



The Dialogue®
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SURVEY REPORT

TUNING INTO CHANGE

EMPIRICAL INSIGHTS

INTO INDIA'S EVOLVING MUSIC INDUSTRY



SURVEY REPORT

Tuning into Change: Empirical Insights into India's Evolving Music Industry

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The Dialogue® is a public policy think tank with a vision to drive a progressive narrative in India's policy discourse. Founded in 2017, we believe in facilitating well-researched policy debates at various levels to help develop a more informed citizenry, on areas around technology and development issues. The Dialogue® has been ranked as the world's Top 10 think tanks to watch out for, by the Think Tank and Civil Societies Programme (TTCSP), University of Pennsylvania in their 2020 and 2021 rankings.

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COMMITTEE OF PARLIAMENT ON OFFICIAL LANGUAGE
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India's music industry is at an exciting juncture; it is not only realising its full potential as a cultural powerhouse but also as a driver of the economy. Fueled by digital innovation, forward-thinking government initiatives, and the creative talent of our artists, Indian music is now reaching audiences in the country and beyond. A particularly inspiring trend that I would like to highlight is the growth of regional music, especially Bhojpuri, which is now resonating from Patna to Mumbai and among international diaspora communities. This form of cultural embracement and exchange is not only playing a role in reviving and preserving India's artistic legacy but also expanding our global footprint. To fully realise this potential, all of us should strive to become a part of this evolution, whether it be audiences, musicians, industry, the government, or us, policymakers and work together to build a thriving, inclusive, and world-class music ecosystem.

The Government of India has been particularly committed to supporting the growth of musicians and streaming platforms, and our efforts have helped create a space where regional and independent artists can thrive and platforms can innovate. These efforts have particularly benefited grassroots artists, enabling local genres, whether it's the folk traditions of Mithila, the bhajans of Banaras, or contemporary Bhojpuri hits, to reach audiences worldwide.

I congratulate The Dialogue for their study, Tuning into Change: Empirical Insights into India's Evolving Music Industry, which provides important insights into the challenges in India's music sector and opportunities for India. As India cements its position as a global music powerhouse, we should adopt a Whole-of-Society Approach—where government, industry, and creators work together—to sustain this momentum. A key focus area should be strengthening music education and empowering artists with knowledge of their creative and legal rights as well as digital skills. Not to forget, setting global industry standards will further help elevate India's position as a leading force in the global music economy. With the right policies in place and continued innovation and commitment to artistic excellence, India's music industry is poised to become a leader in music and creative entrepreneurship.

I once again congratulate The Dialogue on this insightful report and encourage all stakeholders to build upon this foundation to ensure the continued growth of India's music sector.


(Rajesh Verma)

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4. Mr Danvendra Arya, Producer | Singer | Songwriter
5. Ms Hanita Bhambri, Singer | Songwriter | Poet
6. Ms Nush Lewis, Musician | Music Educator | Founder, OffSet Education
7. Professor (Dr) Shashwati Goswami, Regional Director, Indian Institute of Mass Communication (IIMC)
8. Mr Vijay Basrur, Entrepreneur | Founder, OK Listen | Former Head, AWAL India

Their expertise, time, and unwavering support have been instrumental in shaping this research, and we remain deeply appreciative of their contributions.

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EXECUTIVE SUMMARY

I. OVERVIEW

Every day, millions of Indians go online in search of music—new and old, desi and global, lyrical and instrumental. Whether they're working, doing chores, or winding down for the night, digital nagriks are almost never without music. From curated playlists such as Bollywood Butter and Indie India to hyper-local gems like the Bus Driver Playlist, India's music choices are as diverse as its people.

With 46 crore daily streams and an industry revenue projection of ₹3700 crore by 2026, this evolving ecosystem is at a critical turning point. Currently 87% of industry revenue comes from digital platforms, fueled by millions of paid subscribers. Streaming of regional genres grew by 81%, led by Kannada, Tamil, and Punjabi, with Indian market constituting 14% of the total global audio and video streams. While this growth unlocks immense opportunities, it also has the potential to create friction that intersects with regulatory complexities, piracy, compliance burdens, and infrastructure gaps that pose barriers to the creator economy's sustained growth and global reach.

This study, based on a 2024-25 nationwide survey of 1,200 artists across 21 languages, explores key industry trends, regulatory challenges, and strategies to empower independent and regional artists.

II. RESEARCH METHODOLOGY

- **Mixed Methods Approach:** Quantitative insights from 1200 music artists whose music is available on online streaming platforms and 10 qualitative interviews from Subject Matter Experts.
- **Language Diversity:** Hindi (69%), English (64%) and 19 regional languages (15%).
- **Gender representation:** Male (59%) and Female (41%) participants.

III. QUANTITATIVE INSIGHTS FROM THE SURVEY

The report focuses on the following key thematic areas:

- **Cultural Diplomacy and Global Collaboration**
 - Indian music is expanding globally, but regulatory challenges could make it difficult for artists to expand beyond India. While musicians consider global exposure essential, 77% reported that new compliance barriers, like content evaluation and alignment with prescribed standards, could limit access to international markets.

- Music tourism is also growing, yet 48% of artists emphasise the need for better venues and infrastructure to attract global talent.

- **Regional and Independent Artists: Unlocking Growth Potential**

- Digital platforms provide opportunities, but infrastructure and financial constraints limit the growth of regional artists, with 50% supporting government grants to sustain regional and folk music and 46% emphasising investment in training and music creation resources.

- **Balancing Regulations and Creative Expression**

- Stricter compliance risks limiting creative expression and slowing industry growth, with 75% of artists noting that new additional pre-release content reviews could increase operational complexity, while 82% fear stricter rules could limit musical diversity.
- New additional compliances could raise costs potentially impacting production budgets. 80% of musicians are concerned about potential financial strain.

IV. RECOMMENDATIONS

- **Enhancing Global Music Influence** – Expand international collaborations and government-backed representation at global music festivals.
- **Empowering Regional Artists** – Invest in recording studios, training programs, and government-backed financial grants.
- **Optimizing Regulations** – Enable artist-friendly content guidelines by maintaining the status quo, where the industry complies with the IT Rules 2021, without introducing new regulatory layers that could hinder growth.
- **Strengthening Music Infrastructure** – Develop concert venues, boost music education, and promote music tourism.

A collaborative approach involving policymakers, industry leaders, and digital platforms is essential to unlocking India's music potential globally.

CHAPTER 1

BACKGROUND

India's music industry is undergoing dynamic expansion, with the rise of the music creator economy reshaping traditional structures. This shift is transforming how music is produced, distributed, and consumed, ushering in an era of innovation and artistic freedom. More creators—especially regional and independent artists—are showcasing their music to wider audiences.

Affordable technology, widespread internet access, and the proliferation of digital platforms have empowered a new generation of musicians to break free from traditional models, take control of their artistic journey, and connect directly with audiences worldwide. This transformation is not only democratising the industry but also creating a unique ecosystem. Artists now leverage multiple revenue—streams—streaming royalties, live performances, brand partnerships, and direct fan engagement—to build sustainable careers.

India's music creator economy holds immense promise, poised to unleash the vast creative potential of the nation and redefine the future of music. However, its rapid growth intersects with legal and policy frameworks, raising critical questions about intellectual property rights, creative expression, and fair compensation. The music industry operates within an established regulatory framework, primarily built upon the Copyright Act, 1957, and complemented by the Information Technology (IT) Act, 2000; and IT

(Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021. While these regulations are well poised well to tackle varied concerns from piracy to obscenity, effective and streamlined enforcement is needed instead of adding another layer of regulation.

The key question, then, arises: *How can we bridge the gap between existing legal frameworks and the evolving music creator economy to both protect and promote artistic endeavours?* The solution lies not in introducing entirely new regulations but in ensuring the effective implementation and enforcement of existing ones with clarity and consistency. Rather than adding regulatory layers that may increase compliance burdens, a streamlined approach—focused on simplifying processes and fostering collaboration—will be crucial in empowering stakeholders and nurturing a thriving music creator economy. Strategic government support and industry initiatives will also play a vital role in developing emerging talent and expanding Indian music's global reach.

This study explores the thriving music creator economy in India, examining its potential for cultural diplomacy, its impact on regional talent, and the potential compliance challenges that may arise in the face of proposed regulations. It aims to understand how to best support and empower Indian musicians on both domestic and global stages, frameworks to sustain growth and ensure Indian music's diverse talent thrives on the world stage.

1901

RECORDED MUSIC INDUSTRY BEGINS

GRAMOPHONE AND TYPEWRITER LTD. IN CALCUTTA LAID THE FOUNDATION FOR INDIA'S COMMERCIAL MUSIC ECOSYSTEM.



1931

BOLLYWOOD MUSIC EMERGES

ALAM ARA, INDIA'S FIRST SOUND FILM, MADE MUSIC CENTRAL TO INDIAN CINEMA.



1936

INDIAN PHONOGRAPHIC INDUSTRY (IPI) FOUNDED: LATER RENAMED TO IMI (INDIAN MUSIC INDUSTRY)

PROTECTED MUSIC PRODUCERS' RIGHTS, SIMILAR TO MODERN DIGITAL ROYALTIES.



1941

PPL INDIA ESTABLISHED

CREATED A LEGAL FRAMEWORK FOR PUBLIC PERFORMANCE RIGHTS COLLECTIONS FOR RECORDED MUSIC—A PRECURSOR TO TODAY'S STREAMING LICENSES.



1957

COPYRIGHT ACT INTRODUCED

PROVIDED FOUNDATIONAL IP PROTECTIONS FOR INDIAN ARTISTS, MUSIC RIGHTS HOLDERS, AND CREATORS LATER ADAPTED FOR DIGITAL MEDIA.



1980

RISE OF ROCK AND ELECTRONIC MUSIC

SET THE STAGE FOR INDEPENDENT MUSIC, WHICH FLOURISHED IN THE DIGITAL ERA.



1980s–90s

CASSETTE AND CD BOOM

INDIA BECAME THE SECOND-LARGEST CASSETTE MARKET, PAVING THE WAY FOR DIGITAL DISRUPTION.



1994

INDIA JOINS THE WTO

MUSIC INDUSTRY ALIGNED WITH GLOBAL MINIMAL RIGHTS PROTECTION STANDARDS.



1994

PERFORMERS' RIGHTS INTRODUCED

LAID THE FOUNDATION FOR DIGITAL MUSIC LICENSING AND ARTIST ROYALTIES.



2000

IT Act

ESTABLISHED LEGAL GROUND FOR PIRACY CONTROL AND DIGITAL DISTRIBUTION.



2000s

MP3 AND DIGITAL DOWNLOADS RISE

COLLAPSED PHYSICAL SALES, PUSHING ARTISTS TOWARD NEW REVENUE MODELS.



2018

INDIA RATIFIED THE WIPO INTERNET TREATIES

ALIGNED WITH GLOBAL MINIMAL PROTECTION STANDARDS FOR SONGWRITERS, ARTISTS, AND PRODUCERS.



2021

IT RULES RESHAPE DIGITAL MUSIC

INTRODUCED STRUCTURED OVERSIGHT FOR STREAMING AND CONTENT MODERATION.



2024

STREAMING DOMINATES MUSIC REVENUE

STREAMING NOW ACCOUNTS FOR NEARLY ALL RECORDED MUSIC REVENUE, FUELED BY MILLIONS OF PAID SUBSCRIBERS.



2012

DIGITAL STREAMING REVOLUTION

STREAMING PLATFORMS SUCH AS SAAVN, GAANA, AND iTUNES REVOLUTIONISED DIRECT MUSIC DISTRIBUTION, WHILE UPDATED DIGITAL COPYRIGHTS IMPROVED STREAMING MONETISATION.



2019

LEGAL FRAMEWORK FOR STREAMING

COURT RULING REINFORCED CONTENT REGULATION FOR ONLINE MUSIC PLATFORMS.



2023

INDEPENDENT AND REGIONAL MUSIC BOOMS

81% SURGE IN REGIONAL MUSIC STREAMING HIGHLIGHTS CREATOR-DRIVEN DEMAND.



2024-25

LIVE MUSIC AND TOURISM SURGE

LIVE ENTERTAINMENT IS SET TO REACH NEW HEIGHTS BY 2026, PROVIDING A SIGNIFICANT BOOST TO INDIE ARTISTS.



CHAPTER 2

SNAPSHOT OF THE INDIAN MUSIC INDUSTRY

2.1 THE DIGITAL REVOLUTION AND CHANGING CONSUMPTION PATTERNS

The digital revolution has transformed Indian audiences into global music consumers, making music an integral part of daily entertainment and social expression.

| Listening Habits and Time Spent | Subscription Base Growth | Trends among Audiences |
|--|--|--|
| <p>In 2023, India averaged 46 crore daily music streams, marking a 1.6-fold increase from 2020.¹</p> <p>The number of monthly active users on music streaming services reached 17 crore in 2023.²</p> | <p>Paid music subscriptions grew from 50 lakh to 80 lakh in 2023.³</p> <p>Music streaming services attracted an audience of 18.5 crore Indians in 2023.⁴</p> | <p>Indian artists dominated global Instagram Reels, with 15 of the top 20 most-used songs originating from India.⁵</p> <p>Listeners in India spent an average of 24.4 hours per week streaming music.⁶</p> <p>Over 25.1 crore Gen Z listeners used streaming services daily.⁷</p> |

¹ Basuroy, T. (2024, April 5). *Value of the music industry in India from 2007 to 2023, with estimates until 2026*. Statista. <https://www.statista.com/statistics/235845/value-of-the-music-industry-in-india/>;

² Basuroy, T. (2024, April 5). *Value of the music industry in India from 2007 to 2023, with estimates until 2026*. Statista. <https://www.statista.com/statistics/235845/value-of-the-music-industry-in-india/>;

³ Statista. (2024, June 5). *Paid music subscriptions grew from 5 million to 8 million in 2023*. <https://www.statista.com/statistics/292475/number-paying-online-music-service-subscribers-worldwide/>.

⁴ IBEF. (2024, November). *Media and Entertainment Industry*. <https://www.ibef.org/industry/media-entertainment-india>

⁵ Meta. (2022, December 19). *Reels in Review' – Some of 2022's Top Trends on Reels In India*. <https://about.fb.com/news/2022/12/reels-in-review-some-of-2022s-top-trends-on-reels-in-india/>.

⁶ IFPI. (2023, December 11). *Engaging With Music 2023*. https://www.ifpi.org/wp-content/uploads/2023/12/IFPI-Engaging-With-Music-2023_full-report.pdf.

⁷ For The Record, Spotify. (2024, November 4). *Culture Next 2024: The Major Gen Z Trends That Are Shaping Audio Streaming*. <https://newsroom.spotify.com/2024-11-04/culture-next-2024-the-major-gen-z-trends-that-are-shaping-audio-streaming/>.

2.2 EVOLVING CONSUMER PREFERENCES AND INDUSTRY TRANSFORMATION

Shifting consumer preferences are reshaping India's music landscape, creating a dynamic mix of diverse genres and fostering a more inclusive industry.

| Classical Music (Hindustani and Carnatic) | Folk and Regional Music | Film Music | Contemporary and Non-Film Music | Top Music Genres in India |
|---|--|--|---|---|
| Classical music streaming on Spotify grew by 500%. ⁸ | The fastest-growing genre, accounting for 34% of total streams in FY23. ⁹ | Bollywood tracks drive 50% of total music consumption and contribute 75-80% of industry revenue. ¹⁰ | 70% of listeners prefer regional and indie content. ¹¹ | Bollywood Modern, Bollywood New Age, Bollywood Classic, Bollywood Coming, Indian Pop, Hip-Hop/Rap, Indian Hip-Hop/Rap, and Bollywood Retro. ¹² |

⁸ Spotify Newsroom. (2023, September 26). *India's classical music takes center stage in Spotify's Echo campaign*. <https://newsroom.spotify.com/2023-09-26/indias-classical-music-takes-center-stage-in-spotifys-echo-campaign/>.

⁹ Redseer. (2023, April 21). *Regional music streaming: Hitting the right notes*. from, <https://redseer.com/newsletters/otta-media-services-in-india/>.

¹⁰ KPMG India. (2020, September). *A year off script: Time for resilience; KPMG in India's Media and Entertainment report 2020*. <https://assets.kpmg.com/content/dam/kpmg/in/pdf/2020/09/year-off-script-kpmg-india-media-and-entertainment-2020.pdf>.

¹¹ Times of India. (2022, September 13). *Rise of regional and indie music on popularity charts*. from, <https://timesofindia.indiatimes.com/life-style/spotlight/rise-of-regional-and-indie-music-on-popularity-charts/articleshow/94160628.cms>.

¹² Indian Music Industry. (2024, August 23). *Digital Music Study 2023*. <https://indianmi.org/digital-music-study-report-2023/>.

2.3 THE RISE OF REGIONAL MUSIC IN INDIA

Indian regional music is surging in popularity, both domestically and internationally.

| Exponential Growth in Regional Music Consumption | Fastest-Growing Regional Genres (2023-24) ¹⁴ | Global Appeal of Indian Music |
|--|--|--|
| <p>Streaming activity increased by 81%, with regional music growing at a 14% CAGR (2020–2023).¹³</p> | <p>Kannada, Malayalam, Tamil, Telugu, Punjabi, Bhojpuri, and Haryanvi.</p> | <p>Global streaming of Indian music surged by over 2,000% in 2023 compared to 2019.</p> <p>40% of royalties in 2023 on Spotify came from international listeners in the U.S., Canada, UAE, Indonesia, Turkey, Italy, and Brazil.¹⁵</p> |

¹³. Luminate. (2022, December 5). *India's music market: Only 2nd to US and surging*. from, <https://luminatedata.com/blog/indias-music-market-only-2nd-to-us-and-surfing/>.

¹⁴. Spotify. (2024, March 11). *Five Years of Spotify in India: A Look Back at Our Greatest Hits*. <https://newsroom.spotify.com/2024-03-12/five-years-of-spotify-in-india-a-look-back-at-our-greatest-hits/>; see also JioSaavn. (2022, December 21). *JioSaavn captures India's listening habits with Best of 2022*. <https://www.jiosaavn.com/corporate/blog/2022/12/30/jiosaavn-captures-indias-listening-habits-with-best-of-2022/>.

¹⁵. The Indian Express. (2024, August 14). *8,700 Indian artists reach global audience, Punjabi music most listened in India in 2023: Spotify report*. from, <https://indianexpress.com/article/technology/spotify-report-indian-artists-music-reach-worlwide-9491000/>

2.4 STEADY GROWTH OF INDIA'S MUSIC INDUSTRY

India's music industry continues to expand, driven by streaming, live events, and employment opportunities.

| Year-on-Year Revenue Growth from Digital Platforms | Streaming's Role in Revenue Growth | Live Music Events and Market Expansions | Employment in the Music Industry |
|--|--|--|--|
| <ul style="list-style-type: none"> • 2018: ₹1400 crore • 2023: ₹2400 crore • 2026 (Projected): ₹3700 crore.¹⁶ | <ul style="list-style-type: none"> • 2018: Streaming contributed 70% of total revenue.¹⁷ • 2023: Digital platforms accounted for 87% of total revenue.¹⁸ | <ul style="list-style-type: none"> • The live entertainment market is projected to reach ₹14906 crore by 2026, growing at over 20% CAGR.¹⁹ | <ul style="list-style-type: none"> • Formal Sector: 40,000+ music creators, including singers, composers, and lyricists.²⁰ • Informal Sector: Over 1.4 crore workers, with brass bands forming the largest segment.²¹ |

¹⁶ Ernst & Young LLP. (March 2024). #Reinvent: India's Media & Entertainment Sector is Innovating for the Future.

https://www.ey.com/en_in/insights/media-entertainment/reinvent-india-s-m-e-sector-is-innovating-for-the-future

¹⁷ Deloitte India. (2019, September). Economic impact of the recorded music industry in India.

https://www2.deloitte.com/content/dam/Deloitte/in/Documents/technology-media-telecommunications/IMI%20report_singlePage.pdf

¹⁸ Basuroy, T. (2024, April 5). *India: music revenue share by 2023*.

Statista.<https://www.statista.com/statistics/1154075/india-music-revenue-share-by-source/>.

¹⁹ Kalra, J. (2024, December 6). *Global music stars head to India as young, affluent Indians pack concerts*. from

<https://www.reuters.com/world/india/global-music-stars-head-india-young-affluent-indians-pack-concerts-2024-12-06/>.

²⁰ Ernst and Young. (EY) (2023, December 05). *The music economy creator – The rise of music publishing in India*.

<https://www.ey.com/content/dam/ey-unified-site/ey-com/en-in/insights/media-entertainment/documents/ey-the-music-creator-economy.pdf?ref=staging-2.finshots.in>.

²¹ Kedia, M., Manish, M., Sekhani, R., Gupta, S., & Reddy, A. (2022, August). *The untold potential of India's informal music industry*. Indian Council for Research on International Economic Relations (ICRIER).

<https://icrier.org/pdf/The-Untold-Potential-of-India-s-Informal-Music-Industry.pdf>.

2.5 THE RISE OF INDIA'S MUSIC-TECH ECOSYSTEM

A dynamic music-tech ecosystem is taking shape, with startups and support services driving innovation across the industry.

| Music-Tech Startups | Support Services and Education Hubs |
|--|---|
| <ul style="list-style-type: none"> • Damroo: India's first regional and independent music ecosystem, featuring <i>250,000+ regional tracks in 20+ Indian languages</i>.²² • Hoopr.ai: A music licensing platform that helps content creators discover and license tracks, creating new monetisation opportunities for musicians.²³ • Yours Eventfully: An artist development platform that fosters growth across genres and connects artists with the right audiences through entertainment events.²⁴ • Baahi: A platform dedicated to preserving and promoting regional music and culture from North East India, offering streaming and podcast services for regional music.²⁵ | <ul style="list-style-type: none"> • Shankar Mahadevan Academy: Offers live, online Indian music education 24/7 across 90+ countries, covering Hindustani and Carnatic vocals, instrumental training, and playback singing for learners of all ages.²⁶ • Represent: Provides creator management, music distribution, festival IPs, SaaS tools, and music business education. Key collaborations include Shah Rukh Khan for Marshmello's "Biba" and Triller's expansion (50M+ monthly users).²⁷ • Artium Academy: Offers personalised one-on-one live music classes in vocals, piano, and guitar.²⁸ • Muzigal: A global online academy with 400+ teachers delivering diverse instrument and vocal lessons.²⁹ • Offset Education: Conducts skill-based workshops for learners and online professional development sessions for music educators. |

²² Mishra, R. (2023, August 10). *Artists' success is our success: Damroo's Ram Mishra*. Indian Television.

<https://test.indiantelevision.com/iworld/over-the-top-services/artists-success-is-our-success-damroo-s-ram-mishra-230810>

²³ Sharada, K. (2024, January 17). *Why Hoopr is the best choice for copyright-free music*.

<https://blog.hoopr.ai/why-hoopr-is-the-best-choice-for-copyright-free-music/>

²⁴ Yours Eventfully. <https://www.yourseventfully.com/>

²⁵ New Indian Express. (2024, December 29). *Baahi: Assamese trio creates digital platform to preserve, share regional music*.

<https://www.newindianexpress.com/thesundaystandard/2024/Dec/29/baahi-assamese-trio-creates-digital-platform-to-preserve-share-regional-music>

²⁶ Shankar Mahadevan Academy. <https://www.shankarmahadevanacademy.com/>.

²⁷ Represent Management.

<https://representmgmt.in/about-us#:~:text=They%20onboarded%20the%20Bollywood%20superstar,a%20total%20of%2014%20artists>

²⁸ Times of India. (2022, October 10). *Artium Academy raises \$3 million funding*.

<https://timesofindia.indiatimes.com/business/india-business/artium-academy-raises-3-million-funding/articleshow/94764149.cms>

²⁹ Reddy, M. (2021, July 26). Online music learning startup Muzigal bridges the gap between teachers and learners. YourStory.

<https://yourstory.com/weekender/online-music-learning-startup-muzigal-teachers-learners>

2.6 INDIAN MUSIC AS A GLOBAL CULTURAL BRIDGE

From international festivals to film soundtracks, Indian music continues to bridge cultural divides and gain global recognition.

| Government-Led Cultural Exchanges | Indian Music in Foreign Film and Media | UNESCO and Global Recognition |
|--|---|--|
| <ul style="list-style-type: none"> • The Ministry of Culture promotes Indian music worldwide through Cultural Exchange Programmes (CEPs) and the Festival of India (Fol). • The World Audio Visual and Entertainment Summit (WAVES), hosted by the Ministry of Information and Broadcasting, brings together industry leaders and creators. • The Indian Council for Cultural Relations (ICCR) organises the India International Dance and Music Festival, showcasing Indian music abroad. • During India's G20 Presidency (2023), folk and classical musicians represented India's rich musical heritage on the global stage. | <ul style="list-style-type: none"> • Hollywood films have featured iconic Indian tracks, including: <ul style="list-style-type: none"> • Deadpool (2016): "Mera Joota Hai Japani" from <i>Shree 420</i> (1955). • Lion (2016): "Urvasi Urvasi" from <i>Kadhalan</i> (1994). • Inside Man (2006): "Chaiyya Chaiyya" from <i>Dil Se</i> (1998). • Palestine-Chilean singer Elyanna drew inspiration from Bollywood's <i>Deewani Mastani</i> (2015) for her 2023 track Kayani. | <ul style="list-style-type: none"> • Cities of Music: UNESCO recognises Varanasi and Gwalior for their musical heritage. • UNESCO Intangible Cultural Heritage recognises several Indian musical traditions, including: Hindustani and Carnatic music; Manipuri Sankirtana (devotional music and dance); Borgeet (Assamese devotional songs); Kalbelia (Rajasthani folk songs). |

2.7 GLOBAL RECOGNITION OF INDIAN MUSICIANS

Indian musicians are making a global impact through prestigious awards, international collaborations, and streaming success, solidifying India's presence in the global music industry.

| International Recognition | International Collaborations and Crossovers | Digital Streaming Success |
|--|---|---|
| <ul style="list-style-type: none"> • Zakir Hussain: Multiple Grammy Awards, most recently in 2024. • Shankar Mahadevan and Shakti: Won <i>Best Global Music Album</i> at the 2024 Grammys. • A.R. Rahman: Two Academy Awards and two Grammy Awards (<i>Slumdog Millionaire</i>). | <ul style="list-style-type: none"> • Ravi Shankar and George Harrison: Created "Collaborations," blending Indian classical with Western pop. • Diljit Dosanjh, Camilo and Sia: Fused Punjabi and Latin music. • King and Nick Jonas: Reimagined "Maan Meri Jaan" reimagined for global audiences. | <ul style="list-style-type: none"> • Arijit Singh became the first Indian artist to reach 100M followers on Spotify. • In 2023, Spotify featured 8,700 Indian artists on editorial playlists. • In 2024, Punjabi music on Apple Music surged 124% globally over two years.³⁰ • Hanumankind topped Indian hip-hop, with <i>Big Dawgs</i> featuring in Amazon Music's <i>Viral Hits and International</i> playlists.³¹ |

³⁰ FirstPost. (2024, June 26). *Apple Music picks its first Indian artist, Karan Aujla, for its 'Up Next' programme.* <https://www.firstpost.com/tech/apple-music-introduces-karan-aujla-as-first-indian-artist-in-up-next-programme-13786516.html>

³¹ MusicCulture (2024, December 13). *Amazon Music India unveils 'Best Of 2024' celebrating top hits & artists.* <https://www.musicculture.in/amazon-music-india-unveils-best-of-2024-celebrating-top-hits-artists/>

CHAPTER 3

METHODOLOGY

This study has employed a mixed-methods approach, supporting a holistic quantitative survey with qualitative insights to assess the Indian music creator economy comprehensively. By integrating statistical trends with expert insights, the research ensures a holistic understanding of emerging policies' economic, creative, and international implications.

3.1 PURPOSE OF THE STUDY

The objective of this study is to understand the evolving dynamics of the Indian music industry, with a specific focus on the rise of the music creator economy. By gathering insights from musicians, industry professionals, educators and other stakeholders, the study aims to explore the opportunities and challenges faced by independent creators in a rapidly changing landscape. The study's purpose is to provide a data-driven understanding of the current state of India's music industry, especially within the context of cultural diplomacy, regional empowerment, and the challenges faced by creators in reaching the global stage. The findings are aimed to help inform policies, industry practices, and initiatives that will support the growth and global recognition of Indian music, ensuring that it remains a powerful force for cultural exchange and artistic innovation.

3.2 MIXED-METHODS APPROACH (QUANTITATIVE AND QUALITATIVE)

This study adopted a convergent mixed-methods design, where quantitative and qualitative data were collected simultaneously, analysed separately, and then integrated to strengthen the findings.

- The quantitative survey identified industry-wide patterns, offering statistically significant insights into the challenges faced by music content creators.
- The qualitative interviews provided rich perspectives, allowing for a deeper exploration of individual experiences and industry expectations.

This combination ensured that the study captures both measurable trends and the nuanced realities of the industry, providing a well-rounded foundation for policy recommendations and future growth strategies.

3.3 SURVEY METHODOLOGY FOR QUANTITATIVE RESEARCH

3.3.1 STAKEHOLDER UNIVERSE

The survey targeted 1,200 musicians across various regions of India who actively distribute music on digital streaming platforms such as Amazon Music, Apple Music, JioSaavn, Spotify, and YouTube Music. The stakeholders interviewed for the survey are music artists whose music is available on online streaming platforms, hereinafter referred as musicians. The respondents do not include music artists who solely perform live or whose music is unavailable on digital streaming platforms.

A stratified sampling approach ensured representation across different categories of artists, based on audience size and reach.

A. GENDER REPRESENTATION

The respondent pool consisted of 59% male and 41% female participants, reflecting a balanced gender representation in the study.

B. REGIONAL REPRESENTATION

The surveyed respondents across various regions of India, including South India, North India, West India, East India, North-East India, and Central India, to ensure the widespread participation of creators from every corner of the country.

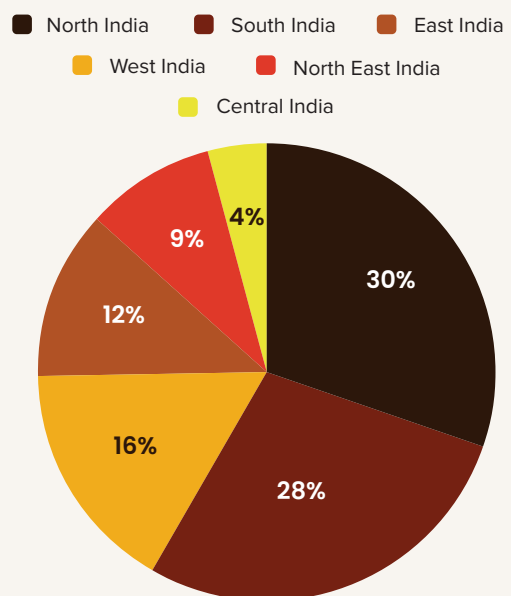


FIGURE 1: REGIONAL REPRESENTATION

C. REACH

The survey captured a diverse range of music influencers, reflecting the broad spectrum of audience engagement within the Indian music ecosystem.

| | |
|--|-----|
| Micro-influencers (10K – 50K followers) | 28% |
| Mid-tier influencers (50K – 100K followers) | 30% |
| Mid-tier influencers (100K – 500K followers) | 22% |
| Macro-influencers (500K – 1M followers) | 30% |

TABLE 1: REACH AND FOLLOWING

D. GENRE

The survey captured a diverse spectrum of music genres to illustrate the dynamic and evolving nature of India's music landscape.

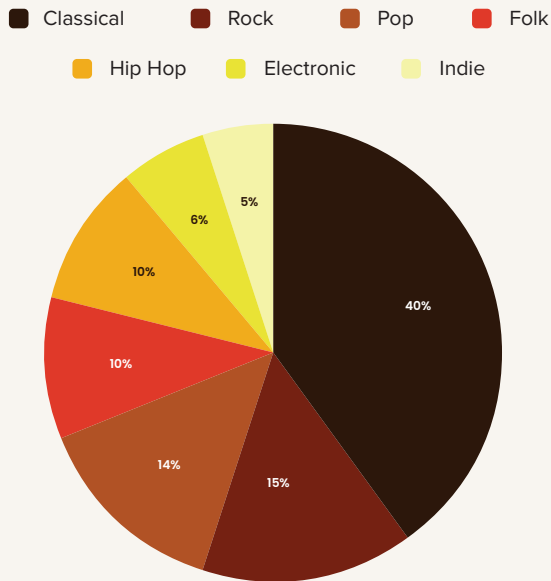


FIGURE 2: GENRE REPRESENTATION

E. LANGUAGES

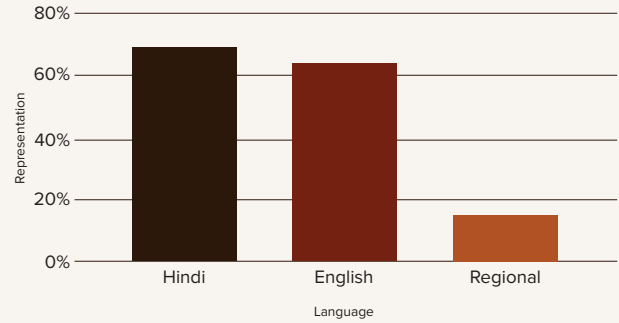


FIGURE 3: LANGUAGES

The survey respondents hail from diverse backgrounds and create music in various languages. Hindi (69%) and English (64%) emerged as the dominant languages for music production by the respondents, reflecting both strong domestic demand and the global reach of Indian artists.

| |
|--|
| বাংলা · भोजपुरी · ગુજરાતી · हरियाणवी |
| हिन्दुस्तानी · ಕನ್ನಡ · മലയാളം · मराठी |
| मारवाड़ी · ଓଡ଼ିଆ · ਪੰਜਾਬੀ · ସମ୍ବଲପୁରୀ |
| संस्कृतम् · سنڌي · தமிழ் · తెలుగు · اردو |

TABLE 2: REGIONAL LANGUAGES

Additionally, 15% of respondents create music in regional languages, including Bengali, Bhojpuri, Gujarati, Haryanvi, Hindustani, Kannada, Malayalam, Marathi, Marwadi, Odia, Punjabi, Sambalpuri, Sanskrit, Sindhi, Tamil, Telugu, and Urdu. This highlights the growing recognition of linguistic diversity in India's music industry. These insights indicate a multilingual and cross-cultural creative space where artists engage with multiple languages to broaden their audience and artistic expression.

3.3.2 SURVEY QUESTIONNAIRE

The survey questionnaire was developed under expert advice and refined based on a pilot. The respondents were asked closed-ended, option-based questions. In addition to the demographic information and

recommendations, the respondents were asked hypothetical questions about the potential impact of defined compliance expectations on their creative journey and economic stability. This hypothetical compliance was derived from provisions pertaining to the evaluation of content by committees and alignment with prescribed content standards envisaged under the proposed Broadcasting Services Regulation Bill, 2023 (Draft BSR Bill).

3.3.3 KEY AREAS OF FOCUS

The survey explored four key dimensions:

- **Economic Impact** – Revenue streams, compliance costs, and financial sustainability of Artists.
- **Compliance** – Legal and operational compliance landscape.
- **Global Reach** – Opportunities for global collaborations and market expansion.
- **Creative Expression** – Enabling ecosystem for artistic expression

3.4. METHODOLOGY FOR QUALITATIVE INSIGHTS

3.4.1 PARTICIPANTS AND STAKEHOLDER GROUPS

In addition to the survey, semi-structured interviews were conducted with 10 key stakeholders to gain deeper insights into the music creator economy. The participants included:

- Independent musicians
- Academics and educators in the music industry
- Representatives from streaming platforms and industry associations
- Legal and policy experts

3.4.2 DISCUSSION THEMES

The interviews focused on the following themes:

- **Economic sustainability** – Challenges related to monetisation, revenue generation, and market accessibility.
- **Global competitiveness** – Effects on international collaborations and India's position in the global music industry.

- **Regulatory concerns** – Anticipated impact of potential policies on creative processes and music distribution.
- **Policy recommendations** – Suggestions for balanced regulations that protect both artistic expression and industry integrity.

3.4.3 DATA COLLECTION AND ANALYSIS

All interviews were recorded, transcribed, and analysed using thematic analysis to identify recurring patterns. The qualitative insights were cross-referenced with survey data to validate trends and provide a contextual understanding of statistical findings.



Human expression has several forms. Music is intangible, the creative arts, especially that which cannot be quantified or set down in a certain formula, such as music, dance, art, these things should not be unduly constrained or limited. The creative content in melodies, like the timeless folk and classical heritage of the Indian subcontinent with its mystical and devotional forms, as well as the new urban experimental music and globally inspired sounds, forms part of the living, intangible heritage of our planet. There is neither a legal nor an ethical precedent for regulatory oversight on these expressions.

While provisions exist to address explicitly hateful or inciting content- a very modern phenomenon- applying them to all music is unnecessary. We live in a very diverse country with hundreds of languages and folk expressions, and it is nearly impossible to fully grasp the meaning, context, and intention behind all these sonic expressions. Regulating music along the same standards as other digital forms of content could lead to huge losses in revenue for future creators, bureaucratic hurdles, and stifle creativity.

I firmly believe that our rich musical heritage deserves protection, promotion, and sustainable support for future generations and beseech the authorities to adopt a more generous and wholesome approach.

**Bilal Chisty (Dhruv Sangari),
Classical Vocalist | Composer**

CHAPTER 4

CULTURAL DIPLOMACY AND GLOBAL COLLABORATION

Music stands as one of the most influential tools of cultural diplomacy, acting as a bridge for international dialogue and cooperation. As a form of soft power, music has the potential to strengthen bilateral and multilateral relationships, transcending geopolitical differences to promote global public goods and address shared concerns such as disinformation, social inequalities, conflict, and climate change.³² Several countries have effectively leveraged music to enhance their international outreach:

- **United States**- Jazz diplomacy as a tool for cultural influence.³³
- **South Korea**- K-Pop as a global cultural export.³⁴
- **France**- Francophonie initiatives promoting French music and culture.³⁵

India, with its diverse and rich musical heritage, has also left a lasting imprint on global music, and experiencing significant moments of global cultural influence.³⁶

In recent years, global collaborations have become increasingly important in cultural diplomacy. Cross-border partnerships between Indian and international artists have led to groundbreaking musical fusions that resonate with diverse audiences worldwide. These collaborations not only introduce India's music to new markets but also foster mutual understanding and cultural exchange on a global scale.

4.1 INFLUENCE OF INDIAN MUSIC

Indian music, both traditional and contemporary, has had a profound impact on global music, inspiring Indian and international artists to fuse Indian musical

elements with mainstream genres like pop, jazz, and blues. Ravi Shankar, often called *The Godfather of World Music*, played a pivotal role in popularising Indian classical music in the West through collaborations with renowned artists and fusions with Western classical and jazz styles.³⁷ The tradition of cross-cultural exchange was exemplified by Shakti—formed in 1973 by John McLaughlin and Zakir Hussain, later joined by Shankar Mahadevan—who continued this legacy with their 2024 Grammy win for Best Global Music Album with “This Moment.”³⁸

New-age artists and collaborations are carrying this legacy forward. Examples include:

- *Joi Barua's* work with the Royal Philharmonic Orchestra
- Indian rappers Divine's and Naezy's collaboration with American artist Nas on the track “NY se Mumbai”
- Diljit Dosanjh's crossover with Colombian artist Camilo
- Peter Cat Recording Company's (PCRC) global tours

India's diaspora artists also serve as cultural ambassadors, amplifying India's soft power and fostering collaboration. The fusion of traditional Indian music with global genres acts as an entry point for international audiences to engage with India's musical heritage. Artists such as *Norah Jones*, *Anoushka Shankar*, and *Raja Kumari* infuse Indian sounds into Western pop and jazz,³⁹ further strengthening India's

³² UNESCO. (2022, January 27). *Cutting Edge | From standing out to reaching out: cultural diplomacy for sustainable development*. <https://www.unesco.org/en/articles/cutting-edge-standing-out-reaching-out-cultural-diplomacy-sustainable-development>

³³ The Washington Informer. (2023, December 13). *Jazz to Hip Hop: Impact of America's Best Cultural Exports*. from, <https://www.washingtoninformer.com/jazz-hip-hop-diplomacy/>.

³⁴ Drimel, Ž. (2022). *KPOP diplomacy – South Korea's soft power* (EARL Working Paper 02/2022). East Asia Resource Library. <https://www.fdv.uni-lj.si/docs/default-source/odk-doc/EARL/kpop-diplomacy--south-korea-s-soft-power.pdf?sfvrsn=0>.

³⁵ The Hindu. (2022, October 2). *In France, a summit for diplomacy, technology and diversity*. from, <https://www.thehindu.com/opinion/op-ed/in-france-for-diplomacy-technology-and-diversity/article68706774.ece>.

³⁶ Financial Express. (2024, February 5). *Indian music dominates streams as local talent gains global traction, reveals Spotify's Loud & Clear report*. from, <https://www.financialexpress.com/business/brandwagon-indian-music-dominates-streams-as-local-talent-gains-global-traction-reveals-spotifys-loud-amp-clear-report-3571013/>.

³⁷ Gilbert, A. (2012, December 12). *Ravi Shankar: the Beatles' muse who turned his back on rock*. *The Guardian*. <https://www.theguardian.com/music/2012/dec/12/ravi-shankar-beatles-rock>.

³⁸ The Recording Academy. (2024, February 4). *Shakti wins Best Global Music Album | City National Bank First Look Camera | 2024 GRAMMYS*. from, <https://grammy.com/videos/shakti-best-global-music-album-city-national-bank-first-look-camera-2024-grammys>.

³⁹ GQ India. (2024, November 21). *After Diljit Dosanjh and AP Dhillon, Hanumankind and Indo Warehouse become the latest Indian-origin artists to perform at Coachella*. from, <https://www.gqindia.com/content/after-diljit-dosanjh-and-ap-dhillon-hanumankind-and-indo-warehouse-become-the-latest-indian-origin-artists-to-perform-at-coachella>

4.2 INTERNATIONAL FESTIVALS AND PLATFORMS

International festivals serve as vital spaces for dynamic cultural exchange, fostering global appreciation of Indian music and dance. The India International Dance and Music Festival by ICCR, brings together musicians, dancers, and artists from across the globe, promoting Indian music and dance forms such as Hindustani and Carnatic music, Kathak, and Bharatanatyam. In 2023,⁴⁰ Lollapalooza, one of the world's largest multi-genre music festivals, debuted in India, featuring a mix of international and local artists, including Imagine Dragons, The Strokes, and Diplo, alongside AP Dhillon and The Yellow Diary.

Meanwhile, events like Rajasthan International Folk Festival (RIFF) in Jodhpur and Ziro Festival in Arunachal Pradesh draw global artists and audiences, showcasing regional sounds on a global stage.

Contemporary festivals like Zamna India and Magnetic Fields seamlessly blend traditional Indian aesthetics with modern sounds, further solidifying India's presence in the global music scene.

4.3 DIGITAL STREAMING PLATFORMS AND GLOBAL REACH

Digital streaming platforms and social media have revolutionised the accessibility of Indian music, playing a pivotal role in amplifying Indian artists on the global stage. Artists like Hanumankind, who broke global barriers with *"Big Dawgs,"* and Diljit Dosanjh, who captivated global audiences through streaming before featuring on *The Tonight Show* and performed at Coachella, exemplify this transformation. Curated playlists have also played a key role in driving music discovery internationally, with platforms showcasing diverse Indian sounds:

- Spotify's Indie India
- JioSaavn's Indie Hotlist
- Amazon Music's Desi Hip-Hop



Streaming platforms are the perfect springboard independent musicians need to start & grow their musical careers but they must be aware that streaming is only a means to the end goal and not the goal itself. Given the deluge of new music coming to streaming platforms, artists need to look at a holistic approach to build a loyal & monetisable fan base.

Vijay Basrur
 Founded OKListen in 2012, acquired
 by AWAL in 2023

4.4 MUSIC TOURISM

With growing enthusiasm for global live events, India is well-positioned to become a major hub for music tourism, attracting both domestic and global travellers. The country's expanding appetite for live performances was evident in 2024-25, marked by an 18% surge in live entertainment consumption, with 30,687 live events hosted across 319 cities.⁴¹

- In January 2025, Coldplay's 'Music of the Spheres' World Tour saw multiple sold-out shows, highlighting India's growing demand for international live music events.⁴²
- Sunburn Goa remains Asia's biggest EDM festival, drawing over 150,000 attendees from across the globe annually.⁴³

The burgeoning creator ecosystem in India presents a unique opportunity for the country to leverage its rich musical heritage and digital advancements to expand its global cultural influence. Despite the immense

⁴⁰ Hindustan Times. (2023, October 20). *New Delhi hosts 9th India International Dance and Music Festival by ICCR.* from, <https://www.hindustantimes.com/lifestyle/art-culture/new-delhi-hosts-9th-india-international-dance-and-music-festival-by-iccr-101697800789774.html>.

⁴¹ Hindustan Times. (2024, December 24). *No toilets, parking woes to warring fans: India sees music tourism boom but are we really ready for it?* from, <https://www.hindustantimes.com/entertainment/music/no-toilets-parking-woes-to-warring-fans-india-sees-music-tourism-boom-but-are-we-really-ready-for-it-101734961784542.html>.

⁴² The Economic Times. (2025, February 1). *Coldplay's 'Music of the Spheres' becomes most-attended tour ever, dethrones Taylor Swift's 'Eras' tour.* from, <https://economictimes.indiatimes.com/news/india/coldplays-music-of-the-spheres-becomes-most-attended-tour-ever-dethrones-taylor-swifts-eras-tour/articleshow/117813510.cms?from=mdr>.

⁴³ The Hindu. (2024, September 25). *Skrillex and Peggy Gou announced as fresh headliners for Sunburn Goa 2024.* from, <https://www.thehindu.com/entertainment/skrillex-and-peggy-gou-announced-as-fresh-headliners-for-sunburn-go-2024/article68681374.ece>.

potential, India's creative sectors face several challenges that add layers of complexity to the creative process and hinder artistic expression.

Compliance is vital in ensuring business certainty and standard processes and acts as a regulatory check against illegal practices. The existing laws regulating the music industry ensure the standard methods and are robust enough to tackle varied harms.⁴⁴ Any additional layer of regulation may thwart creative expression and add entry barriers, especially for smaller, independent artists.

Conducted amidst the ongoing regulatory shifts envisaged under the proposed Draft BSR Bill 2023, our survey reveals that 75% of respondents perceive a new potential compliance expectation of pre-release expert review of music process as a likely possible constraint on creative expression and growth, with 39% anticipating a significant restriction and 36% indicating a moderate impact, underscoring concerns that such mechanisms could hinder artistic innovation and limit the global reach of Indian music.

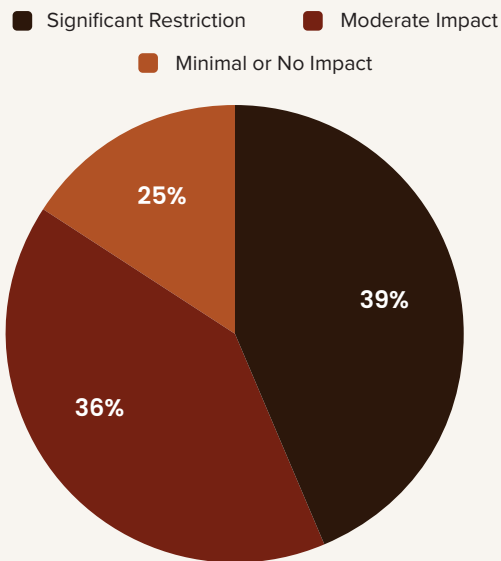


FIGURE 4: IMPACT OF PRE-RELEASE COMPLIANCE REVIEWS ON CREATIVE EXPRESSION

When asked about the potential impact of future additional compliance requirements, i.e., content evaluation and compliance with prescribed standards, 82% of respondents perceive the potential additional compliance requirements as a limitation on musical diversity and creative uniqueness, with 51% citing a severe impact and 31% indicating a moderate impact. In contrast, only 18% expected minimal or no impact, indicating that while a small segment of musicians would be able to navigate such compliance standards regulations with ease, the prevailing industry sentiment highlights the need for a more flexible and balanced regulatory framework to foster artistic innovation. This calls for developing artist and innovation friendly policy frameworks that can encourage seamless international collaborations, enabling its rich musical heritage to reach and resonate with diverse global audiences. Given that the music streaming industry has been effectively complying with the Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021 (IT Rules, 2021), it is imperative to maintain the status quo to ensure regulatory stability while safeguarding creative expression and industry growth.

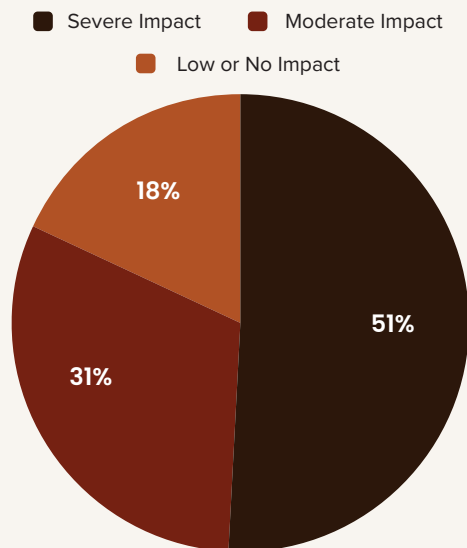


FIGURE 5: EFFECTS OF COMPLIANCE STANDARDS ON MUSICAL DIVERSITY AND UNIQUENESS

⁴⁴ Shreya, S., Tiwari, P., Rizvi, K., & Saxena, G. (2023, July 18). IT Rules, 2021: A Regulatory Impact Assessment Study (Vol. 2). New Delhi. The Dialogue and Internet And Mobile Association of India. <https://thediologue.co/wp-content/uploads/2023/07/IT-Rules-2021-Analysis-Volume-2.pdf>



The advent of music streaming platforms has democratised the very process of music creation and music distribution. Thus, regional music, which largely remained geographically regional in the pre-digitalisation era, has started enjoying a global patronage. Local artists, therefore, can experiment with newer musical forms and instantly receive a wider acceptance and consequently financial returns that were unthinkable even a decade back. Co-creation and collaboration have become the musical buzzwords across the globe

**Dr. Amrita Chakraborty, Associate Professor,
Manipal Academy of Higher Education**

CHAPTER 5

EMPOWERING REGIONAL TALENT



India's musical landscape blends classical traditions, folk expressions, tribal rhythms, and contemporary fusion genres. Recognised as part of the country's 'Intangible Cultural Heritage,' these diverse art forms reflect India's deep cultural roots and evolving musical identity.⁴⁵ From Baul music in Bengal and Bihu songs in Assam to Lavani in Maharashtra and Pandavani in Chhattisgarh,⁴⁶ regional music continues to shape India's artistic expression.

5.1 EMPOWERMENT THROUGH TECHNOLOGY AND STREAMING PLATFORMS

Streaming platforms have played a crucial role in reviving and promoting India's linguistic diversity by giving regional artists direct access to audiences without traditional industry intermediaries. Platforms such as JioSaavn, Apple Music, and Damroo have made native-language music more accessible. Curated playlists such as Spotify's *Hot Hindi Hits and Tamil Top Tracks* on Apple Music help regional artists gain visibility, while Apple's *Up Next Local Artist Programme* spotlights emerging talents.

Social media platforms and Online Curated Content (OCC) platforms have further propelled regional music's growth. In FY23, regional and indie music accounted for 34% of total streaming, driven largely by social media and digital platforms.⁴⁷ Hashtags like #PunjabiFolk, #TamilMusic, and #MalayalamRap have fostered dedicated online communities, around regional music.⁴⁸ Viral creators like Yashraj Mukhate have used Instagram to break into mainstream media,⁴⁹

while OTT platforms such as Netflix, Amazon Prime, and Hoichoi provide dedicated spaces for Tamil, Punjabi, and Marathi artists to showcase their work.⁵⁰



Independent artists, particularly those operating on a small scale, often grapple with significant obstacles. Limited financial resources and technical know-how make it challenging for them to navigate an increasingly complex regulatory landscape, hindering their ability to gain the visibility they need in today's competitive digital ecosystem.

Apoorv Srivastava, Musician

5.2 FUSION OF TRADITION AND MODERNITY

Bollywood has played a crucial role in bringing regional music to the mainstream by blending traditional folk melodies with contemporary cinema. Songs like "Navrai Majhi," Sasural Genda Phool," and Mame Khan's rendition of "Chaudhary" have become fan favourites, demonstrating folk music's enduring appeal in modern spaces.

Beyond Bollywood, folk-fusion bands like Swarathma and Raghu Dixit, along with the Tamil hip-hop movement led by HipHop Tamizha,⁵¹⁵² have redefined the fusion of tradition and modernity. Cultural festivals such as the Orange Festival in Arunachal Pradesh and the Cherry Blossom Festival in Shillong celebrate this dynamic blend by showcasing both traditional music and contemporary influences.⁵³ Initiatives like Warner Music India's 'Maati' and the #MeForMyCity campaign

⁴⁵ Cardozo, Elloit. 2021. "Hip Hop Goes to B-Town: Bollywood's Assimilation of the Underground Aesthetic." *SRFTI Take One 2* (1): 26–43. <http://srfti.ac.in/wp-content/uploads/2021/11/SRFTI-Take-One-May-2021.pdf>.

Trillroute. (2022, September 15). *The impact of Indian and Western music on cultural understanding and appreciation in India*. from, <https://www.trillroute.com/post/the-impact-of-indian-and-western-music-on-cultural-understanding-and-appreciation-in-india>.

⁴⁶ Historified. (2024, December 11). *The lost art of Pandavani: Rest in pieces: Chhattisgarh and Odisha Folk Lore*. from, <https://historified.in/2024/12/11/the-lost-art-of-pandavani-rest-in-pieces-chhattisgarh-and-odisha-folk-lore/>.

⁴⁷ Times of India. (2022, September 12). *Rise of regional and indie music on popularity charts*. from, <https://timesofindia.india-times.com/life-style/spotlight/rise-of-regional-and-indie-music-on-popularity-charts/articleshow/94160628.cms>.

⁴⁸ Nowak, F. (2014). *Challenging opportunities: When Indian regional music gets online*. First Monday, 19(10). <https://doi.org/10.5210/fm.v19i10.5547>.

⁴⁹ Times of India. (2023, October 30). *Yashraj Mukhate's hilarious parody takes the internet by storm: 'Just looking like a wow'*. from, <https://timesofindia.indiatimes.com/etimes/trending/yashraj-mukhates-hilarious-parody-takes-the-internet-by-storm-just-looking-like-a-wow/articleshow/104830091.cms>.

⁵⁰ Times of India. (2023, January 22). *Bollywood's out, original tracks in on OTT*. from, <https://timesofindia.indiatimes.com/life-style/spotlight/bollywoods-out-original-tracks-in-on-ott/articleshow/97191675.cms>.

⁵¹ The Hindu, (2024, March 28). *Swarathma and Jumma Khan: A fusion folk collaboration in EQUALS docuseries*. from, <https://www.thehindu.com/entertainment/music/swarathma-and-jumma-khan-a-fusion-folk-collaboration-in-equals-docuseries/article67853093.ece>.

⁵² The News Minute. (2021, December 9). *How Tamil indie artistes are using music to discuss everything from casteism to patriarchy*. from, <https://www.thenewsminute.com/tamil-nadu/how-tamil-indie-artistes-are-using-music-discuss-everything-casteism-patriarchy-158520>.

⁵³ The Hindu. (2024, February 16). *From Lollapalooza to the Cherry Blossom Festival: Here is a list of India's top music festivals to look forward to*. from, <https://www.thehindu.com/entertainment/from-lollapalooza-to-the-cherry-blossom-festival-here-is-a-list-of-indias-top-music-festivals-to-look-forward-to/article68779096.ece>.

(Season 4), themed *Meri City Mera Music*, provide crucial platforms for emerging regional artists, ensuring their voices reach wider audiences.⁵⁴

5.3 RISE OF THE EXTENDED ECOSYSTEM

The growing demand for live performances and independent music has fueled the rise of independent artists, record labels and recording studios, giving artists greater creative control. This expanding ecosystem has also increased the demand for talent managers, record label managers, and music journalists, all of whom play a crucial role in amplifying regional and indie music in India.



As an independent artist and a music producer, streaming has been a game changer for me. It has broken down traditional barriers, allowing my music to reach listeners from all corners of the globe. This unprecedented global exposure not only enriches my creative journey but also connects me with a diverse audience, fueling my passion and inspiring my art.

Danvendra Arya, Producer

Despite the surge in digital accessibility and growing demand for regional content, musicians and artists continue to face significant challenges that impede their growth. Independent musicians in India face limited digital and legal literacy, inadequate digital infrastructure and a lack of structured music education and skilling programs. Many artists also struggle with opaque agreements that frequently fail to honour their artistic vision. Moreover, without the backing of major labels, independent musicians must self-fund production, marketing, and distribution, making it harder to compete in the commercialised music industry. In addition, emerging regulations introduce multiple layers of administrative responsibilities, adding complexity to an already challenging landscape.

The existing regulatory frameworks have been playing a pivotal role in shaping the creative and collaborative potential of artists, which has led to the growth of music content on the internet. While intended to uphold cultural and social standards and protect intellectual property rights, any new regulatory requirements focusing on content evaluation, approval processes,

and compliance with prescribed standards can inadvertently introduce complexities that hinder Indian music's potential to shine on the global stage.

When asked about the potential impact of a future additional compliance for music streamed on the internet, requiring approval before releasing music, the study reveals that 80% of respondents foresee the associated compliance costs affecting their financial situation, with 45% fear experiencing a severe impact and 35% expect facing a moderate impact, which could lead to potential constraints on new music production and essential creative operations. While 20% of respondents view compliance costs as a necessary investment without affecting other endeavours, concerns persist regarding the trade-off between regulatory adherence and sustaining artistic endeavours. Consequently, increasing compliance costs for music streamed on the internet could worsen independent artists' financial situation and reduce spending on essential creative operations, which may hinder innovation and artistic development.

■ Severe Impact ■ Moderate Impact
 ■ No Impact

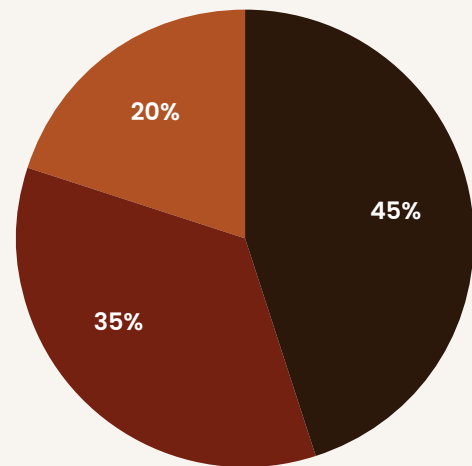


FIGURE 6: FINANCIAL BURDEN OF COMPLIANCE ON MUSIC PRODUCTION AND GROWTH

Moreover, 78% of respondents reported that such additional compliance costs in the future could impose a significant burden on their long-term growth, with 41% anticipating severe impact and 37% noting moderate challenges, while only 22% indicating minimal or no effect, highlighting the urgent need for a balanced, light-touch regulatory framework for music streamed on the internet that ensures financial sustainability without stifling artistic production.

⁵⁴ The Statesman. (2025, February 9). *Turning the spotlight on the lost glory of India's diverse folk music.* from, <https://www.thestatesman.com/features/turning-spotlight-lost-glory-indias-diverse-folk-music-1503042315.html>.

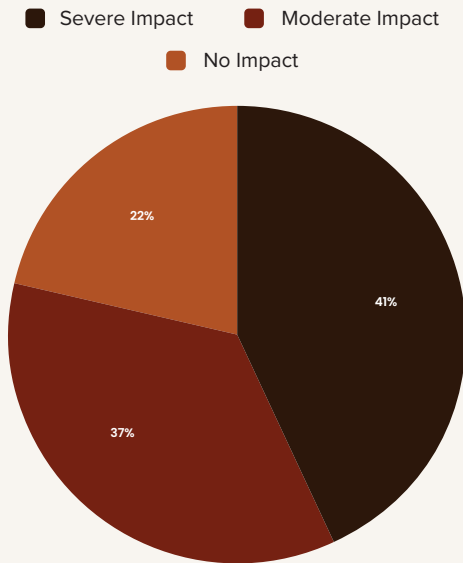


FIGURE 7: IMPACT OF COMPLIANCE COSTS ON MUSIC PRODUCTION AND SUSTAINABILITY

Any new non-compliance penalties in the future could potentially pose a substantial challenge for independent musicians, with 50% of respondents foreseeing a significant impact on their careers and 26% indicating a moderate impact, suggesting that stricter penalties may discourage innovation and risk-taking ability, potentially limiting creative exploration and artistic growth. While 24% noted minimal or no impact, the majority of artists could face regulatory hurdles that might hinder their creative and commercial growth. Accordingly, a majority of artists believe that rising financial pressures from compliance will hinder their long-term growth and sustainability.

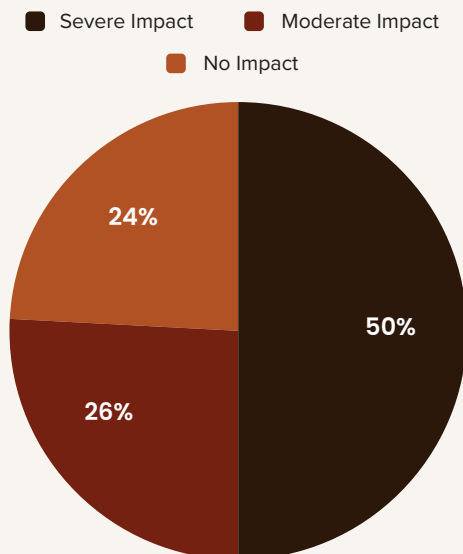


FIGURE 8: IMPACT OF COMPLIANCE PENALTIES ON MUSIC CAREERS

Amidst the shifting regulatory landscape, our survey noted that 77% of respondents reported a moderate to high impact on their ability to collaborate globally if compliance expectations like content evaluation or alignment with prescribed standards for music streamed and distributed on the internet are introduced in the future, while 23% stating that they would face no to minimal challenges. Potential new regulatory hurdles for music content on the internet are seen as a significant barrier to global collaboration for Indian artists, limiting opportunities for cross-border artistic exchange and the global cultural influence of Indian music.

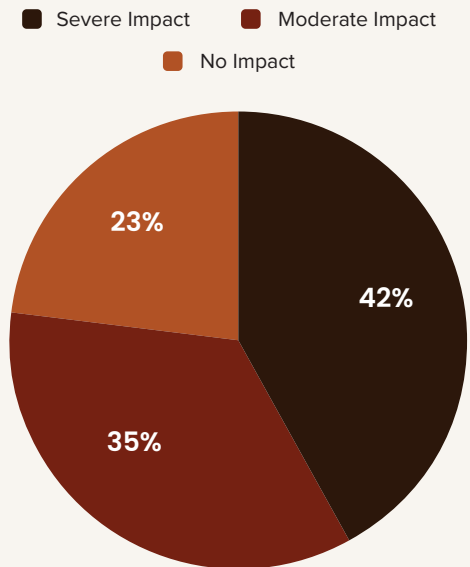


FIGURE 9: IMPACT OF COMPLIANCE FRAMEWORKS ON GLOBAL COLLABORATION AND REACH

Survey results indicate that 72% of respondents believe that new additional compliance requirements for music streamed on the internet, including content evaluation and alignment with prescribed standards, could affect music output or delay release schedules. Meanwhile, 16% remain neutral, and 12% foresee minimal impact. These findings indicate that potential future compliance obligations might not only slow down production timelines but could also contribute to an environment where piracy becomes a concern. If fans are unable to access music promptly through licensed streaming platforms, they may be tempted to turn to unauthorised sources that do not pay royalties. By fostering an enabling environment for Indian music on the global stage, India can position itself as a thriving hub for international musical exchange, ensuring that its rich cultural legacy continues to inspire and engage audiences worldwide.

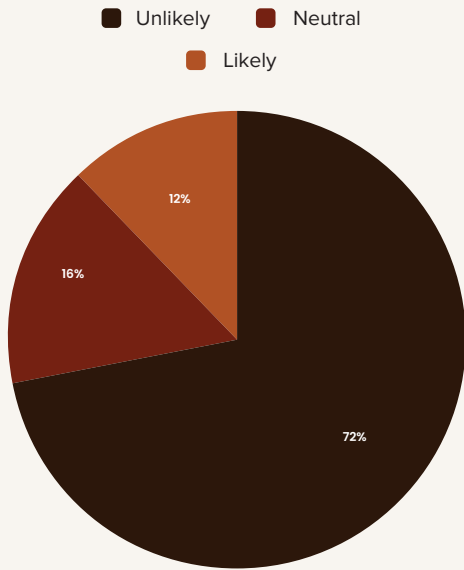


FIGURE 10: IMPACT OF COMPLIANCE REQUIREMENTS ON VOLUME OF PRODUCTION AND RELEASE TIMELINES



Streaming platforms have been instrumental in leveling the playing field for independent artists like us. I now have access to a global audience, allowing my music to travel far beyond geographical boundaries. In 2024, my music was heard in 180 countries - it's surreal! These platforms also value merit and talent no matter where you come from, enabling artists like me to reach listeners organically without massive marketing budgets. They have also allowed me to collaborate with big names like Mr. Tanishk Bagchi and Mr. Jubin Nautiyal and pushed my music globally, putting a small emerging artist on NY Times Square and billboards across Delhi and Mumbai. However, if regulations in the future bring strict content reviews and rigid classifications, they would risk stifling the spontaneity and authenticity that fuel global showcase partnerships and curtail the dynamic exchange of ideas that makes indie music thrive.

Hanita Bhambri
Singer-songwriter

CHAPTER 6

BALANCING REGULATIONS AND CREATIVE EXPRESSION



A supportive and balanced regulatory framework is essential for the sustained growth and global reach of the Indian music industry.

6.1 PIRACY

Music piracy remains a significant challenge in India, with nearly 74% of internet users accessing unlicensed or illegal platforms to listen to music.⁵⁵ The widespread availability of pirated content undermines fair monetisation, depriving creators of rightful earnings. The economic impact is substantial, leading to lost revenue for artists, composers, and copyright holders.⁵⁶ Music streaming platforms have been instrumental in curtailing piracy by enabling legitimate alternatives to access music. A delay in fans accessing the music could drive the audience back to illegal and unlicensed platforms, undoing decades of efforts to limit piracy. New requirements to pre-certify content could delay content availability, increasing the likelihood that users will turn to pirated versions of music that otherwise would be readily accessible on regulated streaming platforms.⁵⁷

In 2023, India's piracy economy was valued at ₹22,400 crore, ranking fourth in the segment-wise revenue losses in the media and entertainment industry. Many users continue to access pirated content due to affordability issues with regards to subscriptions, limited availability of desired music, and the complexity of managing multiple subscriptions. In 2022, Rajasthan reported the highest number of cybercrime cases related to piracy, with 43 incidents, while Jammu and Kashmir recorded the most digital copyright infringement offences, with nine cases.⁵⁸

6.2 PERMITS

Musicians in India face significant challenges, particularly due to uncoordinated and delayed payment schedules. Many struggle to secure gigs in

other cities, as venues primarily support local artists. Without a centralised forum or network, organising inter-city tours and collaborations remains difficult. Organising concerts presents greater obstacles due to the extensive approvals required, including a no-objection certificate (NOC) from the police, fire safety clearance, venue approval from the municipal corporation, excise department permits and licenses from copyright bodies, it becomes difficult for independent artists to manage these processes without the backing of a record label or an experienced promoter. The bureaucratic hurdles, coupled with financial constraints, often lead to delays or even cancellations, making large-scale performances inaccessible for many musicians.

6.3 ADMINISTRATIVE BURDENS

Independent artists struggle to balance creativity with administrative responsibilities, with recent data showing that they spend 20% to 30% of their time on marketing and administrative duties.⁵⁹ Many musicians have called for clearer concert regulations in India, as some have faced fines exceeding ₹1 crore for hosting events without official permits.⁶⁰ Another significant challenge facing India's artists is the limited awareness of music rights and the modalities for monetising music. Many artists struggle with limited knowledge of essential industry practices, from securing the relevant metadata needed for tracking and monetisation to understanding where and how to register their music rights, ensuring proper royalty collection, and navigating various distribution channels to make their music available across platforms.

⁵⁵ IFPI. (2023). *Engaging with music 2023*. https://www.ifpi.org/wp-content/uploads/2023/12/IFPI-Engaging-With-Music-2023_full-report.pdf.

⁵⁶ Times of India. (2023, September 20). Indian entertainment industry lost Rs 22,400 crore to piracy in 2023: EY-IAMAI report. from, <https://timesofindia.indiatimes.com/business/india-business/indian-entertainment-industry-lost-rs-22400-crore-to-piracy-in-2023-ey-iamai-report/articleshow/114506176.cms>.

⁵⁷ Tiwari, P. B. (October, 2024), Written Comments: Impact of the Draft Broadcasting Services Regulation Bill, 2023, on the Music Streaming Industry. The Dialogue

⁵⁸ Basuroy, T. (2023, December 6). *Number of cyber crimes with piracy as the motive reported across India in 2022, by leading state*. Statista. <https://www.statista.com/statistics/1098886/india-piracy-as-motive-for-cyber-crime-by-leading-state/>.

⁵⁹ Rosenblatt, B. (2024, April). *The global digital music landscape: An overview of distribution, copyright, and rights administration for music in the digital age*. World Intellectual Property Organization. <https://www.wipo.int/export/sites/www/cooperation/en/docs/digital-music-landscape.pdf>.

⁶⁰ Hindustan Times. (2024, December 13). *Karan Aujla concert in Chandigarh: ₹1.16-cr fine slapped on show organiser for illegal advts*. from, <https://www.hindustantimes.com/cities/chandigarh-news/-karan-aujla-concert-in-chandigarh-1-16-cr-fine-slapped-on-show-organiser-for-illegal-advts-101734049227170.html>.



It is perplexing that music could be subjected to regulatory measures aimed to regulate digital content in the future. Music per se is consumed in a very different fashion in today's internet-dominated world. It is mostly user-generated and far more organic than it was a few years ago. Music has also transcended borders and has become universal. Indian law primarily applies to the platforms, which are largely international. By introducing such regulations, we risk limiting the reach of Indian artists rather than addressing the broader issues. Ultimately, this approach could disproportionately impact the artists.

Professor (Dr) Shashwati Goswami,
Regional Director, Indian Institute of Mass
Communication (IIMC)

6.4 CONTENT REGULATIONS

As the music industry continues to evolve, content standards regulations play a crucial role in maintaining ethical values, standards and industry integrity, ensuring that music remains inclusive and culturally respectful. The IT Act of 2000 and IT Rules, which were implemented in 2021, are robust enough to deal with any content level challenges that may violate Indian cultural values and the ethos of our society, The existing IT Rules governance structure also operates in intersection with other laws- including the Indecent Representation of Women Act, 1986; the Bharatiya Nyaya Sanhita, (BNS) 2023; the Protection of Children from Sexual Offences (POCSO) Act. The industry has indicated robust adherence to the compliance mandates under the IT Rules and has noted that the model is functioning effectively for them.⁶¹

While such regulations help establish consistency in artistic policy standards, creators have expressed the importance of a well-structured regulatory framework that can support creativity and economic growth while upholding industry standards, providing artists with a stable environment to create and distribute music freely.

These insights underscore the music services industry's ability to effectively integrate compliance mechanisms, demonstrating a mature regulatory adaptation that aligns with existing legal obligations. Given this progress, policymakers must ensure effective enforcement of the existing content regulatory framework to deal with obscenity and problematic content on the internet, rather than introducing additional compliance burdens which could have inadvertent impact on the economies of the music streaming industry. A balanced regulatory approach that builds upon established compliance practices would ensure both effective governance and industry sustainability across the music supply chain while fostering continued innovation and growth in India's digital music ecosystem.

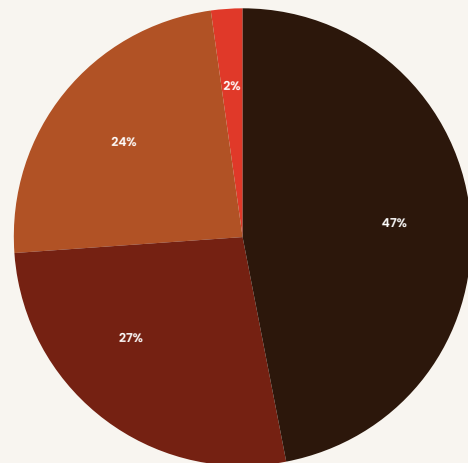
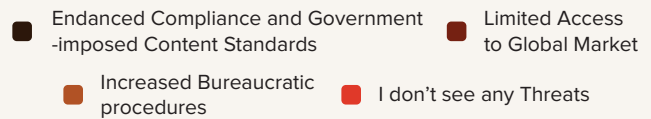


FIGURE 11: KEY CONCERNS EMANATING FROM ENHANCED COMPLIANCE EXPECTATIONS

When asked about the potential challenges of enhanced compliances in the future, i.e., content evaluation and adherence to prescribed standards, in the future, respondents expressed concerns about its impact on creative expression, global reach, and administrative complexity. The responses highlighted a need for balanced regulations that support both artistic expression and industry integrity:

⁶¹ Shreya, S., Tiwari, P., Rizvi, K., & Saxena, G. (2023, July 18). IT Rules, 2021: A Regulatory Impact Assessment Study (Vol. 2). New Delhi. The Dialogue and Internet And Mobile Association of India. <https://thediologue.co/wp-content/uploads/2023/07/IT-Rules-2021-Analysis-Volume-2.pdf>

- 47% of respondents expressed concern that institutionally-imposed content standards and enhanced compliance expectations could limit creative expression citing the risk of over-regulation restricting artistic innovation.
- 24% highlighted the burden of increased bureaucratic procedures, which could complicate artistic and operational processes.
- Another 27% identified limited access to global markets as a significant issue, emphasizing the importance of seamless international distribution frameworks.

A balanced regulatory framework is essential to preserve artistic expression, streamline administrative processes, and ensure global market access, as nearly half of the respondents demonstrate concern towards over-regulation which could thwart creativity and the current growth trajectory of the Indian music industry, while bureaucratic burdens (24%) and restricted international reach (27%) pose significant additional challenges to the industry's growth.

6.5 GOVERNMENT INITIATIVES AND INDUSTRY PARTNERSHIPS

Strategic government involvement and industry collaboration play a pivotal role in showcasing India's cultural diversity and nurturing regional talent. Government initiatives, including cultural diplomacy efforts and institutional support, have strengthened India's global cultural presence. Organisations such as the Indian Music Industry (IMI) advocate for the fair valuation of music rights and the enforcement of best

practices in copyright law, ensuring a structured and equitable industry framework.

Despite technological advancement expanding access to music education, government support in this area remains limited. Most music institutions in India are privately managed, receiving minimal government funding.

A few government-supported establishments exist, such as Kala Academy in Goa, though it is often criticised for being outdated. Meanwhile, the Delhi Education Board has taken a progressive step by introducing music and theatre into its curriculum.

A notable initiative by Nagaland's Education Board certifies music educators, setting a valuable precedent for other states. Stronger collaboration between the Ministries of Culture and Education could help build a comprehensive music education framework, equipping artists with stronger foundations and fostering a thriving music ecosystem across India.



It would be fantastic if we could have access to more government grants with regards to performance, artistic development and arts education. That sort of support will only encourage more creativity with financial security which would result in some incredible art that can be showcased worldwide.

Nush Lewis, Offset Education

| Region | Reducing entry barriers and encouraging publication on streaming platforms (%) | Promoting traditional and classical music through education & media (%) | Providing grants and financial support for emerging artists (%) | Supporting collaborations between Indian & global musicians (%) | Enhancing infrastructure for live performances & festivals (%) | Investing in training & music creation resources (%) |
|------------------|--|---|---|---|--|--|
| All | 51 | 50 | 50 | 49 | 48 | 46 |
| North India | 53 | 49 | 52 | 49 | 52 | 47 |
| South India | 54 | 54 | 48 | 48 | 46 | 48 |
| East India | 43 | 40 | 57 | 50 | 43 | 39 |
| West India | 47 | 53 | 48 | 51 | 51 | 50 |
| Central India | 50 | 54 | 50 | 46 | 42 | 48 |
| North-East India | 49 | 50 | 41 | 48 | 46 | 44 |

The table presents regional expectations for government-led initiatives to support and globalise Indian music,⁶² highlighting strong demand for reducing entry barriers (51%), promoting traditional and classical music through education and media (50%), and providing government grants and financial support for emerging artists (50%). Notably, North (53%) and South India (54%) prioritise digital accessibility through streaming platforms, while Eastern India (57%) strongly favors government backed financial grants. West India (51%) emphasizes collaborations with global musicians and enhancing live music infrastructure, whereas Central India (54%) supports classical music education. These findings suggest a need for region-specific policies that balance financial, infrastructural, and digital enablers to boost India's music sector globally.

By continuing to foster strategic partnerships between the government, industry stakeholders, and global collaborators, India is well-positioned to become a leading force in the international music industry. A forward-looking policy framework, coupled with investments in education, infrastructure, and cross-border collaborations, will help drive the sustained growth of India's music ecosystem, empowering artists while strengthening India's cultural influence worldwide.

⁶² The respondents had the option to select more than one option.

CHAPTER 7

THE FUTURE OF INDIA'S MUSIC CREATOR ECONOMY

The democratisation of music production has fostered innovation and artistic freedom, allowing independent artists to maintain greater control over their work and revenue. The rise of streaming platforms and digital tools has empowered artists to distribute, monetise, and promote their music directly to a global audience. However, challenges such as protecting and growing the value of music online, fair compensation, securing effective distribution of royalties to creators market saturation, and the need for continuous innovation remain. Addressing these challenges will be crucial for sustaining the growth of India's music-creator economy.

7.1 EXPANDING INDIA'S CULTURAL DIPLOMACY THROUGH MUSIC

- **Enhance Global Music Exchange Programs:** Strengthen initiatives like CEPs, FoI, and the ICCR's Music Diplomacy Efforts to increase Indian artists' global participation and promote cross-cultural collaborations.
- **Increase Indian Representation at Global Music Events:** Develop a government-backed program to sponsor Indian artists at international festivals and award shows, boosting India's global cultural influence.

7.2 SUPPORTING REGIONAL ARTISTS AND INCLUSIVE GROWTH

- **Strengthen Regional Music Infrastructure:** Expand funding and promotional programs for regional artists, ensuring better representation of India's diverse linguistic and folk music traditions.
- **Encourage Regional Music-Tech Startups:** Support regional music-tech startups to enhance fair monetisation and royalty distribution capabilities, ensuring that better digital distribution and revenue reaches generation for independent and folk musicians.

7.3 OPTIMISING REGULATIONS

- **Enable Artist-Friendly Content Guidelines:** Ensure that the status quo, wherein the industry complies with the IT Rules 2021, and continues without adding regulatory layers that could limit industry growth.

7.4 STRENGTHENING MUSIC INFRASTRUCTURE AND MARKET GROWTH

- **Develop Dedicated Concert Venues and Live Performance Spaces:** Address India's live music infrastructure gaps by investing in high-quality venues and improving logistics for large-scale music events.
- **Expand Music Education and Training Programs:** Integrate music training and music sector know-how into mainstream education while also equipping artists with essential skills in music distribution, monetisation, promotion, and understanding their creative and legal rights.
- **Boost Music Tourism with Policy Support:** Encourage large-scale international concerts and festivals by creating an artist-friendly ecosystem, reducing logistical hurdles, and investing in tourism-driven music infrastructure.

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