

## **Gaming in India**

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### **Abstract**

India represents an emerging market in the contemporary gaming landscape. Although not as established as other nations, India possesses the potential to become a significant gaming powerhouse. Recently, there has been a notable increase in the gaming community in India, encompassing both streamers and players. Currently, several gaming companies have released noteworthy titles in recent years, such as *Raji: An Ancient Epic* by Nodding Head Games. However, despite these developments, India faces certain limitations that impede its progress toward becoming a major gaming powerhouse comparable to Japan, China, or the United States.

### **Keywords**

Gaming, Indian market, KIGI, Sony India Hero Program, Krafton, Government Support, Gaming Genres, Gaming Scenarios.

### **Introduction**

Recently, there has been a notable increase in the number of game enthusiasts in India, leading to a significant gaming boom. Traditionally, gaming has found immense success in European countries and the USA, but Asian countries are now emerging as new powerhouses in the gaming market. Companies such as Software, Game Science, and Namco Bandai have created games that have been both commercially and critically successful. Titles like “*Elden Ring*” from Japan and “*Black Myth: Wukong*” from China have not only achieved commercial success but have also been recognized with awards like “Game of the Year.”

Amid this Asian gaming boom, India has a place in the landscape, but unfortunately, it is not as advanced or developed as some of its Asian counterparts. In this paper, we will examine India's current position within the gaming industry.



*EldenRing-FROM Software    Black Myth Wukong-Game Science*

### **Evolution Gaming in India**

Gaming in India is influenced by many factors. Since the introduction and evolution of computers, gaming has also evolved. Nowadays, we even have computers specially targeted to gamers to play games with utmost visual fidelity. Gaming consoles also play a major part in gaming. These machines are specially designed to play games only. Both consoles and PCs are instrumental, and their popularity drives companies to create multiple genres of games to maintain jaw-dropping graphics and immersive gameplay.

But when we talk about this gaming innovation, we can see India lagging. Many big and small companies have been formed, and many games are also been published, but it is still not creating enough stir among the gaming community and not making the gaming industry take the giant leap forward that was expected from a country like India.

It is to be noted that the majority of the market movement is initiated by the middle-class society in India. Mindset and budget are a barrier. A good gaming computer costs a lot with high end specifications, it is a far cry for an average middle class people, who constitutes the majority of the Indian population. However, with the recent economic progression of India, the middle-class people specially in the big cities like Delhi, Mumbai, Bengaluru are now considering gaming as a hobby. But still many areas within India specially in the rural areas, people don't even know anything about computers forget about gaming. To them a modern smartphone is no less than a high-end computer that can suffice their everyday need. To them calling, and some internet browsing is all what they want for entertainment.

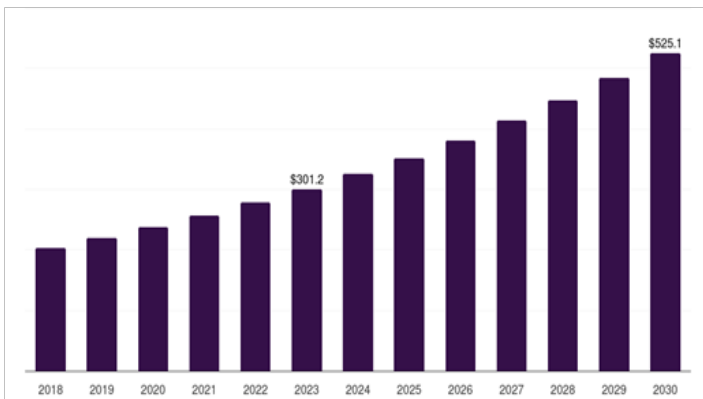
Another major factor in this respect is the mindset of the general Indian people who do not take games and gaming seriously, even parents discourage gaming citing it as a waste of time. The majority of the Indian students prefer different career options rather than gaming and computer learning if not animation or game studies are considered secondary subjects. Lack of awareness is a major factor. Most students don't even know that careers can be pursued.

However, with exposure to foreign animation content, Indian students are now familiar with the rich universe of animation. Many computer centers have evolved to provide computer training. With the evolution of Films and the huge use of VFX in them, it has attracted a huge number of students, and career opportunities have also started to grow. However, the gaming industry did not develop this film and vfx counterpart, and even now, we are lagging behind the major players in this field.

This does not mean that gaming is less popular in India. When Computers started to become a household commodity, gaming also came into Indian homes. Many foreign gaming companies like SEGA, EA, and UBISOFT introduced their games to the Indian population, and the youth were particularly attracted by them. It was the first stepping stone that made gaming a part of the Indian market. During the 90s and 2000s, the floodgates of the games were opened, and

Indian gamers then started to get the full flavor of games. Games like Far Cry, Age of Empires, Doom, Unreal, etc. became very famous and many new gaming genres flavored the gaming schema. Genres like first-person Shooters, third-person shooters, role-playing games, Turn-Based strategy, real-time strategy, etc came into existence. This attracted huge gaming enthusiasm in India, so much so that many international games started to get released simultaneously in India as well as other parts of the world.

But it is the rise of the internet that made gaming what it is now. With the internet, games started to exploit the multiplayer features, which made the games far more interesting than playing a game solo. Many games focus on multiplayer features only, such as Battlefield, Call of Duty, etc. Even strategy games have this feature incorporated in them, like Age of Empires 2, 3, and 4, which garnered much appreciation. Many gaming communities emerged in India, and gaming companies organized many gaming events to popularize this. By this time, gaming had become a major thing in India. Many centers that previously provided animation courses have now started offering gaming courses as well. This was fueled more by the establishment of foreign gaming companies starting their branches in India, like UBISOFT in Pune and Mumbai, Rockstar Games in Bengaluru, Rocksalt Games in Hyderabad, and many others.



*India gaming accessories market, 2018-2030 (US\$M)*

## Gaming Genres in India

India's gaming market has experienced rapid growth, with approximately 500 million gamers projected by 2024 across mobile, PC, and console platforms. Mobile gaming dominates the landscape, accounting for over 90% of gamers, largely due to the widespread availability of affordable smartphones and affordable data plans. Meanwhile, PC and console gamers represent a smaller yet dedicated segment. This dynamic has led to a unique environment where casual gaming genres excel in player numbers and downloads, while competitive "core" genres excel in engagement and revenue. Below is a breakdown of the most popular game genres in India across all platforms, along with their estimated relative market share.

- **Battle Royale (Shooter):** Battle royale games are immensely popular, spearheading the shooter category. Titles like BGMI (Battlegrounds Mobile India) and Free Fire amassed tens of millions of players, making this genre one of India's favorites. By downloads, shooters (largely battle royales) account for a modest share (~6% of mobile game installs). Still, they dominate player engagement and spending, contributing about 50% of all in-app gaming revenue in India. This reflects the genre's deep engagement: competitive gameplay and esports scenes have thrived, with battle royale titles consistently topping grossing charts in 2024.

- **First-Person Shooter (FPS):** Aside from battle royales, other FPS games (e.g., Call of Duty Mobile, Counter-Strike, Valorant) maintain a strong following. On mobile, Call of Duty: Mobile ranks among the top titles and helped popularize traditional FPS modes. On PC/console, classics like Counter-Strike (now CS2) and Valorant have dedicated communities and esports events in India. While the combined shooter genre (including Battle Royale and other FPS) is only a single-digit share of total downloads, FPS games are a staple for core gamers, frequently played in competitive circles. The genre's popularity is evident from consistent tournament viewership and active player bases, even if it's a smaller segment compared to casual mobile genres.

- **Multiplayer Online Battle Arena (MOBA):** MOBA games have a niche but passionate audience in India. On PC, Dota 2 and League of Legends are the dominant MOBA titles, each with a dedicated fan base (especially among college and esports enthusiasts). However, MOBA remains relatively small in market share – it does not feature among the top genres by overall player count or downloads. The absence of an India-focused mobile MOBA (Mobile Legends was banned for a time) kept this genre's share low (estimated well under 5% of the market). Still, Dota 2 is one of the most played PC games in India's esports scene, indicating MOBA's influence despite its limited reach.

- **Role-Playing Games (RPG):** RPGs constitute a smaller segment of Indian gaming. They account for only around ~2% of mobile game revenues, reflecting modest popularity compared to other genres. Nevertheless, certain RPG titles have made an impact. For example, Genshin Impact gained attention with its expansive open world and garnered a sizeable community of Indian players since 2020. Traditional single-player RPGs and JRPGs are not mainstream in India, but a subset of gamers enjoys action-RPG and adventure titles. Overall, the RPG genre remains niche, far behind the leading genres in terms of downloads and active user share by 2025.

- **Simulation Games:** Simulation (including hyper-casual and lifestyle sim games) is the #1 category by downloads in India. Simple simulators – such as driving, flying, or life simulators – and hyper-casual games captured roughly 20–22% of all mobile game installs by FY2024. Their broad appeal comes from simple gameplay and low time commitment, attracting players across demographics. Many Indian gamers regularly download simulation and hyper-casual titles (e.g. virtual farming, driving simulators) for quick entertainment. This genre's ease of play and low device requirements make it a mass-market favorite, though monetization per user is low (it contributes only ~5% of revenues).

- **Casual/Arcade Games:** Casual arcade-style games are immensely popular, reflecting India's preference for easy, pick-up-and-play entertainment. Arcade games (like platformers, runners, endless action games) make up about 19% of downloads, one of the largest shares. Notable examples include endless runners, arcade shooters, and other light games that thrive on quick sessions. These, along with other casual games (like match-3 puzzles and party games), have *high penetration* in India's gamer population. Casual and hyper-casual titles drove a 20% growth in the segment in 2024. Thanks to their high download volumes, casual/arcade games are also a prime avenue for advertising, as many brands use these games to reach young audiences. In summary, the Casual/ Arcade genre accounts for a large chunk of player engagement (roughly one-fifth of downloads), making it a cornerstone of India's gaming landscape.

- **Puzzle Games:** Puzzle games enjoy wide appeal across age groups in India. They represent roughly 15-16% of all game downloads, consistently ranking among the top genres. Simple puzzle titles like Candy Crush Saga, The Room, and Monument Valley remain perennial favorites, offering engaging brain-teasers and matching games that attract millions of players. The "match-3" puzzle subgenre (match-swap games) is especially dominant – it was the fourth-most popular genre by player count in recent years. Puzzle games are often played casually by a broad audience, including many female gamers and older age groups. While their share of revenue is moderate (~9% of mobile game spending), their share of attention is significant. The genre's accessibility and endless level progression ensure puzzle games remain one of the most preferred categories for Indian gamers seeking casual fun.

- **Strategy Games:** Strategy is a high-engagement genre in India, though not the top by download volume. Strategy titles (ranging from real-time strategy and base-building games to chess and tactical war games) comprise only a small portion of installs (on the order of ~4% of downloads). However, their impact is outsized – strategy

games generated about 9–10% of gaming revenues in 2024, indicating loyal, paying player bases. Flagship strategy games like Clash of Clans and new hits like Whiteout Survival have performed exceptionally well, making strategy one of the top three genres by popularity among engaged gamers. The “4X Strategy” subgenre (deep war/ empire-building games) is rising fast in India’s market. Overall, strategy games attract a slightly smaller crowd in terms of user count, but those who do play are highly engaged, securing this genre’s status as a core gaming category in India.

- **Sports/Driving Games:** Sports and racing games have a devoted following in line with India’s love for cricket, football, and car racing. Racing games account for roughly 5% of downloads and Sports games about 4%, combining to ~9% of total downloads. On mobile, cricket games (e.g. Real Cricket, WCC) are extremely popular, tapping into the nation’s top sport. Football titles also have a presence (the FIFA series and eFootball enjoy a dedicated fan base in India). Driving games range from casual racing titles to realistic car simulators, and they consistently rank in download charts (car racing is a common theme in hyper-casual hits as well). Notably, “Realistic Sports” games are on the rise in monetization, as more players invest time (and money) in competitive sports titles. While this genre’s overall share of gamers is moderate, sports/driving games resonate strongly with fans of real-world sports and thus remain a key genre in the Indian market.

- **Card/Board Games:** Traditional board and card games have transitioned successfully to digital formats, becoming a major genre in India. Culturally significant games like Ludo, carrom, and chess account for about 9% of all game downloads by FY2024. Ludo King, in particular, has become a chart-topping success, showcasing the popularity of family-oriented games. Card games are also essential, with real-money options like rummy and poker engaging over 155 million online gamers in 2024. This “casino/skill card” segment represents about 3% of downloads but nearly 10% of gaming revenues, indicating

a strong base of paying users. Overall, the Card/Board genre remains one of the most popular in India, thanks to its familiarity and social appeal.

### **Gaming Scenario in India**

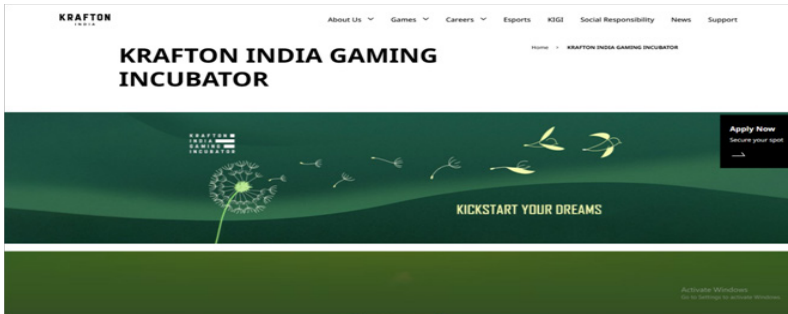
To delve deeply into the current scenario, there is a stark contrast between the Indian gaming market and the more mature one in countries like China, Japan, and South Korea. In a recent interview with the Krafton CEO Mr. Kim Chang-Han, he pointed out that the major pathway gaming took in major countries and India is different. In other countries, especially in Europe and the USA, consoles came first, then came PC games then everything was online, but in the case of India, consoles are perhaps the last to arrive. From what an average Indian gets exposure to gaming is not a console or a PC, but a Mobile phone. Games like PUBG are among the most famous games played by Indian youth, and their popularity rivaled that of some famous AAA games worldwide. After PUBG got banned on September 2, 2020, BGMI gained prominence, and Krafton, the creators of BGMI, have many plans to improve and improvise the gaming model in India.

Krafton has made significant investments in India. According to Krafton CEO Mr. Kim Chang-Han, they have invested 170 million dollars in the Indian market, and in the next two years another 140 million dollars will be invested. This shows how much India has grown as a potential market.

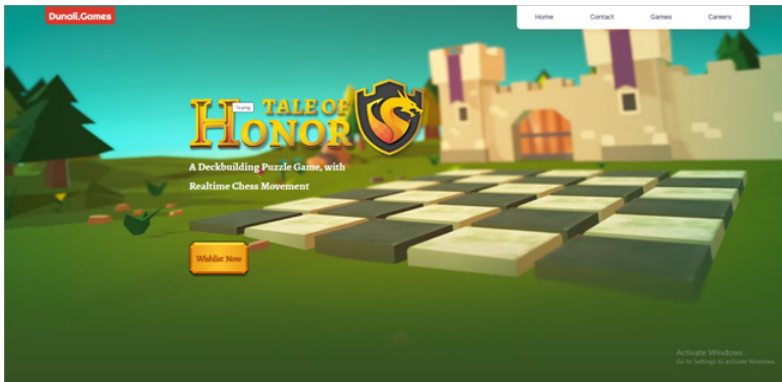
### **KIGI**

Beyond BGMI, Krafton aims to bring more games to India while building local game development capabilities. The company wants to create exciting games for Indian gamers and establish a substantial publishing operation within the country. Krafton aims to modify and improve the gaming infrastructure. One of the initiatives by Krafton in India is named KIGI or Krafton India Gaming Incubator. It is a mission to help ambitious young Indian game entrepreneurs to turn ideas into reality and beyond. Young gamers showcase their ideas and if it is credible they will be given mentorship for further developing the idea and materializing it. Funding is also provided to fulfill the idea of creating a

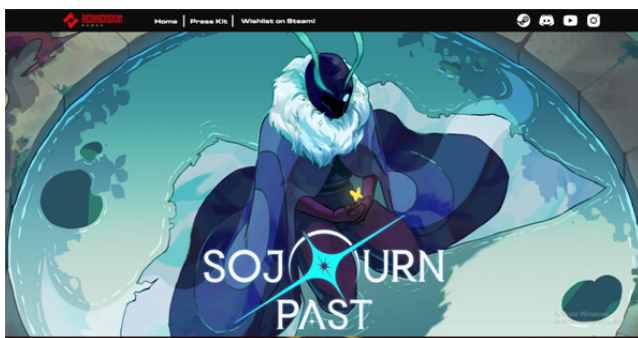
game and publishing it. This idea has had some success in India and many young gamers can publish their games on various platforms and help India to have a footprint in the international gaming community. Some of the games that gained recognition through this program are- Gangster Carnival by Arjuna Studios, Tale Of Honor by Dunali Games, Sojourn Past by Redimension Games, etc.



*KIGI-Krafton India Gaming Incubator*



*Tale Of Honor-Dunali Games*



*Soujourn Past – Redimension Studios*



*Gangster Carnival- Arjuna Studios*

## **Sony India Hero Programme**

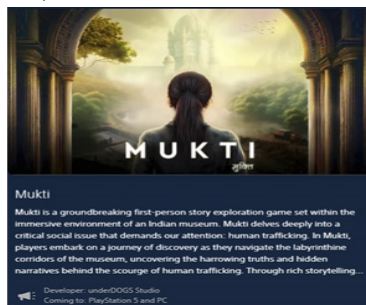
A similar program is also initiated by Sony Interactive India, and their initiative is called the India Hero Project. The norms

are similar to the KIGI, but unlike KIGI, which aims to create games for platforms like mobile, pc, and consoles, the India Hero project aims to publish the games for PC and Sony PlayStation. This provides double benefits for the company and the gamers as well, as it will both publish games and popularize PlayStation as a console in India. Sony has a bigger footprint in India, both in game titles as well as the console market.

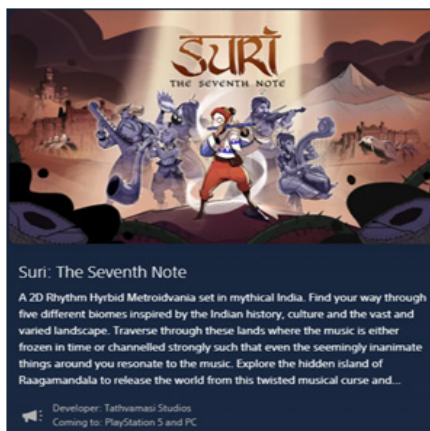


### *Sony India Hero Programme*

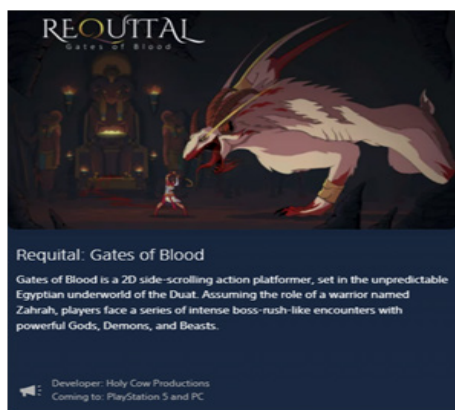
The PlayStation is the largest-selling gaming console in India, and Sony PlayStation exclusive games further enhance this market, so naturally, for Sony, India is a lucrative market. This program aims at getting ideas via registrations and if the ideas are worth getting attention, they get mentorship from Sony Interactive veterans worldwide and also funding from the renowned Sony Interactive games, to get the games published for PlayStation and PC. Some of the games that saw the light of day through this program are- MUKTI-underDOGS Studio,



### *Mukti-Underdog Studios*



*SURI-THE SEVENTH NOTE by Thavamasi Studios*



*REQUITAL- GATES OF BLOOD by Holy Cow Production, etc.*

### **Gaming Platforms and Technologies in India.**

Apart from mobile phones, which perhaps hold the maximum market share in India in gaming; personal computers also play a significant role. Compared to the early phase of computers during the 80s or 90s, PCs now become a more common element in the Indian household, whether be it a desktop or a laptop. However, they have not penetrated the lower economic strata of the lower middle-class Indian population

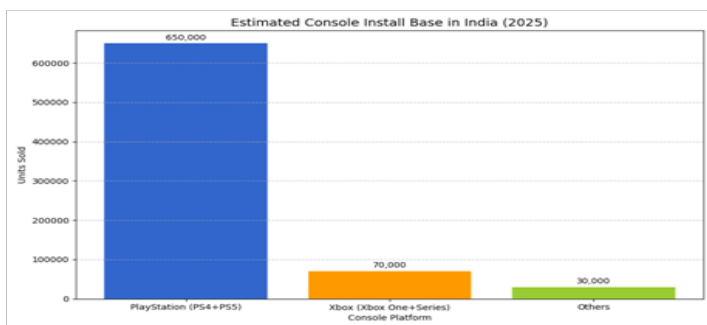
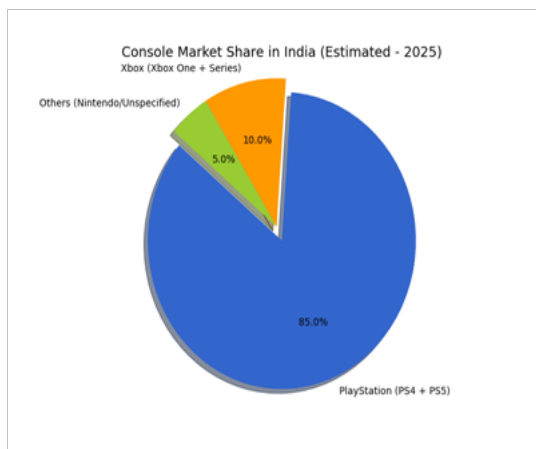
which mobile phones have already reached. That is because PCs concerning gaming or other high-processing tasks require high-budget PCs, whereas a cheap mobile phone will easily take care of the basic gaming needs of an average Indian, maybe an upperclassman or a lower middle-class man.

However, the journey from a basic computer to a gaming computer is nothing short of awesome. Computer hardware and gaming technology are more focused on gaming than ever. Graphics cards like Nvidia, AMD Radeon, and Intel Arc now have much more processing power to reproduce the utmost graphical fidelity that gamers nowadays demand. The game graphics now mimic realistic details that even rival the graphics fidelity of some of the big-budget Hollywood films.

Gaming engines like Unreal and Unity hold most of the market share not only in India but also worldwide. Unreal engine for example has developed so much from its initial stages that most of the gaming companies are choosing Unreal as the next gaming engine and some existing AAA games are shifting to Unreal from other engines. As Unreal Engine is free to use, in India many indie gamers prefer Unreal to make their games in 3d. For mobile games Unity engine is the foremost choice. Since both of them have a flexible subscription model for commercial use, they are the most preferred gaming engines.

Regarding consoles, the Indian market is a second choice. Consoles are not so much widespread in India as in other parts of the world. XBOX by Microsoft and PlayStation from Sony Interactive are the major players in this segment. Handheld consoles like Nintendo and Steam deck almost do not have any footprint in the Indian market. PlayStation is the most popular console in India, holding about 85% of the market share according to The Economic Times, making it the most sold console in 2021 in India. This is because Sony is a big name not only in gaming but also in the electronic field and home appliances. PlayStation has better quality games than XBOX. Since consoles are the third choice in India, and Microsoft's low footprint in gaming console market the console war did not affect the gaming industry in India like in other parts of the world. Both consoles with technological upscaling give players an unparalleled gaming experience.

Play Station 5 with its dual sense controller also gives players feedback regarding the object tension and hardness.



*India Gaming Stats(Market Research.com, livemint.com)*

## Government Initiative in the Gaming Sector in India

Government support in this field is one thing that many gaming companies and communities have been voicing for a long time. The Government of India has acknowledged gaming as a legitimate industry in India. This alone shows the popularity and impact of games in India, and the government support is growing in recent years, thus formulating new policies to grow this industry.

1. Digital India Initiative: This is an initiative by the Government of India to improve the digital infrastructure

in India. It has various ideas like it encompasses various initiatives focused on building digital infrastructure, delivering government services digitally, and enhancing digital literacy. Key initiatives include Aadhaar, BharatNet, DigiLocker, BHIM-UPI, e-NAM, and e-Kranti, aimed at empowering India to become a digitally empowered society and enhance digital literacy. Ensuring mobile availability for all citizens, and creating jobs in the relevant digital fields as well as e-Governance aimed at reforming government through technology by making services accessible online and digitally. India proposed-Digital India Act (DIA), 2023, to replace the existing IT Act of 2000, addressing the evolving digital landscape.

## 1. Policy-Level Support for the Gaming Industry

**Recognition & Regulatory Frameworks:** The Government of India has formally recognized gaming and esports as significant sectors and created supportive regulatory frameworks:

- **Nodal Ministries for Gaming & Esports:** In December 2022, the government updated its Allocation of Business Rules to designate the Ministry of Electronics and IT (MeitY) as the nodal ministry for **online gaming** and the Department of Sports (Ministry of Youth Affairs & Sports) as the nodal agency for **e-sports** (competitive video gaming). This landmark move gave the industry official legitimacy and clear governance, bringing esports under the Sports Ministry's ambit as part of "multi-sport events."

- **Drafting Online Gaming Rules:** MeitY introduced amendments to the IT Rules in April 2023 to regulate online gaming intermediaries. The proposal set up a co-regulatory framework involving self-regulatory organizations to vet permissible online games and prohibit betting. While full implementation (e.g., recognizing self-regulatory bodies) faced challenges, this initiative marked the first effort at federal-level standards for online gaming content and fairness.

- **Taxation Reforms for Clarity:** The government overhauled the tax regime for online games to bring

regulatory certainty. The Finance Act 2023 introduced a **30% income tax** on net winnings from online games (effective April 2023). Similarly, GST laws were amended to impose **28% GST** on the full-face value of bets in online gaming (including skill games), effective 1 October 2023. These steps aimed to uniformly tax the industry and distinguish online gaming from gambling, even as enforcement of GST at this rate is coordinated with states.

- **Defining Illegal Betting:** To curb illegitimate gambling, new penal provisions were introduced. The Bharatiya Nyaya Sanhita, 2023 (effective July 2024) criminalizes unauthorized betting/gambling with imprisonment of 1-7 years and This complements the blocking of over 1400 illegal betting/gaming websites by MeitY (2022-25), signaling a stricter stance on betting while encouraging legitimate gaming businesses.

**Government ban on some online game platforms-** Recently Indian Government has imposed ban on some online gaming platforms such as Dream11, Zepto, etc, through The Promotion and Regulation of Online Gaming Act, 2025, enforced in August 2025, which received presidential assent in August 2025. The bill was passed in both houses of Parliament. The ban is particularly against the gaming platforms that center around monetary stakes, get money on winning, especially games aimed at online gambling, poker, rummy, and other gambling apps or games. Since these games and apps require real money, they pose a serious risk of addiction and losing money. The government and Indian courts have made clear distinctions between games of skill and games of chance. The games involving skills are considered legitimate, while the game of chance has serious repercussions of losing or gaining money in the process. While India has promoted e-sports and other online games, it has enacted a comprehensive ban on all online games involving real-money stakes, overturning earlier distinctions between games of skill and chance. This policy is intended to address public welfare concerns, but it has triggered significant legal and economic pushback from the gaming industry.

**AVGC Sector Recognition:** The government identified Animation, Visual Effects, Gaming & Comics (AVGC) as a **sunrise sector** and set up an AVGC Promotion Task Force (announced in Budget 2022) to recommend growth strategies. Following its advice, the Ministry of Information & Broadcasting (MIB) is formulating a **National AVGC-XR Policy** and Mission. This upcoming policy framework will foster investment, innovation, skill development, and intellectual property in gaming and allied fields, and guide individual states in crafting their own policies.

**Industry Classification & FDI:** Government policy treats online gaming like other IT-enabled industries. Notably, **100% FDI** is permitted in the gaming and esports sector through the automatic route, encouraging foreign investment. The gaming sector's growth potential has been acknowledged by bodies like the Telecom Regulatory Authority of India, which in mid-2024 recommended incentives to promote local game content and make India a global "Gaming Content Hub". High-level recognition – including Prime Minister Modi's remarks in Parliament emphasizing making India the "global capital of creative gaming" – underscores gaming as a key component of Digital India's future.

## 2. Financial and Economic Incentives

**Building a Domestic Gaming Ecosystem:** A range of initiatives provide financial support, incubation, and incentives to gaming start-ups and developers, aligning with *Make in India* and *Atmanirbhar Bharat* (self-reliant India) goals:

- **Startup Ecosystem Support (PPP):** In November 2024, the Department for Promotion of Industry and Internal Trade (DPIIT, Ministry of Commerce) signed a unique **MoU with WinZO**, a leading Indian gaming platform, to nurture **over 2,000 gaming and interactive entertainment start-ups**. This public-private partnership will mentor entrepreneurs through hackathons, workshops, accelerators, and pitch events. It aims to bridge the talent gap in game development (training in coding, animation, and design) and help startups access global opportunities. The collaboration will also establish

a **Center of Excellence** with WinZO to incubate startups, develop monetization strategies for Indian game IP, attract FDI, and even promote the manufacturing of gaming tech in India. By aligning with the Prime Minister's vision of an *Atmanirbhar* gaming industry, this initiative seeks to capture a larger share of the \$300+ billion global gaming market.

- **National AVGC-XR Centre of Excellence (IICT):** The Union Cabinet in 2024 approved a National Centre of Excellence for AVGC-XR in Mumbai – now launched as the **Indian Institute of Creative Technology (IICT)** with a ₹400 crore budget. Developed by MIB in partnership with industry bodies FICCI and CII, IICT is envisioned as a world-class institution to **incubate gaming/creative startups** and produce skilled talent. It will feature state-of-the-art facilities (animation and gaming labs, XR studios, smart classrooms) and operate on an IIT/IIM-like model. Crucially, IICT has secured collaborations with global tech companies – NVIDIA, Google, Apple, Microsoft, Meta, Adobe, and others – to assist in curriculum development, internships, R&D, and even startup funding support. This center (phase 1 in south Mumbai, with a larger 10-acre phase 2 at Film City) will not only train creators but also drive innovation, research, and **policy development** for the gaming/AVGC sector, acting as an incubation hub for new ventures.

- **‘Create in India’ Challenge:** Launched in August 2024 by MIB, the **Create in India Challenge (CIC)** complements *Make in India* by focusing on original content creation in fields like video games, animation, XR, film, music, etc. It features 25 creative challenges under 13 themes to spur innovation. The goal is to empower Indian designers and developers to build globally competitive products and IP. CIC Season 1 included India's first **government-backed esports tournament** and a national **Game Jam** for developers, as well as animation and anime competitions. Finalists receive mentorship, exposure at global events (e.g., winners showcased at the WAVES summit and international festivals). By providing a platform for talent

and the possibility of monetizing their creations, this challenge is boosting the **creator economy** in gaming and allied arts.

- **Incentives and Funds:** The government is exploring further incentives to attract investment in gaming. The AVGC task force has proposed a dedicated **AVGC-XR Promotion Fund** (for R&D, startups, etc.), and the new NCoE/IICT model includes a *“dedicated innovation & research fund to promote the start-up ecosystem”*. Tax incentives have also been sought by industry (e.g. reduced GST for gaming services), though as of 2025, the major fiscal support is through incubation and skilling programs rather than tax breaks. Additionally, *Startup India* and *Invest India* classify gaming/AVGC as high-potential sectors and facilitate investors via ease-of-doing-business initiatives. The **100% FDI allowance** and improvement in IP protection laws are making India attractive for gaming investments, evidenced by increasing foreign funding in Indian gaming startups.

- **Make in India Alignment:** There is a strong push for **“Make in India, Create in India”** in gaming. Prime Minister Modi, in his 2023 Independence Day speech, highlighted the dominance of foreign games and urged Indian youth to develop games rooted in Indian culture and values. He emphasized moving from being only consumers to **producers of games**, signaling top-level encouragement for indigenous game development. This vision has trickled down into programs like CIC and IICT, which focus on developing *Made-in-India* games and content for global audiences. Likewise, the DPIIT-WinZO partnership explicitly notes the aim of developing *“Made in India”* IP of world-class quality and capturing global markets. Such alignment ensures the gaming industry contributes to India’s digital economy and exports, much like the IT services sector did in earlier decades.

### 3. Education and Skill Development Initiatives

**Human Capital Development for Gaming/AVGC:** Recognizing that a skilled workforce is the backbone of the

gaming industry, the government and allied bodies have launched several educational and training initiatives:

- **Indian Institute of Creative Technology (IICT):** As mentioned, IICT in Mumbai is being established as a premier institute for **formal education and training** in animation, game development, VFX, comics, and XR. Modeled on IITs/IIMs, it will offer specialized courses and degrees to create a “world-class talent pool” for the gaming and creative sector. With cutting-edge facilities like immersive studios, AR/VR labs, motion-capture and gaming labs, sound and editing suites, etc., IICT is poised to produce industry-ready graduates. The institute’s curriculum and training programs will be industry-led – global companies (Adobe, Google, Microsoft, NVIDIA, etc.) are partnering to develop course content, provide internships, and even offer scholarships and job placements for students. This robust public-private academic model aims to **bridge the skills gap** in game design, programming, art, and emerging technologies (AI, AR/VR) that the Indian gaming industry faces. Furthermore, IICT will engage in **research & innovation**, and its hub-and-spoke design will eventually include regional centers across India to broaden access.

- **Integration into Curricula:** Beyond IICT, gaming education is being mainstreamed in various ways. Several Indian universities and design institutes (public and private) now offer **formal game development and design programs** (B.Des/B.Sc. in Game Design, BCA in Game Development, etc.), approved by national bodies. The government’s *National Education Policy* and skill development frameworks have acknowledged AVGC as a field of importance. For instance, the Media & Entertainment Skill Council (under NSDC) works on standardizing **skilling initiatives across the AVGC sector**, in collaboration with the industry. This involves creating National Occupational Standards and vocational training modules for job roles like game animator, 3D artist, game programmer, etc. Additionally, some state governments (e.g., Karnataka, Kerala) have introduced AVGC curricula

and scholarships, complementing central efforts. At the school level, elements of coding, animation, and gamified learning are being introduced to inspire the next generation of game creators (e.g., the National Curriculum Framework 2023 encourages creative applications of technology). These steps ensure a steady pipeline of talent trained in modern game engines and design principles.

- **WAVES Summit & ‘Game Forge’ Workshops:**

In early 2025, as a run-up to the World Audio Visual & Entertainment Summit (WAVES 2025), MIB and the Indian Digital Gaming Society (IDGS) organized “**Game Forge**” – a series of skill-building workshops across Chennai, Bengaluru, and Hyderabad. Over 2,000 students participated in these four-day programs, which exposed them to the latest **technological advancements in gaming** (e.g., handheld gaming hardware, Unreal Engine, virtual production techniques) and career opportunities in game development. Industry experts and mentors led sessions on game design, programming (with a focus on UI/UX and languages), VFX in games, and the intersection of AI with gaming. Importantly, students engaged in competitions like *Innovate2Educate Handheld Device Challenge* to design innovative gaming devices for education. These workshops – a part of the WAVES outreach – helped **bridge academia and industry**, ensuring that educational institutions align their teaching with real-world skill needs. The success of Game Forge (with enthusiastic student response) underlines the government’s commitment to “**cutting-edge skill development**” in gaming, as noted in the official teaser. Similar events and hackathons are planned under the WAVES umbrella to nurture young talent across the country.

- **Game Jams and Competitions:** To cultivate practical skills, nationwide game development competitions are being promoted. For example, the “**Road to Game Jam**” was a national-level game design contest organized by the Game Developer Association of India in collaboration with the WAVES initiative. It drew over 5,500 entrants, challenging them with creative themes (“Everything falls

apart”, “Invisible connections”, etc.) and resulting in 10 finalist indie games. The top games were showcased at WAVES 2025 in Mumbai – giving student and indie developers exposure to industry leaders – and winners received mentorship and a prize pool to develop their games further. Such government-backed jams and hackathons are fostering a culture of **innovation and hands-on learning**, encouraging students to apply their skills and potentially turn their projects into start-ups.

- **Skill Certification & Training Centers:** The Government, through Skill India and partnerships, is also supporting short-term training for gaming-related skills. Dedicated **Centres of Excellence (CoEs)** have been set up by Software Technology Parks of India (STPI, under MeitY), focusing on gaming and allied tech. For instance, STPI’s IMAGE CoE in Hyderabad (launched 2020) incubates startups in **Gaming, Animation, VFX, AI**, and mentors young developers – aiming to nurture 140 startups over 5 years [stpi.in](http://stpi.in). Similarly, NIELIT (under MeitY) and various IITs/incubation centers conduct courses on AR/VR development, game programming, etc. With support from bodies like FICCI’s Animation and Gaming forum and state governments, workshops for faculty development are held so that more colleges can start game design courses. The overall thrust is on **creating an industry-ready workforce** – from artists to engineers – to sustain the booming gaming and AVGC industry. As a result, India is seeing a growing number of qualified professionals in game art, design, and engineering, which will attract more game development studios to set up operations domestically.

#### 4. Esports Promotion and Recognition

**Elevating Esports to Mainstream Sports:** The government has taken notable steps to promote esports (competitive gaming) as a legitimate sport, paralleling traditional sports in recognition and support:

- **Official Recognition of Esports (2022):** In a watershed moment, the Indian government officially recognized

**e-Sports as a part of multi-sport events** in December 2022. A Gazette notification placed esports under the Department of Sports, signifying that organized video game competitions are to be managed like other sports. This differentiation (separating esports from fantasy sports or iGaming) has legitimized competitive gaming and paved the way for policy support. It was promptly followed by the inclusion of esports in national sports programs (and distinguished from real-money gambling). Industry stakeholders hailed this as it allows esports athletes access to sports facilities, coaching, and a clear governance structure under the sports ministry.

- **Sports Ministry Incentive Schemes:** By 2024–25, the Ministry of Youth Affairs and Sports has begun extending its athlete welfare programs to esports players. In February 2025, esports was **added to the Sports Ministry’s list of sports eligible for cash awards** for medal winners in international competitions. This means if Indian esports athletes win medals at recognized world or Asian championships, they will receive the same cash prize from the government as medalists in traditional sports. This move – putting esports on par with the 51 other medal sports – was a *landmark* step that “affirms esports as a legitimate sport in India” and encourages players to pursue it as a career. It also provides coaches of esports teams the incentive rewards, fostering a professional coaching infrastructure in esports. The decision follows India’s participation in esports at the **2022 Asian Games** (where India competed in League of Legends, DOTA2, eFootball, etc.) and ahead of esports’ debut at the Olympics (with the IOC’s Olympic Esports Series). By institutionalizing rewards and recognition, the government signaled a long-term commitment to nurturing esports talent.

- **Tournament Support & Talent Development:** Government departments are now collaborating to host and promote esports events. The Ministry of I&B backed the inaugural **WAVES Esports Championships 2025** in Mumbai – a national tournament held alongside the WAVES summit – marking one of the first instances of

direct central support for an esports event. Similarly, as part of the Create in India Challenge, the **first government-backed esports tournament** was announced in 2024 to give gamers a platform and mainstream exposure. These events, supported by public broadcasters and media campaigns, help in scouting new talent and increasing acceptance of esports. Furthermore, the government has been engaging with esports communities: in late 2024, Prime Minister Modi personally met prominent Indian gamers/streamers (e.g., Naman “Mortal” Mathur, Animesh “Thug” Agarwal) to discuss the sector’s growth and potential. Such high-level interactions provide a morale boost and indicate that policymakers are keen to understand and assist the gaming community.

- **Esports in National Games and Khelo India:** Esports is making inroads into India’s official sporting events. In 2023 and 2024, **Khelo India Youth Games** – the government’s flagship grassroots sports program – included esports as a demonstration sport, featuring titles like Chess (digital), eFootball, and popular mobile/console games. Multiple state teams participated, and this pilot opens the door for esports to be a medal event in future school or college games. The inclusion introduces esports to the sporting culture at the youth level and grants it visibility among educators and parents. The Sports Ministry’s new **National Sports Policy (Khelo Bharat Niti 2025)** also acknowledges technologically evolving sports; it aims to combine sports and education, potentially integrating disciplines like esports in the sporting framework (though detailed plans are emerging). On the national stage, the Indian Olympic Association facilitated an esports delegation for the Asian Games and is likely to include esports in the National Games. These steps ensure **esports athletes receive training, facilities, and recognition akin to other athletes**, including access to the sports authority’s coaching camps and international exposure trips.

- **Federations and Governance:** While the Esports Federation of India (ESFI) has been the primary body

sending teams to events, government recognition means closer cooperation with official sports governance. The Department of Sports can now work on accrediting a national sports federation for esports or empowering ESFI under its guidelines. Already, the government has involved esports stakeholders in policy dialogues – for example, consultations on regulating online gaming also invited inputs on esports. There's also an emphasis on **safeguards like doping control and fair play** in esports, aligning with international standards. By treating esports like any other sport, issues of player contracts, transfer rules, etc., can be streamlined. The outcome is a more structured esports ecosystem with leagues and tournaments that could be sponsored by public and private partnerships, and possibly the inclusion of esports in schemes like *Target Olympic Podium* in the future if it becomes a medal sport internationally.

- **Public-Private Collaborations:** The surge in esports has also led to private investments and partnerships, often with government encouragement. For instance, MIB noted how companies like Nodwin Gaming are expanding esports events and even bringing them to television. State governments, too, have started partnering in esports – e.g., in 2024, Meghalaya sponsored an esports team, and other states hosted state-level esports leagues. These local moves, while not direct central initiatives, are a ripple effect of the central recognition. The central government often showcases such successes to inspire more public-private initiatives (like tech companies sponsoring college esports leagues or telecom firms hosting esports platforms with 5G, as Reliance Jio has done). Overall, the Government of India's involvement in esports – from policy to promotion – has transformed it into a mainstream pursuit with institutional backing, which is expected to yield a stronger performance by India in global esports events and growth of a vibrant domestic esports audience.

## 5. Digital Infrastructure Enhancements for Gaming

**Strengthening Connectivity and Tech Backbone:** The rapid growth of India's digital infrastructure, propelled by

government policies, is a key enabler for the gaming industry, improving access, performance, and future technologies like cloud gaming:

- **Nationwide 5G Rollout:** India has undertaken one of the world's fastest 5G network rollouts, greatly benefiting online gaming and esports. Since the launch of 5G services in October 2022, telecom operators (with strong policy support from the government) have installed over **300,000 5G base stations across 714+ districts** within 10 months. By mid-2023, India had the **second-largest 5G network** globally, and by 2024, it spans almost every district. The government facilitated this by auctioning spectrum at fair prices and, importantly, by **simplifying Right-of-Way rules** and infrastructure permissions like the Indian Telegraph RoW (Amendment) Rules 2022 streamlined approvals for deploying small cells on street furniture, and the GatiShakti Sanchar portal created a single-window interface for telecom infrastructure clearances. This aggressive 5G push means gamers across India can enjoy **high-bandwidth, low-latency connectivity**, which is crucial for seamless multiplayer gaming, live-streaming, and emerging AR/VR gaming experiences. As a result, mobile gaming performance has improved, and rural/Tier-2 areas are now viable markets for real-time online games and esports streams. The Department of Telecom is also fostering **5G use-cases in sports and education**, encouraging sectors (including the Sports Ministry) to leverage 5G's high speed, which could translate into initiatives like AR/VR training for athletes or enhanced broadcast of e-tournaments.

- **Boost to Cloud Gaming:** With 5G and fiber broadband expansion (India already has 800 million internet users with some of the world's cheapest data rates), the stage is set for **cloud gaming** services to flourish. **Cloud gaming** allows high-end games to be streamed from data centers to users' devices, and it demands stable, fast networks – now increasingly available in India. Industry reports project that India's fast 5G deployment and massive user base could make it the **world's largest cloud-streamed gaming**

**market by the early 2030s**, even surpassing the US and China. Anticipating this, Indian telecom operators have begun partnering with gaming companies (for example, Jio has beta-tested a cloud gaming platform, and Airtel has showcased cloud gaming during 5G demos). The government's Digital India initiative indirectly supports this trend by incentivizing domestic **data centers** and cloud infrastructure development. In 2022, the government proposed a **National Data Centre policy** with incentives like tax holidays and infrastructure status for data center parks. Many states also offer subsidies for setting up data centers. These measures attract investments from big cloud providers (AWS, Google Cloud, Microsoft Azure are all expanding regions in India), which in turn means popular game streaming services can host servers locally. **Local game servers** (for titles like PUBG/BGMI, Valorant, etc.) significantly reduce latency for Indian players, improving competitive fairness and user experience. The government's emphasis on data localization (e.g., under the Draft Digital Personal Data Protection law) also encourages international gaming companies to host Indian user data on Indian servers, leading to more regional server deployments.

- **High-Performance Computing and XR Infrastructure:** Beyond connectivity, the government is promoting the tech backbone needed for next-gen gaming. MeitY's initiatives in **AI and GPU computing** (such as setting up AI supercomputing facilities and collaborating with NVIDIA for AI workforce training) complement the needs of game development and running complex game physics/graphics. The push for indigenous tech – e.g., C-DOT's development of an indigenous 5G stack – could eventually extend to gaming, with Indian startups encouraged to build game engines and cloud solutions. There is also significant focus on **XR (Extended Reality) infrastructure**: for instance, some of the AVGC Centers of Excellence have **motion capture studios, AR/VR incubation labs**, etc., which game developers can use. The **IICT's virtual production and XR studios** will support the creation of immersive content, including VR games. These

facilities mean Indian developers don't have to go abroad for advanced production – it lowers costs and builds local expertise in high-end game development, including metaverse applications.

- **5G Use-Case Labs and Gaming:** The Telecom Ministry has formed an inter-ministerial committee to identify and pilot 5G use cases across sectors. **Gaming and esports are among the focus areas**, given their economic potential. For example, 5G could enable large-scale AR games or holographic esports viewing. We may soon see collaborations between DoT, the Sports Ministry, and private innovators to host 5G-powered AR treasure hunts or VR esports tournaments as showcases. Additionally, the advent of **6G (which India is also planning for)** might bring ultra-low latency and high throughput to truly revolutionize cloud gaming and remote VR experiences – areas where India is keen to be an early adopter. The government's support for R&D in emerging tech (through programs like IMPRINT, startups under Digital India) means Indian companies can innovate in gaming tech (like real-time translation in games, haptic feedback devices, etc.), with potential government seed funding or grants.

- **Public Wi-Fi and Broadband:** Under the Bharat Net and PM-WANI schemes, the government is expanding affordable broadband connectivity via fiber in rural areas and public Wi-Fi hotspots in cities. This directly aids gaming penetration – enabling downloads/updates of games and participation in online play in areas previously lacking high-speed internet. The combination of Bharat Net (connecting villages with fiber) and 5G fixed wireless access is expected to bring **online gaming to millions of new users** in small towns and villages, expanding the talent pool and market size. The government also works with content providers on **cached servers** at telecom networks (through NIXI and others) to speed up content delivery; for instance, popular game patches or digital distribution platforms benefit from these local caching nodes, reducing lag and network loads. Furthermore, initiatives like **Digital India Startup Hub** and **IoT/AI Centers** implicitly support

gaming by advancing the overall tech ecosystem. As cloud computing and edge computing improve (with edge data centers at telecom network edges), cloud gaming latency will drop further, making competitive gaming viable even without expensive hardware on the user's end.

In summary, the Government of India's multi-faceted approach – from progressive **policies and recognition** to **economic incentives, skill development, esports integration, and digital infrastructure** – is actively fueling the growth of the gaming industry. These initiatives involve numerous ministries (MeitY, MIB, Sports/YAS, Commerce/DPIIT, Education, Telecom) in synergy with industry and academia. By 2025, India will have not only recognized gaming and esports as mainstream sectors but will also be investing in the ecosystem (through institutions like IICT, funds, and challenges) and enabling the technology (via 5G and data centers) required to make India a global gaming hub. The continued public-private partnerships, such as the DPIIT-WinZO startup program and industry collaboration in IICT, highlight a strategic intent to make Indian game developers and esports athletes globally competitive.

Given the strength of the Indian R&D community in software development, computer visualization, and human-computer interface, we are suitably poised to take online and digital games for education, learning, entertainment, Indian culture, and arts. The advantage of multi-player online games and digital technologies will eventually also reinforce our commitment to social diversity and community inclusion. It is notable that digital online games bring in more revenue compared to other entertainment industries, and are well integrated, especially with the younger population, as a part of contemporary culture. With faster internet connectivity (5G) and advances in mobile technology platforms, newer forms of digital gaming, virtual and augmented reality games, animation, and comics necessitate Indigenous breakthroughs and development to also reflect Indian ethos and values. In addition, newer developments in cloud gaming would leverage and exploit hyper-scale cloud capabilities, global delivery networks, and powerful streaming media to usher

in futuristic social entertainment platforms with a strong presence in the global market.

Considering the above-mentioned aspects and potential of the emerging field of gaming, in association with the **Indian National Academy of Engineering (INAE)** as a knowledge partner, SERB announces the **“SERB-INAE Online and Digital Gaming Research Initiative”**. Under this initiative, well-defined proposals on the following thematic areas concerning online and digital games are being invited.

### **Category (I): R&D in Learning, Educational, and Leisure Online Gaming Platforms**

Development of game-based interactive tools that offer and enhance creative insights for a focused application by improving the design, user interface, and interactive experience.

### **Category (II): Immersive Game Prototypes, with a focus on Indian Culture & Values**

Indigenous gaming research should aim to reflect Indian ethos and values while making newer digital games appealing and useful for a wide spectrum of end-users at both national and global levels.

### **Category (III): Collaborative Technical Design Process: Creation of SERB Game Labs**

This area of research provides an opportunity for cooperation between academia, start-ups, and industry by creating playable, real-world demonstrations of state-of-the-art concepts and research. This call endeavors to create **SERB Gaming Labs** in institutions where collaborations would germinate between academic researchers and industries so that true translation could occur.

### **Initiatives by Gaming communities and Gaming Companies to boost gaming in India.**

India's gaming sector has surged since 2020, driven not by government initiatives but by **private companies, investors, and community efforts**. Below, we detail key investment-driven developments in Indian gaming – from esports

arenas and studio expansions to grassroots incubators, tech platforms, and brand sponsorships – highlighting major projects, funding, and their impact on the ecosystem.

### 1. Esports Infrastructure and Leagues (Private Sector-Led)

The esports scene in India has seen significant private investment to build tournaments, leagues, and venues:

- **Krafton's Investment in Nodwin Gaming (2021):** South Korea's Krafton (publisher of PUBG/BGMI) invested ₹164 crore (~\$22.5 M) for a minority stake (~15%) in Nodwin Gaming. Nodwin – a leading Indian esports organizer (India Premiership, ESL One, DreamHack, etc.) – is using these funds to **expand esports tournaments and infrastructure**, support local talent, and create new IPs nationally and internationally. Krafton's CEO called this an effort to “*foster the promising esports ecosystem*” in India.

- **JetSynthesys&Skyesports Merger (2021):** Digital entertainment firm JetSynthesys (backed by Sachin Tendulkar and Adar Poonawalla) acquired a **65% stake in Chennai-based Skyesports** – one of India's largest grassroots esports companies. Renamed **Jet Skyesports**, this venture is creating nationwide esports leagues (Skyesports League, Grand Slam, Championship) and expanding to South Asia. The goal is to nurture “*talent in non-metros*” and build esports at the **grassroots level**, turning passionate gamers into professionals. Skyesports' tournaments have drawn over **100 million** online viewers across YouTube, Facebook, and Loco, underscoring the reach of these private initiatives.

- **Offline Esports Arenas & Big Finals (2022–2023):** Gaming firms and sponsors are bringing esports into physical venues. In October 2023, Krafton hosted the **BGMI (Battlegrounds Mobile India) finals** at a Mumbai stadium, drawing ~20,000 fans over three days. Brands like **iQOO (smartphones), Lenovo, and Red Bull** teamed up with Krafton, Nodwin, and Jio to fund these large-scale offline events. The BGMI finale featured a ₹2 crore prize pool – one of the highest in South Asian esports – awarded by Olympic gold medalist Neeraj Chopra. The

huge turnout and corporate backing demonstrate a **new era of stadium esports** in India, aimed at mainstreaming competitive gaming.

- **Telecom and Media Partnerships:** Non-gaming companies have also propelled esports. For example, **Bharti Airtel** partnered with Nodwin in 2020 to launch the **Airtel India Esports Tour**, a national ranking system and multi-game tournament circuit. This year-long tour aggregates esports performance across games like PUBG Mobile, CS:GO, Clash of Clans and more, with Airtel broadcasting events on its digital platforms. Such private-sector collaborations provide funding, media coverage, and wider audiences for Indian esports, accelerating its inclusion in the country's sporting culture.

## 2. Investments in Gaming Studios and Content Development

Domestic and international gaming studios have ramped up investment in India through new offices, acquisitions, and funding of Indian game developers:

- **Krafton's Acquisition of Nautilus Mobile (2022-2025):** Krafton deepened its India commitment by first investing \$5.4 M in Pune-based **Nautilus Mobile** in 2021, then acquiring a **75% controlling stake for \$14 M** by 2025. Nautilus is famed for its **Real Cricket** mobile franchise (100+ million downloads). Krafton plans to leverage Nautilus's expertise to *"double down on [its] India gaming strategy"*, refining cricket titles and exploring new game genres for both Indian and global markets. According to Krafton's India head, this marks their first Indian game development studio partnership, aligning with a *"goal of creating unique sports gaming experiences for the passionate cricketing Indian audience"*. The move bolsters India's game development capabilities in the high-demand sports genre.

- **Venture Funding for Indian Game Studios:** Several Indian studios have secured substantial private funding to build original IP:

- o **Mobile Premier League (MPL):** MPL, a Bangalore-based skill-gaming and esports app, raised

**\$90 M in 2020** and another **\$150 M in 2021** (at a \$2.3 B valuation). This made MPL one of India's first gaming unicorns. The funds have fueled MPL's platform growth, game developer partnerships, and sponsorship of esports teams, thereby strengthening the competitive gaming content ecosystem.

- o **SuperGaming:** Pune-based SuperGaming (known for **MaskGun** and the upcoming battle royale *Indus*) raised a multi-million-dollar Series A (backed by Skycatcher, AET Fund, etc.) around 2020–21 to develop “**Indo-futuristic**” games. This enabled the studio to hire talent and even collaborate with global players (e.g., integrating its *Indus* game with Epic Games' *Fortnite* for reach). Such investments in domestic studios are creating original Indian IP and signaling confidence in local game development.

- o **Global Studios Expanding in India:** International game companies have increased their presence:

- o **Ubisoft** (France) has grown its two Indian studios (Pune and Mumbai) to contribute to AAA projects.

- o **Electronic Arts (EA)** operates a mobile game studio and QA center in Hyderabad.

- o **Microsoft** and **Sony** have primarily focused on console sales, but their growing interest in Indian content and talent (e.g., featuring Indian games on Xbox ID@Xbox, hosting developer events) shows India's rising profile in global strategies. Moreover, tech giants like **Netflix** have begun adding mobile games targeting Indian audiences, indicating more content partnerships on the horizon.

- o **Nazara Technologies** (an Indian gaming conglomerate) has been acquisitive as well – it upped its stake to 100% in **Nextwave Multimedia** (developers of *World Cricket Championship*) by 2024, consolidating a popular cricket game franchise under its umbrella. By backing studios like Nextwave, Nazara is bolstering locally made content (WCC has 15 million MAUs) and integrating real sports IP (e.g., partnerships to bring real cricketers into games).

Overall, 2020–2025 saw **over \$1.5 billion poured into Indian game startups and studios** by VCs, corporate funds, and global publishers, transforming India from an outsourcing hub into a viable development and IP creation center.

### 3. Community Initiatives

Beyond big studios, the gaming community and industry leaders have launched incubators and accelerators to nurture indie talent:

- **Krafton India Gaming Incubator (KIGI, launched 2023):** Krafton initiated an incubator program to help **young Indian game entrepreneurs** turn ideas into reality. KIGI selects 6–10 promising game startups per batch for a 6–12-month program. Participants receive **mentorship from veteran developers**, access to market research and Krafton’s internal resources plus financial grants between **\$50,000–\$150,000** each. Notably, KIGI-backed teams like *ReDimmension Games* (Nagaland) and *Shura Games* (Bengaluru) have already benefited from this support. By providing funding, tools (e.g., AWS credits, AppMagic analytics), and investor exposure, KIGI is seeding a new wave of indie studios from the grassroots.

- **Lumikai – India’s Gaming VC Funds:** Launched in 2020, **Lumikai** is India’s first dedicated gaming venture capital fund. After an initial fund that backed startups like Bombay Play and Loco, Lumikai announced a new **\$50 M fund in 2023** with investors including Supercell (Finland), Krafton, and gaming industry veterans. This fund targets early-stage Indian game developers in areas like original content, creator platforms, gaming tech, and even frontier fields (AR/VR, AI in games). Lumikai’s partners note that India’s “*mobile-first market*” of over 500 million gamers is ripe for investment – a result of the “*supernova*” of near-free 4G data since 2016. By injecting capital and expertise, such private funds are **incubating indie studios** and encouraging innovation in the Indian gaming ecosystem.

- **Global Accelerators and Contests:** Indian indie developers have leveraged international programs as well:

o The **Google Play Indie Games Accelerator** has been a springboard for Indian studios, offering a 10-week mentorship and training bootcamp with Google experts. Many Indian mobile game startups (e.g., PlaySimple in earlier years) honed their skills through this program, gaining global best practices.

o Community-driven game jams and contests (often backed by companies): For instance, the *BYOG (Build Your Own Game)* game jam hosted by the India Game Developer Conference, and corporate-sponsored hackathons (such as Game Jams by Microsoft or Ubisoft in prior years) have continued virtually, helping developers showcase talent and even secure seed funding or publishing deals.

- **Creator & Esports Collectives:** Indian gamer communities have organized themselves into content collectives. **Streamer-led startups** like *S8UL*, a gaming content house formed by top YouTube gamers, have attracted sponsorships and mentoring to professionalize content creation. Similarly, some esports teams (e.g., **Global Esports, GodLike**) have academies and bootcamps to train grassroots players, funded by prize winners and private sponsors. These community-led efforts, while smaller in scale, complement formal incubators by building a pipeline of skilled creators and competitive players from the ground up.

**Impact:** These grassroots initiatives are addressing a crucial gap, providing early-stage funding, guidance, and community support to transform solo developers and small teams into viable businesses. As a result, more Indian indie games (from hyper-casual hits to narrative titles) are reaching global app stores, and a new generation of game entrepreneurs is emerging across the country.

#### **4. Platforms & Technology Infrastructure for Gaming**

Private sector investment has also targeted the **tech platforms** that enable gaming – from streaming services and cloud gaming to distribution platforms tailored for India:

- **Game Streaming Platforms (India's "Twitch" rivals):**

India has seen a boom in local game streaming startups:

**o Loco:** Originally a Pocket Aces product, Loco became India's leading homegrown game-streaming platform. It raised a **\$9 M seed round in mid-2021** (led by Krafton and Lumikai) and then a **\$42 M Series A in March 2022**. Backers include South Korea's Hashed, Makers Fund, and Krafton, underscoring global confidence. Loco's mission is to build a **"Twitch for India"** – it already amassed ~5 million monthly active viewers by 2021 and secured exclusive partnerships to stream content from PUBG/BGMI, Activision Blizzard, and Riot Games. Investors note that India's youthful demographic (over 100 million battle royale players) lacks a dedicated streaming platform – Loco is filling that gap, creating a vibrant ecosystem where streamers can earn via virtual gifts and brands can reach engaged gaming audiences.

**o Rooter:** Another Indian game streaming and esports content platform, **Rooter**, attracted **\$25 M Series A funding in early 2022** (from Lightbox, March Gaming, Duane Park, and others) and an additional \$16 M in 2023. Rooter focuses on mobile esports streams and user-generated gaming content, tapping into the same surge in demand for localized streaming. These infusions have helped Rooter sign content deal with popular streamers and improve its tech (e.g., interactive features, regional language streams). The competition between Loco, Rooter, and international platforms is spurring better infrastructure (low latency streaming servers, content moderation tools) for Indian gaming audiences.

- **Cloud Gaming & Low-End Access:** To bring high-end gaming to a broader audience, Indian companies are investing in cloud gaming:

**o JioGamesCloud (Reliance Jio):** Telecom giant Jio launched the beta of **JioGamesCloud** in late 2022, allowing users to stream games instantly on smartphones, PCs, and Jio set-top boxes. Jio partnered with global leaders, licensing NVIDIA's GeForce Now technology and, in 2023, signing a **10-year deal**

**with France's Gamestream** for white-label cloud gaming solutions. The goal is ambitious: bring quality cloud gaming to "1.4 billion Indians... on virtually any device" over Jio's expanding 5G network. Early tests showed promising performance on 4G/5G connections for titles like *Deliver Us The Moon*. Other telecoms have followed suit – Airtel and Vi (Vodafone Idea) demoed cloud gaming demos in 2022 – but Jio's head start, and investment mean India could leapfrog to **console-quality gaming without consoles**, once 5G is widespread. This infrastructure push, led by private telcos, aims to **democratize gaming access** in a country where dedicated gaming hardware penetration is low.

**o Cloud Gaming Startups:** Indigenous startups like **The Gaming Project** have also emerged, offering cloud gaming via subscription even before the 5G rollout. By 2022, The Gaming Project had **thousands of Indian gamers subscribing** to play PC/console titles streamed from local servers. Such ventures often receive angel and seed funding from tech investors, viewing cloud gaming as the next big opportunity in India's gaming market. Their existence further indicates a robust, privately driven effort to build the **backend tech and server infrastructure** needed for India's gaming future.

- **Game Distribution & Platforms Tailored to India:**

**o Mobile Gaming Platforms:** With mobile gaming dominating ~78% of Indian gaming revenue, companies have built platforms to distribute and monetize games for Indian users. **Mobile Premier League (MPL)**, for instance, operates a platform bundling dozens of casual competitive games and real-money tournaments. Its massive fundraises (over \$375 M to date) have enabled MPL to acquire users at scale and even expand abroad. Similarly, startups like **WinZO** (a vernacular language gaming platform) raised significant private funding (e.g. \$65 M in 2021) to fund indie developers and host their games, often targeting India's non-English speaking gamers. These platforms often implement local payment methods, regional languages, and lightweight game downloads to suit Indian conditions – a form of **distribution infrastructure** that global app stores alone couldn't provide.

**o Local App Stores and Services:** Reliance Jio has a **JioGames Store** on its devices, and partnership ventures like **Indus App Bazaar** (by PhonePe) include gaming sections targeting Indian content. While Google Play remains dominant, these alternative app stores (funded by private telecom or fintech firms) are investing in the curation of India-centric games and even exclusive releases, giving Indian developers more channels to reach players.

- **Backend Technology & Tools:** Investment is also flowing into companies that provide technology to game developers and streamers in India. For example, startups offering game analytics, localization, and multiplayer tech (such as **Yahahaha** or **Gamezop** for HTML5 games) have drawn seed funding. Even global tech providers like **Unity** and **Epic Games (Unreal Engine)** have expanded training programs and developer relations in India around 2020–2023, recognizing the need for skill development in advanced game design. Though not direct “infrastructure” in a physical sense, these efforts enhance the **soft infrastructure (skills, tools, middleware)**, enabling Indian game creators to build world-class products.

In sum, from cloud servers to streaming apps, private sector initiatives between 2020 and 2025 have laid critical **platform and tech foundations** for India’s gaming ecosystem. This is closing the gap in access (for players) and distribution (for developers), setting the stage for broader adoption of games across the country.

## 5. Sponsorships and Brand Collaborations in Gaming

Corporate sponsorships and cross-industry collaborations have flourished, validating gaming and esports as mainstream entertainment in India:

- **Non-Endemic Brands in Esports:** Over the past few years, **50+ brands from diverse sectors** have entered Indian esports sponsorships. Global tech brands like **Intel**, **AMD**, **Dell-Alienware**, and **Acer** routinely sponsor esports tournaments and college gaming fests, providing high-end equipment and prize money. Beverage and FMCG brands have also jumped in – **Red Bull** has been especially

notable, sponsoring tournaments (e.g., *Red Bull M.E.O.* for mobile esports, *Red Bull Flick* for CS:GO) and even signing India's first esports athlete, Ankit "V3nom" Panth, as a Red Bull athlete. **Monster Energy** and **Coca-Cola** have sponsored gaming events to reach young audiences, while **Mercedes-Benz** appeared as a surprise sponsor for some PUBG Mobile events, indicating how even luxury brands see value in esports visibility. This influx of non-gaming brands has greatly increased prize pools and professional opportunities for players. For instance, the FICCI-EY 2021 report noted that brands like Airtel, Flipkart, Yes Bank, MTV, and **Sony LIV** (OTT platform) had all backed esports events, collectively helping the esports industry reach ₹3 billion in FY2021 revenue.

- **Telecom & Tech Sponsorships:** Indian telecom companies are leveraging gaming for marketing – beyond Airtel's esports tour tie-up mentioned earlier, **Jio** has hosted online gaming tournaments for its users and packaged data plans with gaming benefits. Smartphone makers in particular see Indian gamers as a key market:

- o **OnePlus** partnered with esports org Fnatic to sponsor its Indian PUBG Mobile team (with OnePlus branding on jerseys) and co-hosted the **OnePlus Domin8** charity tournament in 2020 featuring gamers and celebrities. Likewise, **OPPO** and **Vivo** (Chinese phone brands) sponsored the flagship PUBG Mobile India Series championships pre-ban, associating their devices with gaming prowess.

- o Gaming PC brands (HP Omen, ASUS ROG) sponsor Indian LAN events and streamer shows to showcase their hardware. These collaborations bring funding, hardware prizes, and publicity, helping cultivate a **professional gaming culture**.

- **Sponsoring Streamers & Content Creators:** Recognizing the influence of gaming creators, brands have begun investing in individual influencers:

- o Top gaming YouTubers and streamers (some with 5–10 million subscribers) have inked endorsement deals for energy drinks, peripherals, and even apparel. For example, leading streamer Dynamo Gaming became a brand ambassador

for ASUS ROG in India, and Mortal (Naman Mathur) had partnerships with HP and Puma for gaming merchandise. These deals often involve sponsorship fees or equity in startups, incentivizing creators to continue building the gaming community.

o Streaming platforms like Loco and Rooter also collaborate with brands to host sponsored content series. **Loco's partnership with Red Bull** in 2020 aimed to "*transform esports into popular culture*" by creating branded tournaments and content showcases on the platform. Together, they live-broadcast events like the Red Bull Flick finals and planned new co-branded events across PUBG Mobile and Dota 2. Such tie-ups not only fund the content but also elevate the visibility of esports by linking it with well-known consumer brands.

- **Gaming x Pop Culture Collaborations:** Entertainment and media companies are now treating gaming IP as valuable content. For example, **Amazon Prime Video** sponsored a Free Fire tournament series to promote a show, and streaming service **SonyLIV** has hosted esports on its platform as content. We also see brand integration in games – e.g., Indian fashion brands designing virtual outfits for PUBG/BGMI characters or automobile brands featuring in-game car models – usually as paid partnerships. This trend of **cross-pollination between gaming and other industries** is unlocking new revenue streams for game developers and event organizers.

**Overall impact:** Sponsorships and brand deals have **professionalized the gaming ecosystem** in India. They provide crucial funding for tournaments and content, allowing esports teams and players to earn salaries and focus full-time. They also signal social acceptance – when names like Pepsi, Airtel, or Red Bull back gaming, it legitimizes esports and streaming as viable careers to the public. The 2020–2025 period has been pivotal in this regard: major brands went from tentative experiments to full-fledged marketing strategies around gaming, suggesting that such collaborations will continue to grow and diversify (with sectors like education, fashion, and fintech now also targeting the gamer demographic).

## Key Developments (2020–2025) and Future Outlook

Between 2020 and 2025, India's gaming industry experienced a remarkable upswing fueled by **private investments** across the board. Key highlights included massive venture funding (Indian gaming startups raised ~\$1.6 B in just the first nine months of 2021), the entry of foreign publishers like Krafton with multi-million-dollar stakes in Indian companies, and the rise of homegrown unicorns (Dream11 in fantasy sports, MPL in casual esports). This influx has built out critical infrastructure – from tournament circuits and studios to streaming apps and cloud services – essentially laying the groundwork for a mature gaming ecosystem.

### Notable trends and future signals:

- **Mobile-First Momentum:** As of 2023, India's gamer base reached ~500 million, predominantly on mobile. Investments reflect this reality (focus on mobile esports, mobile studios, and mobile streaming). Going forward, improving monetization of this large user base is a priority. The industry is projected to grow from \$2.6 B in 2022 to **\$8.6 B by 2027–28**, indicating substantial revenue upside as paying users increase. Both content and tech investments are expected to keep targeting mobile gamers, including exploring Web3 and NFT-based games to capitalize on new monetization models for this audience.
- **Esports Recognition and Growth:** Private sector efforts succeeded in getting esports recognized as a medal sport in the 2022 Asian Games (India won its first medals in esports in 2023). This milestone, while a government/regulatory decision, was predicated on the robust esports culture that private investments built. It is likely to attract **even more sponsors and media deals** with the esports industry. Stadium events like the BGMI finals in Mumbai may become regular, multi-city tours. We anticipate more franchised leagues (potentially city-based teams) and higher prize pools, possibly crossing the million-dollar mark, funded by a mix of game publishers (e.g., Riot, Valve), as well as corporate sponsors.

- **International Interest in Indian IP:** The success of games like *Ludo King* (500M downloads) and *WCC* cricket, and new IPs like *Indus*, has drawn attention from global publishers. We might see more **acquisitions of Indian studios by global giants** (similar to how Zynga acquired a hyper casual studio in 2022, or how Sony and Tencent invested in FromSoftware, which has Indian tech support). Companies like **Tencent, NetEase, and even Western publishers** could re-enter with strategic investments if regulatory climates allow, given the market's sheer size. For instance, reports suggest Krafton has over \$150 M earmarked for further investments in India. Similarly, Ubisoft's and EA's continued expansion hints that India will play a bigger role in global game development pipelines.

- **Infrastructure and Talent Upgrades:** With 5G rolling out, cloud gaming could hit an inflection point around 2025–2026. If JioGamesCloud's 10-year plan succeeds, India may become one of the largest user bases for cloud gaming, reducing the barrier of expensive hardware. Concurrently, the talent pool is improving – gaming-focused education (private training institutes, online courses sponsored by Unity/Epic) and incubators are producing more skilled developers, artists, and designers. The private sector will likely continue to invest in **skill development initiatives** (such as internships at studios, hackathons, and creator monetization programs) to ensure a steady supply of talent to fuel the growth.

- **Community-Driven Innovation:** The rise of indie hits and the passionate fan communities around them (for example, modders of Indian origin, or fan-funded projects on platforms like Kickstarter) could encourage more **community-backed funding** models. We might see the emergence of crowdfunding for games, or tokenized community ownership of esports teams, especially as crypto and blockchain-based gaming evolve (some Indian startups are already exploring play-to-earn games with community tokens). While still nascent, these grassroots funding avenues can complement traditional VC investment.

## Conclusion

India's tech-savvy youth and increasing disposable income are driving the growth of the country's gaming industry. Mobile gaming has become very popular among both casual and competitive players, establishing India as a significant player in the gaming market. Beyond mobile platforms, the future of gaming in India looks promising. The rise of high-speed internet and the availability of devices are facilitating a resurgence in PC and console gaming. The industry offers opportunities for programmers who create immersive worlds and talented artists who bring characters to life. Additionally, e-sports administrators are gearing up for exciting tournaments, and game developers are innovating cutting-edge products.

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