are based on Indian classical music and the notes in Indian classical music. These songs are very close to the natives from the region and one of the reasons the remixes have grabbed the attention of the audience is that these remixes do not move away from the original melody of the track.

COMPARING THIS YEAR (2021) TO LAST YEAR (DURING THE START OF THE PANDEMIC) AND ALSO TO THE PRE-PANDEMIC PERIOD, HAVE YOU NOTICED ANY DRASTIC CHANGES ACROSS THESE THREE STAGES?

Yes, there has definitely been a change and the change we have noticed is listeners have solely started to depend on their digital devices. Due to the absence of live performances, there has been no other way for the consumers to listen to music. The amount of time spent listening to music, daily routines and finances of the consumer have also drastically changed over these 3 periods.

IS THERE ANY REGION IN INDIA THAT YOU THINK HAS SHOWN GREAT STRIDES WITHIN THE RECORDED MUSIC INDUSTRY? (NORTH/SOUTH/EAST/WEST)

The southern region of India is a region we admire a lot. They have delivered a new soundscape which is very rich and at the same time they have not interfered with the traditional music that has emerged from the region. Their music culture has remained intact, and this is something we truly admire.

WHAT IS THE ONE ASPECT WITHIN THE RECORDED MUSIC INDUSTRY THAT YOU THINK YOUR REGION HAS GREAT POTENTIAL TO CAPTURE HEARTS ACROSS INDIA?

We have always believed that music from our region is all about the melody. We pride ourselves on the melodious tunes that emerge from the region. We truly believe that a good melody has the ability to move any listener. Any traditional folk song from the region has a very moving melody and these songs are evergreen. On the other hand, in the current day and age, there are viral trends that catch on amongst the consumer and explode for a short while, but eventually disappear.

WHICH DISTRICT IN WEST BENGAL DO YOU GET THE MOST CONSUMER TRAFFIC FROM? ARE THEY MAINLY BIGGER CITIES OR SMALLER TOWNS?

As for what Kristi Creation has noticed, the North 24 Pargana district of West Bengal is the region we get the most traffic from.

What language have consumers from your region consumed their music in the most and why do you think that is?

Bengali and Hindi are the two languages that consumers from this region listen to their music in. The main reason they consume music from these languages is because they are familiar with them. However, as the consumers are from the eastern region, a majority of these consumers speak Bengali and it is their mother tongue. Hindi music is essentially listened to as it is popular.



MS. SWETA GUPTA
OWNER,
KRISTI CREATION



SOUTH – Chennai, Tamil Nadu

Interview with a Music Label, Giri Trading Agency Pvt. Ltd.
(with Ms. Meenakshi Balu, Director, Giri Trading Agency Pvt. Ltd.)
by Aarya Gadkari



MS. MEENAKSHI BALU
DIRECTOR,
GIRI TRADING
AGENCY PVT. LTD.

WHAT ARE THE FEATURES WITHIN THE RECORDED MUSIC INDUSTRY THAT ARE UNIQUE TO YOUR SOUTHERN REGION?

According to me, Carnatic Music, both vocal and instrumental, South India Sloka, Vedas and Mantras (in Tamil, Malayalam, Kannada and Telugu) are all the features that are unique to the South Indian region.

WHICH GENRE, ACCORDING TO YOU, IS AN EMBODIMENT OF THE MUSIC FROM YOUR REGION, BOTH PAST, AND PRESENT?

Carnatic Music as a genre is what signifies music from the southern region. This has transcended over time and continues to be relevant even in today's day and age.

FROM THE TRENDS THAT ARE TAKING PLACE, WHAT HAS BEEN THE BIGGEST TREND IN YOUR REGION?

Amongst the music trends in the southern region, devotional songs and infotainment videos in the form of short form videos are a few of them.

WHY DO YOU THINK THE ABOVE TREND HAS CAUGHT ON SO MUCH?

Innovative creations that are available to view from different channels via DTH and new concepts of film, media and sound have enabled these trends to grow.

COMPARING THIS YEAR (2021) TO LAST YEAR (DURING THE START OF THE PANDEMIC) AND ALSO TO THE PRE-PANDEMIC PERIOD, HAVE YOU NOTICED ANY DRASTIC CHANGES ACROSS THESE THREE STAGES?

Yes, there have been changes across these stages. New streaming partners, individuals and creators have emerged throughout this period.

IS THERE ANY REGION IN INDIA THAT YOU THINK HAS SHOWN GREAT STRIDES WITHIN THE RECORDED MUSIC INDUSTRY? (NORTH/SOUTH/EAST/WEST)

The northern region has shown great strides in the recorded music industry according to me. The people from the southern region are very intrigued by the way the music from the north incorporates modern elements, without losing the essence of the song. This is why we admire the northern region of India.

WHAT IS THE ONE ASPECT WITHIN THE RECORDED MUSIC INDUSTRY THAT YOU THINK YOUR REGION HAS GREAT POTENTIAL TO CAPTURE HEARTS ACROSS INDIA?

The southern region has an abundance of fusion devotional and Carnatic songs. These forms of music are what make the southern region appealing to people at large.

WHICH DISTRICT WITHIN YOUR REGION DO YOU GET THE MOST CONSUMER TRAFFIC FROM? ARE THEY MAINLY BIGGER CITIES OR SMALLER TOWNS?

We notice that most of our consumer traffic is from the smaller towns of the southern region. Smaller towns have now got access to the internet and are exposed to music that they would not normally have heard earlier.

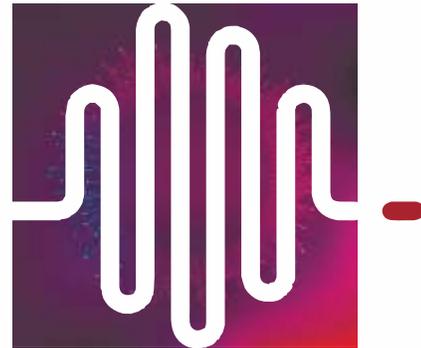
WHAT LANGUAGE HAVE CONSUMERS FROM YOUR REGION CONSUMED THEIR MUSIC IN THE MOST AND WHY DO YOU THINK THAT IS?

Tamil is primarily the language that listeners listen to their music in from our region. This is mainly attributed to the fact that Tamil is their mother tongue and the songs are more relatable because of it.



WEST – Vasai, Mumbai, Maharashtra

Interview with Band, Rhythm Beats (with Sijoy Almeida, Vocalist, Rhythm Beats) by Arya Gadkari



WHAT'S THE GENRE THAT RHYTHM BEATS FITS INTO AND TO THAT EFFECT, WHAT INSPIRED YOU TO KEEP THAT GENRE GOING? CURRENTLY ARE THERE MANY TAKERS FOR THIS MUSIC?

In Vasai, the majority of the public are Catholic and this population has remained in the area since Portuguese times. We are all part of the East Indian Culture. The genre is mainly popular amongst people from the outskirts of Vasai and not the central township. The song 'Vasaikar Masala' that we released on YouTube is actually a combination of 2-3 different songs. The first song is a song composed by our band, Rhythm Beats, which is basically describing an interaction between a couple. The other songs are pre-released songs as part of the Vasai Folk Music genre. These kind of songs and this kind of music in particular is played at traditional Vasaikar weddings.

WHAT INSPIRED YOU TO TAKE ON THE EAST INDIAN FOLK SONG GENRE?

Our main inspiration and intention to take on the East Indian folk song genre was to bring this kind of music to the new generation.

HOW MANY BANDS LIKE YOURSELF ARE PRESENT IN YOUR AREA WHO PERFORM TRADITIONAL MUSIC AND ON AVERAGE HOW MANY MEMBERS FROM EACH BAND?

In the area, there are roughly 6-7 bands and on average there would be roughly 6-11 members per band. Some of the bands may be small which include 6-7 members whereas some are much larger with 11-12 members.

DID YOU HOST LIVE PERFORMANCES EARLIER, BEFORE THE ADVENT OF LOCKDOWN?

Our group, Rhythm Beats, was formed in October-November 2020 and the video, Vasaikar Masala, which turned viral was uploaded in January 2021. Hence, we never really got the chance to perform live considering the band was formed in the middle of the lockdown and pandemic. We aim to start performing live once the restrictions have eased and we are permitted to.

THE VIDEO, VASAIKAR MASALA, HAS CLOSE TO 6 MILLION VIEWS ON YOUTUBE. HAVE THERE BEEN ANY HIGHLIGHTS FOR YOU AFTER THE RELEASE OF YOUR VIDEO?

There haven't really been any highlights in terms of the video going viral however we are very happy with the response we have received from people and the number of views we have managed to garner for the video. There are a lot of content creators on YouTube that have used our song for their videos, some that have taken our permission to use the song, which we have allowed and some who have used our music without our permission. We have launched copyright claims against those creators that have not taken permission and their videos have been taken down.



NORTH Dehradun, Uttarakhand

Interview with Brass Band,
Altaf Band (with Abdul Rehman,
Director, Altaf Band)
by Arya Gadkari

HOW LONG HAVE YOU BEEN INVOLVED WITH YOUR BAND AND WHAT IS YOUR MAIN JOB?

I've been involved with my band for 30 years and I am the director of the band. However, our band has been active since the year 1925 and we consider ourselves to be India's oldest brass band.

WHAT KIND OF MUSIC DO YOU PLAY? IS IT PRIMARILY BOLLYWOOD OR YOUR OWN COMPOSITIONS?

We play the kind of music that you would hear at any wedding or event or jagran (religious festival). Our songs depend on the type of event we play at though, for example, at a wedding we play wedding music, at a religious festival we play bhajans. We play music according to the situation. We also have songs that we have composed ourselves as a band and we try to incorporate those at events as well.

YOU ARE CONSIDERED THE OLDEST BRASS BAND IN INDIA, HOW HAS YOUR MUSIC PERFORMANCE EVOLVED OVER THE YEARS?

The only aspect that we feel has changed is the audience. Their tastes and preferences in music have evolved. Hence, we have to learn to adapt to keep our audience happy.

IS IT ONLY WEDDINGS THAT YOU PLAY FOR OR ARE THERE ALSO OTHER KINDS OF EVENTS?

We play at all kinds of events and do not limit our brass band to only weddings. Weddings, music events, religious festivals, at a 'baarat'.

HOW HAVE YOU IMPROVISED DURING THIS LOCKDOWN AND HOW ARE THE MUSICIANS FROM THE BAND DEALING WITH THE CRISIS?

For the last year and a half, there has practically been nowhere for us to play at. All the important functions have stopped – weddings, religious events, the Kumbh Mela, Shubh Yatra's. Hence it has been difficult for us to cope with the restrictions, however, our band still remains active.

WHICH AREAS DO YOU PLAY IN, AND DO YOU CHANGE YOUR GENRE BASED ON THE PLACE YOU PLAY IN?

We have played all over India. We have played a lot in Uttar Pradesh, and we have also played in Madhya Pradesh, Haryana and Rajasthan. We haven't just limited ourselves to India as we have also played in countries abroad. We try to tailor our performance based on the audience but we stick to the songs we usually play most of the times.

LIKE YOURSELF, HOW MANY BANDS ARE PRESENT IN THE AREA AND DO THEY PLAY THE SAME KIND OF MUSIC?

There are a plenty of brass bands like us but their music can be slightly different. Not all brass bands play the same type of music and some may explore different genres.







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