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**Challenges And Future Perspectives of Technical Vocational  
Education And Training (TVET) System in Entrepreneurship  
Development of India with special Reference to India And  
Entertainment Industry**

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**Abstract**

*The purpose of this paper is to build skilled and employable workforce in the field of Media and entertainment sector and to explore the synergies between entrepreneurship and innovation and investigates their roles in the field of skill development systems in India with special reference to Media and entertainment sector. The Media & Entertainment Industry is a growing at an exponential rate but at the same time it is grappling with many Skill Development Challenges, including a huge supply-demand gap both in terms of quality and quantity of workforce, which the current vocational education and training infrastructure is, not, geared enough to meet. Therefore MESC aims to turn this “lost opportunity” into a “golden opportunity”. The Indian Media and Entertainment industry, with a size of Rs. 584 billion and a Compounded Annual Growth Rate (CAGR) of 15% between 2005 and 2008, is one of the fastest growing sectors in the country. The key drivers of the growth of Indian Media and Entertainment industry have been the rising spend on entertainment by the growing Indian middle class, regulatory initiatives, increased corporate investments and integration of existing players across the value chain. In addition to the expected increase in spend of the Indian middle class towards entertainment, the rising global interest in Indian content is also expected to fuel growth in this industry. Also, technological advances and liberal government policies favoring foreign direct investment (FDI) continue to aid expansion. The Media and Entertainment industry comprises of the following segments: Television, Print, Films, Radio, Music, Animation, Gaming, Advertising – Internet and Outdoor. In addition to this factors affecting the development and integration of entrepreneurship and innovations. The study explored and highlighted the synergies between entrepreneurship and innovation in skill development through a review of principal literature in this field of Skill development system. Entrepreneurship and innovation should be regarded as ongoing, practices in Skill Development system. Entrepreneurship and innovation are emerging disciplines for proactively responding to*

*changes in the Skill development systems. The skill level and educational attainment of the workforce determines the productivity of any nation. The largest share of new jobs in India is likely to come from the unorganized sector that employs up to 93 per cent of the national workforce, but most of the Skill training caters to the needs of the organized sector. Some Skills Development efforts require a few minutes; others take hundreds of hours. Even those with great aptitude blessed with a large dose of talent must practice endlessly to get really good Skill. A majority of Indian workforce does not possess marketable skills which is an impediment in getting decent employment and improving their economic condition. While India has large young population, only 5% of the Indian labour force in the age group of 20-24 years has obtained vocational skills through formal means .whereas the percentage in industrialized countries varies between 60% and 96%. About 63% of the school students drop out at different stages before reaching Class-X. Only about 2.5 million vocational training seats are available in the country whereas about 12.8 million persons enter the labour market every year. Even out of these training places, very few are available for early school dropouts. This signifies that a large number of school drop outs do not have access to skill development for improving their employability. The educational entry requirements and long duration of courses of the formal training system are some of the impediments for a person of low educational attainment to acquire skills for his livelihood .On the other hand, Skill Development on how to make a positive first impression takes less than 30 minutes since the theory is not that complicated. However, one must still practice at many times to get good at it. **Media & Entertainment Skills Council (MESC)** has been setup under the National Skills Development Mission, Government of India under the aegis of National Skills Development Corporation (NSDC) and promoted by FICCI. The Media & Entertainment Industry is projected to grow to INR 1457 billion by 2016. Therefore it becomes imperative to have skilled workforce catering to the growing needs of the industry across various subsectors in terms of quality and quantity. MESC would ensure generation of adequately skilled workforce which is industry ready and employable. The paper focus on promotion of skill development for self/wage employment in the field of Media and entertainment industry by the use of new technology and skill and to assist entrepreneurship in obtaining necessary inputs required for setting of self-employment venture in Media and entertainment sector.*

**Key Words: Media & Entertainment Skills Council (MESC), National Skills Development Corporation (NSDC) Innovations, unorganized sector, Skills Development.**

## **Introduction**

Skill Development and entrepreneurship efforts across the country have been highly fragmented so far. As opposed to developed countries, where the percentage of skilled workforce is between 60% and 90% of the total workforce, India records a low 5% of workforce (20-24 years) with formal vocational skills. There is a need for speedy reorganization of the ecosystem of skill development and entrepreneurship promotion in the country to suit the needs of the industry and enable decent quality of life to its population.

## **Concept of Skill Development**

One of the expected outcomes of education is skill Development. Skill is often understood in the limited meaning of technical skill like Mechanical skill, communication and soft skill. What are actually ignored are intellectual skill, personality development skill and other

type of skills needed for group working. Skill acquisition and developing expertise in putting the skill to use in specific program has to be given greater weight age through practice and exposure.

Today, more than 20 Ministries/Departments run 70 plus schemes for skill development in the country. However, there are gaps in the capacity and quality of training infrastructure as well as outputs, insufficient focus on workforce aspirations, lack of certification and common standards and a pointed lack of focus on the unorganized sector.

Based on the mandate under the Allocation of Business Rules and taking into account the requirements of multiple stakeholders, the following four outcomes to be achieved have been identified:

- Ensure youth emerging from formal education are employable with job or self-employment oriented skills
- Ensure people stuck in low income jobs and in the unorganized segments can access growth opportunities through up-skilling / re-skilling and Recognition of Prior Learning (RPL)
- Improve supply and quality of the workforce for industry, contributing to increased productivity
- Make skilling inspirational for youth

To achieve these outcomes, a framework built on five central pillars representing the core requirements for skilling has been conceived by the Ministry – to create a pipeline of skilled people, correct supply for demand, Certify global/common standards, and Connect supply with demand. These five pillars will be supported by cross-cutting enabling measures.

## **VISION AND THRUST AREAS OF THE SKILL DEVELOPMENT POLICY 2015**

The Vision of the National Policy for skill Development and Entrepreneurship 2015 is” to create an ecosystem of empowerment by skilling on a large scale at speed with high standards and to promote a culture of innovation based entrepreneurship which can generate wealth and employment so as to ensure sustainable livelihoods for all citizens in the country. Common norms and metrics on inputs, outcome measures and funding for skill development schemes across Central Ministries/Departments are being developed by the Ministry. Skill gap studies for all high priority sectors including key manufacturing sectors under Make in India have also been initiated. Support to States has been extended via the State Skill Development Mission through funding and technical support to ramp up capacity and improve standards of skilling at the State level. A number of other initiatives such as collaborating with other nations to adopt international best practices, revamping the vocational education framework in the country, partnering with corporate, leveraging public infrastructure for skilling, creating a pipeline of quality trainers and leveraging technology for skill training, are being pursued by the Ministry.

## **Initiatives of Government of India**

The Government of India has supported Media and Entertainment industry’s growth by taking various initiatives such as digitizing the cable distribution sector to attract greater institutional funding, increasing FDI limit from 74 per cent to 100 per cent in cable and DTH satellite platforms, and granting industry status to the film industry for easy access to

institutional finance. Recently, the Indian and Canadian governments have signed an audio-visual co-production deal that would help producers from both countries to explore their technical, creative, artistic, financial and marketing resources for co-productions and, subsequently, lead to exchange of culture and art amongst them. Furthermore, the Centre has given the go-ahead for licenses to 45 new news and entertainment channels in India. Among those who have secured the licenses include established names such as Star, Sony, Viacom and Zee. Presently, there are 350 broadcasters which cater to 780 channels. “We want more competition and we wanted to open it up for the public. So far, we have approved the licenses of 45 new channels. It’s a mix of both news and non-news channels,” said Mr. Bimal Julka, Secretary, Ministry of I&B, Government of India. The radio industry is expected to witness growth opportunities after the Phase III auction of 839 radio channels in 294 cities, expected to complete later this year. The Phase III auction, which started in July 2015, is expected to bring in an estimated US\$ 390 million in revenue to the government. With over 800 frequencies up for auction in third- and fourth-tier towns, radio is likely to match the reach of print.

The Media and Entertainment industry comprises of the following segments: Television, Print, Films, Radio, Music, Animation, Gaming, Advertising – Internet and Outdoor .In addition to this factors affecting the development and integration of entrepreneurship and innovations.

#### **The main objectives of the study are:**

- To assess the Revenue, demand and supply for workforce across different segments/ sub-sectors of the Media & Entertainment (M&E) industry
- To understand the key drivers of growth for each segment, and the corresponding change in demand for workforce over time

#### **Challenges and Issues of Media & entertainment sector**

- Education and training has not become a norm in the industry. In certain cases, training is not valued and fresh candidates are hired and trained on the job. In other cases, companies/ employers continue to hire entry-level professionals from graduate schools/ colleges – and do not generally visit specialized institutes for placements
- Further, even after completing a course in media, job placements are not guaranteed. As a result, students are not incentivized to pursue a course
- Students do not have much clarity on the spectrum of jobs available and their career paths
- Salaries across the media industry are low – as compared with other industries. As such, the quality of candidates is also not up to the mark
- It is a challenge to identify and attract students that are naturally talented for creative courses such as film-making, script-writing, production, acting, animation, journalism etc.
- A number of smaller institutes that are not well-equipped to provide students with industry-relevant skills have mushroomed in the country. As a result, the overall perception of education imparted by media schools gets diluted
- These qualitative skill gaps have been highlighted by all the key employers in the Industry. Individual chapters of the report aim to draw attention to these gaps at a sub-sector and occupational level, and correspondingly the need for better training and skill development programmes for various roles.

## REVENUE FROM MEDIA & ENTERTAINMENT INDUSTRY

The Indian Media and Entertainment Industry is estimated to be more than INR 905 billion in revenue, and is expected to grow at a CAGR of 16% to reach INR 1,640 billion by 2017<sup>1</sup>.

Industry (INR Billion)	Size					CAGR
	2013	2014	2015	2016	2017	
<b>Film</b>	122.4	138.3	153.6	171.7	193.3	12%
<b>Television</b>	419.9	501.4	607.4	725.0	847.6	19%
<b>Print</b>	241.1	261.4	285.6	311.2	340.2	9%
<b>Radio</b>	14.0	15.4	18.7	22.7	27.4	18%
<b>Animation</b>	40.5	46.8	54.3	63.1	73.4	16%
<b>Gaming</b>	20.1	23.8	30.9	36.2	42.1	20%
<b>Digital</b>	28.3	37.1	48.9	65.1	87.2	32%
<b>OOH</b>	19.3	21.1	23	25	27.3	9%
<b>Total</b>	<b>905.6</b>	<b>1,045.3</b>	<b>1,222.4</b>	<b>1,420</b>	<b>1,638.5</b>	<b>16%</b>

Source: FICCI-KPMG Indian Media and Entertainment Industry Report 2013

## Workforce Demand

The total current employment in the Media & Entertainment Industry is estimated at ~4.6 lakh<sup>5</sup>, and is projected to grow at a CAGR of 13% to 7.5 lakh by 2017<sup>6</sup>.

Workforce Size	2013	2014	2015	2016	2017	CAGR
<b>Film</b>	160,800	179,300	199,900	222,900	248,600	<b>12%</b>
<b>Television</b>	144,600	170,600	201,300	237,600	280,400	<b>18%</b>
<b>Print</b>	62,800	65,700	68,600	71,700	74,900	<b>5%</b>
<b>Radio</b>	23,000	26,400	27,600	28,800	30,000	<b>7%</b>
<b>Animation</b>	22,100	24,200	26,600	29,200	32,000	<b>10%</b>
<b>Gaming</b>	17,300	18,700	22,100	23,400	25,300	<b>10%</b>
<b>Digital</b>	8,100	10,600	14,100	18,600	24,500	<b>32%</b>
<b>OOH</b>	7,600	8,200	8,800	9,400	10,100	<b>7%</b>

<b>Advertising</b>	15,600	17,200	18,900	20,800	23,000	<b>10%</b>
<b>Total</b>	<b>461,900</b>	<b>520,900</b>	<b>587,900</b>	<b>662,400</b>	<b>748,800</b>	<b>13%</b>

This growth is primarily driven by the Television sub-sector, which is expected to grow at a CAGR of 18% over the 5 year period, on the back of cable digitization and launch of new channels. These trends are expected to add close to 1.35 lakh people across various job roles.

The film sector, with an expected growth of 12% over the 5 year period, is also expected to fuel workforce demand by 88,000 employees. Demand from other sub-sectors is expected to be approximately 63,000 additional employees by 2017.

### **Workforce Supply**

While the demand for workforce is on the rise, there has been no shortage in the number of people seeking to be employed in the sector (i.e. quantity of supply). However, most aspiring candidates come with no formal training and/ or through generic graduate courses. As a result, the sector is characterized by a sizeable shortage of trained professionals that possess the relevant skills for jobs within each sub-sector.

Due to the lack of a standardized knowledge infrastructure and practical training courses, employees in several occupations end up learning technical/ role-specific skills on the job. This leads to time and budget overruns at the employer end, and in one form or another, these organizations end up bearing the cost of training.

As part of this study, a survey of more than 40 institutions providing media education across the country was also conducted. They highlighted several concerns in attracting the right talent to their institutes.

### **FUTURE PERSPECTIVES OF MEDIA AND ENTERTAINMENT SECTOR**

The Indian Media and Entertainment industry is on an impressive growth path. The revenue from advertising is expected to grow at a CAGR of 13 per cent and will exceed Rs 81,600 crore (US\$ 12.29 billion) in 2019 from Rs 41,400 crore (US\$ 6.24 billion) in 2014. Internet access has surpassed the print segment as the second-largest segment contributing to the overall pie of M&E industry revenues.

Television and print are expected to remain the largest contributors to the advertising pie in 2018 as well. Internet advertising will emerge as the third-largest segment, with a share of about 16 per cent in the total M&E advertising pie. The film segment which contributed Rs 12,640 crore (US\$ 1.90 billion) in 2014 is projected to grow steadily at a CAGR of 10 per cent on the back of higher domestic and overseas box-office collections as well as cable and satellite rights.

Digital advertising is expected to lead the CAGR with 30.2 per cent, followed by radio with 18.1 per cent. Animation and VFX, and television are expected to register a CAGR of 16.3 per cent and 15.5 per cent respectively, followed by growth rates of gaming (14.3 per cent), music (14.0 per cent), films (10 per cent) and OOH with 9.8 per cent expected CAGR. Within TV, subscription revenues are expected to be three times more than advertising revenues, by

2018. Growth in the regional reach of print and radio shall provide opportunities to further improve the advertisement revenue.

~~Key themes that are expected~~ to drive the 16% annual growth in the Media & Entertainment sector, and which would likely have an impact on employment and skill development, are Digitization of Television Distribution, Digitization of Film Exhibition, Auction of Phase III Radio Licenses, Demand for Regional Content, and Growth in Digital Content

## **SUGGESTIONS AND RECOMMENDATIONS**

- In media and entertainment industry there is need for Development of Core Competencies Soft skills that includes cluster of personality traits, social graces, facility with language, and personal habits that make someone a good employee and a compatible co-worker. Some important core competencies are to be developed through skill development course. 1. Punctuality, discipline and honesty 2. Cordial relationship and Cooperation with co-workers and team Work 3. Positive attitude and behavior 4. Work ethics and dependability 5. Self esteem and confidence 6. Self-motivation and initiative 7. Flexibility/ adaptability 8. Communication Skills 9. Respect for rules and regulations 10. Concern for quality 11. Concern for health and hygiene 12. Responsibility and accountability 13. Care of equipment and tools 14. Safety consciousness and safe working practices 15. Learn continuously 16. Concern for environment and waste disposal 17. Ability to bear stress and work under pressure

Following competencies should also be developed during level-II and higher courses:

- Ability for planning, organizing and coordinating 2. Creative thinking, problem solving and decision making 3. Leadership, delegating, appraising, motivating 4. Negotiation 5. Time management ability 7 In addition to above, livelihood skills like how to apply for a job, facing an interview, opening/ operating a bank account may also be covered.
- A combination of an approved training programme plus recognition of prior ♣ learning including credit transfer; Or the recognition of prior learning that provides evidence of the ♣ achievement of the competencies for the qualification.
- The training methods to be used should be appropriate to the development of competencies.
- The focus of the programme is on “performing” and not on “Knowing”. Lecturing will be restricted to the minimum necessary and emphasis to be given for „hands on training“.
- The training methods will be individual centered to make each person a competent one.
- Opportunities for individual work may be provided.
- The learning process should be continuously monitored and feedback will be provided on individual basis. Demonstrations using different models, audio visual aids and equipment will be used intensively.
- Instructional Media Packages in order to maintain quality of training uniformly all over the country, instructional media packages (IMPs) must be developed by the National Instructional Media Institute (NIMI), Chennai.
- Assessment should be through DGE&T approved assessing bodies to assess the competencies of the trained persons.

## **CONCLUSION**

The Indian Media and Entertainment (M&E) industry is a sunrise sector for the economy and is making high growth strides. The Indian media & Entertainment sector is expected to reach US\$ 100 billion by 2025, from its estimated size of US\$ 17.85 billion in 2015, due to its large capacity to consume new products and businesses. In 2015, the overall Media and Entertainment industry grew 11.7 per cent over 2014. The largest segment, India's television industry, is expected to maintain its strong growth momentum led by subscription revenues, representing a year-on-year growth of about 13.2 per cent to reach Rs 60,000 crore (US\$ 9 billion) in 2015. Significantly, with the increased penetration of smart phones and expansion of 3G/4G network in India, the country is likely to see around nine billion mobile application (apps) downloads during 2015, which is five times more than 1.56 billion in 2012. This uptick in app-downloads is also expected to increase the revenue from paid apps to an estimated over US\$ 241.16 million as against US\$ 144.7 million in 2014. Industry estimates reveal that video games industry grew at a record 22.4 per cent in 2014 over 2013; wherein its net worth rose to US\$ 392 million. The Indian animation industry was valued at US\$ 748 million in 2014 and is forecasted to grow at 15-20 per cent per annum. The Foreign Direct Investment (FDI) inflows in the information and broadcasting (I&B) sector (including print media) in the period April 2000 – September 2015 stood at US\$ 4.28 billion, as per data released by Department of Industrial Policy and Promotion (DIPP).

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