Govt. of Punjab

International Punjabi Chamber
for Service Industry

Think India-Think Punjab

International Summit

Investment Opportunities for Infrastructure Development by

Creating Media-Entertainment & Film Industry Hub in Punjab

with Domestic Corporate, NRI / Foreign Direct Investors

Saturday, the 22nd April 2006 at Hotel J. W. Marriott, Mumbai, India

BACKGROUNDER

Govt. of Punjab

Think India - Think Punjab

Domestic-NRI Connect

Capt. Amarinder Singh
Hon'ble Chief Minister, Punjab

Agenda 2006

Global Competitiveness - Anchoring NRI Investment & FDI in Punjab
Business Networking with Indian Corporate

Date	Event	Venue
4th March 2006 (Sat)	Infrastructure, Housing & Real Estate Development Summit	Chandigarh, India
22nd April 2006 (Sat)	International Summit-Creating Media-Entertainment & Film Industry Hub in Punjab	Mumbai, India
1st-9th June 2006 (Thus-Fri)	Investment Networking Meet & Business Interface	USA, UK
24th June 2006 (Sat)	Summit on The Role of Banking, Insurance and Financial Service Sector in Infrastructure and Economic Development of Punjab	Chandigarh, India
22nd July 2006 (Sat)	Summit on Harnessing Agricultural & Bio-Technology Potential	Chandigarh, India
24th-25th July (Mon-Tue)	Think India - Think Punjab Investment Interface organised by Vice President - IPCSI	Malaysia
27th-28th July (Thur-Fri)	Think India - Think Punjab Investment Interface organised by Vice President - IPCSI	Singapore
29th-30th July (Sat-Sun)	Think India - Think Punjab Expo organised by Associate Vice President - IPCSI (YNRI)	Sydney, Australia
31st July (Mon)	Think India - Think Punjab Investment Interface	Melbourne, Australia
1st-2nd August (Tue-Wed)	Think India - Think Punjab Investment Interface	New Zealand
3rd-4th August (Thur-Fri)	Think India - Think Punjab Investment Interface organised by Associate Vice President - IPCSI (YNRI)	Bangkok, Thailand
26th August 2006 (Sat)	Summit on tapping Investment for Aviation-Tourism-Hospitality-Cultural Heritage & Transport Services in Punjab	Delhi, India
26th September 2006 (Tue)	Investment - Destination Punjab (NRI Conference)	Chandigarh, India
25th-27th Sept 2006 (Mon-Wed)	World Punjabi Film Festival & Awards Film-Television-Music-Radio-Theatre-Animation-Live Entertainment	Mohali, Punjab, India
21st October 2006 (Sat)	Summit on Human Capital Management for Service Industry with JobsFest	Chandigarh, India
18th November 2006 (Sat)	International Health Infrastructure Development Summit - Advantage Punjab	Chandigarh, India
28th-29th Dec 2006 (Thur-Fri)	Parvasi Punjabi Divas - IIIrd Annual Convention	Chandigarh, India

Will Lead to
Investment-Infrastructure Development-Employment

Concept - Planning & Management by:

IPCSI - International Punjabi Chamber for Service Industry
(Single Window to anchor Domestic-NRI Investment, FDI & Knowledge Partnership)

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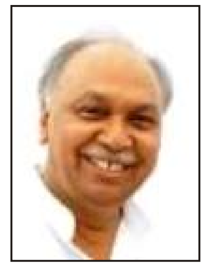
With Dept. of NRI Affairs, Govt. of Punjab as anchoring Department

Capt. Amarinder Singh
Hon'ble Chief Minister, Punjab

Sh. Partap Singh Bajwa
Minister Cultural Affairs
Govt. of Punjab

Sh. Amarjit Singh Samra
Minister NRI Affairs,
Govt. of Punjab



Sh. Surinder Singla
Minister Finance
Govt. of Punjab

Released

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Event Concept, Planning & Management by

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PUNJAB CALLING

Contents

Global Media & Entertainment industry

Global entertainment and media (E&M) industry spending will increase at a 6.3 percent compound annual growth rate (CAGR) to $1.7 trillion in 2008, according to a PricewaterhouseCoopersThe global media and entertainment industry is picking up and expected to grow at an annual rate of 6.3 percent over the 2004-08 period after three years of sluggish development, according to a study released Wednesday. Global media and entertainment industry, which was hit hardly due to the global economic slowdown and terrorism woes in the past years, is projected to hit 1.67 trillion US dollars in 2008, according to the fifth annual edition of Price waterhouse Coopers' "Global Entertainment and Media Outlook." The study said the Asia-Pacific region will lead the recovery in the next four years with an annual increase of 9.8 percent while China and India will serve as the two main growth engines. The US market is set to expand at a 5.4 percent compound annual rate. The report identifies video games and the Internet as key growth opportunities for media and entertainment companies. Film growth is set to slow as the DVD market moves toward a maturation point in the United States, while advertising trends will be uneven over the five-year period, PwC predicts. "While terrorism remains a grave threat, economic conditions inmost countries have improved, and the entertainment and media industry is expanding," the report indicated. PwC's annual outlook covers 14 industry sectors - from print, film and television to radio, recorded music and video games - in the United States, Canada, Latin America, Asia-Pacific and the Europe/Middle East/Africa region. It calculates media and entertainment revenue from two sources --consumer spending and advertising.

Last year, the industry expanded its revenue 4.2 percent to 1.23 trillion dollars globally, with the US market increasing 4.3 percent to 523.2 billion dollars. For 2004, PwC projects a 5.7 percent improvement in both figures to 1.3 trillion and 552.9 billion dollars, respectively. However, over the full five-year period, the worldwide industry's growth will outpace US gains. The Asia-Pacific region showed media and entertainment revenue of 229.1 billion dollars last year, up 5.6 percent year-over-year. Global advertising revenue will increase at a 5.3 percent compound annual rate to hit 412 billion dollars in 2008. The US market will exceed this growth rate, with PwC estimating a 5.8 percent expansion.

Asia/Pacific is emerging as a key driver of Media and Entertainment industry growth fueled largely by the People's Republic of China (PRC) and India, both of which are investing heavily in communications and media infrastructure and opening up their markets. Both countries have huge populations and low media penetration, providing significant room for expansion. The Asia/Pacific region's video games and Internet segments will be the world's largest and fastest-growing, and television distribution will benefit from the addition of 96 million multichannel households in India and the PRC.

We're expecting **Asia/Pacific** to be the **fastest-growing region** in the world during the next five years as a result of several exciting opportunities for industry growth and expansion, particularly in China and India," said Marcel Fenez, Asia/Pacific Leader of PricewaterhouseCoopers' Entertainment & Media Practice. "Although piracy remains a negative force, efforts to stem its affects combined with domestic and foreign industry investments will drive growth in the regionThe E&M industry is experiencing a major shift

in the way entertainment is distributed, with new distribution channels, such as broadband Internet access and wireless communications, driving significant growth in the industry. During the next five years, the number of broadband households will grow at a 31.3 percent CAGR, surpassing the 300 million mark for the first time in 2008. This shift will start to positively impact a number of industry segments, such as recorded music. The music segment had its fourth consecutive year of decline in 2003, hurt by unauthorized downloading of music from the Internet and CD burning. Legal measures against piracy, lower prices, and an improved economy will help start turning the music industry around in 2005, with a projected 2 percent CAGR for the 2004-2008 period.
"The Internet has evolved into a vital distribution channel, despite piracy issues faced by the music and movie industries," stated Mr. Jackson. "In 2003, licensed online music services began acquiring paying customers, showing that consumers will pay for high-quality entertainment that is easily accessible online. We expect to see the expansion of digital and online subscription services not only begin to lift the music industry later in the forecast period, but also positively impact segments such as film, video games and business information."

Next-generation technologies will reinvigorate maturing segments and drive E&M growth. Digital television is replacing analog, thus expanding the potential market for advertisers and subscribers; online and wireless video games are bridging the gap until the introduction of new console platforms scheduled for 2006-07; and digital audio broadcasting (DAB) and satellite radio are helping attract new national advertisers. Additionally, DVDs have revitalized home video, with rapid growth in the sell-through market driving growth at the expense of rental.

Global Advertising Solid, Highlighted by Internet Ad Rebound

Global advertising spending will increase at a solid 5.3 percent CAGR during the 2004-08 period, rising to $412 billion in 2008 from $318 billion in 2003. Television advertising is projected to expand at a 6.5 percent CAGR during the 2004-2008 period, boosted by new channels as well as advertising associated with the 2004, 2006 and 2008 Olympic Games, and the 2006 FIFA World Cup. Television remains the largest advertising medium, rising to $164 billion in 2008.

Internet advertising spending rebounded strongly in 2003, with a 22.9 percent increase after a weak 2001-2002. "Paid-search and rich media propelled spending in 2003, and the growing number of broadband households along with expanding e-commerce makes the Internet more attractive to advertisers," said Mr. Jackson. Despite being the smallest of the six advertising media tracked by PricewaterhouseCoopers, the Internet will remain the fastest-growing advertising medium, growing to a projected $18.9 billion in 2008 with a 12.7 percent CAGR.

Due to overall economic growth, print advertising will improve slowly during the forecast period – by a 4.3 percent CAGR for magazines and a 3.3 percent CAGR for newspapers. However, print media advertising will continue to lose share to electronic media as advertisers continue to be attracted by broadcasting's superior reach and younger demographics.

Growth by Region

The U.S. remains the largest entertainment and media market, projected to rise by 5.4 percent CAGR and reach $680 billion in 2008, followed by EMEA reaching $549 billion in 2008 at a 5.5 percent CAGR. Asia/Pacific, despite becoming the fastest-growing region, will remain the world's third-largest region. It is projected to average 9.8 percent annual growth, increasing to $366 billion in 2008.Latin America's E&M market is projected to rise at a solid 6.5 percent CAGR to $44.7 billion in 2008. During the next five years, 9.2 percent growth is anticipated in television distribution, as low Internet and multichannel penetration rates leave substantial room for expansion. Canada is projected to expand at a 5.9 percent CAGR to $31.4 billion in 2008, driven by double-digit increases in video games and the Internet.

Filmed Entertainment:

***The Indian film industry is the largest in the world in terms of the number of films produced and number of admissions (more than 3 billion per year)*.The ever-increasing Indian diaspora around the world (the U.S. alone is estimated to have more than 3.5 million residents of Indian descent) has significantly impacted the movie business in India**

Rapid growth in DVD sell-through, shorter theatrical-to-video release windows, and the transition from VHS to DVD will drive home video growth. Subscription services such as mail-order DVD rentals and growing DVD hardware penetration will also boost global spending, which is projected to reach $108 billion in 2008 from $75.3 billion in 2003, rising at a 7.5 percent CAGR.

Television Networks (Broadcast and Cable): Television networks are among the earliest beneficiaries of improved economic conditions because advertisers value the medium with the largest reach. Global spending is projected to increase at a 5.9 percent CAGR to $174 billion in 2008.

Television Distribution (Station, Cable and DBS): Large increases in subscription spending in Asia/Pacific are expected, as the multichannel universe in that region expands. Maturing markets in other regions nearing saturation will keep growth in the single digits, with a projected 7.1 percent CAGR bringing total global spending to $183 billion in 2008. Additionally, satellite will gain market share at the expense of cable, and Pay-Per-View and Video-On-Demand will grow rapidly during this period.

Recorded Music: Increased spending on licensed digital music combined with stabilized sales of CDs will lead to a rebound in spending, with expansion projected for 2006, following after five consecutive years of decline and flat sales projected for 2005. Piracy will continue to dampen growth in the near-term, but legal measures to against piracy – along with lower prices and an improved economy – will stem the decline in spending during the next three years. By 2008, global spending on recorded music will total an estimated $33.7 billion, growing at a 2.0% CAGR.

Video Games: The fastest-growing segment during the next five years, global video game spending will increase to $55.6 billion in 2008, at a 20.1 percent CAGR. By 2008, online and wireless will be major distribution channels, spurred by broadband penetration and new mobile phones that will be used as much for entertainment as for communication. The PC game market will shrink, and console game spending will grow as next generation consoles are introduced.

The E&M Outlook also includes in-depth global analyses and five-year market forecasts for nine other industry segments, including: radio and out-of-home advertising, Internet advertising and access spending, newspaper publishing, magazine publishing, business information, consumer book publishing, educational and professional books and training, theme parks and amusement parks, and sports.

Indian Economy

According to the widely discussed Goldman Sachs report of October 2003, over the next 50 years, Brazil, Russia, India and China — the BRIC economies, could become a much larger force in the world economy. “India could emerge as the world’s third largest economy and of these four countries; India has the potential to show the fastest growth over the next 30 to 50 years”. The report also states that “Rising incomes may also see these economies move through the ‘sweet spot’ of growth for different kinds of products, as local spending patterns change”. The Indian economy has witnessed significant change in the last decade. Almost all the sectors have been opened up for private participation. Import licensing has been abolished and Import duties have now been rationalized to internationally acceptable levels. Peak import duty is now at 15 per cent. The process of reforms since independence in 1947 has been slow but steady. The 50s through the 70s saw agricultural reforms, 80s up to the mid-90s was the phase of industrial reforms, while the post-90s era has seen the emergence of information technology and service sector reforms, showcasing India as an information technology and service industry powerhouse.

Entertainment: It's Showtime for India

The Indian Entertainment Industry: An Unfolding Opportunity

Riding on the economic growth and rising income levels that India has experienced during the past few years, the **Indian entertainment industry is one of the fastest growing sectors of the Indian economy. It stands at more than Rs. 20,000 crores ($4.65 billion) today and is expected to grow at an 18 percent compound annual growth rate (CAGR)to reach more than Rs. 45,000 crores ($10.46 billion)in 2009.** The nation's entertainment industry is expected to outperform GDP growth by a significant margin in the coming years. The entertainment industry is experiencing a major shift in the way entertainment is distributed, with new distribution channels, such as broadband, Internet access and wireless communications, which are driving significant growth in the industry.
In terms of employment, an estimated 6 million people earn their livelihood from the media and entertainment industry. **Some experts feel that during this decade another 1 million people will get jobs in this industry since it is projected to be one of the prime economic driving forces of the country**, even ahead of economic driving forces of the IT sector. Such predictions are not restricted to India alone. The media and entertainment industry is rapidly growing across the world and current trends clearly show that this sector will be among the top services sector in all growing economies. In India, television is the major driving force of the media and entertainment industry. Television is projected to be a major contributor to the country's GDP in the coming years. As of today, television reaches about hundred million Indian households. Of these, about half (fifty million households) are cable and satellite homes where majority of the satellite channels are being beamed on a daily basis. This makes India the third largest television market in the world behind only china and the USA. India also is among the cheapest cable subscription market in the world where in many places a monthly cable bill is only about US $ 3 and rarely exceeds US $ 10. **In terms of popularity, the India media and entertainment industry goes well beyond the geographical limitations of the country. Indian television channels and films are viewed and enjoyed across the entire South Asia, particularly in Pakistan and Nepal on account of the similarity in languages Across the Middle East, parts of South East Asia and Africa, large expatriate populations ensure that Indian TV channels and films are a regular part of their entertainment bouquet**.

In the UK and North America (USA and Canada), Indian TV channels and films are increasingly finding a foothold beyond the expatriate pockets as an increasing number of people have started to enjoy the improving quality of Indian entertainment fare. The Film Industry has now grown **multi-dimensionally** with unique blend of commerce, art, craft, start glamour, social communication, literary adjuncts, artistic expressions, performing arts, folk forms and above all a wide- ranging and abiding appeal to the heart, the mind and the conscience.
Today, **India** makes almost **800 feature films**, every year, making it the largest film producing country in the world. Over **14 million people see the films, every day**. And their number is increasing rapidly. The Indian Entertainment and Media Industry has out-performed the Indian economy and is one of the fastest growing sectors in India. It is rising on the back of economic growth and rising income levels that India has been experiencing in the past years. This is significantly benefiting the entertainment and media industry in India as this is a cyclically sensitive industry and it grows faster when

the economy is expanding. An added boost to the entertainment and media industry in India is from the demographic point of view where the consumer spending is rising due to increasing disposable incomes on account of sustained growth in income levels and reduction of personal income tax over the last decade. India ranks among the top five economies of the world in terms of purchasing power parity, while its GDP ranks eleventh in absolute terms. Combined with the fact that India has the second largest population in the world with over a billion people, this makes India one of the most exciting marketplaces for any consumer products or services industry.Given the average Indian's cultural affinity for entertainment.

The Indian entertainment industry's growing contribution to the economy cannot be understated. Over the past decade, India has been the second fastest growing economy in the world. In 2004, it grew by 8.2 percent, breaching the psychological 8 percent barrier for the first time. In terms of purchasing power parity, it is already the fourth largest economy in the world. Most major global companies are of the opinion that it will become a key market in the years to come. As the Indian economy continues growing, the Indian middle class will also expand significantly. Compared to other nations, the 300 million strong Indian middle class allocates a higher percentage of its monthly expenditure on entertainment. The increasing consumerism of middle-class India is seen from the sharp growth in the sales for various products like automobiles, colour television sets and mobile phones and the burgeoning increase in credit cards and personal loans

INDIA IS HIP

Indian culture has always had an exotic and romanticized appeal in the West but did not reach America until recently. With the appeal of Depak Chopra's perspective on holistic medicine in the 1990s, America became fascinated with the East in general and India in particular. From Madonna appearing in a sari and a "bindi" in *Rolling Stone* magazine to CBS' *60 Minutes* declaring actress Aishwarya Rai the most beautiful woman in the world, everything Indian is now hip. In 1992, acclaimed director Mira Nair exposed Indian society and social mores to the American audience in Mississippi Masala. Since then, films like *Salaam Bombay*, *Monsoon Wedding* and *Bend it Like Beckham* have popularized Indian culture. Indian traditions and customs even found their way to Broadway in a West End Andrew Lloyd Webber musical, *Bombay Dreams*. Last year, director Nair had Reese Witherspoon not only speaking with a perfect English accent but breaking out in a Bollywood-style dance number in an adaptation of the period novel *Vanity Fair*. Not only has India infiltrated American entertainment, major entertainment conglomerates such as Disney, Warner. Brothers and News Corporation have recognized

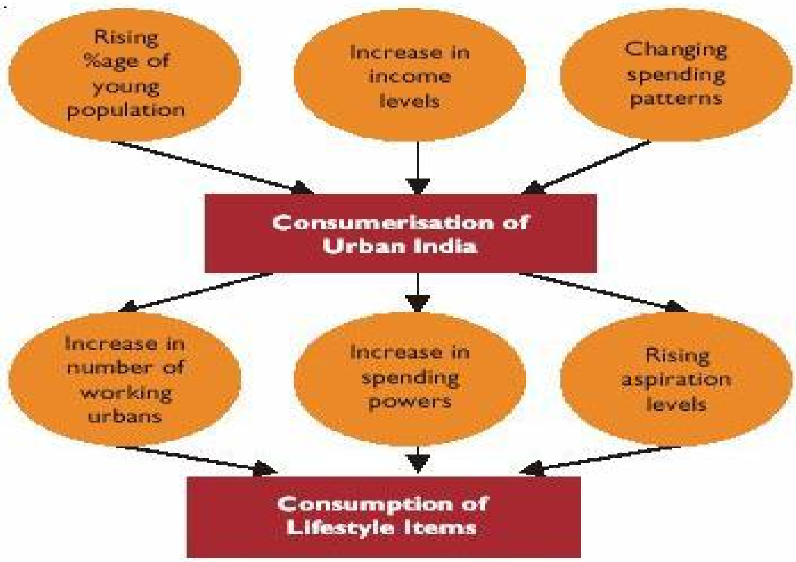
the potential Indian customer base of over one billion people, making India second only to China as the most populous nation on Earth. India turns out between 800 and 1,000 movies a year. This is about 10 times the films generated in Hollywood. The genres run from cutting edge documentaries that have been banned by the Indian government (fearing that the explosive content will generate civil unrest) to comedies, action and suspense. Perhaps the most promising aspect of the Indian entertainment sector is its incredible potential…the entertainment industry in India is expected to grow at an astounding 18 percent over the next five years This must be contracted with the United States where entertainment industry growth is not expected to hit double digits.The most sobering economic reality in Indian entertainment is that, while box offices admissions are more than three times what they are in the United States, the average admission price in an Indian movie house is only 15 Rupees. This amounts to less than 50 cents. So, while the audience is certainly there, the economics are difficult to support. But that is not the end of the story. There is a major transformation taking place. First, the Indian middle class and its disposable income is increasing at a fast clip. Second, until recently, motion pictures were shown in essentially aging single screen theaters. Rather than simply renovating these theaters, Indian operators are converting them into multiplexes and building brand new ones as a part of major real estate developments. With higher ticket prices and ancillary concession sales, the multiplex in India will dramatically change the economics of the Indian film market. Bollywood is not Hollywood and the models and formulas that work in Hollywood do not work in India. India entertainment executives have known that for many years

ANIMATION INDIA:

Endorsing India's potential in the animation space, a report by Anderson Consulting estimates that the market will grow at 30 per cent annually in the next three years resulting in a US$ 15 billion industry by 2008 from its present US$ 500-600 million. The study also reports that India will receive more than US$ 2 billion worth of animation business in the next three years. While India's share in the world animation market is fairly small, the potential is huge, as the needs of the film and television industry are growing worldwide. The appetite for animation is on a surge. And it is not only because of the commercial success of completely animated films and television programmes such as Princess Mononoke, Final Fantasy, Toy Story, Star Wars; or the popularity of special effects in feature films, ad films and the like. It is also because the world has begun to acknowledge the contribution of technology beyond the film theatre. Be it mobile phones, games, PDAs, the demand for audio-visual content can only grow in one direction skywards.

India: The Animation Hub?

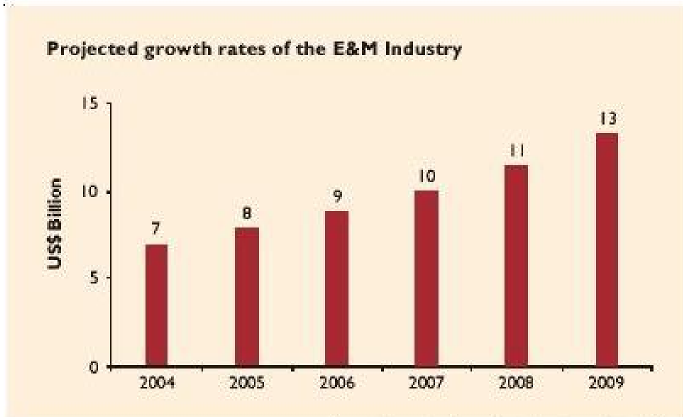
A recent study on the animation industry by NASSCOM shows that the global animation production market is set for major growth. The study, which is based on multiple statistical projections on the market, from segments such as industry sources, Pixel Inc. and Arthur Andersen (Study on the Entertainment and Media sector) forecasts that the global animation market will generate revenues worth US$ 50-70 billion by 2005**.** Total animation production by Indian producers meanwhile is expected to touch US$1.5 billion by 2005 (Arthur Andersen's study on the Entertainment and Media sector).



Source: Lifestyle Consumption by Edelweiss Securities Private Limited-2005

There is an increase in the direct consumer spends on entertainment and advertising revenues have also been on the rise. With the average Indian getting younger, and hence more likely to spend on nonessentials, the entertainment industry has the potential to grow explosively in the future. The Indian entertainment industry is ready to enter a second stage of growth, powered by technology and an enabling regulatory environment. Consistent commitment to economic reform over the last decade has spurred the steady growth of the Indian economy. The emphasis on creating an enabling environment for investment and the inherent potential of the Indian economy have together pushed India's annual Gross Domestic Product (GDP) growth rate beyond 8 percent.While India's GDP ranks eleventh in the world in absolute terms, it ranks among the top five economies of the world when assessed in terms of purchasing power parity. It is the growing consuming class with the proclivity to spend that will drive the growth of the Indian entertainment industry. Adding to this positive outlook is the fact that the average Indian is getting younger and is showing a greater propensity to indulge and entertain himself . Moreover, there are over 25 million Indians living abroad who are increasingly opting for India-oriented entertainment, as the availability of such content increases. Globally, a clutch of international films with Indian content, themes and performers are receiving wide visibility and acclaim. This broad acceptance of Indian entertainment is likely to give a further fillip to the expansion of this industry.

The current size of the industry as a whole is estimated at US$ 7 billion in 2004 and is expected to grow at a CAGR of 14 per cent to US$ 13 billion by 2009. The Filmed Entertainment and Television segment dominate the industry followed by the Print, Radio and the Music segments.



Source: PricewaterhouseCoopers Global Entertainment & Media Outlook 2005-2009

Foreign Direct Investment (FDI)

Today India has probably one of the most open liberal investment regimes among the emerging economies with a conducive FDI environment. The entertainment and media industry has significantly benefited from this liberal regime and most segments of the entertainment and media industry today allow foreign investment. Recently FDI was permitted in the two important sectors of Print Media and Radio. Films, Television and other segments are already open to foreign investment. In the print media segment, 100 per cent FDI is now allowed for non-news publications and 26 per cent FDI is allowed for news publications. Printing of facsimile editions of foreign journals are now also allowed in India. This policy is helping the foreign journals save significant costs of distribution
them to service the Indian market audiences more effectively.The FM radio sector too was opened for foreign investment recently with 20 per cent FDI being allowed. The FM radio sector itself has expanded by opening 330 licences for private investment, which currently is underway. As a result, the radio sector is expanding rapidly with forecasted growth rates of 22 per cent per annum.

Film

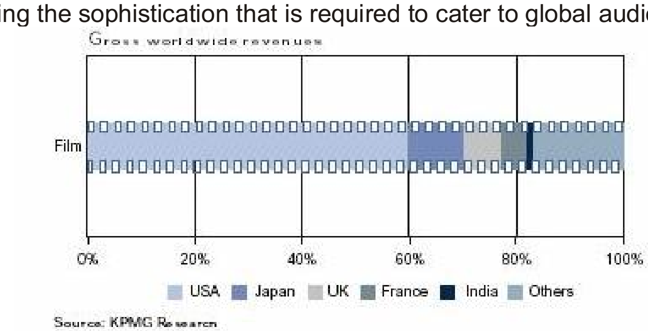
Films: Getting tech-savvy

India has the world's largest movie industry, which churns out around 1,000 movies a year. It stands at an estimated Rs 6,800 crore (Rs 68 billion) and is expected to grow around 20 per cent annually. It is projected to reach Rs 15,300 crore (Rs 153 billion) by 2010. Domestic box office revenues account for 78 per cent of the total industry revenue. Ancillary revenues - earned by film producers by selling their digital rights to mobile companies, satellite rights to TV broadcasters and distributors (cable companies and DTH players) - are estimated to increase by 20 per cent a year.The home video households, which currently stand at three million, are projected to increase to about 13 million by 2010 - primarily because VCD and DVD prices are falling. However, what can upset the balance is the introduction of video-on-demand and pay-per-view services by TV distributors.

Multiplexes - though only 250 compared with the estimated 12,000 single-screen theatres in the country - are helping the domestic box office revenues. India is the world's largest producer of films by volume - producing almost a thousand films annually.

However, revenue-wise, it accounts for only 1 percent of global film industry revenues. Film and film-based entertainment together occupy a considerable part of the Indian consumer's mindshare. In terms of its sheer impact and visibility, film and film-based entertainment transcend well beyond what their 27 percent direct share of the Indian entertainment industry's revenues would indicate. Indian films, especially the mainstream Hindi film industry (or "Bollywood") dominate segments like music and live entertainment as well as television, where popular films and film-based programmes attract the

highest viewership along with cricket. Apart from the growing international success of Indian themed films like '*Monsoon Wedding*', '*Bend it like Beckham*' and '*Bride and Prejudice*' (which debuted at the top spot at the UK box office), global curiosity about Bollywood is on the rise - Bollywood has been featured in recent issues of 'National Geographic' and 'Time'. All these point to the fact that the Indian film industry is now reaching the sophistication that is required to cater to global audiences



Although over ninety years old, the Indian film industry was accorded the status of an industry as recently as 2000. Consequently, it is only during the last five years that organised financing from banks, financial institutions, corporates andventure funds became possible. Earlier, it was almost solely reliant on private and largely individual financing at extremely high interest rates. The seeds of corporatisation have been sown and early forms of vertical integration between content producers, distributors, xhibitors, broadcasters and music companies can be observed in the industry. The stakeholders, especiallythe new generation of producers, directors and performers, are now much more receptive to international best practices to redefine the way of doing business. Better discipline has resulted in a slow turnaround in the industry, which recovered from an unsuccessful 2002 to record better profitability in the last two Years.

<u>Components of the Indian film industry</u>:

The Indian film industry comprises of a cluster of regional film industries, like Hindi, Telugu, Tamil, Kannada, Malayalam, Bengali, Punjabi etc. This makes it one of the most complex and fragmented national film industries in the world. These regional language films compete with each other in certain market segments and enjoy a virtual monopoly in certain others. The most popular among them is the Hindi film industry located in Mumbai, popularly referred to as “Bollywood”.

The multiplex revolution

Theatres: Going digital

Currently, there are about 100 digital theatres. Digital prints are cheaper (estimated to be one-fourth of regular celluloid prints), of better quality and less vulnerable to piracy. However, you need more digital theatres for this phenomenon to grow.Unfortunately, the FICCI-PWC report estimates that only around 10 per cent of the total theatres in the country plan to go in for digital conversion today.Incidentally, one can book cinema tickets online and also with one's cellphone. And even pay for it using cellphone. Bangalore-based Jigharak is believed to be working on the software application.Inox Leisure is about to kick off one such initiative soon either in Bangalore or Pune. Besides, Shringar Cinemas has plans to start hawking tickets through PDAs in the next couple of months at its multiplex in Andheri.Moreover, with the setting up of self-collection kiosks, buying tickets will become as simple as withdrawing cash from an ATM. Kiosks will be installed in all metros soon, at a cost of around Rs 100,000 each.

PVR Cinemas has already installed one in Bangalore. As for theatre screens, D-Cinema 2006 (the high-end of digital cinema is still about five years away, thanks to high costs) could see some upgrades of e-Cinema.
However, only two screens of Satyam Cinema in Chennai have real D-Cinema. The price of a D-Cinema projector is four times that of an e-Cinema projector, which currently costs between Rs 15 lakh (Rs 1.5 million) and Rs 20 lakh (Rs 2 million).Internationally, six major Hollywood studios have already drawn up plans to begin selling movies over the internet so that buyers can download and preserve for watching anytime at will. The service is being launched by Movielink - an online joint venture formed in 2002 by MGM Studios, Paramount Pictures, Sony Pictures Entertainment, Universal Studios and Warner Brothers.Until now, the only downloads the studios have offered have been on online rentals, which can be watched only for a 24-hour period. Downloading new movies will cost about $20-30; older titles will cost as little as $10. Downloads will be available on the same day on which the DVD is released - quicker than rentals, which are put online about 45 days later and cost $2-5.
The conversion of standalone, poorly maintained single-screen theatres to sophisticated multi screen theatres, in addition to the new multiplexes within or around shopping malls and family entertainment centres, is an emerging trend in urban India today. Multiplexes, though a recent urban phenomenon, have shown the way forward in increasing domestic theatrical revenues. The reasons for their success are:

- They enjoy an average of 50-60 percent occupancy per screen as opposed to 30-35 percent of standalone theatres,
- The customer is willing to pay more for the enhanced viewing experience,
- The government has accorded various tax rebates for multiplexes,
  states like Maharashtra and Delhi have permitted dynamic ticket pricing,

Allowing them to change ticket prices according to demand and supply.

- They increase footfalls in shopping malls by 40-50 percent. As a result, Several major malls have multiplexes in or near them. The present retail boom has led to a significant rise in the number of multiplexes. The advent of multiplex chains is expected to usher in a new era of film exhibition, apart from just an enhanced viewing experience. Some of the expected changes are:

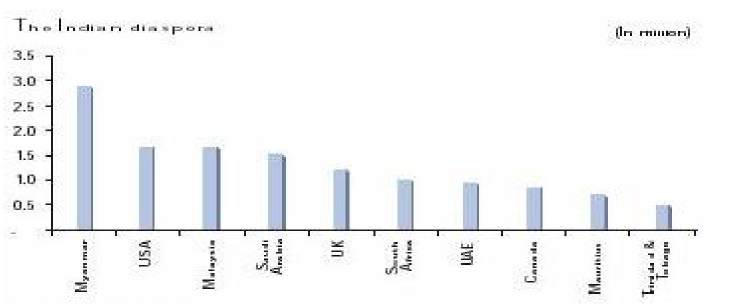
- Dedicated marketing teams to leverage state-of-the-art technology to address the programming needs of exhibitors
- Marketing team to work out content-to-customer matches on the basis of consumer surveys and other metrics
- Developing synergistic marketing strategies in conjunction with content producers, broadcasters, music companies, etc.
- Offering better terms to producers based on
  - Presence across multiple locations
  - Significantly higher transparency
  - The strength of their balance sheet

Expanding the international market

While the initiatives mentioned above can expand the domestic market, a better exploitation of Indian products in other markets can provide another avenue of growth. These markets include:

- The Indian Diaspora
- Neighboring markets like Pakistan, Sri Lanka and Bangladesh which are now opening up,
- Non-traditional / new markets like Greece and the CIS countries, where Indian films were extremely popular 30-40 years ago, through sub-titled or dubbed content.

The Indian diaspora is estimated to be 25 million strong and growing. The combined wealth of the global Indian Diaspora is an estimated USD 300 billion.
Apart from being a community binder for Indians across the world, Indian films in the past few years have contributed in a significant way in promoting culture and tourism.



Over the last ten years, overseas theatrical revenues have grown continuously and are now a major influence in determining the way mainstream films are made. More Indian films are now distributed and released in mainstream international theatres, owing to the growing demand from the Indian diaspora.
Most of these revenues accrue from US, UK and Canada owing to their high

Government incentives

The role of the government as an enabler and a facilitator

Specifically in the context of films, there are several areas where the government could act as a catalyst, through direct or indirect support. Certain countries like Canada, Iceland etc. offer tax incentives for shifting the production to a local site in that country from a country where, the film is primarily intended to be exhibited ('runaway film production'). Tax incentives are also granted by certain countries on co-productions, involving two or more production companies from different countries jointly financing and producing a film.
Co production can enable the production houses to avail the benefits that are available to national films in other countries with which co-production treaties have been entered into. These tax incentives are by way of special tax credits or deduction of eligible profits from income subject to tax. Entertainment tax levied by various states/ municipal bodies on the value of film tickets, live stage-shows etc. adversely affects the entertainment industry. This results in a large portion of theatre ticket receipts diverted towards tax, instead of being channelled into development of theatre exhibition facilities. At an average of 60 percent, the entertainment tax levy in India is one of the highest in Asia. A wishlist of concessions: Complete amortisation of production costs in the year of completion of the film Amortisation of costs of incomplete films, subject to furnishing adequate documentation Extending tax-incentives for multiplexes in metro cities Tax incentives for newly set-up film ventures, with a corporate set-up and sizeable amount of investment Providing facilities and indirect tax incentives on film production, studios, etc. Tax incentives for film-financing activities Rationalisation of entertainment tax Concessions on customs duty on import of studio and other equipments and software to promote use of superior technology in film-making.

Filmed Entertainment

With over three billion admissions per annum, India is clearly the leader in the Global Filmed Entertainment segment. The immense popularity of films as a source of entertainment and the vast cultural diversity of the Indian population has been instrumental in making India also the largest producer of films in the world. With a strong appetite for movies and an upward migration of household incomes in India, this segment brings out several business opportunities in this segment, some of which are described briefly below:

Print Media

Indian print media has evolved through a series of revolutionary events. This has rendered the market highly fragmented with approx. 1900 news publications for a circulation figure of just 200 million. As per the latest readership survey NRS 2005, the reach of the print media (dailies and magazines combined), as a proportion of the reading population (i.e. 15 years and above) is only 27 per cent. The global average readership is estimated to be over 50 per cent. This highlights the significant potential of the print media market in India. Further, as literacy (as measured in the NRS) grows by nearly eight points and even higher in the rural areas, the potential of the print media assumes a significant proportion. This can be illustrated from the fact that one of the reasons that Dainik Jagran, India's leading daily has been able to retain its leadership position for the last three years is because the number of literates in Uttar Pradesh, Bihar and Jharkhand (strong Dainik Jagran markets) has grown explosively. Time spent on reading has also gone up quite significantly from an average of about 30 minutes daily to around 39 minutes daily over the last three years, further contributing to this growth potential.

Television

Television has dominated the entertainment and media industry and continues to have the potential to do so even in the future. With over 200 million homes, television today reaches to over 100 million homes . With an average household-size of 4-5, advertisers simply cannot get over the potential to reach over 500 million eyeballs. The potential of the industry just seems to get better even with the current statistics. Television homes are growing at a staggering rate of 4 per cent per annum - it is no wonder that today in India, the number of television homes far exceed the number of telephone-connected homes. The growth in the appetite of television homes to get a cable connection is ever-increasing with the changing demographics and economic status in not just the 'A' class cities but also the 'B' and 'C' class cities. In fact, most growth in the Cable and Satellite (C&S) connected homes is now likely to emerge from these segments, which till date were privy only to the channels provided by the State Broadcaster. With a current base of about 61 million C&S homes, the growth projected in these homes is about 8-10 per cent. This is inspite of the fact that most C&S homes today are in the analog mode and the potential of the Digital C&S services is still in its nascent stage.

Radio

Currently is the most cost-effective mass communication medium in the country. This mass medium currently rides on microwave and is primarily driven by the state owned broadcaster. The revenues in the sector are contributed by the advertisement.
The Indian radio industry of about US$ 53 million is expected to grow at 22 per cent in the coming year Indian radio today reaches out to 99 per cent of the population and currently is the most cost-effective mass communication medium in the country. This mass medium currently rides on microwave and is primarily driven by the state owned broadcaster. The revenues in the sector are contributed by the advertisement that accompanies the content. The size of the market in India is currently estimated at US$ 53 million and is expected to have the highest growth at a CAGR of 22 per cent in the coming years. Radio, which till a couple of years back, was in the privy domain of the State Broadcaster, has now been opened up to private investment. This sector has become the hottest sector for investments amongst the entertainment and media industry due to the following reasons:
As many as 338 FM Radio licenses are now available for bidding for the private players. These cover about 91 cities, most of which till now were being serviced only by the State Broadcaster.
The Government has allowed FDI up to 20 per cent in the sector, which was not allowed previously.
The Government has moved to a low revenue-share regime in contrast to the earlier fixed license fee regime, which was hurting the industry badly. These three measures by the Government have thrown open several opportunities in the sector, which is poised to grow at 22 per cent per annum

Music

The Indian music industry is over a century old. However, the past few years have been dismal for the industry. It has shrunk to INR 10 billion from INR 13.5 billion in the last four years, as the onslaught of piracy, the high cost of acquisition of film music and the low priority accorded to the sectoral issues by the authorities have somewhat upset its business viability. In India, the pattern of music consumption and distribution has shifted radically in recent times. Music buying has reduced and, despite the popularity of the new Hindi films, which make up for 40 percent of total music sales, the number of units being sold is falling. On the other hand, piracy has ensured that the average retail price of music cassettes remains stagnant over the years, while that of CDs fall. This has led to a spiralling decline in revenues, since such falling prices have not been compensated through rising volumes.

The Indian music industry has a unique structure unlike most other global markets. Earlier, the music market was completely dominated by film music as music is an integral part of Indian films and music rights contributed as much as 15 per cent of an individual film's earnings. However, in the past few years, the success of music videos and non-film albums is driving growth in the Indian music market. Also, the music industry players are proactively focusing more attention on developing non-film music and global music for the Indian market in order to reduce their dependence on Indian film-based music for their growth.

The Indian music industry is estimated to be about US$ 149 million in legitimate sales of music cassettes and CDs and is pegged to grow at 3 per cent over the next five years. As the Indian music industry is largely dependent on the Indian film industry, following are some of the initiatives taken by these industries to promote growth in this segment.

Growth Drivers for the Music Industry

The Indian music industry has traditionally ridden on the back of Indian film music. However, with the advent of satellite television, the consumer's exposure to non-film music channels and music videos has increased their popularity and their share of revenues vis-a-vis total music industry revenues has been rising steadily.

Animation & Gaming

The year 2004 saw the animation industry rising to its highest levels thus far. The emergence of the gaming industry also made its mark during the year with the first ever investment in this segment by a Chinese company in India games Limited. Though the Indian animation industry continued its dominance in the outsourcing segment, several co-produced projects and a move towards creating original IP was initiated. The year was also marked by increased use of animation in the .lm segment, as was evident by the Hindi Blockbuster *Hum Tum*. Effective use of animation in special effects and titling in the .lms, continued as before. The increased number of downloads of games on mobile phones is likely to open new opportunities for the existing gaming companies and will also encourage entry of new companies in this sector. India's large pool of software talent has made it an appropriate resource base to develop animation and graphics-heavy content. Many international organisations outsource their animation requirements to leading Indian software players. As the industry grows and establishes its quality credentials, India will emerge as a serious animation hub.

Talent nurturing

One of the strategies adopted by the music industry for growth of the non-film music segment involves identifying new talent, nurturing it and creating strong brands around it. Recent examples of “Indian Idol” on Sony Television and “Zee Cine Star” are examples of talent search in the television segment nurturing growth in the music industry as well.

Emerging Digital Technologies

New delivery platforms using digital technologies are enabling publishing companies to tap other sources of revenue. Some of these include putting up the content on the Internet thereby increasing the reach. This enables the companies to command higher advertising revenues due to the reach as well as convince readers to sign up for the subscription of these publications. Today all leading newspapers and magazines have their content on their websites which is not only increasing traditional advertising revenues, but also leading to additional revenue from online advertising.

Technology will drive the Entertainment Industry into the next decade. In the new converged paradigm, its boundaries will be merged with those of the Telecommunications & Information Technology segments. This will give rise to a host of value added features for

the consumers, and new revenue streams for the players in each segment. Mobile entertainment with its ability to dissect the boundaries of time and space, will be the biggest growth driver. Digitalisation is the future of the Television Industry. It is only a matter of time before market
forces propel the industry towards that. Resolution of current challenges of distribution and digitalisation, will also de.ne the content formats and the viewership patterns of the consumers in future. Digitalisation will also revolutionalise the Film Industry by bringing out faster and cheaper modes of delivering .lms to the consumers. These will be in terms of digital distribution of .lms, emergence of the home video market entailing shorter release windows and new distribution formats like internet and mobile devices. Success in Animation & Gaming will be driven by co-productions and securing rights over content produced. This technology-intensive industry will evolve itself to come at par with the world standards, not only in terms of technological advancements but also creation of original content. Finally, content is and will continue to be the king of entertainment in future. Securing rights over the content will decide the strength of the players across all segments. The challenge will then be of having a regulatory regime working towards adapting to these advancements.

The film industry is one sector in India, operations of which have always remained under cloud, mystery and suspicion. While producers dependence on underworld and *hawala* money (money transferred unofficially) for financing has always been a known fact, it's a different story that all Hindi films ultimately end with the victory of “Good” and enemies of the nation, “Evil”, destroyed! The Film Industry on the whole has always worked like small scale industries in the unorganized sector. For over five decades of its existence, the industry did not produce any “Corporate Entity” worth its name.

In a country like India, where sources of entertainment for the masses are limited, watching a film at a cinema hall is still considered a privilege for a majority of citizens living in rural areas. Films and their TV program offshoots, continue to be sole entertainers for common people. Besides giving employment opportunities to many thousands of people directly and indirectly involved with the film industry, films are a huge source of government receipts on account of the high rate of entertainment tax. The significance of this important industry has always remained undermined, problems unattended and potential untapped.

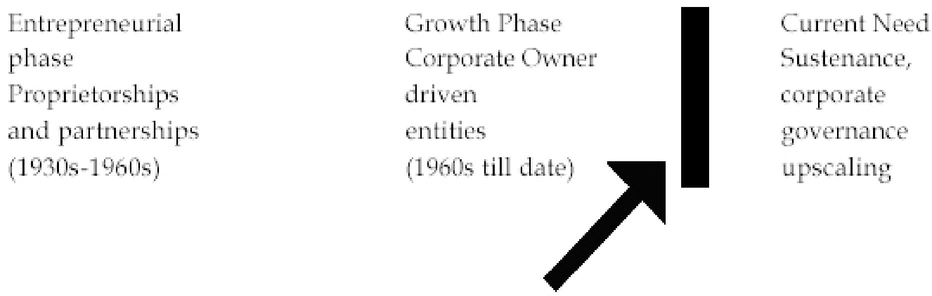
While the bosses at the film industry have kept demanding more support from the government, policy & regulatory framework and clean money from institutions for financing, they did little work in cleaning up their balance sheets, income tax returns, disclosures and above all, incorporating their businesses. But the last few years have seen some change. The famed actor, Amitabh Bachchan called the Big B who promoted Amitabh Bachchan Corporation Limited (ABCL) took the lead towards Corporatization of film industry in India. Though still an unlisted company with shareholders and whatever its fate may be, ABCL set the example for others in film industry, that things can be done in a little more organized way.

Globalization, Software technology, TV programming and the Music boom in India have since prompted several traditional players and industry majors to make their operations more transparent and hence CORPORATIZE.

Scores of film producers, financers, distributors and associates, have now converted their businesses into “Companies” under law. Some have already raised capital from the public and are now listed at major stock exchanges, while several others propose to do the same. Besides Zee Telefilms, some others who have successfully corporatized includes music leader Tips Industries, Jitendra promoted Balaji Telefilms, Dheeraj Kumar's Creative Eye, Sri Adhikari Brothers, RPG's Saregama, Pritish Nandi Communications and of course Subhash Ghai's Mukta Arts.

THE NEED FOR CORPORATISATION

Management vis-a-vis ownership
Three typical phases of industry growth



Where the Indian film industry stands today
Source: KPMG and FICCI Report - Indian Entertainment Sector in the Spotlight

BANK FINANCING FOR INDIAN FILMS

The fiscal year 2000-2001 will go down in history as a landmark year for the Indian film industry as it marked the announcement by the government stating that the Indian film makers could obtain industrial financing from banks and financial institutions for their projects. Consequent upon Government of India conferring industry status to the "Entertainment Industry, including films" and approving the same as an eligible activity for film financing, Industrial Development Bank of India was the first institution to make an allocation of Rs 1
billion (U.S. $ 20.83 million) for the film industry for 2001-2002 and it sanctioned film financing to the tune of Rs 635 million (U.S. $ 13.22 million) in 2001 spread over seven projects floated by the likes of Crest Communication, Padimini Telemedia, VR Projects and D. Raama Naidu, which rose to Rs. 995 million (U.S. $ 20.72 million) in 2002.

INFRASTRUCTURE

The Economic Times Entertainment Report 2001-2002 describes the infrastructure for films comprising production, post-production and exhibition infrastructure. Production & Post-Production Infrastructure here includes studio floors, film cities, laboratories and post-production facilities. Currently, India has 25 studios and three film cities. Studios are enclosed structures where sets can be built for shooting. A studio floor should have the necessary dimensions to allow building of these sets and provide the necessary acoustics for shooting. Mumbai being the hub of film production in the country has the maximum number of studios. However, most of the studios are not maintained due to lack of funds. Many like Famous Studios at Andheri and Ranjeet Studio at Dadar in Mumbai have closed down. Besides, the studio floors are very small and do not allow building of huge sets. For example, an average studio floor size in India is 100 feet by 150 feet versus the international standard of 220 feet by 22 350 feet. An Indian studio is spread over 5 acres and has one or two studio floors whereas an
international studio is spread over a minimum of 500 acres and has more than 6-10 studio floors and hundreds of locations. In fact, an international studio is akin to a film city in India. Indian films cities do not come even close to international ones. For example, the Mumbai and Noida film cities are spread over barely 40-50 acres of land and have only 20 locations each. Perhaps the only international grade studio in the

country is the Ramoji Rao Studio in Hyderabad, with six studio floors. The film city is spread over 2,800 acres, of which 1,500 acres is developed and has over 100 shooting locations. Post-production infrastructure like editing and dubbing suites are given as part of the overall package to the production houses. Till recently, most of the equipment used in India was largely outdated. Now, several specialised post-production studios like Empire Studio, Crest Communications, CMM and Pentamedia Graphics have been set up which offer modern technology to producers. Players like Ramoji Rao and Rama Naidu have already set up or are in the process of setting or investing in post-production facilities. They are positioning themselves as end-to-end providers, wherein a producer can just come with a script and can take away a readymade film from the studio, which is how it is done internationally. Post-production facilities have to keep pace with fast changing technology. Avid Editing Suites are rapidly replacing the old Steinbeck editing systems. In fact, even Avid Suites are becoming obsolete and are being replaced by computer-based editing suites like Adobe Premier

Exhibition Infrastructure:

The number of theatres has declined in the last three years due to the high degree of piracy, low ticket rates, high incidence of taxes and levies, low collections of theatre owners which prevent them from spending on renovation. Alternative profitable options for real estate like retailing have led many theatres in Mumbai to be converted into shopping complexes and departmental stores. Another reason for the poor infrastructure is the high incidence of entertainment tax, which stands at an average of 25 per cent for the country as a whole. In fact, in Maharashtra, it is as high as 60 per cent. Gujarat has an incidence of 100 per cent, while Madhya Pradesh has a tax rate of 75 per cent. If one were to reduce the entertainment tax, one would easily see the improvement in exhibition infrastructure. Andhra Pradesh is such an example. With 12 per cent average entertainment tax rate, the state has the highest number of theatres and a very flourishing film industry notes Uday Singh, Managing Director, Colombia Tristar Films of India. Even a country like China, which has a highly regulated market and produces far less films than India, has 65,000 theatres.

SCREENS

As compared to approximately 36,000 screens in the U.S. , there are around 12,500 cinema screens in India. Most of the cinema halls in India operate in an unorganized environment and are owned by individual businessmen. More than 95 per cent theatres are single screen andstand-alone. However, the industry has recently seen the entry of organised corporate players.Priya Village Roadshow Ltd., a joint venture between the New Delhi based Bijli Group and Australian media and entertainment conglomerate, Village Roadshow Ltd., was the firstorganised corporate player in this space. E-City Entertainment India Limted, Inox Leisure Ltd.and Adlabs Ltd. are other corporate who have ventured into this space in 2001.Till 1997, the concept of housing more than two screens in one theatre was non existent in India. Priya Village Road show Ltd. pioneered the concept of world class multiple screen cinema halls in India by opening their flagship property, Anupam-PVR, in New Delhi in 1997.In the last two years, the state governments of Gujarat, Rajasthan, West Bengal and Maharashtra have announced entertainment tax exemptions on new multiplexes which has resulted in an increase in the development of multiplexes in these states. With a population totaling more than 1 billion, 12,500 screens translates into a measly 13screens per million of the population. This is far below global averages. India has witnessed a sharp decline in cinema attendance in the last 10-15 years due to three reasons, namely poor cinema content, poor film exhibition infrastructure and rampant piracy However, the film exhibition industry in India is expected to grow rapidly over the coming years due to continuous positive developments in the area of film content (which is Country improving), film exhibition space (which is witnessing development of multiplexes with as many as 200 multiplex screens planned in the near future) and a sustained clampdown on piracy (which is likely to result in a decline in the frequency of watching films in homes through alternative media platforms). These three factors are likely to lead to higher cinema attendance in India.

FILM INSURANCE

Most of the developmental work that has happened in the introduction of insurance covers for Indian films is attributable to Mr. Ajit Gupta, Development Officer of United India Insurance (UII), who is credited with pioneering this concept in the India film industry. The credit is also due to film makers like Subhash Ghai and Bobby Bedi, who have been the forerunners and proponents of taking insurance cover for film production. The importance of insurance cover assumes significant importance in view of the concerns of institutional lenders, who want to mitigate risks associated with the film production process from multiple entities. Taal (1998) was the first Indian film to be insured for covering risks associated with the film during the production period. Since then, United India Insurance has insured more than 20 films with total production outlay in excess of Rs 1 billion (U.S. $ 20.83 million). Till date, UII has settled four claims out of the films insured by it. The first claim was from Yash Raj Films India Ltd. for a month's delay in the completion of its film, Mohabattein, due to postponement of shooting caused by an injury to the heroine, Aishwarya Rai. Other films that have received compensation for production delays include Dil Chahta Hai (unseasonal rains in Australia), Saathiyaan (camera malfunctioning) and Badhai Ho Badhai (Anil Kapoor had to hospitalised due to a leg injury).

FOREIGN DIRECT INVESTMENT IN THE FILM SECTOR

100% foreign direct investment ("FDI") is permitted in the film sector. This is subject to the following conditions:

- The investing company must have an established track record in films, TV, music, financeor insurance.
- The investing company should have a minimum paid-up capital of US$ 10 million if it isthe single largest equity shareholder of the Indian company and atleast US$ 5 million inother cases.
- The minimum level of foreign equity investment should be US$ 2.5 million for the singlelargest equity shareholder and atleast US$ 1 million in other cases.
- The Indian company's borrowing must not exceed its equity.
- Dividend balancing provisions apply, i.e., the Indian company must have export incomegreater than the dividend paid to foreign investors under a prescribed formula.

Tax benefits to multiplex construction companies 50% of the profits and gains derived from the business of building, owning and operating multiplex theatres are allowed as a tax deduction. In order to avail of this deduction, thetheatre must have been constructed during the period between April 1, 2002 and March 31,2005 and must not be situated in Mumbai, Kolkatta, Chennai and Delhi. The deduction isavailable for five (5) consecutive assessment years beginning from the first assessment year.(Section 80IB(7A) of the Income-tax Act, 1961)Foreign investors can consider investing in reputable Indian film production houses andmultiplex construction companies under the FDI route.

CINEMATIC TOURISM A CASE STUDY

SWITZERLAND

Even though the Swiss Government has no role to play in promotion of the Indian film industry because Switzerland is a free market economy and though the country has no centralized assistance for the Indian film industry, there are certain regions like Bernice Oberland, in mid-Switzerland bordering on the Alps and regions in the centre of Switzerland such as Lucerne, Geneva, and Zurich which are taking steps to promote Indian cinema in Switzerland The first Indian films were shot in Switzerland in the 60s, but that was a novelty. Only since the 80s when the Kashmir problem intensified, the Indian film industry, began to look for an alternative landscape for shooting to Kashmir and almost incidentally discovered Switzerland.

Among the early producers to discover Switzerland was Yash Chopra and after that many Indian film makers followed suit. Mr. Josef Renggli, Consul General of Switzerland in Mumbai says that because witzerland is a relatively small country with a small film industry, there are a few tour operators who essentially help the Indian film makers to shoot in Switzerland.

The Indian film makers comein large teams of around 50 or 60 people and bring everything along with them from a carpenter to a cook. The Swiss tour operators arrange cheap accommodation for them and since food is very important, they arrange for mobile kitchens for the crew and cast. Mr.Renggli however, states, that the Indian film makers are very disorganised and do not realise that costs of delay in Switzerland whether it be for cameras or lights or equipment which can be as high as 50 Swiss Francs an hour. Since the Swiss normally want payments in advance, the Indian film makers pay through the international carnet system which is issued by the Indian Merchants Chamber under an inter-governmental agreement. The Swiss market for Indian films is still small and there are hardly any Indians living in Switzerland.

Recently however, there was a Bollywood exhibition in Zurich and this was a large show last summer. Pointing to the growing popularity of Indian films in Switzerland however, Mr. Renggli pointsout that the film Lagaan was rated among the top 10 foreign films in Switzerland last year,according to the box office turnout. Monsoon Wedding was another success story inSwitzerland.The Swiss Consulate in Mumbai has been playing its own role in the promotion of Indiancinema in Switzerland. Though nothing happened for a decade, in the past five or six years,there have been efforts made by the Consulate to promote Indian cinema. Thus the past ConsulGeneral Max Heller started developing contacts with Indian producers realising that there is alot of competition from countries like Germany, Austria, the U.K., Canada, New Zealand.

South Africa and Indonesia.

Since the year 2001 the Swiss Consulate has instituted an award for the best Indian films and last year, the Swiss Actress Ursula Adres, handed over the award for the best film. In addition, the Swiss Tourist Board is trying to promote Bollywood in order to promote Switzerland as a travel experience. Of course, as Mr. Renggli points out the typical Bollywood film still does not attract a large audience in Switzerland. Films like Lagaan and Monsoon Wedding have more appeal and even they are mainly screened in specialised cinema halls.

Mr. Renggli explains that in promoting Indian cinema shooting in Switzerland, they are often faced with a conflict of interests. On the one hand it is beneficial to promote the shooting of Indian films in Switzerland from the business point of view. On the other hand, since Swiss businessmen demand advance payments, this aspect has to be safeguarded. Also the Consulate has to sometimes screen the teams that go to Switzerland to make sure that some of the younger members of the team are genuinely going to the country for the shooting of the film and not for any other purpose.

Canada

In Canada the Provincial governments and the provincial film commissions help the film industry from all over the world, including India, to shoot inCanada.Canada in fact has a network of provincial and municipal film commissions which provide support to the film, television and commercial industry. Film Commissioners help the producer scout locations, provide comprehensive production manuals, issue location permits, and cut through red tape to arrange government services. The network of Film Commissioners provide the visiting film producer with a window to the widest diversity of locations and climates in the world.Francis Dorsemaine, Vice-Consul & Assistant Trade Commissioner, Canadian Consulate,Mumbai , says that, according to the Canadian Film and Television Producers Association.

British Columbia leads the provinces with 50 per cent of foreign location shooting taking place there, followed by Ontario with 28 per cent and then Quebec. Many Indian film producers go to Vancouver for shooting, for instance Subhash Ghai and Vinod Chopra, to name a few. Among the facilities offered by the British Columbia Film Commission are interactive maps, locations, photos from their digital library, production guides, community services and assistance with co-productions and local shooting.

Yash Johar will soon be shooting a film in Toronto. Toronto has a thriving film and TV production community with a full range of services and facilities from pre-production to post-production. Describing the reasons for Canada being an attractive location to shoot for Indian producers, Mr. Dorsemaine says Canada's scenic beauty is incredible. The country offers producers a variety of geographical features in one city/locality which makes it economical for producers to shoot at these locations.

Canada is also a very competitive place to shoot since the Canadian dollar is a weaker currency as compared to the US dollar which makes your rupees go further. Canada's large South Asian community found in cities such as Vancouver and Toronto allow the Indian film producer to hire secondary actors, dancers, behind the camera crews, even catering services for their productions, an advantage not found in many other locations outside South Asia. Canada's well-developed film infrastructure also offers state of the art equipment and processing facilities which Indian producers can use to enhance their productions in a cost-effective manner. Mr. Dorsemaine also states that since nearly 20 million Indians live abroad, Bollywood productions are increasingly catering to the global market. Within Canada, there is anincreasing domestic demand for television and film productions from South Asia.

Currently there are Canadian movie theatres that regularly screen Hindi films, and Canadian films with a substantial link to India have done very well in Canada and, increasingly, in India as well as is demonstrated by the commercial success of Deepa Mehta's film “Bollywood/Hollywood” in both countries. In addition there are Canadians of Indian origin who come to India to work in the industry in Mumbai.Canada has co-production agreements with 64 countries, which gives the Canadian producers access to federal tax credit provisions, public support mechanism and Telefilm Canada programs such as the Feature Film Fund and Equity Investment Program of the Canadian Television Fund.

The Canadian Government is presently holding discussions with the Indian Government on a co-production treaty between India and Canada which will facilitate more co-operationbetween Indian film makers and Canadian film makers.Apart from British Columbia and Ontario, all the other provinces offer attractive facilities and tax incentives to shoot in their respective regions.

France

The French Ministry of Foreign Affairs and the Ministry of Co-operation and the National

Centre for Cinematography have a South Cinema Fund for countries to assist film production by developing countries and a subsidy is offered between FF 100,000 and FF 1,0000,000 for film projects . The aid, which must be administered by a French film production company, and registered at the National Center for Cinematography, must be spent in France. The aid is granted in the form of a subsidy, which is paid to the French film production company chosen by the foreign film maker as his /her aid fund manager.

Britain

The British Film Commission, a division of the Film Council promotes the U.K. as a production centre for international film makers. It works with a network of regional commissions and draws upon local knowledge, expertise and contacts to make the U.K. fully accessible and user friendly. It helps Indian producers as well as producers worldwide with employing an experienced location manager. The production has also to be insured by a U.K. insurance company. Since the U.K. does not have a system of concessionary rates for overseas filmmakers, privately owned locations are always a matter for individual negotiation.

The British Film Commission assists with its network of regional screen commissions that cover the whole of England, Wales, Scotland and Northern Ireland. It also assists with equipment hire, with locating actors and actresses. Currently, there are 143 Asian actors and 109 Asian actresses registered with the British Film Commission in the U.K. The British Film Commission also assists with film production tax breaks. This allows theproducer to access approximately 10 per cent of the budget of the film. In order to avail of this funding however, at least 70 per cent of the production spend needs to be in the U.K. and 70 per cent of the labour spend needs to be in the U.K. Similarly, if an Indian film producer is working with a U.K. co-producer, he may be eligible for funding from the Film Council.

New Zealand

Trade NZ (New Zealand), an official body funded by the New Zealand Government helps Indian film companies by supplying New Zealand film promotional material to them and enhancing their knowledge about New Zealand's potential as an ideal film destination. It also services Indian film enquiries by assisting Indian producers in identifying ideal locations in New Zealand for their films based on their story lines. Trade NZ advises Indian producers about New Zealand's land production companies and their ability to assist with all matters relating to filming in the country. It co-ordinates with Air NZ Ltd. to secure seats in Air NZ planes for Indian film clients and to ensure that the film crew travels as per plans. It helps Indian film crews with visas and supplies NZ land production companies in turn with relevant information obtained through Indian film companies who are likely to be interested in filming in New Zealand. Trade NZ also provides liaison and communication support between New Zealand film companies and their Indian clients in India.

INTERNATIONALISATION OF THE INDIAN FILM INDUSTRY

Analysing the growing internationalisation of the Indian film industry, Sreedhar Pillai, a reputed film journalist says that " from the late 50's Indian films have been popular in what is known as the former Soviet Union (Russia). It was a shrewd move by the Russians as a part of their Indian-USSR friendship treaty to popularise Raj Kapoor films like "Awara", though the market was negligible.

It was the Hindujas who were the first commercial traders of Hindi films in Iran. They had a great thing going with the then Shah of Iran in Tehran and they were also Hindi film financiers in Bombay. In 1965 they took the Raj Kapoor-Vyjayanthi-Rajendra Kumar musical hit "Sangam" to Europe and U.K.where it is found a ready made audience with the locals of Indian origin. In the 70's and 80's the growth of Indian films was rapid with the advent of the 'angry young man' films of Amitabh Bachchan. The Hindujas and later Eros entertainment also played an important role in popularising Hindi films. By the 90's with the spread of non-resident Indians (NRI) all over Europe, UK and USA the market started growing rapidly. In the mid 90's, thanks to Yash Chopra and his "Dilwale Dulhaniya Le Jayenge (DDLJ) and films in that genre like Hum Aapke Hai Kaun (HAHK) and Kuch Kuch Hota Hai (KKHH) the market boomed. DDLJ has reported to have collected Rs 200 million (U.S. $ 4.16 million) and above during 1995-96 from overseas. When you compare this with the Amitabh Bachchan films of the 80's collecting Rs 5 million (U.S. $ 104166.66) it was a huge stepforward. In 2000 Karan Johar's "Kuch Kuch Hota Hai" (KKHH) became the highest grossing overseas film in the history when it is rumoured to have done business worth Rs 800 million (U.S. $ 16.66 million)! Remember that by now the audience for Bollywood had almost quadrupled and after American movies, Indian song and item dance movies had become very popular. The audience were mainly immigrants from Asian countries who loved Indian romantic mush. A parallel happening was the growth of satellite television in India. These channels created a new market for Indian films. The overseas and satellite rights became big business much more than the Indian theatrical rights. So producers veered away from typical Indian 'masala' to make sophisticated romantic mush or what is known as the NRI movies. The growth of stars who appealed to the international audience like Shah Rukh Khan, Hrithik Roshan, Salman Khan, Aamir Khan and a bevy of beauties like Aishwarya Rai and Madhuri Dixit popularised this new Bollywood to the masses and in fact stars like Kareena Kapoor and Ameesha Patel started looking and behaving like spoilt NRI brats. Now NRI's themselves like Mira Nair, Gurinder Chadha have struck gold by making films like "Monsoon Wedding" and "Bend It Like "Beckham". They are films that are Indian centric and told in a style that is comfortable to the upmarket audience. A plethora of such films have popularised Indian films abroad. Today Hollywood studios are seriously funding some NRI ventures. Cross over films like Monsoon Wedding, Bend it like Beckham and East is East have each generated profits in excess of U.S. $ 20 million.

DIASPORA AND ENTERTAINMENT

Describing the Indian diaspora and the Indian entertainment industry, Mr. Amit Khanna, Chairman of Reliance Entertainment says: " walking down crowded Manhattan or driving through the arid Arabian Peninsula, sunbathing in Seychelles or tobogganing in the Swiss Alps it is no longer startling to catch a snatch of a Hindi film song. Go to Russia and you are still asked about Raj Kapoor, the moment anyone discovers you are an Indian.

Amitabh Bachchan is voted as the star of the millennium and is mobbed in many parts of the world from Dubai to Durban. Shah Rukh Khan draws frenzied crowds at a Jakarta concert. Javed Akhtar recites his poetry at Oxford University even as Zakir Hussain enthralls an exuberant audience in Berlin. An American University offers Indian films as a subject of Post-Graduate studies. Retrospectives, exhibitions, seminars about Indian films and entertainment are a regular occurrence on the International cultural calendar. There have been during the past twelve months at least 10 retrospectives of Indian films at various important film festivals including Cannes.

There are regular theatrical performances, international co-productions and even a teaching of Bollywood Cinema at Ivy League Colleges! Indian entertainment is truly a global phenomenon today. We make the largest number of feature films(800-900 per annum) and the Indian movie Industry is worth US $ 3 billion with exports of over US $ 200 million. With a population of over 1.1 billion every sixth person in the world is an Indian. It is not surprising that there are about 25 million people of Indian origin spread across 120 countries in the world (40 million from the sub-continent). Many of these migrants have very strong familial links with their motherland but almost all of them have at least a few tenuous roots in their ancestral home. Invariably these roots go back to their food, language and culture.

Most sociologists agree that communities retain their cultural specificity in spite of alteration in time and space. In fact ethnicity usually reasserts itself often aggressively even as ghettoization aspires to overcome such barriers. So it is not uncommon to see a Little India or a China Town in most great cities around the world. Arguably one of India's most valuable exports - entertainment is also the country's best brand ambassador along with Information Technology. Indian films are exported to about 10 countries around the world.

The biggest markets being USA, UK and South Africa. The Middle-East, South-East Asia, Australia and the Caribbean are some other important markets. On a per screen average, Indian, especially Hindi films feature in the Weekly Top-Ten in all these markets. From a mere twenty prints a decade ago big films release upward of 400 prints in the overseas market today. Yet our films have not yet made significant progress in crossing over to the mainstream in these markets. Much of this is because of poor marketing. Till recently Indian films, except those by a handful of new wave film makers like Satyajit Ray, Mrinal Sen, Adoor Gopalkrishnan, Shyam Benegal, Gautam Ghose were hardly visible, even on the festival circuit. Popular cinema was happy at catering to traditional Diaspora markets alone.

The Non-Resident Indian is far more of a bundle of contradictions than the average urban middle-class Indian. In alien surroundings but with a better economic disposition there is a heightened need to cling on to Indian values and mores. Nothing reflects this more than many of the Indian hits abroad. So elaborate weddings and festivals, family feuds and foibles, chiffon and chintz, ornate havelis and picture-post card locales are de rigueur in popular cinema these days. A synthetic sheen covers the warts of contemporary India and overseas Indians rejoice in a cinematic celebration of the wonder that is India. Underlying all the gloss is often a stereotypical storyline of a good joint family where virtue always triumphs. Whether cinema reinforces regressive social mores or merely reflects popular tastes is a moot point. Many film makers like Yash Chopra, Subhash Ghai, Karan Johar and

Sooraj Barjatya conscious of the large overseas market for Indian films have been replicating the celluloid dream world in film after film with huge success. There is also a resurgence of Indian films made in English. These are presently fringe films but the film makers like Dev Benegal, Rahul Bose and Nagesh Kukunoor are trying to reach International audiences.

In fact there is a conscious effort on the part of many Indian producers to market their films aggressively abroad. There is much more active participation of Indian films in International Film Festivals and markets. Even some Hollywood Studios are now taking interest in distributing Indian films. Rapid corporatization has also given an impetus to the internationalization of Indian cinema. Interestingly, another set of expatriate Indians like Mira Nair, Gurinder Chadha and Deepa Mehta have been creating their own place in the sun. Their films aimed at a global audience are often laced with the dilemmas of second-generation expats. There are at least a dozen Indian filmmakers who live abroad and yet have not cut their creative umbilical chord with India. On the other hand directors like Manoj Night Shyamlan and Shekhar Kapur have been making International films but with an Indian consciousness. A third breed of filmmakers are ABCDs (American Born Confused Desis), a rather disparaging acronym to describe a whole bunch of young talented filmmakers making films about second-generation expatriates. There is no denying that both at the popular level as well at the fringe our films are slowly finding a global audience. What we need is more aggressive marketing and positioning of these films to make a perceptible impact. Bhangra music is a good example of an Indian art form getting wider international acceptance. Almost like reggae or soul, Bhangra is a distinctive genre of music. It is not surprising that some of this is being re-imported into India. The immense popularity of our film stars abroad can be ascertained from the number of live shows being performed in many parts of the world. Thousands of eager fans pay upwards of US$100 to come to these song and dance extravaganzas. Similarly almost all popular Indian TV channels are now being shown as a part of some or the other cable bouquet almost around the world. A great fear often espoused in India is how technology and western influence is undermining Indian culture. All one can say to such xenophobes is that our culture and heritage is not so vulnerable that it can be trampled on easily. In this digital age where communication is no longer an ordeal , an over-arching pan-global Indian ness-"BHARTIYATA" is emerging. From food to fashion, films to literature there is a distinct Indian genre developing. This artistic expression may often be superficially jingoistic or even totemic in its Indianness but at least there is a conscious attempt that India as a culture can hold its own anywhere in the world. Our pluralistic, democratic and secular society is an ideal nursery for art. What we need is to guard against is attempts at subverting the values which we have stood for,for centuries.

The danger to this is not from any external sources but from the extremists from within our nation. In the years to come as our economy grows, our clout in the comity of nations will grow. The sheer size of our population makes India a major global influence. In fact new technology has the very strange capability of simultaneously strengthening ethnicity and diversity. For the first time expatriates from different countries and ethnic backgrounds are getting together on the Internet and sharing values of their homeland. For example there are more GREEKS outside Greece or Jews outside Israel. So in the years to come a virtual GREEK nation could be created without consonance with a land mass. Interestingly the Greek word 'ethnos' describes a group of common origin regardless of their geographical location. The twenty five million people of Indian origin by themselves constitute one of the largest expatriate communities in the world. They constitute only 2% of India's population but generate wealth which is about a third of our GDP. Many of them have achieved exemplary success in their chosen field in their country of adoption. Yet somewhere something connects them back to their lineage in India. Entertainment, culture and media are the bridges between them and us and the rest of the world. This way we will not be limiting ourselves to interacting amongst people of Indian origin alone but will have the entire world as an audience."

How is Filming important to our community- A Community Approach

Production of filmed entertainment creates and generates revenues for the local economy. **Money spent by a production company has a long life; it keeps going, and going, and going.** A .lm production company in your community is likely to patronize hardware stores, florists, dry cleaners, neighborhood restaurants, hotels, etc. These businesses all have employees who spend more money locally as well. Across the world, cities and small towns, states and geographic regions seek to attract producers to their areas in hope of attracting a feature .lm or television project. Just one good-sized production can translate into economic good times for your town or community.

Business Needs

The media and entertainment industry is striving to enhance revenue, improve
customer services, develop new distribution channels, create premium service levels, explore cross-selling opportunities, and exploit multiple content sources to build critical mass, namely, subscriber volume. The model of content distribution is designed to attract an audience. Portals such as AOL and Yahoo! produce little content of their own, but their value is derived by aggregating content and paying attention to customer feedback. Like broadcast and cable TV distribution, portals are designed to do the same thingattract customers with compelling content.
The industry is also motivated to:
Extract higher revenues from existing intellectual property by syndicating
content to new and multiple distribution channels, marketing affiliates and customers.
Build competitive customer/subscriber volume by providing content through multiple channels.

Dil Hai Hindustani

Not just a nation, India represents a distinct civilisation and universe of values. It defies definition, containing an incredible diversity of peoples, religions, belief systems, languages, social structures, topographies, weather conditions and knowledge systems. India is not very easy to know and understand. Yet Indians are very direct and open, they wear their hearts on their sleeves. You can recognise 'Indianness' by tuning into people's hearts rather than by their external trappings. Raj Kapoor expressed it very aptly in the famous song from the film Shree 420, challenging the "Be Indian, Buy Indian" variety of nationalism promoted by the government in the 1950's

Mera Joota hai Japani,
Yeh patloon Englishtani,
Sar par lal topi Russi
Phir bhi dil hai Hindustani

The message is clear - you may dress and dance like Madonna or Michael Jackson, you may wear jeans or mini-skirts, you may look like a vamp or a call girl - all those are just externals. What really matters is that your heart stays Indian. Any time our NRIs get deeply nostalgic or sentimental, they proclaim their deep attachment to their Indian roots not by showing you their investment portfolios or listing the number of times they visit India every year, but by proclaiming that if they could tear open their chests like Hanuman did for Ram and Sita, people would find the map of India inscribed within.

India indeed defies comprehension, especially for those who try to understand it through books, research studies and as an intellectual exercise. The 'Real India' can only be understood by connecting to the emotions of its people (as did Mahatma Gandhi), by understanding what touches their hearts, what makes them perform miraculous feats or

What makes them indulge in the most brutal violations of human rights; what makes Indians accept corruption as a way of life and what makes them rise against it in rage and indignation.

The 'Real India' can only be known by coming to understand what triggers off large-heartedness and tolerance for others, no matter how different their values and appearances, and what evokes vicious and mean responses. Under what circumstances do Indian men worship and revere women as Saraswatis, Lakshmis and Durgas incarnate, and what makes some of them turn so woman-hating that they kill their own daughters as unwanted burdens and torture their daughters-in-law to death?

Among Bollywood's most important cultural contributions are the emotional bridges it has built with India for people of diverse races, nationalities and languages and the manner in which it has made them feel deeply connected with the Indian worldview and way of life, albeit often in rather caricatured form. Much of what I am going to say is gathered from informal interviews and chats with people in diverse countries who go to see our films with devotion and enthusiasm. I would like to emphasise that these responses are based mostly on Bollywood hits which became a rage internationally as well. (This is not to overlook the fact that Bollywood also makes many crude, vulgar and violent melodramas. However, it is significant that most of these are commercial flops.)

When one travels to Europe, North America or Australia, India (for those few who are at all interested in its existence) is synonymous with poverty, disease, wife murders, dowry torture, burning of widows, killing of baby girls, communal riots, caste atrocities and pervasive human rights abuses. This is because the basic sources of information about India in these countries are their newspapers, TV channels and select intellectuals from India who act as native informants, "interpreting" to the white world our many social evils and problems.

Western media have made India's dowry murders and satis far more wondrous, exotic and famous than the Taj Mahal, the Konarak Temple, the Qutab Minar, the ghats of Varanasi and other such renowned symbols of India's heritage. Not surprisingly, before India produced the great information technology success stories, it evoked mainly derision and contempt among most Europeans, Americans or Australians.

Connecting across cultures

However, whenever one travels to any of the non-European countries - from the Middle East to the Far East, from the backwaters of Africa to the troubled shores of Russia - people know India mainly through Bollywood masalas. These are not primarily made for the benefit of the outside world. Bollywood films are about Indians sharing with other Indians their hopes, fears and romantic aspirations, their critique of their own society, their anger against what they perceive as unjust and unacceptable, the kind of transformations and social reforms they aspire to see take place, their notions of the good life and of fair-play. Bollywood has synthesised the emotional life of NRIs living in distant and diverse cultures and has made them feel "Indian" by making them feel connected to their cultural values. From Kashmir to Kanyakumari, from California to Kuala Lumpur, from Trinidad to Tokyo and from Dubai to Dublin, these films are the heartbeat of the Hindustani dil, both of the resident and the non-resident variety. Indians of all ages have overcome linguistic barriers and made Hindi film songs the vehicle for expressing their most heartfelt sentiments

Astonishing outreach

The Bombay film industry produces around 900 films a year - more popular entertainment than any other film centre in the world. And yet, unlike Hollywood, Bollywood did not start off with global aspirations. Hollywood spends a good deal of money and energy capturing world markets. Bollywood could never afford that kind of international publicity, yet its films

Have travelled far and wide on little more than word-of-mouth. Ours is the only film industry in the world which has offered American films any real competition. Hollywood's share in many other film markets is up at 60 to 90 per cent, but it has failed to make a dent on the enormous Indian market where it averages a mere 5 per cent. Internationally as well, the entire non-European world has found a much greater emotional appeal and fascination in Bollywood masalas than in American films. Their popularity is particularly astonishing, given their overwhelmingly Hindu/Indic worldview. TV networks in Indonesia, Singapore, Malaysia, Thailand, Egypt, Algeria, Morocco and many other Afro-Asian countries provide a staple diet of Indian cinema, often half-a-dozen films in a day. On the theatre circuits, audiences come to see the same films again and again and in many of these countries, one hears people of all ages singing the songs of Kuchh Kuchh Hota Hai or Kal Ho Na Ho, even if they do not know a word of Hindi. In many countries of Africa and the Middle East and in small towns, even villages, of Indonesia and Malaysia, I have seen children break into Hindi film songs to greet one as a visitor from India, to communicate a sense of bonding, despite language and other barriers. Amitabh Bachhan, Madhuri Dixit, Shah Rukh Khan, Kajol and Aamir Khan are far more popular than any Hollywood star has ever been or could ever hope to be in non-western countries. They are not just cult figures; among film aficionados they are also perceived as role models and moral exemplars on the strength of the oversimplified but warm-hearted values they propagate as characters in various runaway hits. Films like Dilwale Dulhaniya Le Jayenge, Hum Aapke Hain Kaun, Mission Kashmir, Amar Akbar Anthony and Zanjeer don't just tell entertaining stories. They are treated as moral fables which propagate a consistent set of what are seen as "quintessential" Indian values - despite all the dhishum dhishum scenes and the sexy latka jhatka dance numbers.

Punjabi Colours of Bollywood

The growth and development of Hindi cinema owes much to Punjabis. They are pervasive in every area of filmmaking, on and off screen. The Hindi film industry has been a multi-cultural potpourri **where the Punjabi fraternity has always enjoyed a majority. The Punjabi presence in Hindi cinema, both in the reel and real life, has been spectacular**.

The Kapoors are the leading Punjabi family of Bollywood. With grecian features, impressive personality and a booming voice, Prithviraj Kapoor played roles of kings and emperors, the most outstanding being the role of Akbar beleaguered by his son's romantic transgressions in **Mughal-e-Azam.Raj** Kapoor made the common man into an icon in his films like *Awara*, *Shri 420*, *Jagte Raho.* Shammi Kapoor was adored by women, envied by men and ridiculed by critics.On the screen, his wife Geeta Bali connected astoundingly with the audience. Shashi Kapoor considers theatre superior to cinema. He was greatly influenced in his tastes by his wife Jennifer and stands apart from the extrovert Kapoors. Rishi Kapoor opted for violin and survived the reign of violence unleashed by Amitabh Bachchan. Randhir Kapoor's high expectations and low confidence proved his Waterloo. The Kapoor girls Karishma and Kareena possess the Kapoors' exuberance and energy

.Baldev Raj Chopra makes socially relevant films on diverse subjects like widow remarriage (*Ek Hi Raasta*), rehabilitation of prostitutes (*Sadhana*), communal harmony (*Dharamputra*), Muslim matrimonial law (*Nikah*), politics of rape (*Insaaf Ka Tarajoo*), adultery (*Gumrah*) and filial ingratitude (*Baghbaan*).In his films, Yashraj Chopra never substitutes size and style with substance. His films, including his latest production *Veer-Zaara,* aim to improve the lot of society. He may shoot his films on glossy foreign locales, but his films exude Indian values and ethos.Chetan Anand's *Neecha Nagar* (1946) won an international award. Dev Anand's rat-a-tat dialogue delivery, his hair style and romantic charm have held the audience in a sway.

Vijay Anand emerged as the writer-editor-director par excellence with *Guide*.Two words, grandiloquence and Subhash Ghai, go together. His films, *Karz*, *Karma*, *Saudagar*, *Khalnayak*, *Ram Lakhan*, etc, mirror society. Gulzar has the courage of conviction to break away from the trodden path. In his films, such as *Mere Apne*, *Koshish*, *Parichay*, *Maachis*, *Hu Tu Tu*, etc, the complexities of life are never reduced to formulae. Shekhar Kapoor won worldwide acclaim with *Bandit Queen* and *Elizabeth*. Raj Khosla was aflame with ideas. He explored a range of stylescrime (*CID*, *Kala Pani*), musical (*Ek Mussafir Ek Haseena*), love triangle (*Main Tulsi Terey Aangan Ki*) and melodrama (*Do Raaste* and *Do Badan*).With the passage of time, Dilip Kumar has come to be known as an institution in the field of acting or the textbook of acting. From romantic tragedies to fun-filled comedies to bone-crunching action films, the fluidity in his performance has stayed intact over the years .Balraj Sahni won lasting fame as an optimistic peasant, Sambhu Mahato, in *Do Bigha Zameen*. His identification with the characters he played made his performances ring true in *Kabuli Wala* and *Garam Hawa*. Dharmendera as the ruffian Shaka in *Phool Aur Pathar* (1966) set the box office aflame with his raw physicality. Sunny and Bobby Deol have gone much ahead of other star sons. The granite-jawed, cleft-chinned, typically Punjabi hero Vinod Khanna made it big with *Amar, Akbar, Anthony*, *Qurbani*, etc.A victim of the Partition, Sunil Dutt not only won his wife Nargis in *Mother India*, his performance as Birju made him a star. His experimental film *Yadein* (1964)) had only one actor. Rajinder Kumar enjoyed huge success and won the appellation of 'Jubilee Kumar'. Rajesh (Jatin) Khanna set the screen ablaze by crinkling his eyes and shaking his head. As a cheerful chatterbox living under the shadow of death in *Anand*, he proved that tragedy is not when the hero cries, tragedy is when the audiences cry. When Pran Sikand dilated his lynx-like eyes, he projected rancorous malevolence in films till Manoj Kumar made him Malang Chacha in *Upkar*. With his strong physique and an ice-in-the-vein demeanour, Amrish Puri reduced his opponents to bleating in films.

An occasional positive role like in *Virasat* and *Dilwale Dulhaniya Le Jayengey*, etc, reaffirms Amrish Puri's range of acting. Prem Nath's performance as a callous philanderer in his brother-in-law Raj Kapoor's *Barsaat* made him a star but he made a career out of projecting vices. For all Madan Mohan's modernity, not once could you sense the *dehati* Punjabi at work in his compositions that were literally rooted in the Punjabi soil. The rhythm king O. P. Nayyar created songs that were intoxicating and transcended time.

Jalandhar-born Khayyam was Punjab music personified. Sardar Malik (Anu Malik's father) created a sensation as the music director of *Laila Majnu*. Roshan made the name of Punjab and Punjabi fraternity *roshan* with *Na to karvaan ki talash hai*a qawwali that is considered as the paragon effort in Hindi cinema.Kundan Lal Saigal got the fawning adoration of the public for the sonorous sweep of his voice. Mohammed Rafi cast a spell with his vocal virtuosity singing bhajans, qawwalis, ghazals, geets, nazms or bhangra numbers. Zohrabai Ambalawali raised a musical storm with her crisp voice singing numbers like *Akhiyan milake jiya bharmake chaley nahin jana* in *Rattan*. Noorjehan spun eternal classics with her brass Punjabi voice singing *Bulbulo mat ro yahan*. Mahendra Kapoor's *Sohni Mahiwal* number *Chaand chhupa aur tarey doobey raat ghazab ki aayi* catapulted him to dizzy heights in the world of music.

He has come to be identified with patriotic numbers such as *Mere desh ki dharti sona ugley ugley heeray moti*, *Mera rang de basanti chola,* etc. After Talat Mahmood, Jagjit Singh has revived ghazal-singing in Bollywood. Surender Kaur's *Badnam na ho jaye mohabbat ka fasana* and *Ujda umedon ka chaman* from *Shaheed* are a rage even now. Unforgettable is *Khamosh zindagi ko ek afsana mil gaya,* sung soulfully by Jagjit Kaur in *Dil-e-Nadaan. Lo apna jahan duniya walo hum is duniya ko chhod chaley,* sung by popular Punjab folk singer Asa Singh Mastana in film *Dooj ka Chaand* brings a lump to the throat.Sahir Ludhianvi delineated the pain and agony of the Partition in one of his poems, saying *Ay rehber-e-mulk-o-kaum batta/Yeh kis ka lahoo yeh kaun mara*. He used his pen to highlight social causes. He lambasted society for exploitation of women saying *Aurat ne janam diya mardon ko, mardon ney use bazar diya*. Rajender Krishan Duggal became a household name with *Suno suno aye duniya walo Bapu ki ye amar kahani*. When Gulshan Kumar Mehta appeared before a producer, he remarked: What will this *bawra* write? Gulshan Bawra went on to write mind-boggling numbers like *Yaari hai iman mera yaar meri zindagi* and *Chandi ki diwar na todi, pyar bhara dil tod diya.* Prem Dhawan's poetry, whether it is *Sub kuchh luta ke hosh mein aaye to kya kiya* or *Mera rang de basanti chola* had a straight-from-the-heart quality, easily understood and yet so meaning. Among Bombay's Top Film people Punjabis shine like stars.

Major known Punjabi Producers & Directors like Ramanand Sagar, BR Chopra, Yash Chopra, Gulzar, Late IS Johar, Late Prithvi Raj & Raj Kapoor, Shashi & Shammi Kapoor Brothers and Sons, DevAnand, ChetanAnand, Lekh Raj Tandon, Late K.A. Abbas and many more. Famous Punjabi Actors are countless and virtually household names; from Late KL Sehgal, Balraj Sahni, Prithvi Raj, Raj Kapoor, Madan Puri to still going on and evergreen DevAnand, Dharmendra, Jeetender (Ravi Kapoor),Rajender Kumar, Shashi Kapoor, Shammi Kapoor, Pran, Sunil Datt, Rajesh Khanna, Om Puri, Amreesh Puri, to other top acting names like Raj Babbar, Vinod Khanna, son Akshaya Khanna, Dharmendra's sons, many sons and daughters of Kapoor Family, Shakti kapoor, Ranjit [the 'notorious' ex villain famous as Ranjeet is really Gopal Bedi from Patiala, who is also extremely talented director besides being a great artist], Kabir Bedi, and many more Punjabiactors.Famous Actor Dilip Kumar hails from Peshawar. 80s Superstar Amitabh Bacchan's Mummy Mrs. Teji Bacchan is from a known Punjabi Family. Among 90s actors there are many Punjabi faces including Juhi Chawla, Raveena Tandon, Poonam Dhillon, dozens more. Who does not know the names of some of India's topmost singers and legends like Late Mohammed Rafi, Mahender Kapoor and lyrics writers like Sahir Ludhianwi, Anand Bakshi and many music directors like Ravi and many more.There are other tens of thousands of Punjabis who work in technical depts. TV productions and other aspects of this industry.

India's principal and top selling Hindi Movies industry have been dominated by Punjabis in such a way that without them the industry will be absolutely colorlessBollywood in Amritsar. It may seem a case of mix up. But those familiar with the city know about its contribution to the tinsel town. In fact, the city has emerged as the “mini Bollywood”, where shooting of many Hindi and Punjabi films takes place. What's more, the city has the distinction of being the birthplace of many film stars, who have left an indelible mark in the film industry.

India leads the world in the production of films, with more than 800 Indian films rolling out from Mumbai and other metropolitan cities annually. However, hardly a film is produced in Mumbai without major contribution of Punjabis. city Hindi films boast of a billion-plus audience on the Indian subcontinent alone. Jaswant Singh Jass, a journalist who himself starred in Hindi and Punjabi movies, said that the local Open Air Theatre was once the hub of theatre activities where known film personalities like Prithvi Raj Kapoor and Balraj Sahni used to stage plays. Balraj Sahni loved Amritsar so much that he constructed his house at Pareet Nagar, a few km from thethis, Amritsarites have achieved an envious place in the music world of Mumbai. Right from the most famous play back singer Mohammad Rafi, who was born at Kotla Sultansingh, near Amritsar, to Narinder Chanchal, Mohinder Kapur, Sukhwinder, famous Urdu Ghazal singer Bhupinder and Jaspal Singh all belong to Amritsar. Interestingly, students from various local colleges have performed bhangra and gidha in many Hindi and Punjabi movies. In addition to stars and singers, many music composers, too, are from Amritsar.

The theatrical groups of Gursharn Singh (who himself acted in many feature films) Amritsar Natak Kala Kendra, Shiromani Natakar Kewal Dhaliwal's Manch Rangmanch, Harjit Gill and Jagdish Sachdeva's groups, also produced many actors who left their mark in the film industry. Gurinder Makana (34), Jagjit Kaur and Jaswant Singh Jass are the most famous actors of the new generation. After he played the role of a villain in Hindi feature film “Hawain”, Makan caught the attention of high-profile producers from Bollywood. Makan's new film “Ab Tumare Hawale Watan Sathio”, which was released this week, has earned him lot of fame. His acting in Hindi films, including Train to Pakistan (Pamela Rookes), Jungle (Ram Gopal Sharma), Munna Bai MBBS, Anarth, Mujhe Kujh Karna Hai, Luv Ke Liye Kujh Bhi Karega, Anarth was appreciated by film critics and analysts. Amritsar also created a history in the film world when shooting of the Punjabi film “Addi Tappa” was completed with all-women cast . All artistes of the to-be-released film are students of the local BBK DAV College. This college's senior lecturer, Ms Jagjit Kaur, has acted in many Punjabi films. The local artiste, Harbhajan Jabbal (63), was the first “Gursikh actor” who entered the film industry in sixties with the role of a policeman in “Mahi Munda”. Gursharn Singh, Inderjit Saharan, Jaswant Singh Jass and then Arvinder Bhatti played impressive roles in feature films with unshorn hair. These four artistes from the city broke the myth that only clean-shaven artistes were acceptable in the Bollywood

Brief Profile of Northern States: Focus Punjab

PUNJAB : Punjab is known as the land of **exciting opportunities** with landscape which pulsates with prosperity, valour and romance. The glorious land is also a land of wonderful and rich culture, myriad images of swaying emerald green fields and hearty people whose robust ways of camaraderie and bonhomie are very much apart of their culture. It has been possible for Punjab to top in so many fields of life because of an ever-vibrant and ever-renewing Punjbi spirit. A built-in vitality of the essence of **Punajbiat** which is not just Bhangra or Gidda or, for that matter its traditional cuisine. Punjabiat is a cosmopolitan outlook exuding charity for all, and malice towards none, an outlook Punjabis developed over the ages by rubbing shoulders with variegated cultures and communities, an outlook that is eternally embedded in their supreme scripture Adi Granth which contains the wisdom of a cross section of seers and saints. Through the centuries, Punjab had been a sword arm of India. **Punjab offers both cultural and heritage attractions with excellent infrastructure facilities.**

UTTARANCHAL : Carved out of the state of Uttar Pradesh, Uttaranchal, the 27th Sttae of India, mainly comprises the hilly regions of Uttar Pradesh. The state borders Himachal Pradesh in the north-west and Uttar Pradesh in the South, and has international borders with Nepal and China. A **picturesque state**, Uttarancahal has magnificent glaciers, majestic snow-clad mountains, panoramic views of the Himalayas, dense forests and the valley of flowers, as well as some of Hinduism's most sacred pilgrim sites. The State's 13 Districts can be grouped into three distinct geographical regions, the High mountain region, the Mid-mountain region and the Terai region.

The famous peaks of Uttaranchal are Nanda Devi, Kedarnath, Trishul, Bandarpunch and Mt Kamet. The major glaciers include Gangotri, Pindari, Milam and Khatling. The Ganga, The Yamuna, Ramganga and Sharda are principal rivers of this region.

The State government is actively projecting Uttaranchal as an all tourism destination for nature lovers, adventure tourists and health enthusiasts. . **New destinations are being developed with a focus on a planned and integrated approach.**

HARYANA : Haryana has a grand history, that dates back to the Vedic age. The state was home to the legendary Bharata dynasty, which gave the name 'Bharat ' to India. Kurukshetra, the scene of the great epic battle between the Kauravas and the Pandavas, is situated in this state. Here Lord Krishna gave his immortal message of karma to Arjun.

The state is bound by Uttar Pradesh and Delhi in the east, Punjab in the west, Himachal Pradesh in the north, and Rajasthan in the south.Haryana could well be called a perfect vacation land: A state that blazed a trail of holiday traditions, with its highway tourism policy. The bird named complexes of Haryana Tourism dot the five national highways passing through the state. Tourism complexes, 43 in number, are dotted with beautiful lakes, picturesque landscaping, golf courses, bath complexes, tennis and billiards facilities. Here Adventure sport means canoeing & kayaking, trekking & rock climbing, camping and river rafting. These complexes have been set up along the national/ state highways, and at districts, towns and places around Delhi.. The immensely popular Surajkund Crafts Mela is held every year, in the month of February, to promote Indian arts and handicrafts. The 'Mango Festival' and the 'Kurukshetra Festival' are the other much - awaited events. Yadavindra Gardens at Pinjor, one of the most sought after holiday resorts , are perhaps the only Mughal gardens, that have a symmetric design in northern India.

HIMACHAL PRADESH : With several spurs and sub-systems, the Himalayas are a strong spine for the state of Himachal Pradesh in northern India. They have also given the area and enormous geographical spectrum and one that is hard to parallel anywhere in the world. Low rolling hills, a couple of hundred meters above sea level, steadily clime to touch peaks that are several thousands meters high and determinedly maintain their uniforms of sharp creased rocks and caps of startling snow. Past these heights, are the fabulous almost lunar-like- tracts of the arid Trans- Himalayas. In tendam with this diversity, comes a vast range of flora and fauna. The outer fringe of Himachal Pradesh is formed by the Siwalik hills which are charecterised by shallow valleys and low dense scrub. With waters of pure snowmelt enriched by rain, thousands of streams race through deep boulders-strewn gorges and valleys of breathtaking beauty. Mcleodganj is the seat of His Holiness Dalai Lama, while Shimla, Dalhousie and Kasauli hold lingering echoes of the Raj. The bleak, high altitude regions of Lahaul, Spiti and Kinnaur bear a striking resemblance to Ladakh in Jammu and Kashmir. The predominant influence here is Tibetan Buddhism and there are some spectacular *gompas* (monasteries) here. HImachal's people are warm and welcoming. The pace of life is refreshingly unhurried. Many of Himachal's customs and social norms are rooted in an age-old tradition. The arts and rafts are richly varied and range from court painting to rural handicrafts. There are fairs and festivals by the hundred and these encompass religion, trade, seasons and sports. Quite naturally, hospitality in Himachal has drawn on a long and rich tradition and the quality of hotels, services and cuisine are comparable to any in the world. **Himachal has a well-developed, tourist-oriented economy, and can be considered the backbone of the state.**

JAMMU AND KASHMIR:The lofty snow clad mountain ranges, sylvan landscape and remarkably good-looking people made this state a virtual paradise. Of Kashmir, it was said, "Gar bar-ru-e-zamin ast; hamin ast, hamin ast, hamin asto" or " If there be a paradise on earth, it is here, it is here, it is here."

This state, at the extreme north west of the country, is bounded on the west and north by Pakistan, on the northeast by China and on the southeast and south by the Indian states of

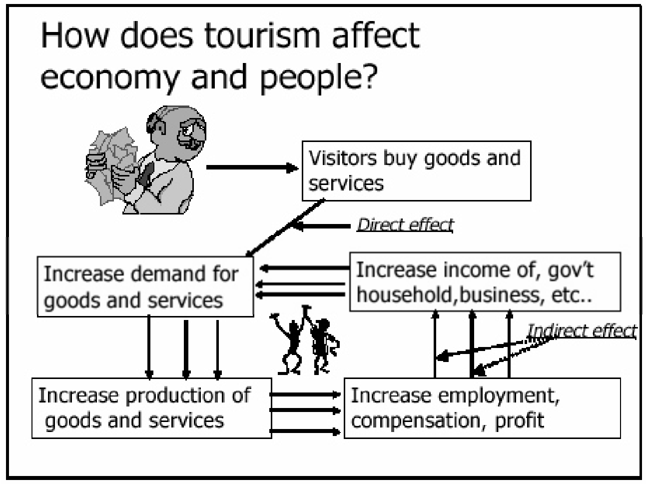
Himachal Pradesh and Punjab. More than 90 percent of the state is mountainous. From southwest to northeast the region contains the fertile Jammu and Punch plains, the coniferous Himalayan foothills from 2,000 to 7,000 feet, the heavily glaciated Pir Panjal range at 12,500 feet, the valley of Kashmir at 5,300 feet, the Himalayan ranges above 20,000 feet, the upper Indus River valley at 11,000 feet, the stark, barren plateau of Ladakh and the remote Karokaram range. The Indus, Jhelum, Chenab and Tawi are the principal rivers while the Dal and Wular are the major lakes. The climate varies from alpine in the northeast to subtropical in the southwest.

The topography of Jammu and Kashmir offers a wide variety of climate and vegetation making the state a wildlife enthusiast's delight. The eco-system here is well balanced with animals and people coexisting peacefully and one third of the world's true mountain animals belonging to these mountains.

The magnificent landscape has been a perennial source of attraction for the film makers. Srinagar ,Dal lake, Shalimar Bagh, Sonmarg, Gulmarg, and Pahalgam, besides many other scenic spots have been favourite locales for the Hindi films.

CHANDIGARH : Chandigarh, situated at the foothills of the Shivalik hills, is designed by the French architect Le Corbusier. A Union Territory, but also the capital of Punjab and Haryana. Chandigarh owes its name to the goddess Chandi Devi, whose temple is situated in the foothills near the city.

Chandigarh , the first 'planned' city of India, is a unique city with Nehruvian idealism at its core in stark contrast to the industrial development on the outskirts. This is city apparently always oin the move , with a large flow of tourists heading further north; hotels, restaurants and other in-transit facilities have mushroomed as a result. The pollution-free air, the short distances, the wide tree-lined bouvelvards and avenues, the lake and the plush interiors belying the dull exteriors contribute to making Chnadigarh a charming place for residents and visitors. In Capitol Complex, Chandigarh has given a powerful conception of civic life, while a giant hand conveys the message : Open to Give: Open to Receive. Sukhna Lake is part of Chandigarh's life. Internationally famous Rock Garden, consists of art objects , fashioned from industrial and urban waste, the Rose garden has some 1600 varieties of roses, while walks in Kansal and Nepli forest reserves are rewarding. The Government Museum possesses the largest collection of world famous Gandhara (Buddhist) Sculpture Besides architecture and other Urban components, Chandigarh is famous all over the world due to its well planned landscaping. The city boasts of Leisure Valley and well maintained gardens. Le Corbusier retained the eroded valley of a seasonal rivulet on the original site of the city and sculpted into a linear park, running through the whole of Chandigarh, with a series of special “ theme” gardens. Well connected with rail, road and air, Chandigarh has a number of well appointed guest establishments and other facilities. The Department of Tourism has set up a Bollywood Felicitation Centre to enable prospective film and TV serial makers to get all their permissions processed at one source.



<u>Strengths of Northern Region</u>

- Rich Historical and Archaeological Heritage
  - Diverse Cultures, Customs & Traditions
  - Dotted with large number of pilgrimage/religious spots for varied communities
  - Large number of Palaces, Forts, Heritage Buildings
  - Unique Lifestyles
  - Magnificent Landscape, flora & fauna,&
  - Himalayas & Shivalik Ranges - ideal for adventure activities
  - Large number of Holiday Resorts
  - Varied Cuisine
  - Latent talent potential
  - Adequate inter & intra connectivity
  - Well developed infrastructure

Punjab as shooting Destination

- Shooting in Punjab can be one of the most rewarding experiences for any film crew. Punjab has some of the best and the most exotic locations and the range is mind boggling. Exquisite palaces, monuments, Historical Gurudwaras River waters, banks of holy rivers, fast paced cities, and villages in Punjab still holding their cultural values and the exotic Punjabi food and bhangra, moonscapes are just some of the things that make Punjab an irresistible potboiler of magical locations.

- Punjab is home of culture and offers the wildest possibilities and services at a minimum of costs.

- It truly gives you a bang for your bucks and every dollar is sure to take you a much longer mile, when shooting here. It is a truly feasible location for a producer on a budget, but in no mood to compromise her or his creative potential. Punjab also offers the best professional talent and services at a fraction of the cost when compared with other states.

- The other advantage while shooting in Punjab and using local crew is that almost everyone speaks English, and most of them are eager to go the extra mile to get the job done.. Apart from technical crews, one can also get great make-up artists, stylists and set designers at much lower rates.

- Punjab also has a great pool of acting talent to choose from and with enough actors have previously worked with international productions. Untested or less experienced talent, the options are limitless. The casting agent or line producer can arrange extras. They may recommend street casting in certain places, and it's a good and much cheaper option to consider Punjabi people are among the most diverse on the planet.

Proposed Media-Entertainment and Film Industry Hub in Punjab

It is going to be one-stop destination for the Entertainment Industry with Production and post-production facilities, Dummy sets and studios and will be promoted as a Tourist Destination as well. There will be an International Institute for Research & Training with Employment & Entrepreneurship. The proposed Hub will to be developed in three phases
1st Phase: 50 acre
2nd Phase: 100 acre
3rd Phase: 100 acre
Linking Entertainment & Tourism Industry. The proposed film Industry Hub encompass

- **Shooting Locations**
- **Pre & Post Production Facilities**
- **Communication Network**
- **Video Conferencing**
- **Convention Centre**
- **Multiplex**
- **Theme Park**
- **Costumes & Pros**
- **Amphitheater**
- **Open Air & Mobile theatre**
- **Film/TV Facilitation Desk**
- **Media & Entertainment Institute**
- **Other Amenities:** Hotel/Resort/Restaurant, travel desk, Convention Centre etc

<u>Job segments in Film Industry Hub</u>

- Development - the writing, packaging and financing of film ideas and scripts.
- Production - the process of setting up and shooting every scene in a film
- Post Production - where all these shots are assembled, treated and mixed into a finished product.
- Distribution - the process of selling this product to audiences, via the cinemas, retailers and rental firms.
- Exhibition & Launch- the cinemas which screen the film for the general public

Employment opportunities In Film Industry

- **Concept & Research**
- **Script & Screenplay**
- **Cinematography**
- **Locations**
- **Art Department**
- **Set designing & Construction**
- **Casting**
- **Hair and Make-Up**
- **Costume**
- **Camera**
- **Sound & Lighting**
- **Production Unit**
- **Direction**

Post Production

- **Distribution**
- **Sales, Marketing & overseas promotion**
- **Exhibition & Launch**
- **Live Entertainment & event performance**
- **Press & Media management**
- **Props**
- **Travel facilitation & Transportation**
- **Accommodation (Boarding & Lodging)**
- **Accounts**
- **Catering**
- **Health and Safety**

The project to be undertaken with focus on Employment generation & Entrepreneurship

Why Filming important to our Community

- Production of filmed entertainment creates and generates direct & indirect employment with revenues for the local economy. Money spent by a production company has a long life; it keeps going, and going, and going.

- A film production company in your community is likely to patronize accommodation & transportation, tourist locations, fashion stores, temporary structures for shoot, florists, Hotels & restarts etc. These businesses will add to economic activity

- Across the world, cities and small towns, states and geographic regions seek to attract producers to their areas in hope of attracting a feature film or television project. Just one good-sized production can translate into economic good times for your town or community

We aim to position Punjab as a globally competitive Film Industry Hub, thereby boosting tourism, job creation and the development of core skills. Our primary area of activity is to market and promote the Punjab as a world class production destination. Integral to that activity, the Film Industry Hub provides on-going assistance ultimately a “One-Stop-Shop” to international and domestic production companies considering the Punjab state for their .film, television, stills and new media productions. It is clear however, that Punjab cannot claim to be a truly film friendly state unless it makes strenuous efforts to become more inclusive in the local communities. This document aims to begin tackling that issue. The proposed film Industry Hub aims to create a film friendly environment that promotes and encourages production of filmed entertainment in all of our communities in Punjab state. It outlines the processes involved in a production, and takes a look at how communities can attract, retain and co-exist with Filming. It is a guide for permitting authorities, location owners, chambers of commerce, convention and visitors' bureaus, neighborhood associations and residents and rate-payers groups to use a tool for community promotion and economic development.

RECOMMENDATIONS

- To accord Media- Entertainment as an industry status.
- To bring Media- Entertainment industry under the Industrial Facilitation Act of the Punjab Government
- To consider Media Entertainment Industry as Knowledge Industry
- To make M&E Industry mega projects of Rs 25 crore with employment for 500 persons eligible for State Govt's incentives/ concessions/ facilities
- PUDA to be the Nodal Department (Anchoring Department) to provide land at market price for projects in the Media Entertainment Zone.
- The proposed Zone could be developed under PPP (Public- Private Partnership). This Zone could be designated as Special Economic Zone like the Mahashtra government is planning to do by promoting 1000 hectare Entertainment Zone near Mumbai for the Essel Group. The Essel Group proposes to invest Rs 500 crore in developing this Zone.

- Following incentives may be considered :

1. Reduction in electricity duty
2. Waiving of external development charges
3. Change of land-useto be done free of cost or at nominal cost
4. Stamp duties concessions

- To organizing World Punjabi Film Festival & Award on 26th & 27th September, 2006 in Punjab , preferably at Mohali , coinciding with the World Tourism Day
- (27th Sept.) celebrations and to make this Festival as an Annual Event
- To establish Punjab Media- Entertainment & Film Promotion Board, which will be responsible for promoting development of film industry in Punjab through creation of infrastructure, training facilities and undertaking promotional activities through Film Festivals and other activities.
- State Government to provide grant of Rs 10 crore as corpus fund for the Punjab Media- Entertainment & Film Promotion Board.
- The Board will undertake framing of regulatory, fiscal, administrative policies for the promotion of the film industry in Punjab with a view to making Punjab a hub of film production.
- State Tourism Department to set aside certain budget for attracting TV & Film producers to the state.
- To set up Cinematic Tourism & Cultural Centre at Mumbai to provide information to the prospective TV & Film producers and to liaise with them for shooting films in Punjab.
- State Govt to make it mandatory for the Cinema Halls situated in the state to show Punjabi films at least for two weeks in a year.
- Entertainment Tax Holiday for a year for those films which are shot at least 50 % in the state.

International Punjabi Chamber for Service Industry

IPCSI represents a cross section of NRI professionals, experts, entrepreneurs, visionaries, businessmen, scholars, educationists, writers, authors, besides trade commercial, educational and cultural organizations in countries where they are settled and the domestic corporate to serve as conduit between them for promoting the Service Industry and the overall cross- cultural relations.

As the services have grown in importance over the past few years all over the world and in most economies employment has been shifting from agriculture industry to the services providing sectors, IPCSI has made its main aim to promote the service sector in the northern region particularly in Punjab which has immense potential for the same on account of well developed infrastructure, skilled human resource and the conducive environment which now prevails. To achieve this aim, IPCSI had organized International Convention of NRIs and Indian Corporate with focus on "Business Opportunities in the Service Industry" on 14-15th Jan 2006 (Parvasi Punjabi Divas) and international summit on infrastructure, Housing & Real Estate Development on 4th March 2006, in collaboration with the Department of NRI Affairs, Govt of Punjab .

Objectives

- To link Non-Resident Indians, particularly of Punjabi origin with their motherland culturally & emotionally.
- To harness the rich financial, scientific, technical and entrepreneurial resources of the NRIs for developing Service Industry related projects and infrastructure in Northern India for employment generation, having a multiplier effect on the economy.
- To carry out research on NRI contribution for India's economic and social development & to their adopted countries.
- To help the Indian Corporate set up Service Industry related projects overseas and develop collaborations/partnerships/alliances with their counterparts in other countries.
- To assist/encourage joint research in Service Industry segments by scholars, academicians, HR practitioners and others in India and overseas.
- To provide consultancy and also prepare Project/Feasibility Reports for setting up Service Industry related ventures in Northern India.
- To organise annual Conventions/Conferences /Conclaves of Non-Resident Indians and Domestic Corporate for promoting mutual business & social interests .
- To promote NRI visits to Northern India and help offer customized packages especially for religious and pilgrimage sites.
- To honour NRIs for their outstanding contribution to the Service Industry.
- To compile & maintain a DataBank of NRIs, especially of Punjabi origin for possible use by domestic Corporate, educationists and others for possible collaborations/partnerships with their counterparts abroad.
- To facilitate NRIs during their visits to their motherland.
- To organize student exchange programmes between children of NRIs and Indian students forging stronger emotional and cultural ties.

IPCSI Vision & Strategy for Punjab in 2006
Investment-Infrastructure Development-Employment

Infrastructure Development for Service Industry in Punjab with focus on :

- Job Creation
- Preparing manpower for the jobs created
- Self employment
- Investment/Business by NRIs/Others
- PPP with NRIs for Village Development, Service Industry overall development

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