GAME DEVELOPER ASSOCIATION OF INDIA

GameDev Outlook 2026

Presenting the Growth, Talent and Opportunity in India's Video Gaming Industry

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FOREWORD

Sridhar Muppidi

Chairperson, GDAI

Games are becoming one of the most important forms of interactive media in the world. Unlike traditional media, people don't just watch or consume them. They participate, create, compete, collaborate and increasingly build entire communities around them. India already has one of the world's largest gaming audiences. Our bigger opportunity now is to become one of the world's leading creators of games and interactive experiences.

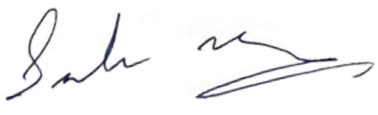
At GDAI, our focus has been on building the ecosystem needed to make that happen. Over the last few years, we have expanded our work across policy, education and skilling, incubation, community development, international market access and IGDC. Initiatives such as Supernova, Indie Connect, our work with IICT and educational institutions, game jams across the country, and Indian participation at major global events are all parts of the same objective. We want more people to learn how to build games, more teams to become studios, and more Indian studios to build successful products for India and the world.

But ambition alone is not enough. A good idea still needs the right team, production experience, capital, publishing support and access to players. This report shows many of those gaps clearly. A large share of studios are young and small, fresh talent is still not production-ready enough, access to capital remains difficult and many Indian studios depend heavily on international markets and partners.

The GDAI GameDev Outlook 2026 is our attempt to build a consistent picture of this ecosystem. It brings together data from studios, educational institutions and industry consultations so that we can understand where India stands today and measure the same indicators year after year. Over time, we want this report to show clearly whether we are creating more studios, shipping more games, developing stronger talent, attracting more investment and building more globally successful Indian IP.

The report also gives us a basis for action. It will inform GDAI's work with government, academia, industry and ecosystem partners, while helping us measure whether the programs we are building are actually making a difference. The opportunity ahead is much larger than gaming alone. The skills and technologies behind games are increasingly shaping simulation, education, training, spatial computing and many other forms of interactive media.

Our ambition is simple. We want India to be a place where great game creators can learn, build, find support, form studios and compete with the best in the world. This report gives us a baseline. What matters now is how quickly we move it forward.



FOREWORD

Dr Ashish Kulkarni

Founding Director, IICT

India's next generation of creators should be able to imagine a world, build it here and take it to audiences everywhere. That ambition captures the promise of animation, visual effects, gaming, comics and extended reality (AVGC-XR). For India, this is an opportunity to combine cultural depth with technological capability and build enduring creative businesses.

It is encouraging to see the Government of India giving this sector greater attention. Hon'ble PM Shree Narendra Modi ji's policies have finally given the long awaited recognition, hygiene, status, dignity and credibility to the creative arts, performing arts, design and sports careers. WAVES 2025 opened opportunities for Indian creators and enterprises to connect with international markets. The Union Budget 2026-27 proposal for AVGC Content Creator Labs in 15,000 secondary schools and 500 colleges is another welcome step. Introducing creative skills early can help students discover possibilities they may otherwise never have considered.

Additionally, it is encouraging to see that State governments are also making significant contributions towards the sector, they have recognised the need to support creative talent, enterprises and production infrastructure through respective State AVGC-XR policies. Furthermore, the initiatives and courses being led by Indian Institute of Creative Technologies (IICT) bring further promise through its focus on industry-aligned education and collaboration. Having engaged with creative professionals and policymakers over several decades, I find these developments heartening. They reflect growing recognition of creative work as a serious and valuable career.

The task now is to ensure that this support reaches the people building the industry even in the tier 2,3 & 4 towns. As the core creators are coming from all over India. For a studio, progress means being able to hire the right people, fund a project through completion and give its game a fair chance of finding an audience.

This makes the GDAI GameDev Outlook 2026 particularly timely. Drawing on industry and academia surveys and stakeholder consultations, it brings the experiences of developers and educators into the policy conversation. Its examination of talent, finance, original intellectual property, publishing and market access helps explain where ambition needs support and what that support should address.

The research can strengthen ongoing government efforts by helping programmes respond to these practical needs. It also gives educational institutions a clearer understanding of industry expectations and offers businesses a basis for identifying shared priorities. As new initiatives take shape, such evidence can help turn encouraging commitments into meaningful opportunities. IGDC 2026 offers the greatest platform for entrepreneurs, publishers and developers to greenlight the Indian offerings to the world.

I commend the Game Developer Association of India (GDAI) for undertaking this work and The Dialogue for its contribution as a research partner. I hope that the report encourages conversations that lead to action, giving more Indian creators the confidence and support to pursue their ideas. Their success will give substance to the creative future that India is working towards.

MESSAGE FROM

PhonePe Appstore

Priya Narasimhan
Chief Business Officer, PhonePe Appstore

India's gaming industry stands at an important inflection point. We have built a large and highly engaged player base, supported by widespread smartphone adoption, affordable connectivity and a growing appetite for interactive entertainment. The next phase of growth, however, will depend on how effectively we translate this scale into a sustainable, globally competitive game-development ecosystem.

At PhonePe Appstore, our vision is anchored in creating an open, developer-first ecosystem that democratizes discovery, removes commercial friction, and gives Indian studios the freedom to experiment and build original intellectual property (IP). Interestingly, the market share gap between Rank 1 leaders and Rank 2 contenders is just 1% to 3%, showing strong receptivity for new studio entrants. Helming this report alongside GDAI is a natural extension of that mission.

To chart the next phase of growth requires looking beyond player numbers and downloads to understand the foundational stepping stones that enable studios to build, grow and thrive including capital, talent, effective distribution, and sustainable unit economics.

Developers need the freedom to reach the right audiences without disproportionate barriers to discovery. Distribution and monetisation are particularly vital to this equation. For games relying on in-app items and downloadable content, friction-free distribution paired with fair platform fees gives developers the margins they need to build sustainable, long-term businesses. That is why we are building PhonePe Appstore - to help developers directly distribute digital goods and services to end consumers with higher flexibility and lower costs, improving unit economics and empowering studios to pass greater value back to players.

At the same time, a thriving domestic ecosystem must aspire to compete globally. Building original intellectual property, strengthening production capabilities, investing in talent and creating pathways to international markets will be essential to moving from being predominantly a market for games to becoming a significant creator of globally relevant gaming experiences. This report is an important step towards understanding both the progress made and identifying the gaps, helping stakeholders move from broad ambition to practical action.

Building a globally competitive Indian gaming ecosystem requires sustained collaboration among developers, platforms, investors, educators and policymakers. PhonePe Appstore is deeply committed to being an active, long-term partner in this journey - investing in transparent payment rails, open distribution models, and scalable infrastructure so Indian studios can build with confidence, reach audiences at scale, and capture greater value from their innovation. India's gaming future will ultimately be shaped not only by how many people play, but by how many creators we empower to build, how effectively they reach their audiences, and how successfully their ideas travel from India to the world.

MESSAGE FROM

The Dialogue

Kazim Rizvi
Founding Director, The Dialogue

GDAI GameDev Outlook 2026 is a timely contribution to understanding India's growing video-game ecosystem. As Indian studios pursue original intellectual property, expand their teams and seek international audiences, it is important to understand the conditions that enable these ambitions to become sustainable businesses. This report brings that development journey into focus, examining both the opportunities before Indian studios and the bottlenecks that constrain their progress.

At The Dialogue, gaming has been part of our research and policy engagement for several years, reflecting its importance within India's technology-policy ecosystem. Gaming brings together creative expression, technological innovation, entrepreneurship and questions of user trust. Our approach combines empirical research with stakeholder engagement to understand how policy can support innovation while responding to the experiences of businesses and users. This reflects our wider commitment to connecting policy discussions with the people and institutions affected by them.

Our collaboration with GDAI builds on this approach. By bringing together industry and academia surveys, stakeholder consultations and secondary research, the report examines how studios finance development, recruit talent, build commercial relationships and reach players. It highlights the connections between these challenges: access to funding matters alongside publishing expertise; education must connect with production requirements; and international opportunities depend on practical support for market entry and business operations.

This annual report is a crucial resource for stakeholders whose decisions will shape the industry's development. For policymakers and public institutions, it offers evidence to assess support programmes and identify gaps in implementation. For investors and publishers, it provides insight into studio ambitions, financing needs and commercial readiness. For academic institutions and training providers, it identifies opportunities to align learning with production. For studios and industry associations, it brings shared concerns into a common discussion and points towards areas where collaboration can make a practical difference.

The annual nature of this exercise is equally important. A developing industry needs an evidence base that can be revisited as business conditions, technologies, policies, and public programmes evolve. Successive editions can help stakeholders track emerging needs, assess whether interventions are working and refine their priorities through continued engagement with the ecosystem.

We are pleased to contribute to this report as GDAI's knowledge partner. We thank GDAI for its collaboration, PhonePe Appstore for its insights, and the participating studios, educational institutions and consultation contributors for sharing their experience. We hope this report serves as a working reference for informed decisions and sustained cooperation, helping more Indian teams build successful games and durable businesses.

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Executive Summary

The Emerging Picture: India's Opportunity in a Shifting Global Games Industry

India's video-game industry has an opportunity to translate a large and growing consumer market into a stronger base of globally competitive studios. This opportunity sits within a changing global games economy: forecasts for 2026 place Asia-Pacific as the largest regional market by revenue, while the Middle East and Africa are expected to record the fastest regional revenue growth. For India, strengthening production capability and international commercial relationships will be central to participating in these opportunities.

In 2025, India's video-game market generated an estimated USD 1.04 billion in revenue, growing 14.8% year-on-year, and served 511 million players. Average annual revenue per user remained modest at USD 2.04, underscoring the challenge of converting audience scale into sustained commercial value. The market is also becoming more diverse: female participation reached nearly half of the player base in 2026, while non-battle royale titles increased their share of mobile revenue. These changes create opportunities for studios that understand their intended audiences and can develop, distribute and sustain games suited to them.

The **GDAI GameDev Outlook 2026**, drawing on 104 industry submissions and 13 academia submissions, supplemented by stakeholder consultations, examines the capabilities and conditions needed to realise this opportunity. **The findings reflect considerable ambition: 82.7% of industry respondents prioritise launching new game IP, 41.3% select scaling existing products and nearly half identify international market expansion as a priority. These aspirations make access to finance, production-ready talent, publishing expertise and global market networks particularly important.**

The findings also show that consumer growth does not automatically provide a sustainable route to market for every studio. Constraints in financing, production capability, publishing and international partnerships can interrupt the path from a promising concept to a commercially viable game. The central task is therefore one of execution: helping studios complete projects, find their players and sustain the teams and commercial relationships needed for repeat success.

Table 1: The 2026 ecosystem dashboard

Indicator	Survey findings and details
Industry survey submissions	104
Academia survey submissions	13
Submissions from studios founded in 2022 or later	56.7%
Teams of one to five people	50.0%
Capital and publishing investment identified as a barrier	75.0%
Funding ecosystem rated inadequate or very inadequate	76.9%
Launching new IP selected as a strategic priority	82.7%
Fresh talent rated poorly or not at all ready	56.7%
Difficulty attracting international partners	51.9%
Responses from Tier 2 or Tier 3 locations	41.3%
Industry Survey Repeats (Different individuals from same organisation)	8
Academia Survey Repeats (Different individuals from same organisation)	2

The survey brings together industry and academia perspectives on studio priorities, revenues, market conditions and talent. The findings point to strong product ambitions and opportunities to strengthen commercialisation, workforce readiness and audience reach.

01 New game IP leads studio priorities, selected by 82.7%

82.7%
Prioritise launching new game IP

41.3%
Prioritise scaling an existing product

38.5%
Prioritise raising capital or securing a publishing deal

What this suggests. Studios are looking to build original intellectual property (IP) and grow existing products. With capital and publishing investment identified as a growth barrier by 75.0% of industry responses, the opportunity is to connect this ambition with finance suited to development and release. State AVGC-XR policies provide a foundation for sector development. Linking public support with publishing expertise, audience testing and launch preparation can help more studios bring their games to market.

02 Nearly half of surveyed studios prioritise entering international markets

49.0%
Prioritise entering international markets

51.9%
Report difficulty attracting international partners

What this suggests. Nearly half of industry responses prioritise international expansion. Asia's growth outlook points to a West to East opportunity for Indian gaming: Industry forecasts expect Asia and the Middle East and North Africa to outperform global market growth through 2030, with India the fastest-growing of the 13 markets covered. Stronger publisher and investor connections can help Indian studios participate in this growth. Preparation, relevant introductions and sustained follow-up can turn international ambitions into publishing and production partnerships.

03 Two in three industry respondents are willing to join curriculum advisory boards

67.3%
Willing to support curriculum advisory boards

45.2%
Willing to offer paid internships or apprenticeships

92.3%
Academia interest in game jams and developer meetups

What this suggests. Although 56.7% of industry responses rate fresh talent poorly or not at all ready, studios and academic institutions show strong interest in working together. Six of the 13 academia submissions report studio partnerships under discussion, alongside two reporting existing partnerships. The Indian Institute of Creative Technologies and proposed Content Creator Labs in schools and colleges add institutional support to this effort. Curriculum input, supervised projects and structured internships can connect education more closely with production requirements.

04 Over half of surveyed studios plan team expansion over the next two years

80.8%
Report stable or expanded teams over the past 24 months

54.8%
Plan team expansion over the next two years

23.1%
Plan headcount growth above 50% over the next two years

What this suggests. Most participating teams retained or increased their capacity: 50.0% report stable headcount and 30.8% report expansion. More than half also plan to grow their teams over the next two years. These findings point to demand for talent alongside continued investment in studio capacity. Connecting specialist training with production finance and project opportunities can help studios retain experienced professionals and build the teams needed for successive releases.

05 High Opportunity in Open Categories

60%
gap between the top two Board titles

39%
gap between the top two Action titles

What this suggests. PhonePe Appstore analysis shows that while genres like Board (60% lead gap) and Action (39% lead gap) are heavily monopolized, categories such as Puzzle, Simulation, and Racing are widely distributed with Rank 1 to Rank 2 share gaps of just 1% to 3%, offering indie and new studios the highest chance of organic discovery.

06 Gamers Live on Fintech Rails

59%
of Midcore gamer devices also have payment and finance apps installed

68%
of Casual gamer devices also have payment and finance apps installed

What this suggests. PhonePe Appstore analysis reports that Indian gamers show massive cross-app engagement with finance tools - 59% of Midcore gamers and 68% of Casual gamers actively overlap with digital payment and finance applications, presenting high-converting acquisition and monetization touchpoints outside traditional ad networks.

LEVEL UP

The emerging picture

The survey points to a diverse creative base with strong original-IP ambitions and plans for growth. Sustaining development, reaching paying audiences and helping fresh talent become productive are connected parts of building durable studios. Industry-academia partnerships and wider regional reach can help turn this ambition into a stronger Indian game development story.

THE INDIAN GAME DEVELOPMENT STORY

Table 2: Four Priorities for Building Sustainable Indian Studios

Priority	Immediate direction	Success measure
Stage-specific capital	Separate prototype, production and commercialisation support.	Completed milestones, releases and follow-on finance
Production-based education	Build curricula around assessed team projects and practitioner review.	Playable portfolios, internships and job-ready specialist talent
Sustained market access	Combine readiness, buyer matching, contracting support and follow-up.	Qualified introductions, agreements and repeat business
Clearer operating environment	Publish guidance and escalation routes for recurring regulatory, banking and tax issues.	Resolution time and reduction in repeated cases

These priorities sit on top of a market that is already large and still expanding. Closing the gap between consumer scale opportunity and studio level commercial capability is the practical task for the next development cycle.

Turning the Findings into Action

Government, industry and academia can address different parts of the development journey, connecting finance, production expertise and market access.

Government

Accessible finance.
Predictable processes.

1. **Finance the path to market**
   Upfront grants and milestone payments can support demos, production, audience testing and global marketing.
2. **Make schemes accessible**
   Clear eligibility, proportionate paperwork and predictable payments can improve access for smaller and regional studios.
3. **Ease banking friction**
   Consistent banking guidance and documentation can ease onboarding and enable timely access to overseas funds.

GDAI & industry

Commercial connections.
Shared expertise.

1. **Build lasting partnerships**
   Project reviews, suitable introductions, contract advice and follow-up can help secure publishing and investment agreements.
2. **Share specialist expertise**
   Shared testing, technical art, porting, localisation and publishing services can fill gaps in smaller teams.
3. **Clarify commercial terms**
   Transparent criteria, realistic milestones and clear publishing terms can support informed commercial decisions.

Academia

Practical learning.
Production-ready talent.

1. **Make playable work central**
   Assessed team projects can connect design, programming, art, testing and production management.
2. **Build faculty experience**
   Studio exposure, applied training and curriculum reviews can connect teaching with current production workflows.
3. **Structure industry links**
   Named coordinators, supervised internships and clear learning goals can turn partnerships into practical experience.

Stronger studios. Completed games. Sustained employment.

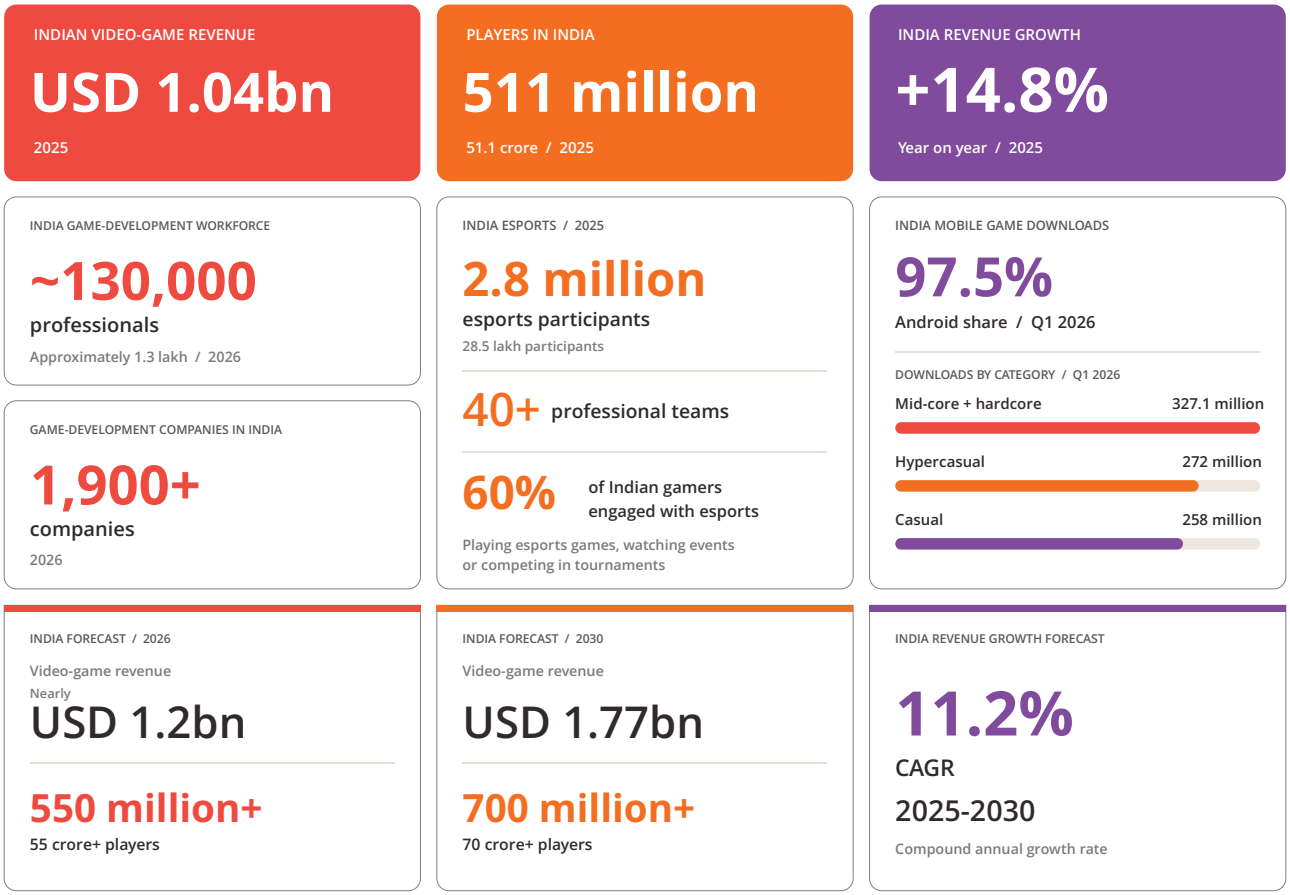
Chapter 1

Introduction

1.1. Understanding India's game-development ecosystem

India's gaming opportunity lies in connecting the scale of its consumer market with the capabilities of its development ecosystem. For Indian studios, this involves building commercially viable games, developing specialist talent and reaching domestic and international audiences. Assessing that opportunity requires a view of both market demand and the industry's capacity to create and sustain production. The snapshot below brings together indicators of revenue, player participation, employment, the company base and esports, alongside mobile-market trends and global context. Together, these indicators provide the macro context for examining the survey's findings on workforce capabilities, studio development and the conversion of audience reach into sustainable gaming businesses.

Infographic 1: Outlook of the Indian Market



India's gaming audience is also becoming more active across the wider ecosystem. In October 2026, Hon'ble Prime Minister Shri Narendra Modi highlighted the participation of young people, particularly in Tier 2 and Tier 3 cities, in gaming, esports, content creation and entrepreneurship.

Image: PM Modi Highlights India's Rise from Gaming to Game Creation at IMC 2026

Describing the mobile phone's expanding role, he observed that it has become both a "gaming console" and a "studio of creation." As more people move from playing games to creating them, the opportunity lies in building the capabilities and businesses that can turn their ideas into finished products.

Game development brings together creative work, technical capability and commercial decision-making. A game moves through concept development, design, programming, art, testing and release, often followed by continued updates and player support. The ability to sustain this work depends on the people, finance and commercial relationships available to the studio.

India's game-development ecosystem includes teams creating their own intellectual property (IP), businesses contributing to larger productions, and providers of specialist services and tools. These activities offer different routes to building experience, generating revenue and participating in domestic and international markets. They also involve different production cycles, investment requirements and skills.

Understanding this ecosystem therefore requires attention to the businesses behind the games. The size of a studio, its development experience, the platforms it builds for and the markets it serves all influence its opportunities and constraints. Examining these factors together provides a clearer basis for identifying what helps studios complete projects, reach customers and sustain their operations.

1.2. Connecting evidence with practical action

The report connects the experiences of studios and educational institutions to identify practical priorities for government, industry, academia and organisations supporting the sector. The framework below shows how this evidence informs recommendations, with attention to implementation and assessment. Consistent questions and reporting measures across future editions can help track changes in studio activity, talent requirements and access to support.

Infographic 2: Connecting Evidence with Practical Action

Chapter 2

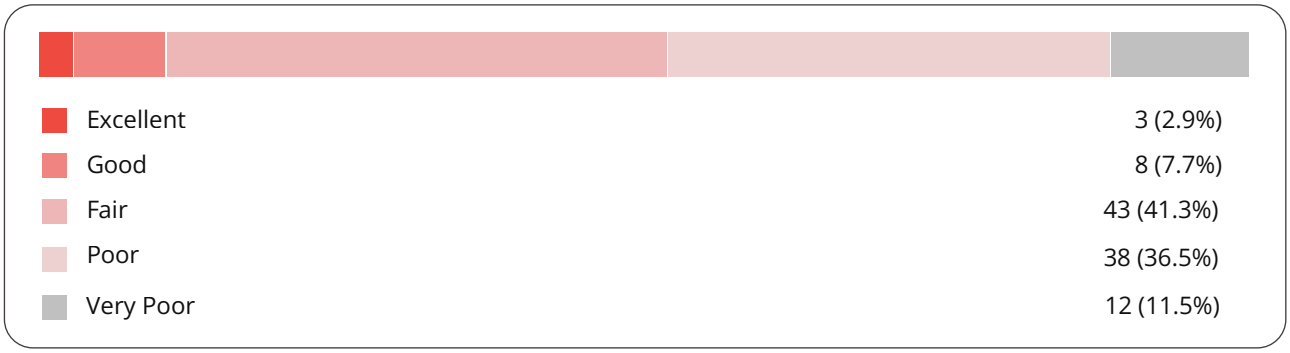
India's Gaming Moment: Industry Outlook and Development Activity

Understanding India's game-development opportunity requires examining how studios assess market conditions, what they are building and how they intend to reach players. These choices influence production costs, skills requirements and commercial prospects. This chapter brings together respondents' assessments of the market with their development activity and the barriers they encounter in building demand.

2.1. A market seeking stronger commercial foundations

Market sentiment among participating studios remains subdued. Out of 104 industry submissions, **41.3% rate current conditions as fair, and 48% poor or very poor, against 10.6% rating them good or excellent.** Read alongside the strong intention to build original IP, this points to a need for execution support that can survive uneven market conditions.

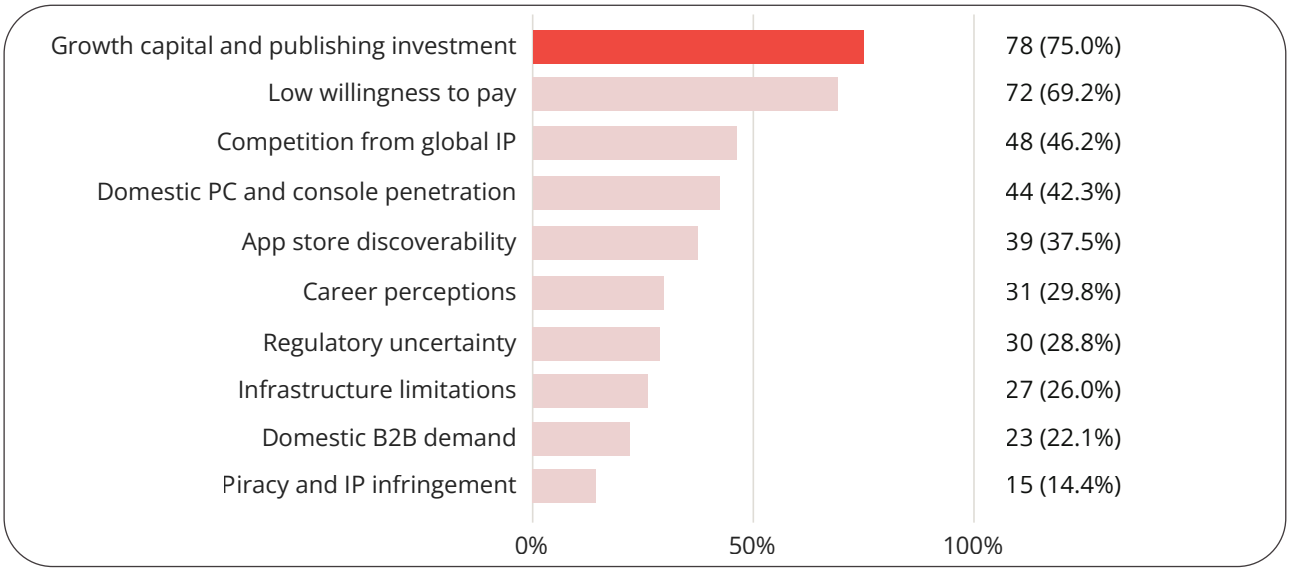
Graph 1: 48.1% of respondents rate India's video-game market health as poor or very poor



Base: 104 industry submissions.

Capital and publishing investment is the most frequently selected barrier to market growth, as identified by 75.0% of respondents. Low willingness to pay follows at 69.2%. These findings describe both sides of the commercial problem: studios must finance development and also build demand. Production funding is therefore most useful when accompanied by audience testing, pricing and monetisation advice, distribution planning and realistic launch budgets.

Graph 2: Capital and publishing investment top growth barriers, cited by 75% of respondents

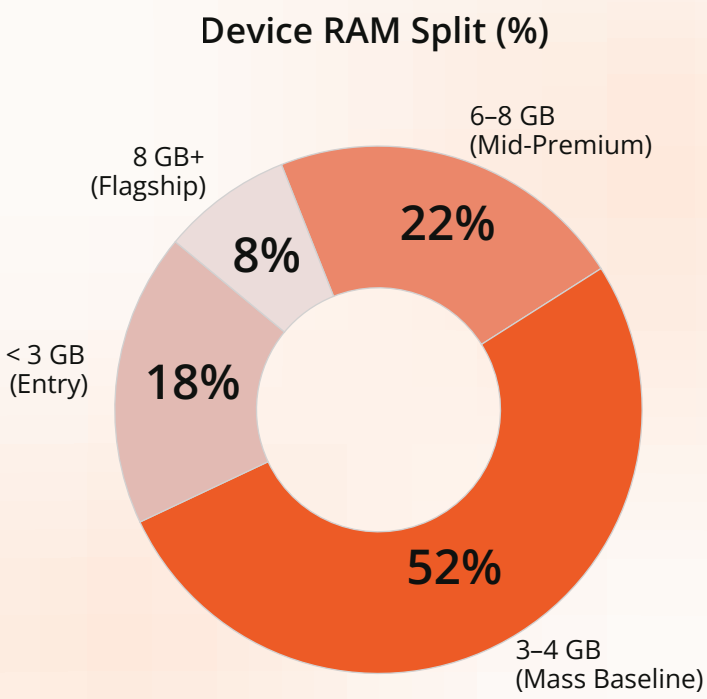


Base: 104 industry submissions. Multiple selections (up to three); all recorded choices retained. Some submissions exceeded the requested selection limit

2.2. Development activity spans platforms and genres

The survey captures the devices and operating systems for which participating studios develop games. **PC is selected by 70.2% of respondents, Android by 66.3% and iOS by 47.1%, while 32.7% select at least one console platform.** Respondents could select multiple platforms, so these figures represent overlapping development choices. This mix suggests a need for technical and publishing support suited to different platforms, including improving game performance, adapting games for additional systems and preparing them for release through the relevant stores.

Device Hardware RAM Breakdown: Insights powered by PhonePe Appstore



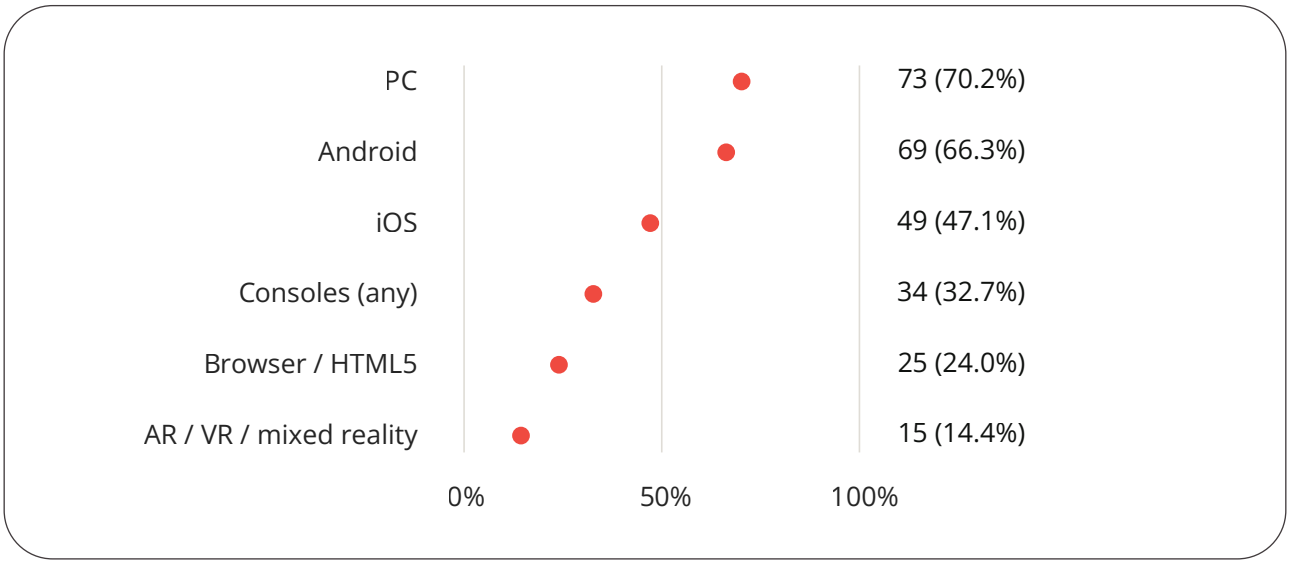
Overview Pie Charts - Device RAM Specifications

PhonePe Appstore

PhonePe Appstore analysis reveals that 3–4 GB RAM devices form the core mass-market baseline, representing 52% of all active gaming devices. Mid-tier devices with 4–6 GB RAM account for 18% of users, while high-spec devices with 6–8 GB RAM represent 22% of users (peaking in graphics-heavy Action and Simulation titles). Entry-level devices with 0–3 GB RAM account for less than 18% of the active base. Game developers must optimize Android Package Kit (APK) sizes and graphics pipelines specifically for 3–4 GB RAM specifications to maximize Total Addressable Market (TAM).

Action adventure emerges as the leading genre under development, followed by a varied mix that includes puzzles, hyper-casual, narrative, shooter, role-playing, co-op, racing, strategy and educational games. Their production and commercial requirements depend on the platform, project scope and revenue model.

Graph 3: PC leads development choices at 70.2%, followed by Android at 66.3%



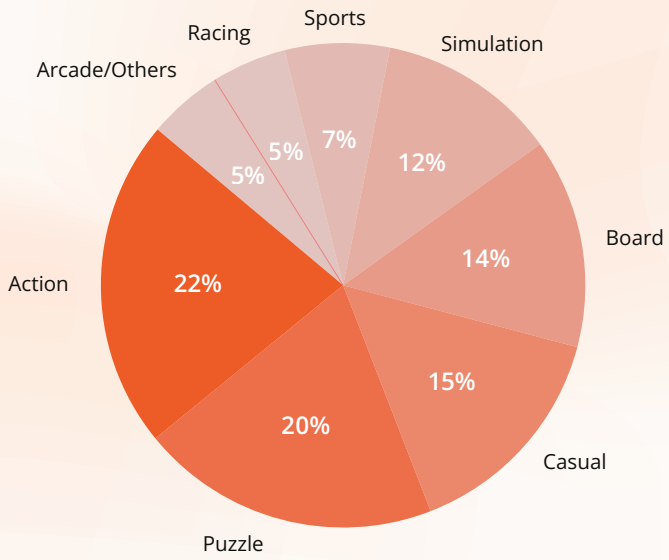
Base: 104 industry submissions. Multiple selections. Console choices combined once per submission.

Consultation inputs illustrate these differences: premium games can require sustained funding through a longer development cycle before sales performance becomes clear, while advertising-funded casual mobile games require repeated testing with real users and expenditure on attracting and retaining players. The intended player experience also matters. Casual games may seek broad initial participation, while mid-core games aim to sustain deeper engagement and progression over time. Funding programmes and investors should therefore assess the proposed experience, production milestones and route to revenue when judging project budgets, development schedules and commercial potential.

Understanding the Mobile Gaming Audience: Insights powered by PhonePe Appstore

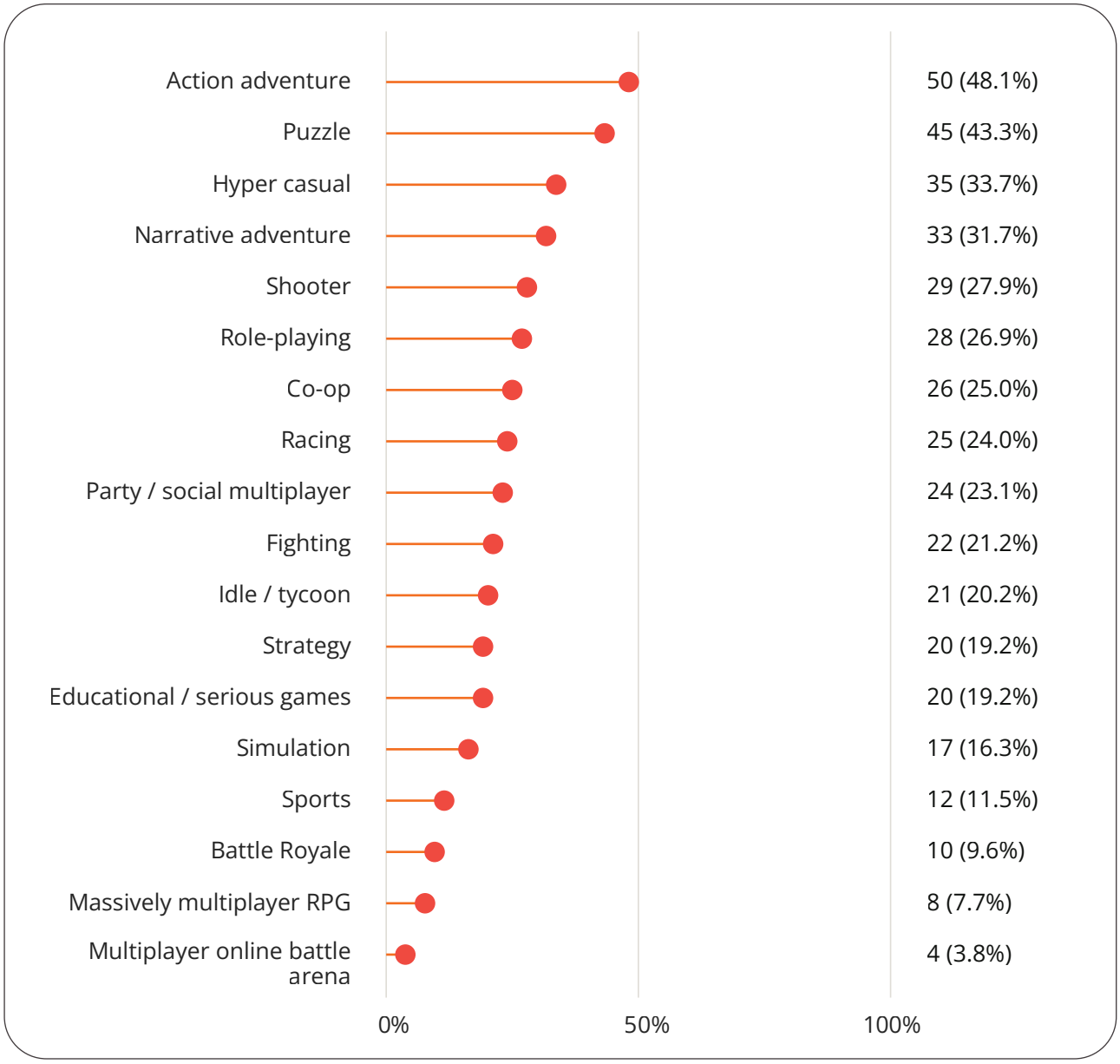
PhonePe Appstore analysis reveals the structural composition of the Indian mobile gaming market. At the macro genre level, Hardcore games represent the largest installed share at 48% of total game installs, followed by Casual games at 27%, and Midcore games at 25%.

Gaming Sub-Genre Active User Share



Genre choice is only one part of defining an audience. Device capabilities affect how a game performs, while differences in age, gender and location can inform user research, accessibility, language choices and distribution planning. These characteristics should therefore enter development decisions before production requirements become difficult to change.

Graph 4: Action-adventure leads genre choices, selected by 48.1% of respondents



Base: 104 industry submissions. Multiple selections.

The survey identifies the platforms and genres being developed by participating studios. PhonePe Appstore's platform data provide a complementary view of the mobile audience, including the distribution of gaming activity across categories and the characteristics of the devices and users observed in India.

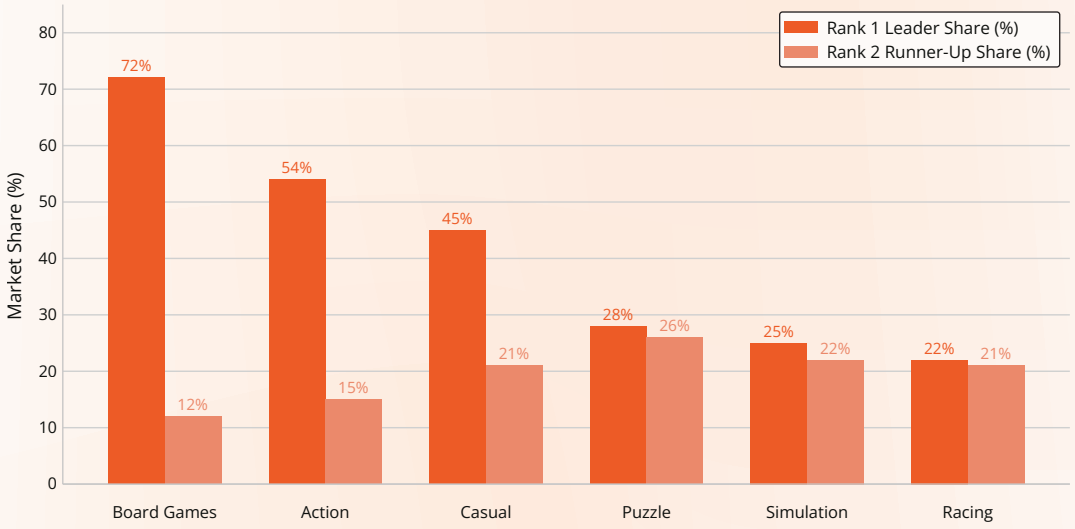
2.3. Discovery must be treated as part of production

A completed game has limited commercial value if players cannot discover it. Stakeholder consultations consistently highlight the cost of reaching audiences and the difficulty of converting initial interest into sustained income.

Market Concentration: Insights powered by PhonePe Appstore

Analysis by PhonePe Appstore reveals a crucial structural distinction in how market share is distributed within sub-genres. **Certain categories exhibit extreme 'Leader-Takes-Most'** behavior, where a single dominant title captures the vast majority of active users. Conversely, other sub-genres demonstrate a highly open, distributed market structure where share is evenly split among multiple competitors.

Market Concentration: Leader vs Runner-Up Share Across Categories



As per app install analysis over the last 6 months, Board games present the highest market concentration, led by the top title with a 67% category share, leaving the second-place app at just 7%—a leader gap of 60 percentage points. Action games similarly display heavy concentration, with the top title capturing 49% share versus the second title 10% (a 39 percentage point gap). Casual games are anchored by Top match 3 Game at 37% share versus second title at 8% (a 29 percentage point gap).

In contrast, categories such as Puzzle, Simulation, and Racing feature low market concentration and small leader gaps. In Puzzle games, the top title holds 17% share while the second title holds 15%—a gap of only 2 percentage points. Simulation games see top title at 13% share versus second title at 10% (a 3 percentage point gap), while Racing is led by top title at 9% versus second title at 8% (a 1 percentage point gap).

Sub-Genre	Rank 1 Share	Rank 2 Share	Leader Gap	Market Structure
Board	67%	7%	60%	Leader-Takes-Most
Action	49%	10%	39%	Leader-Takes-Most
Casual	37%	8%	29%	Leader-Takes-Most
Sports	34%	11%	23%	Leader-Takes-Most
Puzzle	17%	15%	2%	Open / Distributed
Simulation	13%	10%	3%	Open / Distributed
Racing	9%	8%	1%	Open / Distributed

STRATEGIC MARKET ENTRY INSIGHT

Strategic Launch Recommendation for Developers: New gaming titles entering categories with open market share (Puzzle, Simulation, Racing) possess a significantly higher probability of acquiring users and building sustainable market share. Conversely, entering 'Leader-Takes-Most' categories (Board, Action) requires immense user acquisition spend to overcome entrenched network effects.

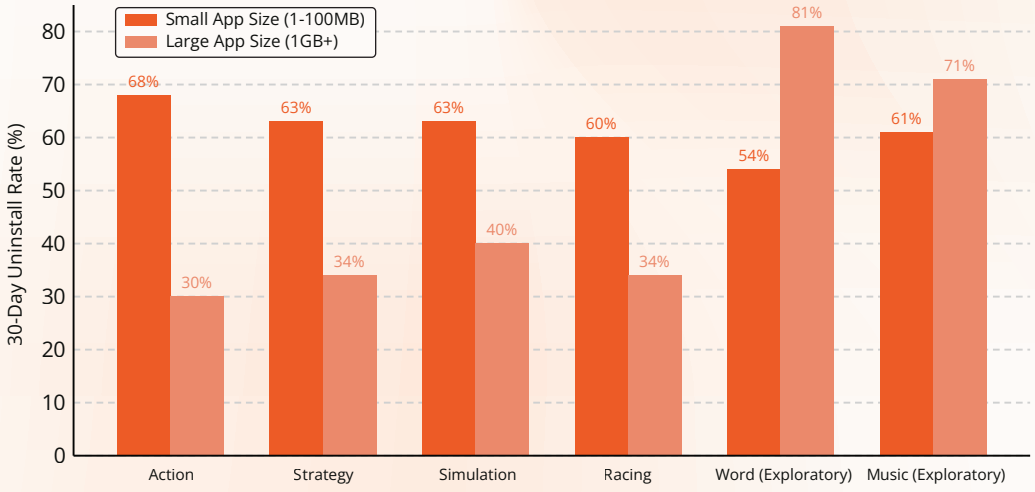
Teams should identify an audience early, test whether the product proposition is understood, measure engagement and assess whether the chosen revenue model fits player behaviour. Market learning should be a funded milestone, not an activity postponed until launch.

Retention, App Size Dynamics & 30-Day Uninstall Behavior: Insights powered by PhonePe Appstore

PhonePe Appstore

PhonePe Appstore analysis across device RAM profiles reveals how app installation size directly impacts retention and churn behavior. A key comparative finding is that app size affects user churn in opposing ways depending on whether the genre represents a core 'High-Intent' category or a casual 'Exploratory' category.

Uninstall Dynamics: High-Intent vs. Exploratory Categories



Comparative Analysis: High-Intent vs. Exploratory Categories

As illustrated in the data, core gaming categories display 'High-Intent' user behavior: 30-day uninstall rates decrease significantly as app size increases. In Action games, small apps (1–10MB) record a 68% uninstall rate, which drops sharply to 30% for 1GB+ apps—a massive 38 percentage point improvement in retention. Strategy games see uninstalls fall from 60% (100MB–1GB) to 34% (1GB+), Simulation games drop from 61% (1–10MB) to 40% (1GB+), and Racing games drop from 60% to 34%. Conversely, casual 'Exploratory' categories exhibit the opposite trend: uninstall rates remain high or

increase with larger app sizes. Word games see uninstalls rise from 46% (100MB–1GB) to 81% (1GB+), Music games increase from 57% to 71%, and Educational titles maintain high churn (55% to 66%). This indicates that users downloading large core games have clear intent and high commitment, whereas casual users treat lightweight games as temporary experiments.

Category Type	Sub-Genre	Small App Uninstall %	Large App (1GB+) Uninstall %	Behavioral Dynamic
High-Intent	Action	68% (1-100MB)	30%	Uninstall drops 38% (High Retention Commitment)
High-Intent	Strategy	60% (100MB-1GB)	34%	Uninstall drops 26% (High Retention Commitment)
High-Intent	Simulation	61% (1-100MB)	40%	Uninstall drops 21% (High Retention Commitment)
High-Intent	Racing	60% (1-100MB)	34%	Uninstall drops 26% (High Retention Commitment)
Exploratory	Word	46% (100MB-1GB)	81%	Uninstall increases 35% (Casual Trial / High Churn)
Exploratory	Music	57% (100MB-1GB)	71%	Uninstall increases 14% (Casual Trial / High Churn)

2.4. Building globally competitive studios

Vietnam, Türkiye and Poland illustrate different foundations for internationally competitive game-development industries. Vietnam's 4.9 billion global downloads in 2025 demonstrate the overseas reach of its mobile games, while Poland's 824 studios and 14,568 specialists indicate the depth of an established production ecosystem. Türkiye offers a particularly relevant example of how successful studios can generate further entrepreneurship, investment and specialist expertise.

Peak's contribution to Türkiye shows how the benefits of a successful studio can extend across the industry. Founded in Istanbul in 2010, Peak developed Toy Blast and Toon Blast, which together attracted more than 12 million average daily mobile users by the time Zynga completed its acquisition in July 2020 for approximately USD 1.85 billion. Their sustained presence among the highest-grossing US iPhone games demonstrated that a Turkish studio could develop original products with substantial international commercial appeal.

Peak also became a source of experienced founders. The State of Turkish Gaming Ecosystem 2025 reports that former Peak employees established 43 gaming startups, collectively attracting USD 860 million in venture capital. These businesses carried forward experience in product development, player acquisition and operating games after launch, allowing capabilities developed within one company to spread through the domestic ecosystem. Dream Games provides a concrete example: its founding team had worked together on Peak's successful titles before developing Royal Match, which CVC described in its 2025 investment announcement as the world's leading puzzle game by revenue. This progression illustrates how accumulated production experience can support subsequent globally competitive businesses.

India has experienced a similar progression. Zynga's Indian studio brought together engineers, game developers and product specialists to work on internationally distributed games. Former Zynga professionals subsequently co-founded Moonfrog, PlaySimple and Bombay Play, carrying experience in product development, engineering and game design into new mobile-gaming businesses. These examples illustrate how experience gained within established studios can contribute to a wider base of founders and production capabilities.

For India, these patterns suggest that expanding development activity needs to be accompanied by stronger commercial and institutional capabilities. The survey identifies connected constraints: 76.9% of industry submissions rate the funding ecosystem inadequate or very inadequate, 51.9% report difficulty attracting international partners, and 56.7% rate fresh talent poorly or not at all ready. These findings support an approach combining development finance with practical production experience, mentoring by experienced professionals and sustained access to publishers and audiences. Progress can be assessed through completed games, retained teams, commercial agreements and revenue across successive releases.

Chapter 3

The Studio Landscape: Who Is Building India's Games?

India's studio landscape has evolved through distinct phases. In the 1990s and early 2000s, the industry was built on production services in art, animation, engineering and quality assurance testing for overseas titles. Global companies established significant development operations in India during the 2000s including EA, Ubisoft, Zynga and later Rockstar, creating deep, globally benchmarked production capability and a generation of experienced professionals.

The arrival of app stores and the mobile boom in the 2010s opened new routes for independent developers. The 2016 data inflection, which was driven by affordable 4G, smartphones and Unified Payments Interface (UPI), dramatically expanded the domestic player base and made live-ops, multiplayer and direct distribution more feasible. From the early 2020s onwards, original IP ambition has grown alongside continuing service and co-development work.

Today the ecosystem combines established production capabilities with newer studios seeking to build their first successful releases. Industry estimates place the number of gaming companies in the range of approximately 1,800–1,900, employing roughly 100,000–130,000 people. Within this evolving ecosystem, studios' experience, team size and type of work shape how they organise production, access specialist skills and sustain projects between releases, creating different needs for support.

3.1 Young studios, varied business models

Studios represented in the survey include a substantial share of recent entrants: 56.7% of responses come from studios founded in 2022 or later. For these teams, completing an initial release can involve building production routines and commercial relationships at the same time. Access to experienced project guidance may therefore be particularly useful.

Graph 5 shows the principal areas of work reported by respondents. Mobile development accounts for 26.0% of responses, while PC and cross-platform development each account for 23.1%. Other respondents identify outsourcing and co-development, publishing, serious games and tools development as their primary activities, among others. The responses cover both development platforms, such as mobile and PC, and business activities, such as outsourcing and publishing.

Studios developing their own games face different commercial challenges from those providing services to clients. Service and co-development teams are paid to undertake agreed work for another company, making timely delivery, quality and continued access to clients central to their business. Studios creating original games must finance development before knowing whether the game will attract enough players to recover its costs. Stakeholder consultations highlighted these challenges.

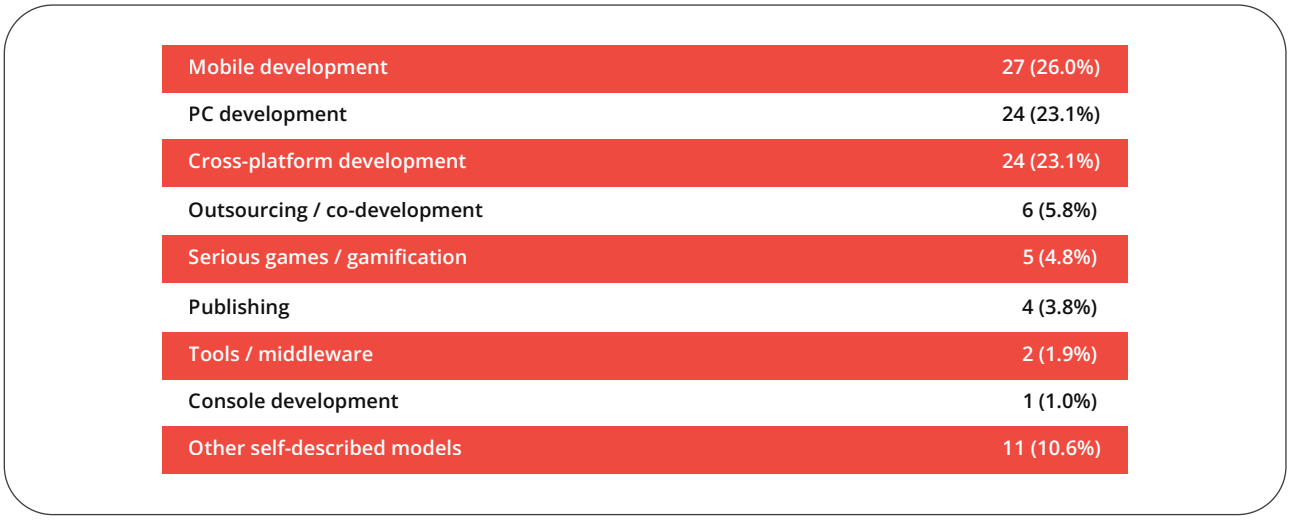
Industry in Practice: Funding the first playable demo

An independent developer explained that securing funding often requires a playable demo, yet producing that demo can itself require paying a team for a year or longer. If funds run out while the studio seeks further investment, it may struggle to retain the team and continue development. Another participant emphasised that reaching international audiences requires investment beyond making the game, including testing it with players, improving the experience and marketing it to potential users.

Furthermore, studios receiving investment from abroad also need timely processing of incoming funds so that the money can be used in India to pay teams and sustain development. Stakeholder consultations highlighted a case in which foreign investment remained unavailable for approximately one and a half months because of administrative issues. Clear requirements and prompt resolution of discrepancies would help prevent such delays from disrupting studio operations.

These funding needs also sit alongside growing pressure to test ideas and reach players sooner. User-generated content (UGC) platforms can make this easier by enabling creators to build and distribute playable experiences using existing tools and infrastructure. Advances in AI-assisted workflows may also raise investor expectations of faster prototyping and development. Funding assessments can therefore consider how studios use these opportunities to demonstrate progress and gather player feedback, while recognising that timelines will still vary by genre, platform, project scope and quality requirements. Additionally, support should reflect a studio's business model, stage of development and location.

Graph 5: Mobile game development is the largest primary activity, reported by 26% of respondents



Base: 104 industry submissions. Others retain self-described and hybrid models.

3.2. Team size shapes the support requirement

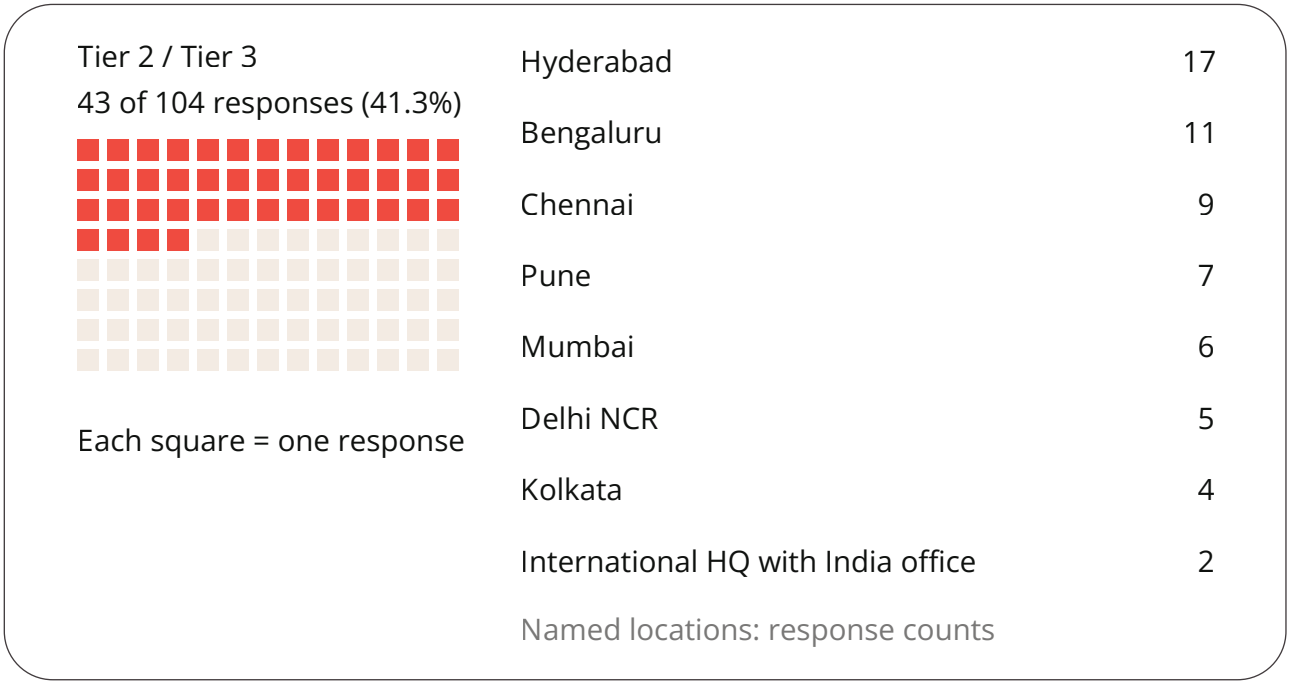
50% of industry submissions report teams of one to five people. In teams of this size, the same founders may handle development, administration, fundraising, legal work and publishing. Specialist support should therefore be accessible without permanent recruitment. Shared testing, localisation, contract guidance, financial planning and publishing expertise can address gaps as projects progress.

3.3. A distributed development footprint

Tier 2 and Tier 3 locations account for 41.3% of survey responses, alongside established studio centres including Hyderabad, Bengaluru and Chennai. The survey does not allocate the grouped Tier 2 and Tier 3 responses to individual states, so the chart should be described as the location of survey responses rather than a definitive map of studio hubs.

Therefore, support should be accessible to studios across this wider geographical base. Established centres could provide access to specialist facilities, experienced developers and industry networks, while regional institutions and local developer groups could organise training, mentoring and networking closer to where studios operate. Online mentoring and remote participation could maintain these connections between in-person events. This approach would allow studios to benefit from expertise in major centres without having to travel repeatedly to a single city to participate in national programmes.

Graph 6: 41% of studios in the survey pool came from Tier-2, Tier-3 locations



Base: 104 industry submissions. Tier 2 / Tier 3 responses remain grouped; no state allocation is inferred.

Chapter 4

Economics of Game Development: Revenue, Funding and Monetisation

India's gaming audience creates central to commercial viability for a larger share of development stage, but studios must establish how that engagement translates into income. Additionally, reports highlight the payer conversion of 25%, highlighting the importance of both player spending and revenue models that serve non-paying audiences.

For most Indian developers represented in the survey, the commercial path still runs substantially through international partnerships. In the survey, 74.0% of responses indicate that less than 10% of studio revenue comes from India. Access to overseas players, publishers, investors and clients is therefore not a secondary consideration but is central to commercial viability for a larger share of development stage.

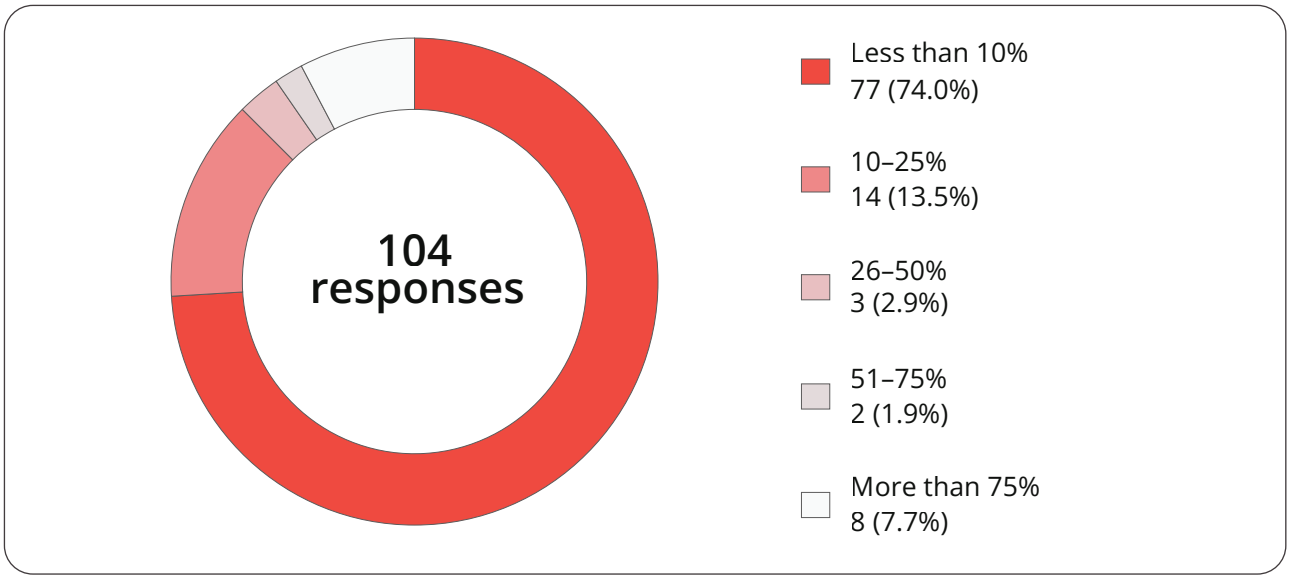
The core takeaway for this chapter is clear: Indian studios continue to rely heavily on international partnerships for financing, market knowledge and distribution. Strengthening go-to-market (GTM) capability and making easier more structured access to publishers and investors is therefore one of the highest priorities for the ecosystem.

Revenue, publishing, and working capital therefore need to be considered together. This chapter examines these relationships and the difficulties studios face in sustaining projects through development, release and subsequent operations.

4.1. Revenue orientation and routes to market

The location of a studio's revenue helps explain which markets and commercial relationships matter to its business. With 74.0% of respondents indicating that less than 10% of their studio's revenue comes from India, access to overseas players, publishers and clients is particularly important for the surveyed development base.

Graph 7: 74% of respondents report earning less than 10% of studio revenue from India



Base: 104 industry submissions. Revenue-share bands count submissions; they are not weighted by turnover.

Government and industry programmes can support these relationships through introductions to suitable publishers and clients, assistance with localisation and overseas marketing, and guidance on contracts, intellectual property rights and international payments. Support can also extend beyond introductions to help studios prepare proposals, negotiate agreements and receive payments predictably. Alongside international expansion, smaller audience tests, pricing experiments and distribution partnerships can help studios assess which products and business models could attract paying players in India.

4.2. Working capital and publishing capability

For many surveyed studios, overseas revenue makes international publishers, investors and clients central to commercial success. Support for production must therefore be accompanied by the capability to identify audiences, reach players and generate revenue. Four priorities emerge:

1. **Match financing to the project.** Demo funding can help studios develop the playable builds needed to attract backing. Guidance can also clarify the differences between publisher finance and investment in the studio, including their implications for ownership, revenue sharing and decision-making.
2. **Connect preparation with sustained publisher access.** Expert reviews, realistic budgets and audience evidence can strengthen commercial discussions. Matching studios with suitable partners, followed by support with negotiations and follow-up, can help turn international exposure into agreements.
3. **Make incoming funds available promptly.** Securing investment does not prevent disruption if studios cannot access it to meet salaries and production costs. Consistent documentation and timely processing can reduce these interruptions. Chapter 8 examines the administrative concerns.
4. **Strengthen publishing expertise within India.** Developing capabilities in audience research, localisation, marketing and launch planning can help studios negotiate informed agreements and retain commercial knowledge across successive releases.

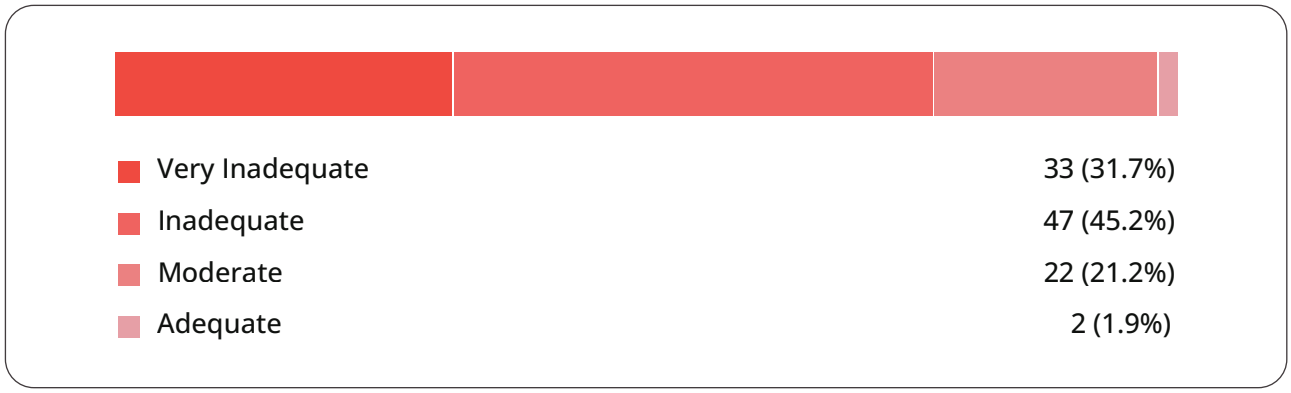
Industry in Practice: Finding the right funding partner

Consultations illustrated the different forms of support studios require. One developer sought project funding from an overseas publisher because conventional venture investment did not fit the game's financing needs. Another highlighted limited global distribution support, distinguishing studios that publish their own games from third-party publishers that bring other developers' titles to market.

4.3. Funding the full development cycle

In the survey, 76.9% of respondents consider the funding ecosystem as inadequate or very inadequate. Understanding the concern therefore involves examining both where funding is difficult to obtain and how projects are assessed.

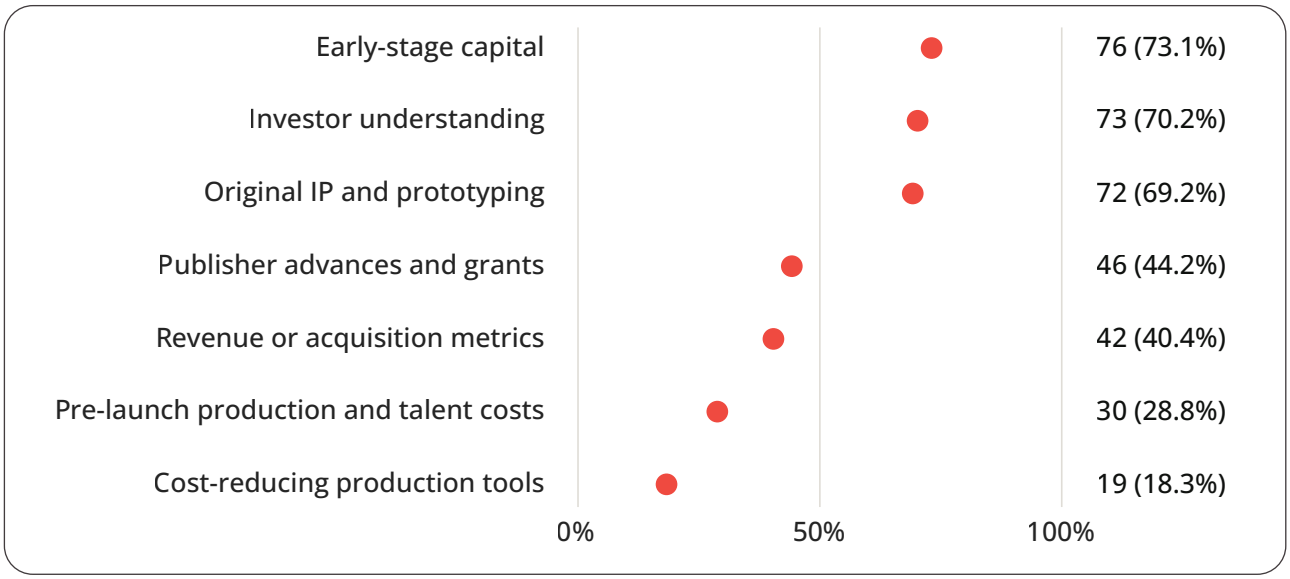
Graph 8: 76.9% of respondents rate the funding ecosystem inadequate or very inadequate



Base: 104 industry submissions.

The overall assessment of funding adequacy is followed by a more specific question: where do studios encounter gaps? The responses below identify the financing needs and assessment challenges that respondents consider insufficiently addressed.

Graph 9: Early-stage capital is the leading funding gap, identified by 73.1% of respondents



Base: 104 industry submissions. Multiple selections (up to three). Some submissions exceeded the requested selection limit.

The most frequently identified gaps are early-stage capital (73.1%); investor understanding (70.2%); and funding for original IP and prototyping, selected by 69.2% of the respondents. **This suggests that access to finance and the ability to explain and assess a game's commercial potential needs attention together.** Respondents also identify gaps in publisher advances and grants (44.2%), revenue or acquisition metrics (40.4%), pre-launch production and talent costs (28.8%), and cost-reducing production tools (18.3%).

These findings suggest that improving the financing environment requires more than increasing the supply of money. Studios need funding suited to the work they are undertaking, while investors need

assessment criteria appropriate to the project's stage, genre and revenue model. A prototype cannot demonstrate the same commercial evidence as a game already available to players. Equally, a premium game purchased upfront and a free-to-play mobile game earning through advertising or in-game purchases should not be assessed using identical measures.

The practical implication is to connect funding with clear development milestones. At an early stage, support should help a studio establish whether its concept works and whether its proposed scope is achievable. During production, assessment should focus on the team's ability to complete the game within its budget and schedule. As the game approaches release, funding must also cover the work required to reach players and support the product after launch.

Early-stage support can help studios build a playable prototype, test its appeal with intended players and assess the resources needed for full production. During production, assessment should focus on the team's ability to complete the game within its budget and schedule. As the game approaches release, funding must also cover the work required to reach players and support the product after launch.

Table 3: Financing the Journey from Playable Prototype to Commercial Release

Development stage	What funding needs to support	Appropriate assessment and milestones
Prototype stage	Developing a playable version that demonstrates the central gameplay; testing it with prospective players; and establishing a realistic project scope, budget and schedule. Smaller grants or funding released against agreed milestones could help teams produce this evidence.	• Assess whether the core gameplay works. • Review what testing reveals about player interest. • Evaluate whether the team can deliver the proposed project. • Prioritise a working prototype, documented feedback and a credible production plan over immediate revenue.
Production stage	Paying the team and contractors to build the game, create content, integrate technical systems and conduct quality testing. Funding should follow a realistic delivery schedule and provide continuity between milestones.	• Assess team capability. • Track progress against the budget and schedule. • Evaluate the resolution of technical risks. • Ensure evidence reflects the genre and platform.
Commercialisation stage	Preparing for release through localisation, store materials, audience testing and marketing, followed by technical support, updates and ongoing operations where required. Player acquisition expenditure should be tested and expanded according to results.	• Assess launch readiness. • Review evidence of audience demand. • Evaluate a realistic route to recovering costs. • After release, use measures appropriate to the business model (e.g. sales for premium games, or player retention, advertising income, in-game spending and acquisition costs for free-to-play games).

4.4. Audience Discovery and App-store Distribution

Reaching players requires studios to understand both their intended audience and the channels through which that audience might discover a game. Marketing choices and app-store presentation need to work together, connecting relevant promotional messages with a clear account of the game's experience. The following insights from PhonePe Appstore examine the non-gaming apps installed alongside games, helping identify potential audiences and opportunities for cross-promotional partnerships.

Gamer Personas & Cross-Category App Affinity: Insights powered by PhonePe Appstore

PhonePe Appstore

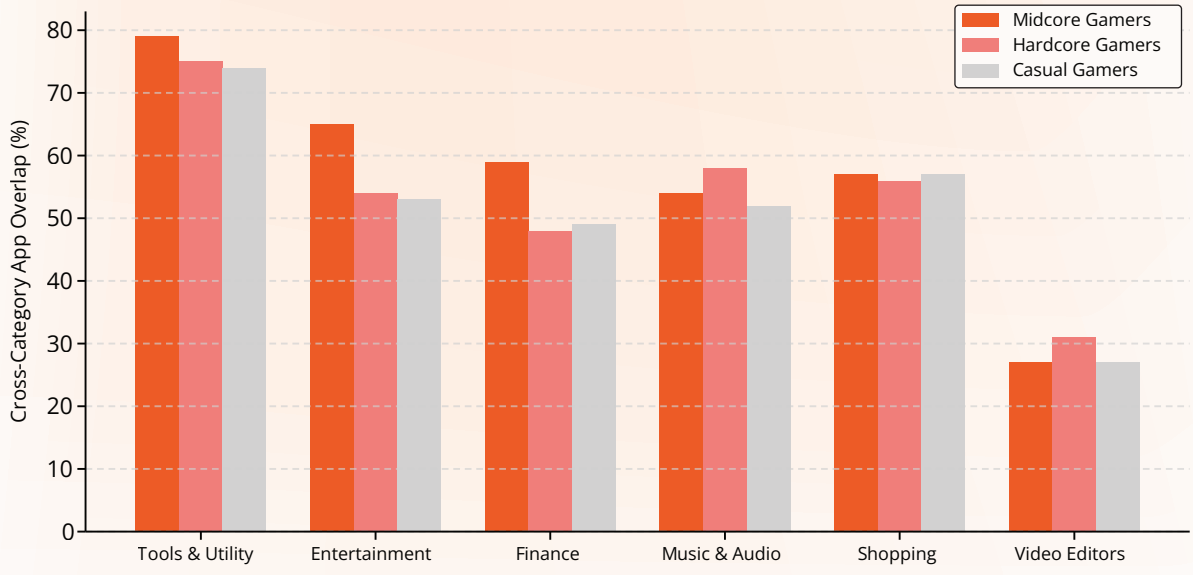
PhonePe Appstore analysis provides a comprehensive mapping of gamer personas across non-gaming digital categories. Understanding where gamers spend time outside of playing games provides game studios with a clear roadmap for off-platform user acquisition and cross-promotional partnerships.

DIGITAL JOURNEY HERO INSIGHT

Hero Messaging For Game Publishers: Where else can gaming companies find their users in their digital journey?

PhonePe Appstore analysis demonstrates that gamers are heavy consumers of non-gaming apps, with Midcore gamers leading in digital multi-homing (Finance, Travel, Business), Hardcore gamers anchoring Media & Audio consumption, and Casual gamers relying heavily on Core Utilities and Shopping.

Digital Journey: Gamer Personas Non-Gaming App Usage



Gamer Persona Profiles & Non-Gaming App Overlap

Analysis by PhonePe Appstore breaks down gamer personas across three primary cohorts:

1 Midcore Gamers
High-Value Cohort

8M devices

- 79% Tools & Utilities
- 65% Entertainment
- 59% Finance
- 23% Travel & Local
- 23% Business

Broadest digital reach; highest LTV.

2 Hardcore Gamers
Media & Youth Cohort

13M devices

- 58% Music & Audio
- 31% Video Players & Editors
- 16% Education
- 11% Personalization
- 10% Art & Design

Strong affinity for media and audio.

3 Casual Gamers
Mass Utility Cohort

12M devices

- 97% Communication
- 74% Essential Apps
- 57% Shopping
- 49% Finance

Everyday utility-led app usage.

Percentages show non-gaming app overlap within each gamer cohort.
Source: PhonePe Appstore analysis.

Category Propensity: Targeting Gamers via Non-Gaming Touchpoints

Flipping the analysis reveals which non-gaming app categories hold the highest concentration of active gamers. PhonePe Appstore data shows that Music App users exhibit a 70% Hardcore gaming propensity (a 97% higher likelihood than average). Beauty App users show a 50% Hardcore gaming propensity (a 124% higher likelihood), while Art & Design users (44%) and Video Player users (41%) also index extremely high for Hardcore gaming.

Non-Gaming Category	Midcore Overlap	Hardcore Overlap	Casual Overlap	Leading Persona Segment
Tools & Utilities	79%	75%	74%	Midcore (+5% Lead)
Entertainment	65%	54%	53%	Midcore (+22% Lead)
Finance	59%	48%	49%	Midcore (+25% Lead)
Music & Audio	54%	58%	52%	Hardcore (+10% Lead)
Shopping	57%	56%	57%	Balanced Across Cohorts
Video Editors	27%	31%	27%	Hardcore (+14% Lead)
Business	23%	18%	19%	Midcore (+29% Lead)
Travel & Local	23%	16%	17%	Midcore (+42% Lead)

STRATEGIC TAKEAWAYS

- Game publishers can find target users across Finance (59%), Entertainment (65%), and Music (58%) app touchpoints.
- Midcore gamers are the highest-value digital cohort due to their dominant presence across Finance, Business, and Travel apps.
- Utilize high-propensity non-gaming categories like Music (70% Hardcore propensity) and Beauty (50% Hardcore propensity) for cost-effective user acquisition campaigns.

For studios, these patterns provide a starting point for testing promotional channels, partnerships and audience-specific messaging. Such efforts should connect to store listings that clearly communicate the game's appeal through suitable descriptions, visuals and language. Decisions about expanding a campaign should then draw on observed downloads, player retention and revenue. This connects audience discovery with publishing execution, helping studios assess which approaches bring players who continue engaging with their games.

Chapter 5

Talent Pipeline: Workforce, Education and Skilling Readiness

India's game-development ambitions depend on an education and training system that can prepare people for increasingly specialised production roles. The Media & Entertainment Skills Council's (MESC) Human Resource and Skill Requirement in the Media & Entertainment Sector (2020-25), published in January 2022, reported 29,600 enrolments in undergraduate, postgraduate and certificate courses related to online gaming in 2019. The study also noted that, despite the expansion of institutes and courses, training in emerging areas such as cloud gaming, machine learning and data analytics remained at an early stage. These findings provide a historical baseline for examining both the reach of training and its alignment with evolving industry requirements.

The scale of the wider skills requirement has since gained greater policy attention. In April 2026, the Ministry of Information and Broadcasting (MIB) reiterated the AVGC Promotion Task Force's projection that approximately two million skilled professionals may be required by 2030 across Animation, Visual Effects, Gaming and Comics – Extended Reality (AVGC-XR), content production, design, programming and related areas. This is a projection for the broader sector, rather than an estimate of game-development employment alone. It nevertheless establishes the scale of the challenge facing education and training providers.

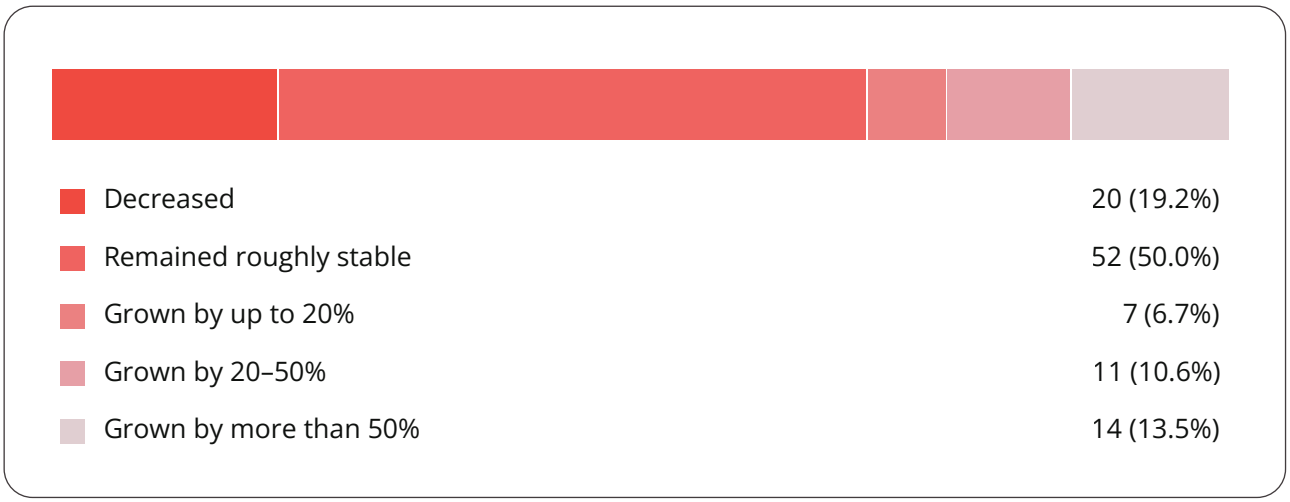
For game development, meeting this challenge requires training that reflects specific production roles. The MESC's published occupational standards include Game Artist and Art Director (Animation & Gaming), providing a basis for connecting training with workplace requirements. The practical question is how effectively education prepares entrants to apply these skills within a development team, while enabling existing professionals to progress into specialist roles. Curriculum, faculty experience and opportunities to work on real projects therefore matter alongside the availability of courses. The industry and academia survey findings help assess these connections between training, recruitment and readiness for game production.

Understanding this requirement involves examining both employers' hiring experience and the education pathways preparing new entrants. This chapter brings the industry and academia findings together to assess workforce needs, practical readiness and opportunities for closer collaboration.

5.1. Workforce growth and participation

Changes in team size provide a starting point for understanding studios' recent staffing experience. **Over the past 24 months, 50% of respondents maintained a broadly stable headcount, 30.8% expanded and 19.2% reduced their teams.** This mixed picture suggests that the talent agenda should address continuity between projects as well as recruitment for growth. Teams need access to expertise that can scale with projects, while retaining experienced staff between releases. Funding continuity and a visible project pipeline are therefore part of the talent agenda.

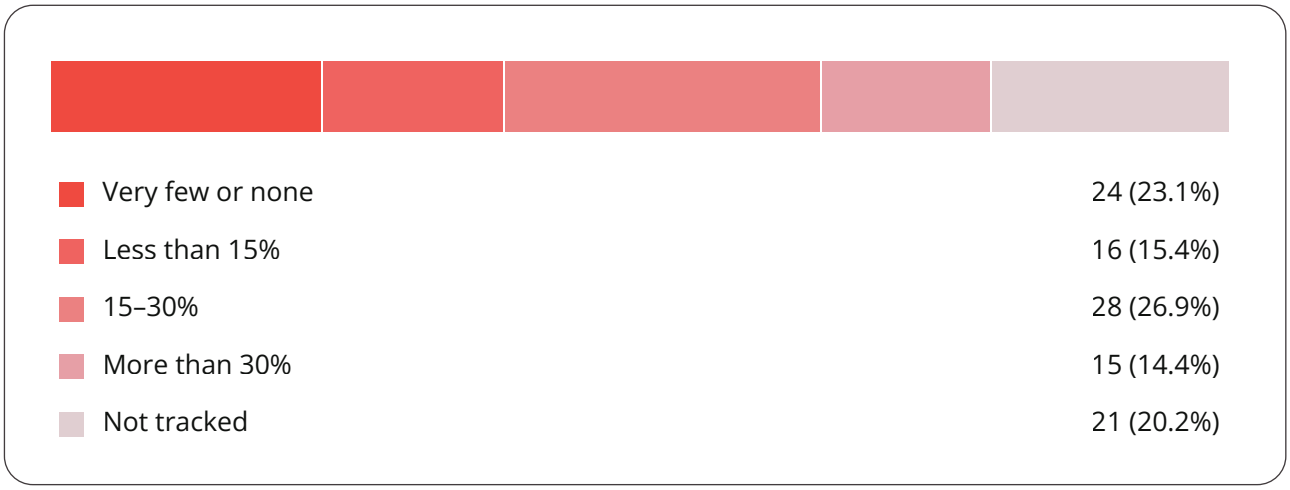
Graph 10: Half of respondents report stable team sizes over the past two years



Base: 104 industry submissions.

Workforce development also involves understanding who participates in technical and creative roles and whether studios track that participation consistently. **Women's participation varies across technical and creative teams, and 20.2% of respondents do not track it.** Consistent workforce reporting, accessible entry routes and visible progression into specialist roles would help studios identify where recruitment and retention can improve.

Graph 11: Only 14.4% report women making up over 30% of their technical and creative teams

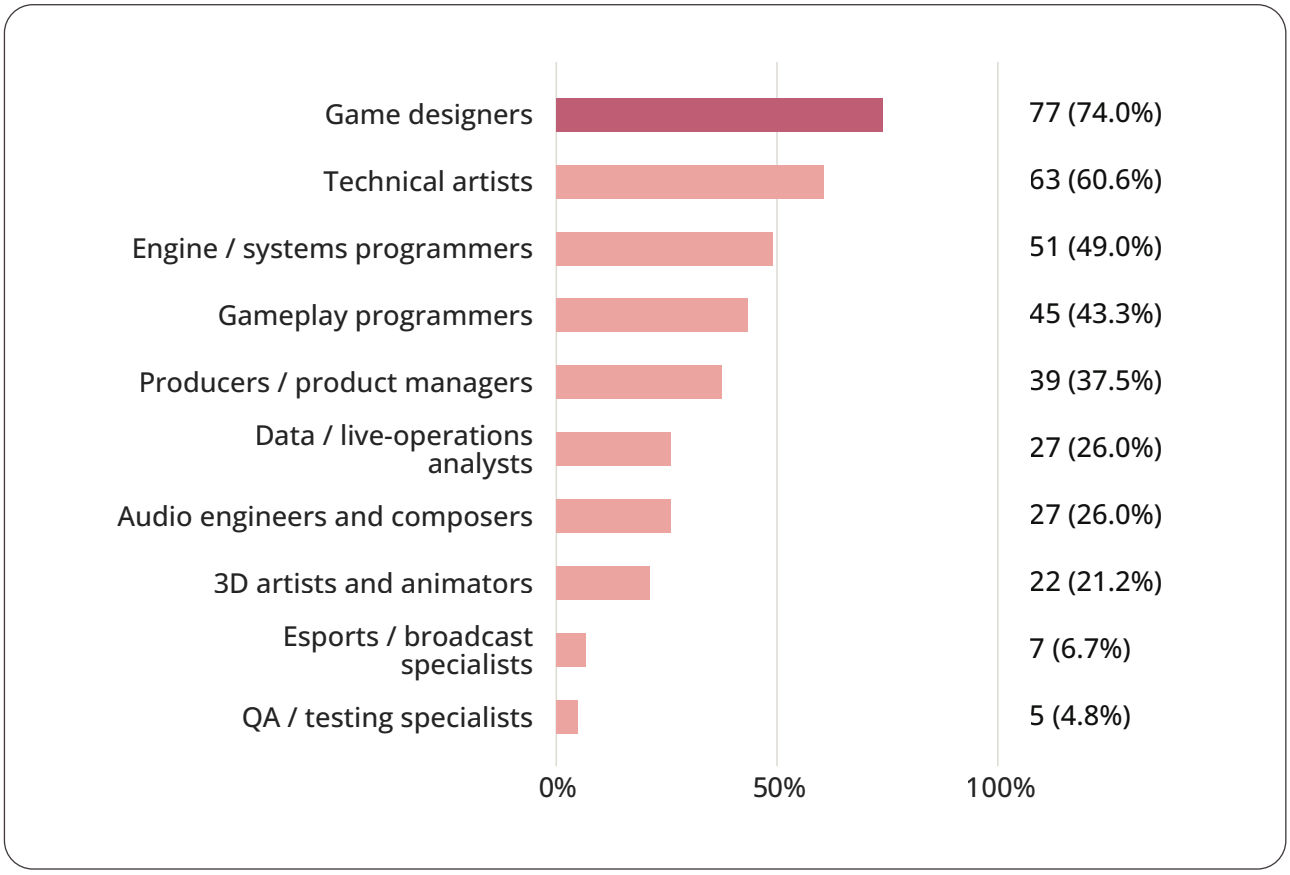


Base: 104 industry submissions. Bands describe respondents' teams, not the aggregate workforce.

5.2. The priority is production capability

Game designers and technical artists are the roles respondents find hardest to recruit, selected by 74.0% and 60.6% respectively. Engine and systems programmers, gameplay programmers and producers also feature prominently. These roles turn creative ideas into functioning games and coordinate their delivery. Skills development should therefore prepare people to work across design, art and programming through practical projects that reflect how studio teams develop, test and complete a game.

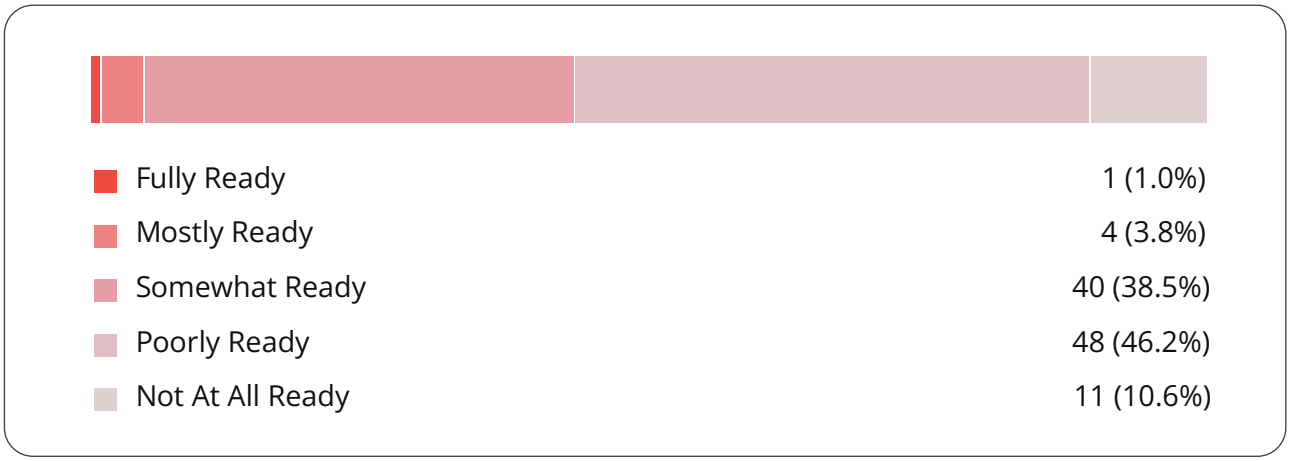
Graph 12: Game designers are the hardest to recruit, cited by 74% of respondents



Base: 104 industry submissions. Multiple selections. Some submissions exceeded the requested selection limit.

A combined 56.7% of respondents rate fresh talent as poorly or not at all ready, while only 4.8% rate it mostly or fully ready. Stronger preparation should include playable projects, iteration, debugging, version control, teamwork, review and delivery against a defined scope.

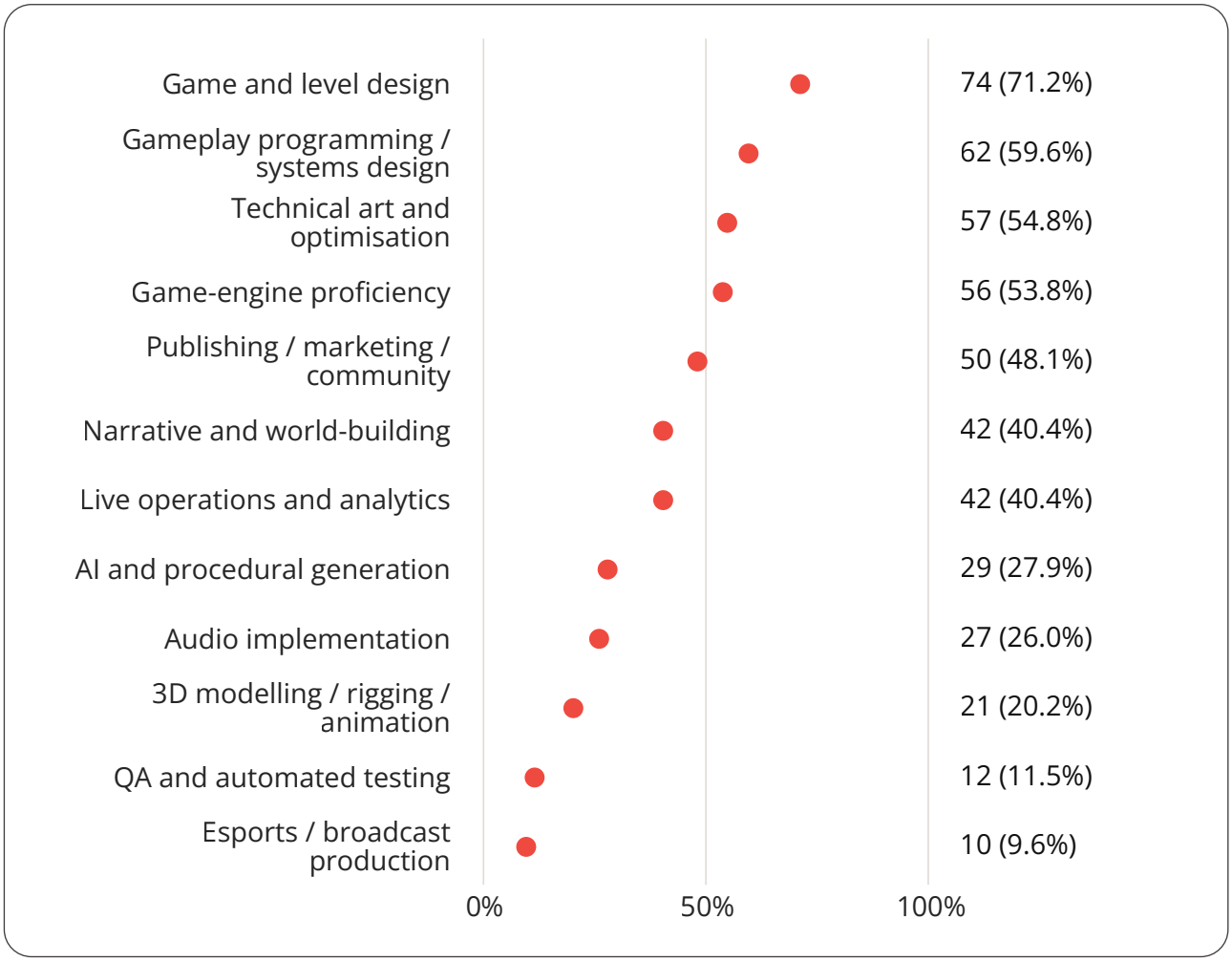
Graph 13: 56.7% of respondents give fresh talent the two lowest job-readiness ratings



Base: 104 industry submissions.

Respondents' curriculum priorities help translate the hiring and readiness findings into areas for educational improvement. Design, gameplay programming, technical art and publishing feature prominently. Therefore, learning should connect these subjects through projects in which students develop, test and improve a game as a team.

Graph 14: Game and level design lead curriculum priorities, selected by 71.2% of respondents

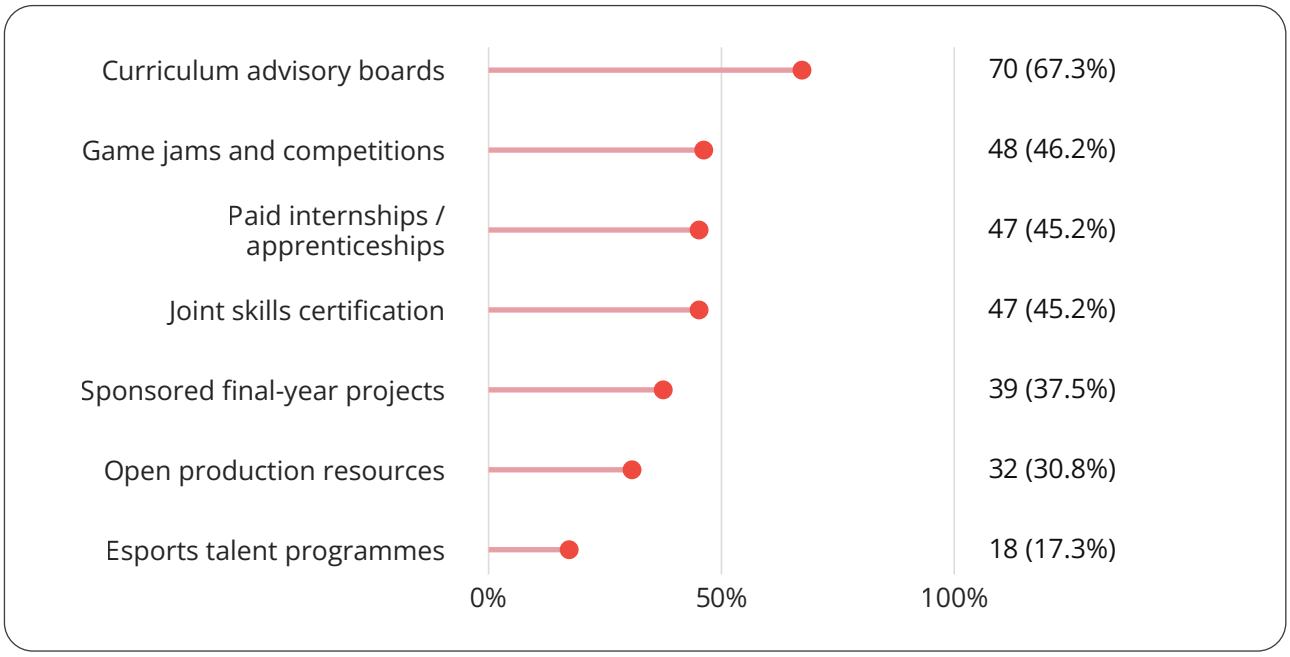


Base: 104 industry submissions. Multiple selections. Some submissions exceeded the requested selection limit.

5.3. Turning willingness into structured collaboration

67.3% of respondents express willingness to support curriculum advisory boards, alongside interest in game jams, internships and certification. Giving this interest a practical structure through agreed activities, scheduled reviews and named coordinators could make collaboration more consistent.

Graph 15: Two in three industry respondents are willing to join curriculum advisory boards

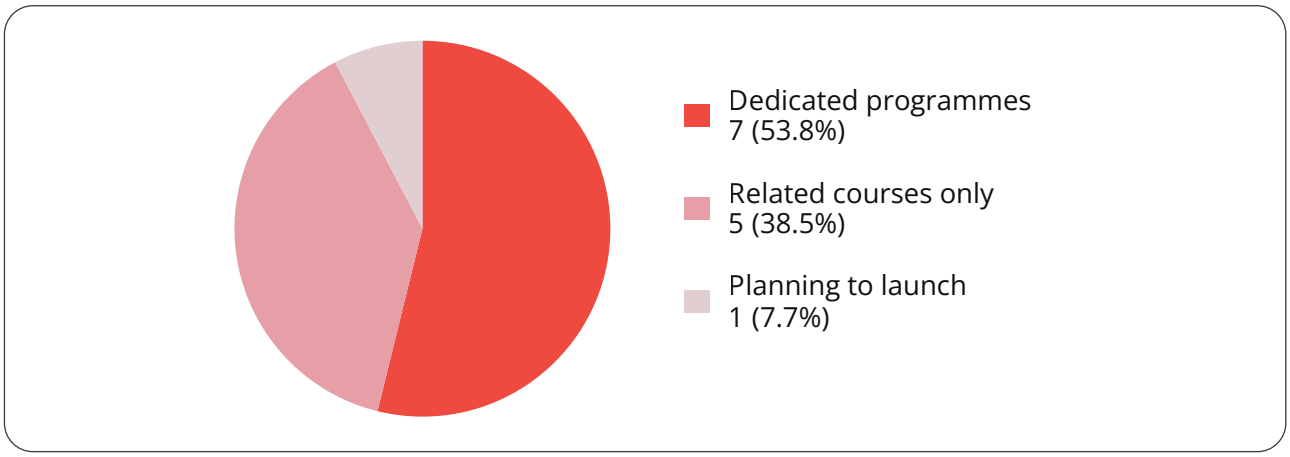


Base: 104 industry submissions. Multiple selections. Explicit selections counted. Free-text "all of the above" is not redistributed.

5.4. Education supply and faculty readiness

The Academia Survey provides a complementary view of how institutions are preparing students for game-development careers. 53.8% of academia submissions report dedicated programmes, 38.5% related courses and 7.7% are planning to launch. Course descriptions span degrees and shorter formats. These routes need shared production benchmarks without requiring every institution to offer an identical programme.

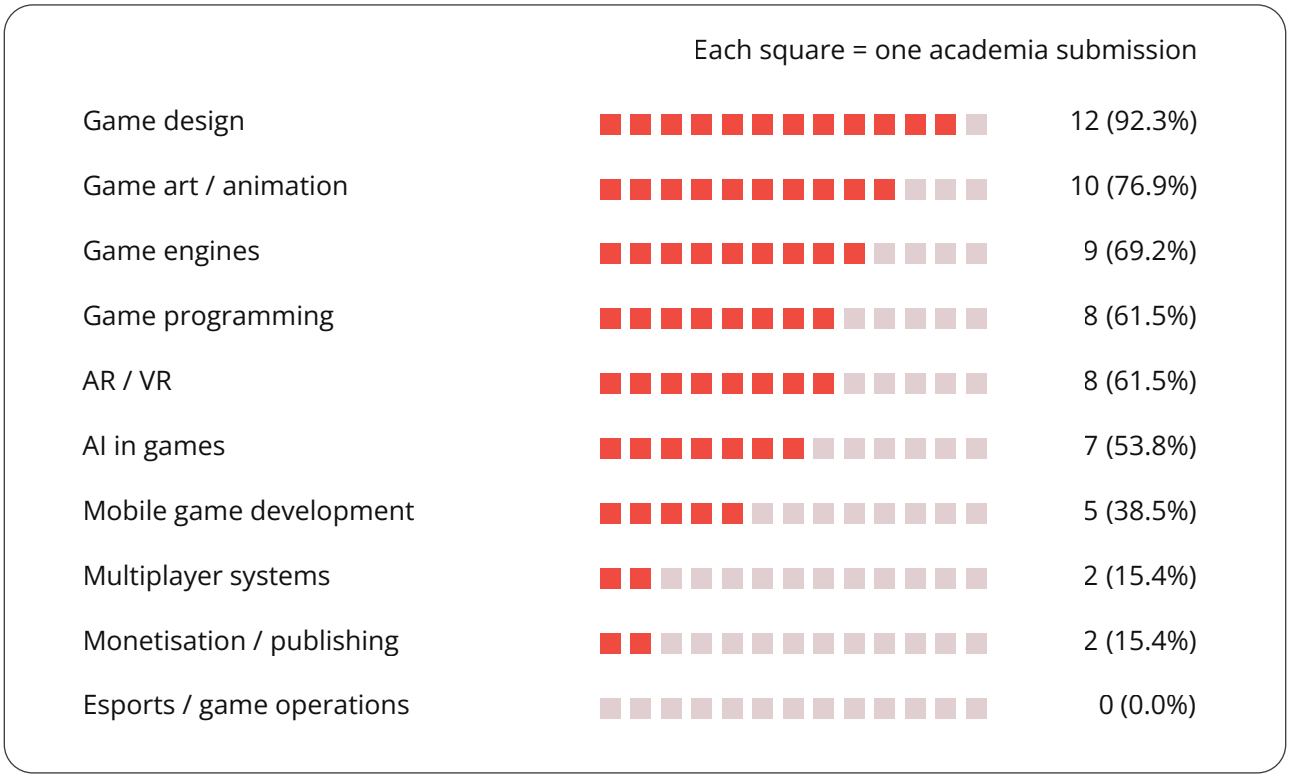
Graph 16: 53.8% of academic respondents offer dedicated game-development programmes



Base: 13 academia submissions.

Game design appears in 92.3% curricula and game engines in 69.2%, while multiplayer systems and monetisation or publishing appear in only 15.4% each. The coverage suggests scope to connect creative and technical teaching more closely with the commercial and operational requirements of games. Assessed projects could help institutions evaluate how students apply these subjects together.

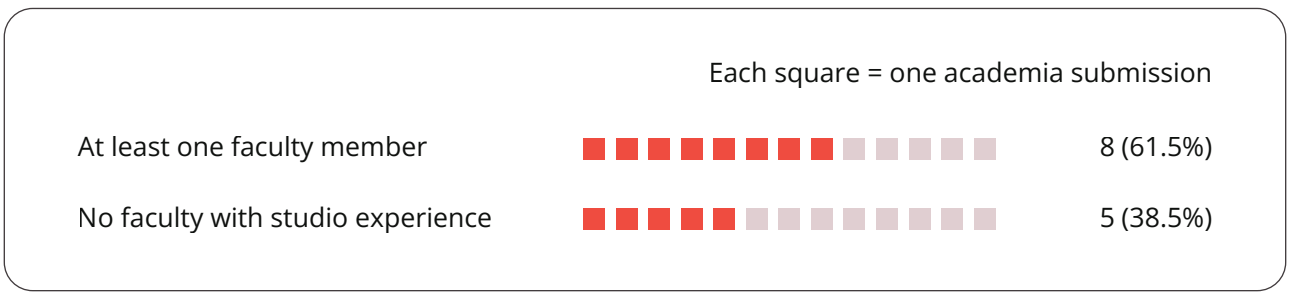
Graph 17: Game design features in 92.3% of curricula, but monetisation and publishing in only 15.4%



Base: 13 academia submissions. Multiple selections. Some submissions exceeded the requested selection limit.

About 61.5% of submissions indicate at least 1 faculty member with direct studio experience; 38.5% indicate none. 84.6% of respondents express interest in faculty development, with hybrid or online formats preferred in these responses. Short practitioner-led production modules offer a feasible starting point.

Graph 18: 38.5% of academic responses report no faculty with direct game-studio experience

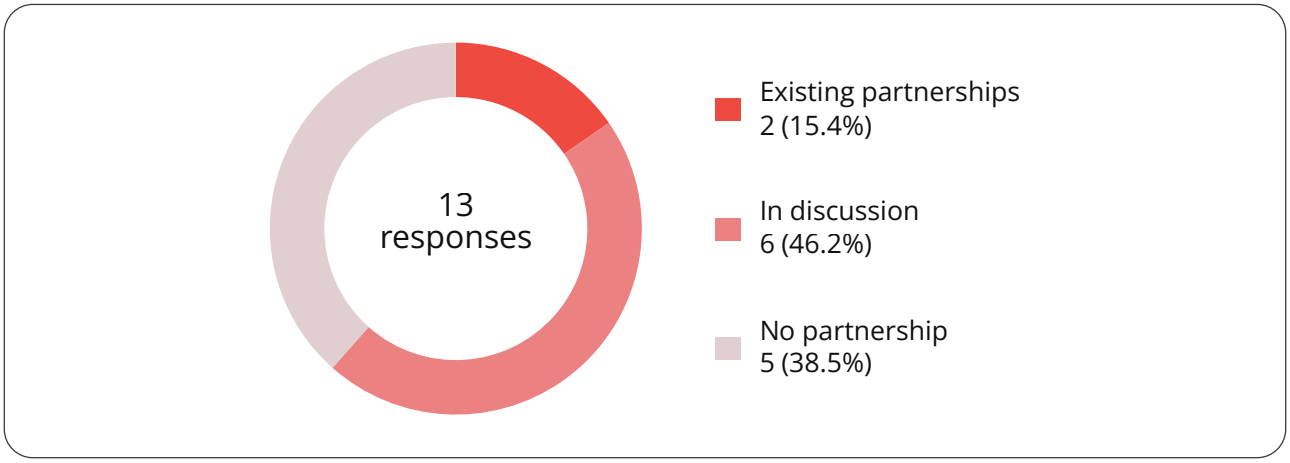


Base: 13 academia submissions. Zero, nil and none grouped. “All of them” indicates experience without an imputed faculty count.

5.5. Practical exposure, placements and the next steps

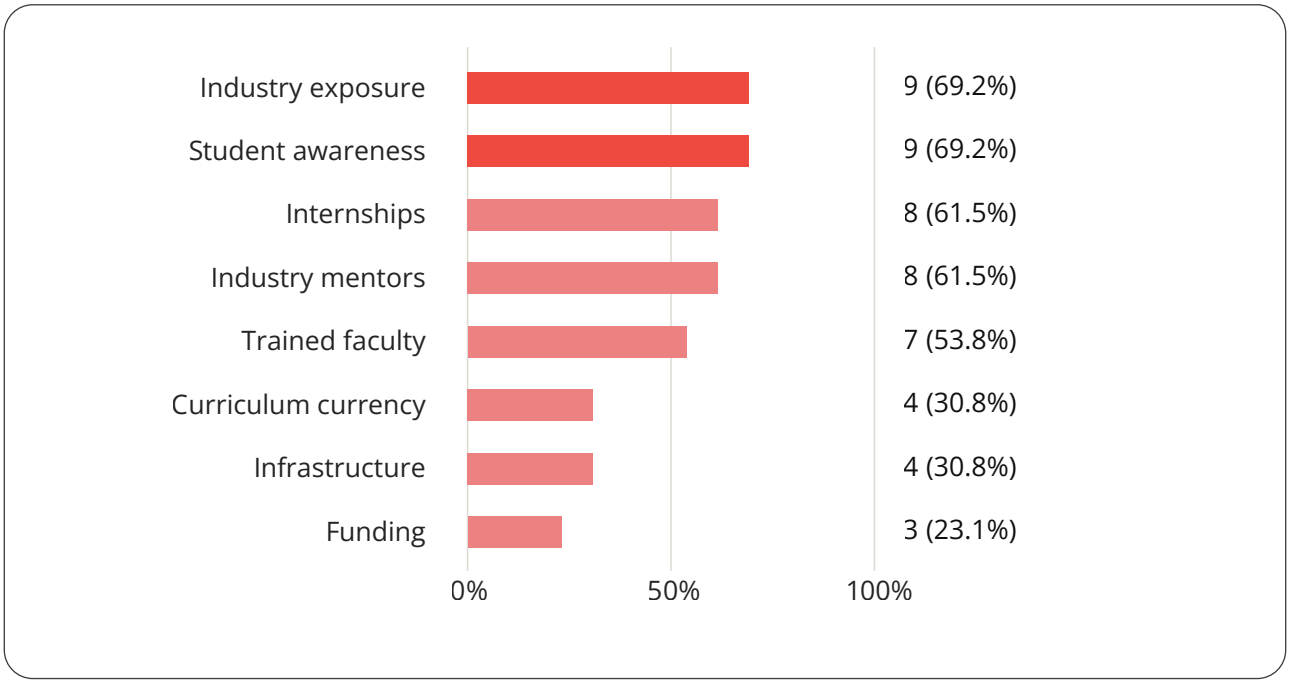
Only 15.4% of academia submissions report existing studio partnerships, while 46.2% are in discussion. Industry exposure and student awareness are the joint leading programme challenges. Connecting institutions with named functions, such as mentors, project reviewers and internship coordinators, would give partnerships a working structure.

Graph 19: Only 15.4% of academic responses report existing partnerships with game studios



Base: 13 academia submissions.

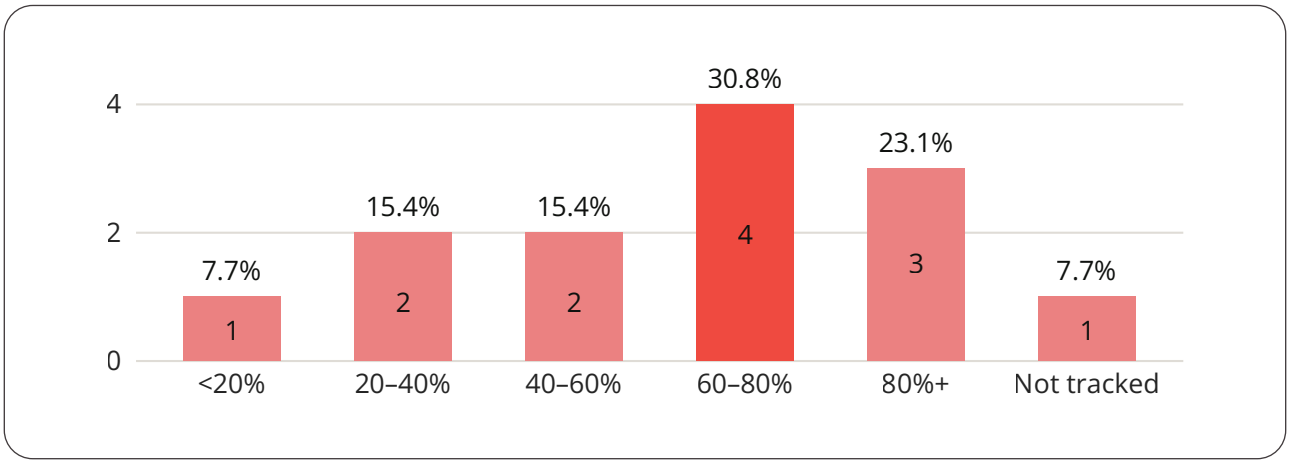
Graph 20: Industry exposure and student awareness top programme challenges, at 69.2% each



Base: 13 academia submissions. Multiple selections.

About 53.8% of the respondents report placement bands of 60% or above. These placements span games and adjacent fields, making role-level reporting useful for judging how well programmes serve game-development careers. Student projects are mandatory in 61.5% of academia submissions, offering a foundation for stronger portfolio assessment.

Graph 21: 53.9% of academic responses report placement rates of at least 60% in games and adjacent sectors



Base: 13 academia submissions. Placements include games and adjacent sectors.

92.3% of submissions express interest in game jams and developer meetups; 84.6% in incubation and student ambassador programmes. These entry points should feed into longer projects, faculty development and mentoring. Additionally, the survey also highlighted that 61.5% of the institutes are interested in a standardized curriculum, with 23.1% open to considering it.

Enrolment, graduation and salary responses mix ranges, reporting periods and adjacent disciplines. A shared annual reporting template should capture programme, cohort, placement role and compensation period. This would strengthen the next annual report and help institutions refine their offer.

Chapter 6

Indian IP, Innovation and Beyond-Gaming Applications

Indian-developed games are beginning to demonstrate the reach of locally created intellectual property. As per reports published in 2025, it was highlighted that Nodding Heads Games' Raji: An Ancient Epic had reached more than two million players, while the educational gaming platform Kiddopia had more than 20 million users. This illustrates the range of products emerging from Indian studios, from original entertainment experiences to games designed for learning.

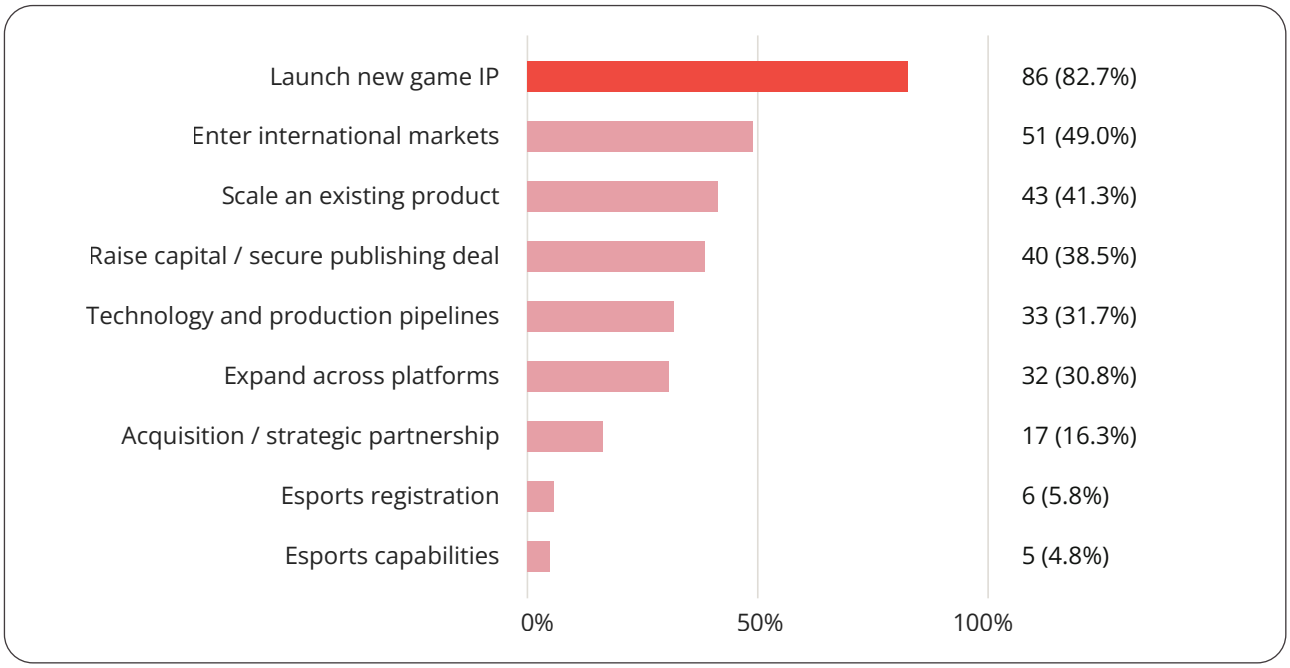
The opportunity also extends to applying interactive technologies beyond consumer games. Defence Research and Development Organisation's (DRDO) published war-gaming technology agenda includes AI-based simulations, virtual training environments and mission simulators, demonstrating institutional interest in related capabilities.

For studios, these possibilities require different approaches: original games must establish their appeal to players, while educational and simulation products must demonstrate their usefulness to learners or institutional users. Creative ownership, technological experimentation and practical validation therefore shape how game-development capabilities can generate value across these markets. This chapter examines original-IP ambitions, emerging technology interests and opportunities to apply game-development capabilities through other products and services.

6.1. Building original IP with commercial discipline

Launching new IP is selected as a strategic priority by 82.7% of respondents, entering international markets by 49.0% and scaling an existing product by 41.3%. The ambition is substantial, but original IP should not be treated as a cultural objective alone. Financing and mentoring should help teams plan audience, scope, production, rights, launch and post-release support.

Graph 22: New game IP leads studio priorities, selected by 82.7% of respondents



Base: 104 industry submissions. Multiple selections.

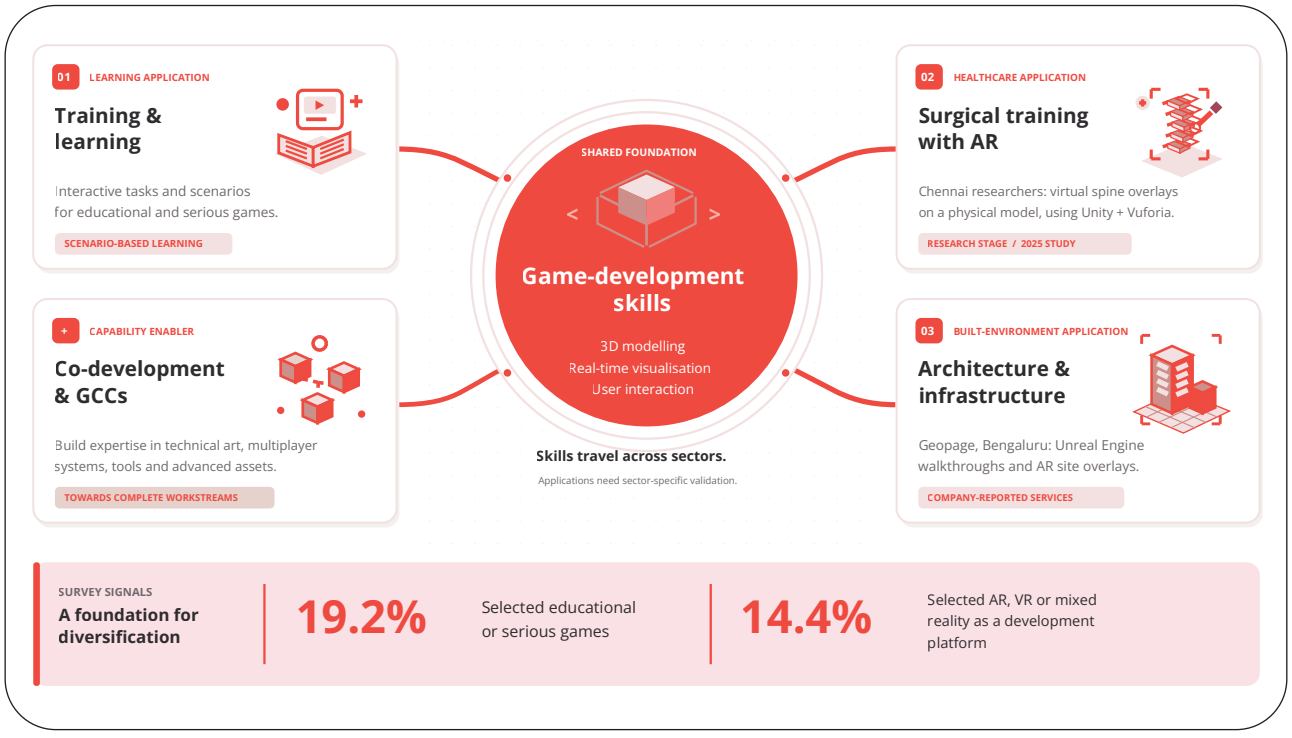
Indian stories and cultural references can provide distinctive creative starting points, but commercial execution remains essential. Audience testing, accessibility, quality and discoverability should shape decisions alongside cultural relevance. Support programmes should reward evidence of learning and production discipline, not merely the presence of an Indian theme.

6.2. AI assisted workflows

Stakeholder consultations highlighted the use of AI-assisted workflows, while 27.9% of industry respondents identified AI and procedural generation as curriculum priorities. Training should combine experimentation with careful review of quality, revision effort, licences, confidentiality, asset provenance and rights. Adoption should be evaluated by whether it improves production outcomes rather than by the use of a particular tool.

6.3. Beyond entertainment games

Infographic 3: The Wider Applications of Game-Development Skills



1. **A foundation for diversification.** Educational and serious games are selected by **19.2% of respondents**, while **14.4%** select Augmented Reality (AR), Virtual Reality (VR) or mixed reality as a development platform. These capabilities offer opportunities in training, simulation and interactive learning.
2. **Game-development skills have wider applications.** Engines such as Unity and Unreal Engine support interactive three-dimensional environments, scenario simulation and AR/VR experiences. Skills in environment modelling, real-time visualisation and user interaction can support medical training, architectural visualisation and other applications involving complex situations.
3. **Co-development can deepen production expertise.** Co-development partnerships and global capability centres (GCCs) can strengthen technical art, multiplayer systems, tools and advanced asset creation. Policy and training should help Indian teams take on integrated production responsibility and deliver complete workstreams, progressing beyond narrowly defined tasks.

4. **Healthcare illustrates a research-stage application.** Researchers from Sri Ramachandra Institute of Higher Education and Research and SSN College of Engineering in Chennai developed an AR-based spine surgical training system using Unity and Vuforia. Their 2025 study describes preliminary testing of virtual anatomical overlays on a physical spine model, with feedback on alignment and instrument positioning. The example demonstrates potential for surgical training but remains at the research stage.
5. **Architecture offers another application.** Bengaluru-based Geopage Consultants describes using Unreal Engine for interactive building and infrastructure walkthroughs, including pre-construction reviews. It also offers AR overlays to compare proposed designs with existing site conditions, drawing on capabilities familiar to game developers.

6.4. A capability base with wider applications

India's game-development capabilities are shaped by both independent studios and the India-based teams of global gaming companies. Global capability centres (GCCs) are a company's own operations supporting its international business, while co-development involves teams sharing responsibility for a game's development. Both can provide experience in complex production processes, specialist technologies and collaboration across locations.

The work undertaken by global gaming studios in India illustrates the range of capabilities being developed. Public descriptions from major studios indicate contributions spanning art, animation, programming, design, co-development of major titles, mobile production and live-services support. For instance, Ubisoft describes its Pune studio as contributing to the co-development of major titles alongside production and quality-control functions.

Industry in Practice: Indian teams in global game production

In a December 2023 account, Ubisoft India's production director explained that its contribution to Assassin's Creed Nexus VR covered art, animation, programming and design, with teams responsible for specific features and supported by access to subject-matter experts. Similarly, EA describes its Hyderabad-based Slingshot studio as contributing to mobile games through co-development and live services, including updates and support for games already in operation. Such work provides exposure to maintaining and improving products after release, complementing experience gained during initial development.

Such work provides exposure to maintaining and improving products after release, complementing experience gained during initial development, and demonstrates how teams can take responsibility for specific features within larger production pipelines.

The opportunity is to deepen this expertise and create stronger connections with the wider Indian development ecosystem. Training, industry partnerships and knowledge-sharing initiatives should help teams take responsibility for complete features, coordinate across disciplines and deliver to agreed standards. Experience gained through global production can strengthen the capabilities needed for original games and related interactive applications, although developing Indian-owned IP also requires separate creative leadership, financing and commercial decisions.

Chapter 7

Esports: Competitive Play, Communities and Industry Development

Esports connects organised competition with a wider economy of teams, tournament operations, broadcasting and community engagement. For India's game-development ecosystem, it offers a way to deepen player engagement and build visibility around competitive titles. Its development, however, depends on sustained opportunities for players and organisations, alongside the commercial and technical support needed to maintain competitions.

7.1. Participation and competitive infrastructure

A 2026 media and entertainment report highlighted that esports participation reached 2.8 million in 2025, along with a rise in the number of professional esports teams to 40. The number of live and other broadcast hours reached 9,500 across 18 platforms. These figures indicate the scale of organised competitive activity without establishing how many participants pursue esports professionally.

Publisher-led circuits provide an important part of this infrastructure. KRAFTON's 2026 India roadmap includes its BGIS (Battlegrounds Mobile India Series), BMPS (Battlegrounds Mobile Pro Series), BMSD (Battlegrounds Mobile Showdown) and BMIC (Battlegrounds Mobile International Cup) competitions across multiple cities, alongside four supported open tournaments. Such recurring calendars can provide progression opportunities and connect domestic competition with international exposure. They also illustrate the importance of publisher involvement in sustaining competitive ecosystems around individual games.

7.2. Indian achievements and international presence

Recent results demonstrate progress across different competitive formats. At the Global Esports Games held in Mumbai in March 2026, India won gold in Clash Royale and bronze in Dota 2. The organiser, the Global Esports Federation, reported participation by 48 athletes from 19 countries. Earlier, India also secured a bronze medal in eFootball at the Asian Esports Games in Bangkok in December 2024. These achievements provide concrete examples of Indian players succeeding beyond domestic tournaments.

Image: When PM Narendra Modi met India's top gamers

Indian organisations are also expanding their international presence. S8UL and GodLike were selected among the 40 clubs in the Esports Foundation's 2026 Club Partner Program, which supports organisational development, marketing and audience engagement. Selection represents access to an international support network; qualification for individual Esports World Cup tournaments remains a separate requirement. In competition, India's True Rippers finished runners-up at the BGMI International Cup in November 2025, against teams from India, South Korea and Japan.

7.3. Connecting competition with industry development

These developments suggest two complementary priorities: strengthening player pathways and building organisations capable of sustaining competition. International club programmes demonstrate that esports development includes marketing, fan engagement and operational capacity alongside competitive performance. Player welfare also matters: the Asian Electronic Sports Federation included a mental-health workshop for athletes and officials at the 2024 Asian Esports Games.

For Indian studios, the opportunity is to explore collaboration with competitive communities where a game's design supports it. Tournament participation does not automatically create demand for Indian-developed titles, but established circuits and community networks offer potential partners for testing competitive experiences and reaching audiences. A stronger esports ecosystem can therefore complement game development through closer connections between publishers, studios, organisers and players.

Chapter 8

Policy, Ease of Doing Business and Ecosystem Enablement

Government support for India's game-development ecosystem spans skills and institutions, online gaming regulation, state-level policies, startup finance and market access. This chapter considers these initiatives alongside the practical barriers studios report in using available support.

National AVGC-XR capacity-building

- The Union Budget 2026-27 proposed INR 250 crore for Content Creator Labs in 15,000 secondary schools and 500 colleges, with IICT coordinating implementation.
- The Indian Institute of Creative Technologies (IICT), established as the National Centre of Excellence, provides a foundation for training, research and industry collaboration.
- The AVGC Promotion Task Force recommended a National AVGC-XR Mission to coordinate sector development.

The PROG Act, 2025 and PROG Rules, 2026

- Promote esports and online social games as distinct parts of the gaming ecosystem.
- Prohibit online money games, including their advertising and facilitation, and related financial transactions.
- Establish a regulatory and user-protection framework, including game determination, registration where applicable, safety measures and grievance redressal.

The PROG Rules, 2026, effective 1 May 2026, operationalise this framework through the Online Gaming Authority of India (OGAI) and procedures for determination, registration and grievances.

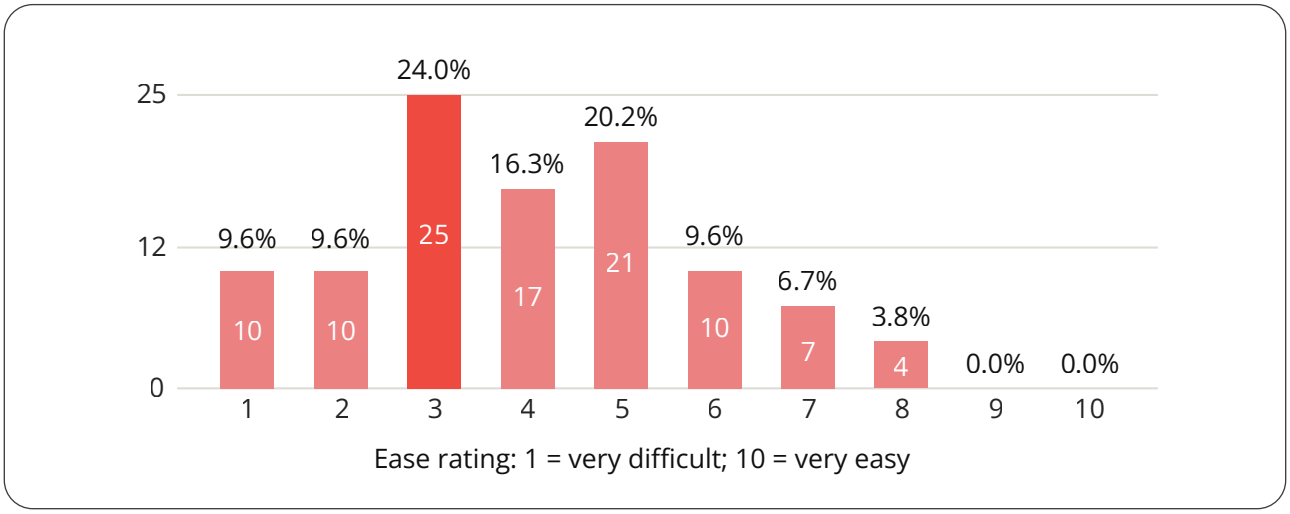
State policies, startup finance and market access

- Karnataka, Maharashtra, Tamil Nadu, Rajasthan and Madhya Pradesh, among other states, have introduced AVGC-XR policies or related frameworks.
- The cross-sector Startup India Seed Fund Scheme supports eligible startups with proof of concept, prototype development, product trials, market entry and commercialisation.
- WAVES Bazaar connects creators and businesses with buyers and partners across the media and entertainment sector, including gaming.

The effectiveness of this support ultimately depends on its accessibility and alignment with how studios operate. Investment in skills and infrastructure must be accompanied by clear regulatory requirements, predictable financial processes and practical routes to funding and international partnerships. Against this policy backdrop, the survey and consultations highlight the administrative and commercial barriers that affect studios' ability to use available support, sustain production and grow. This chapter connects the operating difficulties reported by respondents with practical measures for government, industry bodies and other institutions.

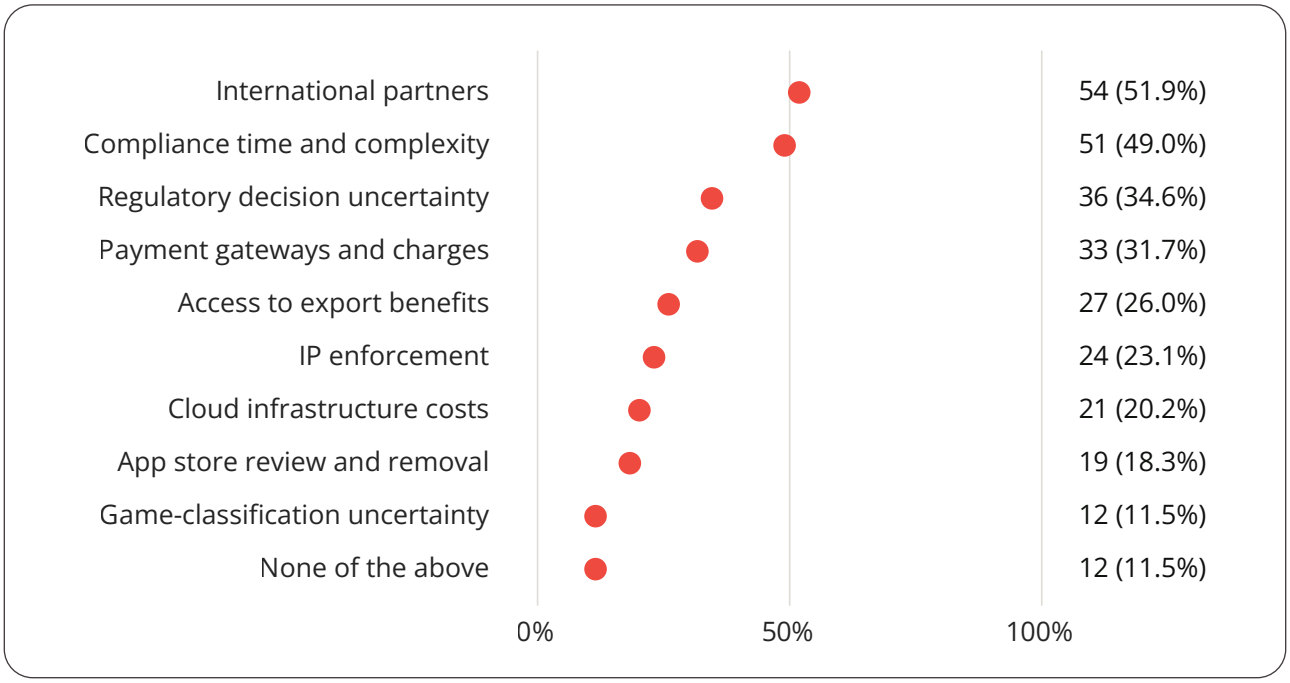
8.1. A practical operating agenda

Graph 23: Respondents give ease of doing business an average score of 4.0 out of 10



Base: 104 industry submissions. 1 = very difficult; 10 = very easy.

Graph 24: 51.9% of respondents report difficulty attracting international partners



Base: 104 industry submissions. Multiple selections. All recorded choices retained. One response selected "None" together with challenges.

The practical priority is to make requirements understandable and their implementation predictable. This involves assessing gaming businesses according to their actual activities, resolving documentation discrepancies efficiently and providing accessible routes for clarification and escalation.

8.2. Regulatory clarity and confidence

Developers need to understand how regulatory requirements apply to game features, monetisation choices and distribution before committing resources to a product. The PROG Act, 2025 provides a framework for online social games and esports. The PROG Rules, 2026, effective from 1 May 2026, set out determination, registration and grievance processes. Games intended to be offered as esports require determination and registration under the PROG Rules while registration of online social games (being voluntary) applies only to categories notified by the government.

Additionally, studios must also navigate **two ministerial interfaces**: MeitY leads online-gaming regulation, while MIB advances AVGC-XR development and sectoral support. Therefore, clear responsibilities, coordinated guidance and designated points of contact would help prevent studios being redirected between ministries when seeking clarification or assistance.

Consultations pointed towards seeking greater clarity on in-app purchases, probabilistic mechanics and independent account transactions. Published case examples and an accessible query mechanism would help involved stakeholders in assessing these questions before committing substantial development resources. Guidance should further explain how regulatory requirements apply to payment flows, rewards and in-game assets. Studios should provide clear descriptions of these features when seeking clarification, while regulatory changes should be communicated with workable transition arrangements.

Therefore, the government should maintain clear explanatory guidance, publish process requirements and communicate changes with workable transition arrangements. Studios should document game mechanics, purchase flows and any transferability of rewards when seeking clarification.

8.3. Banking, payments and tax administration

1. **Banking and payment onboarding:** Banking and payment onboarding should assess a studio's actual activities, revenue model and transaction flows. Clear documentation requirements and access to specialist review would help resolve uncertainty during routine onboarding.

Industry in Practice: When legitimate social games are conflated with real-money gaming

During the consultations, difficulties were reported in explaining game-development business models to financial intermediaries. Industry accounts described premium-game developers encountering reluctance to open business bank accounts and requests for gaming-related licences or approvals. It was also reported that a payment provider associated a business with real-money gaming after seeing "gaming" on its website during discussions about a UPI mandate. A separate consultation described a bank manager advising against receiving proposed overseas investment after learning that the studio developed battle-royale and shooter games.

Section 7 of the PROG Act prohibits financial intermediaries from facilitating payments for online money gaming services. Applying this provision accurately requires an understanding of the relevant business and transactions. Practical guidance and training should help bank and payment-provider staff distinguish game sales, development services and studio investment from payments associated with prohibited activities. Cases requiring further assessment should have a defined route to specialist review.

2. **Foreign investment and remittances:** Access to overseas investment depends on timely clearance as well as securing a commitment. Documentation and processing delays can disrupt production when studios remain unable to use incoming funds to meet salaries and other operating costs.

Industry in Practice: Investment received, funds unavailable

During the consultations, it was reported that an address discrepancy held up foreign investment for approximately six weeks. The delay was followed by requests for a fresh valuation report and updated banking documents, including Know Your Customer (KYC) documentation and a Foreign Inward Remittance Certificate (FIRC). Repeated visits to obtain clearance of an earlier remittance were also described, while salaries and bills remained payable. This illustrates how documentation and processing delays can prevent studios from using funds already received.

Banks should provide consistent document checklists, identify discrepancies early and explain additional requirements clearly. Designated escalation contacts and communication of expected processing times would help studios resolve pending cases. Funds received from abroad should become available for use promptly once applicable checks are completed, allowing studios to meet operating commitments in India.

3. **Tax administration and working capital:** GST refund delays were also reported during the consultations. **These included refunds taking three to four months and substantial claims remaining unresolved over longer periods.** Such delays reduce the cash available for development, testing and marketing, particularly as expenditure increases. **Tax authorities and industry bodies should review recurring documentation problems, clarify evidence requirements and track resolution times.** More predictable processing would help studios use resources already earned without waiting for additional financial support.

8.4. Finance, distribution and rights

The findings in Chapter 04 indicate that access to finance must be accompanied by the capability to reach publishers, investors and paying audiences. During the consultations, the importance of international publishing relationships was repeatedly highlighted, alongside concern that participation in overseas events did not always lead to sustained engagement or commercial agreements.

1. Funding across development stages: Support should reflect the different risks involved in validating a prototype, completing production and commercialising a game. During the consultations, the cost of maintaining a team while preparing a credible demo and seeking further funding was identified as a particular difficulty. Proportionate eligibility requirements, milestone-based support and expert assessment could help address this gap while recognising differences in genre, platform and business model.
2. Publisher and investor access: Difficulty attracting international partners is reported by 51.9% of respondents. A continuing programme should combine project preparation, relevant introductions, commercial advice and post-meeting follow-up. Support should help studios present playable builds, realistic budgets and appropriate evidence of market potential. Testing agreements, publishing negotiations and completed deals would provide more useful measures of progress than event attendance alone.

3. IP protection and platform processes: IP-enforcement difficulty is reported by 23.1% of respondents, while 18.3% identify app-store review or removal problems. Shared contract guidance, records of asset ownership and accessible dispute support could help studios protect their work and navigate distribution requirements. Publishing advice should also cover ownership, licensing, revenue sharing and responsibilities after launch.

8.5. Digital safety and child safety as strengths

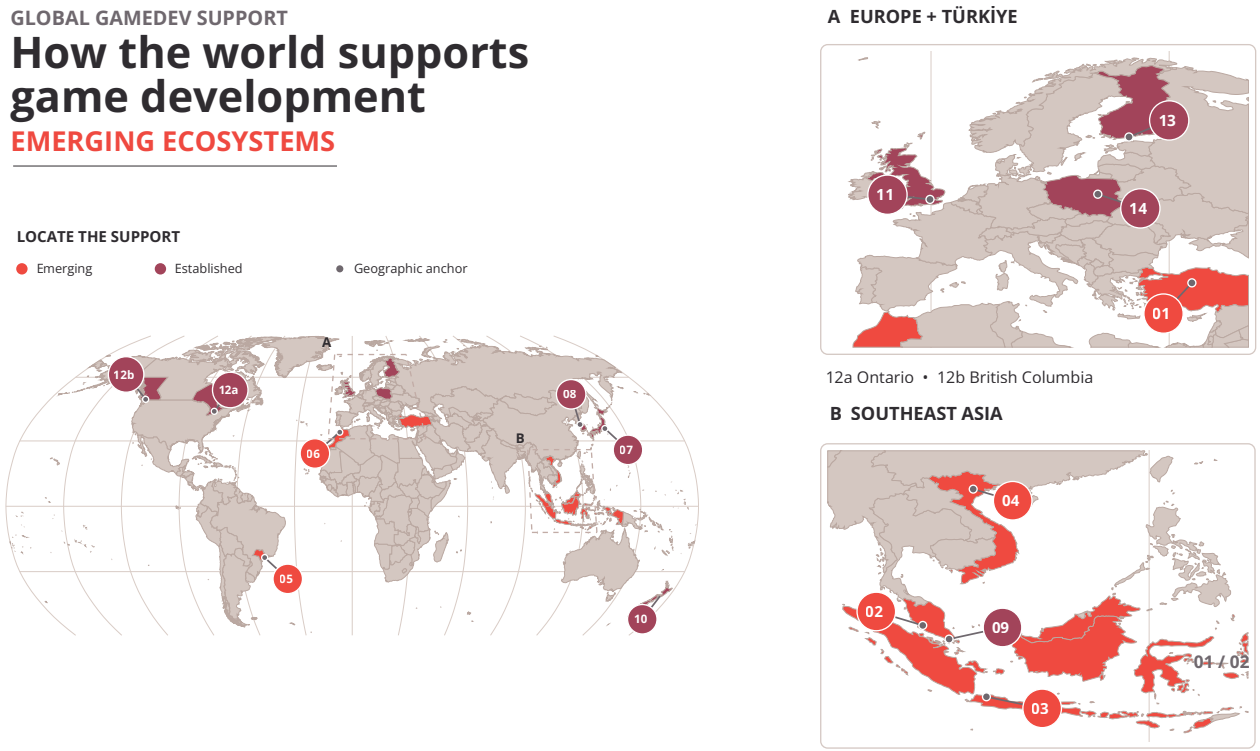
Digital and child safety can strengthen player trust and support the sustainable growth of India's game-development ecosystem. For platforms hosting user-generated content and social interaction, this should include age-appropriate defaults, effective moderation, accessible reporting and parental controls, supported by transparent reporting on how these safeguards work in practice and clear responsibility for the features they control.

The PROG Rules, 2026 recognise risk-appropriate safety features and grievance mechanisms. The Bureau of Indian Standards (BIS) has published IS 19690:2026 on age ratings and content-descriptor labels for video and digital games. These provide a constructive basis for practical implementation guidance.

Shared guidance and reusable resources can help teams integrate safety into development. Privacy, permissions and asset rights should also be considered early in production, so studios build dependable player experiences and clear ownership records.

8.6. Lessons from International Ecosystems

The following examples offer policy design lessons for India. The relevant question is how each mechanism addresses a development need and how it could be adapted to Indian studio conditions.



01 Türkiye
50% base support for overseas promotion and platform commissions. Target-market promotion: up to +20 percentage points.
Ministry of Trade · 2026 framework

02 Malaysia
DCG Mega: up to MYR 2m at 50% of project cost, with revenue sharing. Marketing grant: up to MYR 300k.
MDEC · DCG 2026; call closed

03 Indonesia
Incubation + publisher access. Gameseed 2026 incubated 20 teams; six finalists progressed to IGDX.
Ministry of Creative Economy · 2026

04 Vietnam
Training linked to industry. PTIT introduced game-design/development training in 2024. Training example, not a cash grant.
PTIT · May 2026

05 Brazil | São Paulo
BRL 300k per project. ProAC 05/2026 allocated BRL 6m for 20 game-development or completion/publishing projects.
São Paulo government · 2026; call closed

06 Morocco
70% of prototype costs, up to MAD 1m. TATWIR: pilot industrialisation at 30%, up to MAD 3m.
Ministry of Youth, Culture & Communication

07 Japan
IP360: new IP, production, localisation and overseas promotion, including games.
METI · 2026 selections

08 South Korea
KRW 23.6bn planned for ~82 projects, including board games; testing support.
KOCCA · 2026 programme

09 Singapore
400% tax deduction/allowance on capped innovation costs. Cross-sector; not a refund.
IRAS · Enterprise Innovation Scheme

10 New Zealand
20% rebate on eligible NZ production costs; up to NZD 3m per studio/year.
NZ On Air · GDSR

11 United Kingdom
34% taxable credit: lower of UK core spend or 80% of total core spend.
HMRC · Video Games Expenditure Credit

12 Canada | two provinces
Ontario: 40% own-game labour/marketing; 35% service/specialist labour. BC: 25% eligible wages. Refundable credits.
Ontario Creates / Canada Revenue Agency

13 Finland
R&D grants and loans for eligible game projects/tools. General innovation funding.
Business Finland · Game-business funding

14 Poland
PLN 20k–400k; 80–95% funding for eligible cultural-game, accessibility or localisation projects.
IPK · 2025/26 programme; call closed

Lessons for India:

- **Complement investment in talent with direct support for studios.** India's policy emphasis has been on strengthening talent development, skilling and institutional capacity through initiatives such as IICT and Content Creator Labs. These are crucial foundations, but studios also need a visible, accessible funding pathway to turn these capabilities into commercially viable games.
- **Provide upfront funding for playable demos.** Seed grants should help studios develop and test playable concepts, establish production scope and demonstrate their capabilities to publishers and investors. Funding should be released against achievable milestones, with assessment by professionals who understand different game genres, platforms and development cycles. Reimbursement alone may offer limited assistance to teams that cannot finance expenditure initially.
- **Fund the work needed to reach global players.** Support should extend to overseas audience testing, measured user acquisition, localisation, publishing preparation and international marketing. Korea's testing programme and Turkey's support for recurring commercial costs illustrate functions that exhibition attendance alone cannot fulfil. International showcases should be followed by structured assistance to advance commercial discussions.
- **Connect existing initiatives into a practical pathway.** Central and state programmes, alongside platforms such as WaveX and WAVES Bazaar, should help studios progress from formation and prototyping to production and commercialisation. Clear eligibility, coordinated application processes and predictable disbursement would make this pathway easier for smaller teams to navigate.

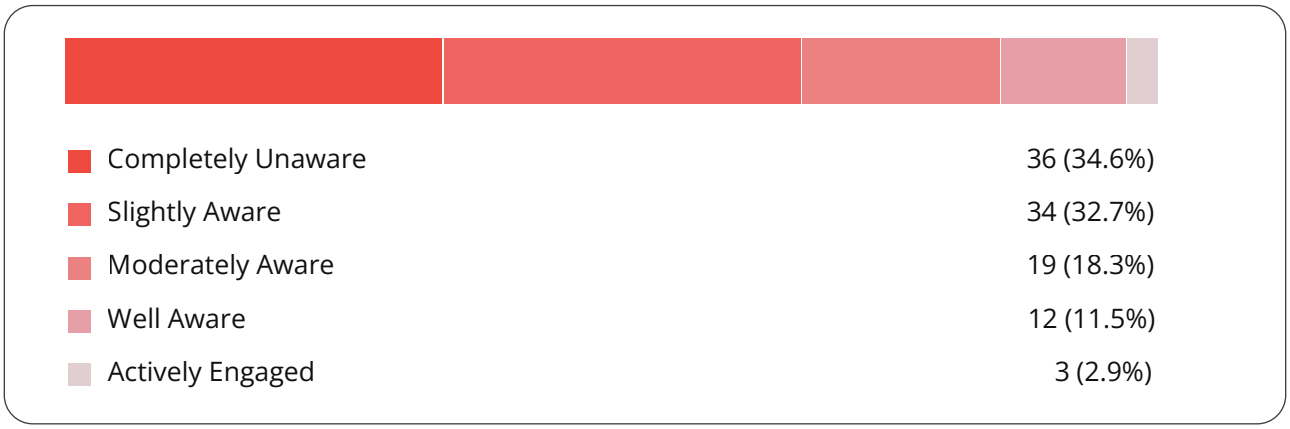
- **Measure commercial and production outcomes.** Programme assessment should track completed games, employment, exports and commercial agreements, alongside participation and training numbers. This would help identify which interventions enable studios to release games, reach audiences and sustain subsequent projects.

8.7. State delivery and access to support

Consultations call for support that reflects game-development cycles and practical studio eligibility. State programmes should publish clear application routes, link facilities with mentoring and market access, and report utilisation and completed outputs.

67.3% of industry submissions indicate that respondents are completely unaware or only slightly aware of government skilling schemes. A centralised current programme directory, regular application clinics and regional outreach could improve access. Tracking awareness, applications, approvals and use would show where delivery needs attention.

Graph 25: 67.3% of respondents are completely unaware or only slightly aware of government skilling schemes



Base: 104 industry submissions.

State governments are developing AVGC-XR frameworks to support skills, infrastructure, investment and market access, but these initiatives are at different stages. Some states have published policies and implementation guidelines, while others are consulting on drafts or developing sector roadmaps. The table below maps ten selected states, distinguishing policy commitments from the guidance needed to translate them into accessible support for game-development businesses.

Table 4: State AVGC-XR Policies and Emerging Support for Game Development

State Policies	Key Initiatives
Karnataka AVGC-XR Policy 2024–2029	Total Outlay: INR150 crore (USD 15.80 million) earmarked. Game development grant: Studios can get back 20% of what they spend developing a game, up to INR 5 lakh (USD 5.3 thousand) per title and two titles per company. To qualify, a game must show traction: 2 lakh downloads for mobile, or 5,000 PC / 2,500 console units sold. Gaming CoE: A dedicated Centre of Excellence for Gaming will give studios shared computing, simulation and testing facilities. **Venture fund:** The INR 20 crore (USD 2.11 million) Karnataka Information Technology Venture Capital Fund (KITVEN) AVGC fund takes equity stakes of INR 50 lakh – INR 1 crore (USD 52.7 – 105.3 thousand), with follow-on funding up to INR 2 crore.

State Policies	Key Initiatives
Maharashtra AVGC-XR Policy 2025	**Total Outlay:** INR 308 crore (USD 32.44 million) for 2025–30 and INR 2,960 crore (USD 311.77 million) spread to 2050. **Round-the-clock operations:** The sector gets industry, infrastructure and essential-service status, so studios can run 24x7, all year. **AVGC-XR parks:** Dedicated parks are planned in eight cities, including Mumbai, Pune and Nagpur, giving studios ready infrastructure outside Mumbai's high-cost market.
Tamil Nadu AVGC-XR Policy 2026	**Total Outlay:** INR 50 crore (USD 5.27 million) earmarked for Centre of Excellence in Chennai and INR 250 crore (USD 26.33 million) R&D fund. **Startup grants:** Gaming startups can draw on existing state funds, plus a Digital Accelerator scheme worth up to INR 1 crore (USD 105.3 thousand) per startup. **Financing against IP:** The state lender Tamil Nadu Industrial Investment Corporation (TIIC) will offer loans using a studio's game IP as collateral, a first for any Indian state. IP filing costs are also fully reimbursed. **Faculty development:** Institutions get subsidies for hiring industry professionals as faculty under Professor of Practice and Train the Trainer programme.
Madhya Pradesh AVGC-XR Policy 2025	**Capital subsidy:** Studios setting up in the state can claim a 25% subsidy on capital expenditure, which lowers the cost of hardware and production facilities. **Media parks and IP support:** Media parks will be built through public-private partnerships. The policy also supports IP registration and R&D, encouraging studios to build and own original titles.
Kerala AVGC-XR Policy 2024	**Centre of Excellence:** A CoE on a 20-acre site in Thiruvananthapuram will be the state's base for AVGC-XR activity. **Startup pipeline:** The policy aims to incubate 150 AVGC-XR startups and create 50,000 jobs by 2029.
Telangana IMAGE Policy 2016	**Innovation in Multimedia, Animation, Gaming and Entertainment (IMAGE) Tower:** A 1.6 million sq ft facility in Hyderabad gives studios production space and training infrastructure in one place. **IMAGE Incubator:** India's first AVGC-specific incubator has supported early-stage studios for several years. **Gaming hub:** AVGC 2.0 proposes a gaming innovation hub focused on R&D and support for small studios.
Rajasthan AVGC-XR Policy 2024	**Game production grant:** Mobile and console game developers can get back 20% of qualified spend, up to INR 1 crore per entity (USD 105.3 thousand), released as milestones are met. This is the largest per-studio gaming grant among these states. **Shared infrastructure:** Atal Innovation Studios will offer subsidised plug-and-play space with VR/AR labs and high-performance computing. **Ease of doing business:** A dedicated AVGC-XR cell and a single online portal will handle all incentive applications.
Haryana AVGC-XR Policy 2026	**Total Outlay:** Not published. Targets over INR 5,000 crore (USD 526.63 million) in investment and about 30,000 jobs. **Capex and opex support:** Structured incentives cover both capital and operating costs, aimed at startups, local content and original IP. **Infrastructure:** Shared facilities, incubation centres and AVGC parks will be developed.
West Bengal	**Outlay:** INR 50 crore (USD 5.27 million) proposed to train about 1 lakh students a year in animation, VFX, gaming and XR. **Training infrastructure:** The proposal includes 500 Content Creator Labs and a revamp of the WEBEL Animation Academy with new 3D and VFX courses.
Tripura (Consultation happened in 2026)	**Focus areas:** The draft prioritises skilling, jobs, entrepreneurship and culturally rooted digital content, and aims to position Tripura as an AVGC-XR destination for the Northeast.

State AVGC-XR policies signal growing recognition of game development, but their value depends on accessible funding and effective implementation. Karnataka and Rajasthan, for example, offer reimbursement of up to 20% of eligible game-development expenditure, subject to conditions and ceilings. Requiring studios to finance expenditure first can limit access for smaller teams seeking funds for playable demos. Upfront, milestone-based grants should therefore complement reimbursements, alongside support for audience testing, user acquisition and global marketing. Policy continuity also warrants monitoring following government changes, including in Tamil Nadu in 2026, Kerala in 2026 and Telangana in 2023.

The assessment should examine whether updated guidelines, budget allocations and application windows enable studios to identify relevant schemes, apply and receive support within predictable timelines. Tracking policy publication, application readiness and actual delivery as separate milestones would provide a clearer measure of progress, supported by transparent processing timelines and proportionate documentation requirements.

8.8. From constraints to action

The policy infographic connects the evidence to proposed responses, lead institutions and implementation horizons. Timelines run from programme adoption and provide a basis for coordination and review.

Infographic 3: From reported constraints to practical policy action

Operating clarity

Evidence: 12 / 104 identify classification uncertainty.

Response: Publish practical examples and a query route.

Lead: OGAI, MIB and MeitY

Timing: 0-12 months

Financial processes

Evidence: Consolidated consultations describe refund and banking delays.

Response: Clarify documents and track case resolution.

Lead: Tax authorities, financial regulators and banks

Timing: 0-12 months

Development capital

Evidence: 76 / 104 identify early-stage funding gaps.

Response: Separate prototype, production and commercialisation support.

Lead: Government, investors and expert reviewers

Timing: 0-24 months

Production skills

Evidence: 59 / 104 rate fresh talent poorly or not at all ready.

Response: Combine faculty development, assessed builds and studio exposure.

Lead: Academia, studios and GDAI

Timing: 0-24 months

Market access

Evidence: 54 / 104 report difficulty attracting international partners.

Response: Link readiness reviews, buyer matching and follow-up.

Lead: GDAI, trade bodies and studios

Timing: 0-24 months

Rights and player trust

Evidence: 24 / 104 identify IP-enforcement difficulty; consultations seek safety guidance.

Response: Support rights records and practical safety resources.

Lead: Relevant public authorities and studios

Timing: 0-12 months

Note: Proposed actions and timelines run from programme adoption.

Chapter 9

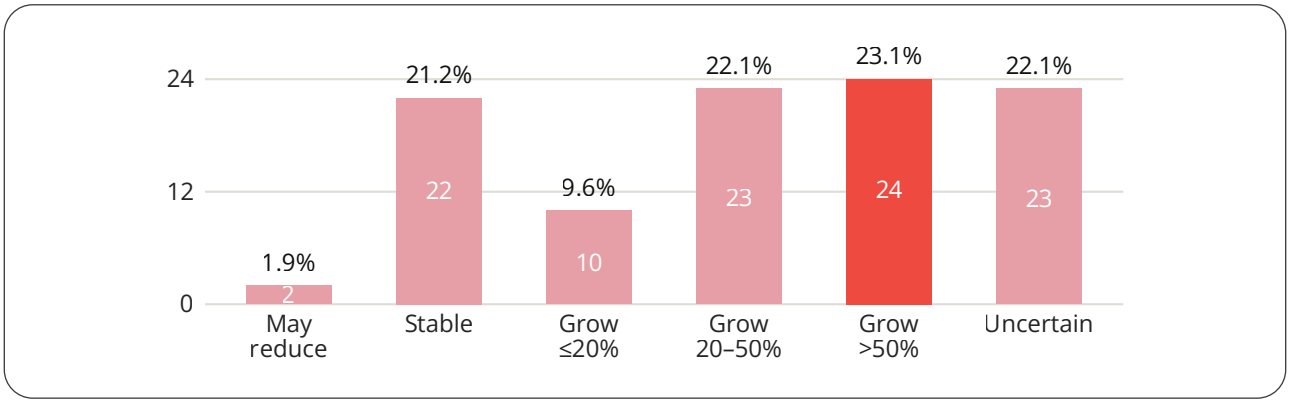
Strategic Roadmap: Building a Globally Competitive Indian Gaming Ecosystem

The findings point to connected priorities in finance, skills, market access and the operating environment. Implementing them requires a sequence of actions, identified responsibilities and a way to assess progress. This chapter sets out proposed priorities for the first two years and a longer-term monitoring agenda for subsequent editions of the report.

9.1. Growth intentions and a shared delivery agenda

54.8% of respondents plan headcount growth over the next two years, including 23.1% expecting growth above 50%. Coordinated finance, skills and commercial support can help turn expansion plans into stronger teams and completed projects.

Graph 26: Over half of surveyed studios plan team expansion over the next two years

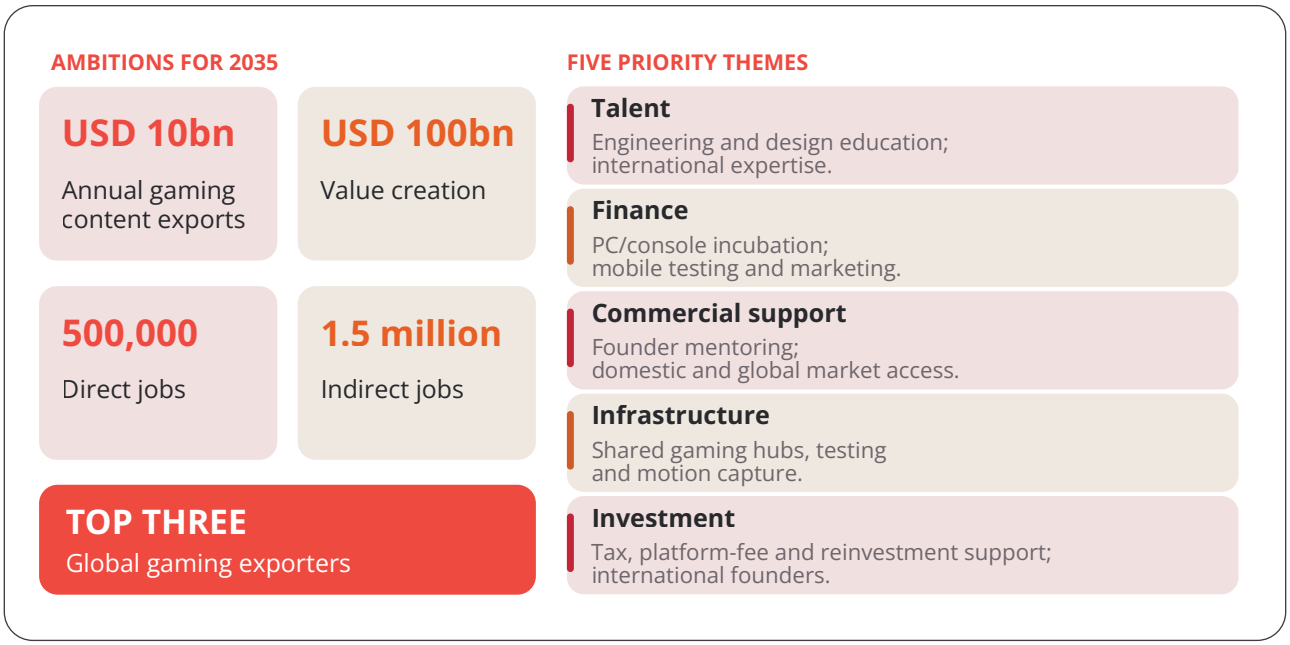


Base: 104 industry submissions. Reported plans over the next two years.

9.2. GDAI's Vision 2035

GDAI's Vision 2035 sets out a long-term direction for strengthening India's game-development ecosystem and its position in global markets. It connects the ambition to build competitive studios with proposals for developing the capabilities and support they require. The infographic below summarises the association's ambitions and proposed measures, providing a framework for the phased implementation roadmap that follows.

Infographic 4: GDAI's Vision 2035- Ambitions for Indian Game Development and Global Competitiveness



9.3. A phased roadmap towards 2035

Building globally competitive Indian studios requires support that connects the development of a playable game with the financing, expertise and visibility needed to reach its intended players. GDAI's published Vision 2035 places studio growth, original IP, employment and international competitiveness at the centre of this ambition. The roadmap below translates that direction into proposed short-, medium- and long-term actions.

Existing public support provides a foundation, but its design does not consistently address the needs of game-development businesses. For example, the Startup India Seed Fund Scheme (SISFS) is sector-agnostic and supports prototypes, product trials, market entry and commercialisation. However, entertainment game development is not expressly identified among its preference sectors, and eligibility is restricted to startups incorporated within two years of application. These provisions raise questions about access for studios with longer development cycles and the availability of reviewers who understand game production and commercial potential.

State AVGC-XR policies also contain relevant support, although the preceding mapping shows differences in policy maturity and implementation guidance. **Karnataka, for example, provides early-stage marketing reimbursement and international market-access support. Its early-stage marketing reimbursement is capped at INR 1 lakh during the policy period, while international market-access assistance covers specified event-related expenditure. Such measures are useful, but their scope differs from sustained support for audience research, campaign testing and launch marketing. Reimbursement also requires studios to finance eligible expenditure before recovering part of the cost. The priority should therefore be to improve access to existing support while introducing instruments that address the full path from prototype to market.**

Short Term: within 12 months of programme adoption

1. **Introduce seed grants for playable prototypes.** Central and state governments should pilot dedicated game-development grant windows, with industry associations like GDAI providing technical input and participating incubators administering support. Eligible expenditure should include development staff, essential software, prototype production and player testing. Selection should assess the playable concept, intended audience, team capability and realistic production scope. An initial instalment followed by milestone payments would help teams begin work without first financing the entire project themselves.
2. **Establish a separate marketing and user-acquisition fund.** Support should cover audience research, trailers and promotional assets, localisation, store-page preparation, community development and measured advertising trials. International showcases should be funded where teams have a credible plan to meet publishers or reach relevant players. Assessment should consider genre, platform and business model, with expenditure linked to market-learning or launch milestones.
3. **Provide continuing publisher and investor access.** Industry associations like GDAI can organise project reviews before introductions, helping studios prepare playable demonstrations, budgets, production schedules and commercial proposals. GDAI already does a portion of this successfully as part of its IP Connect Initiative where they matchmake studios with investors and publishers. Publishing and legal specialists should explain rights ownership, revenue sharing, milestone obligations and termination provisions. Follow-up should track testing requests, negotiations and agreements, building on existing incubation and showcase programmes.
4. **Resolve immediate operating and talent barriers.** Relevant authorities, banks and payment providers should publish consistent documentation requirements and nominate officers to handle unresolved account-opening and remittance cases. Overseas funds should become available promptly once applicable checks are completed. In parallel, participating institutions and studios should begin assessed team projects, faculty placements and structured internships, with named coordinators and agreed deliverables.

Medium Term: years two to five

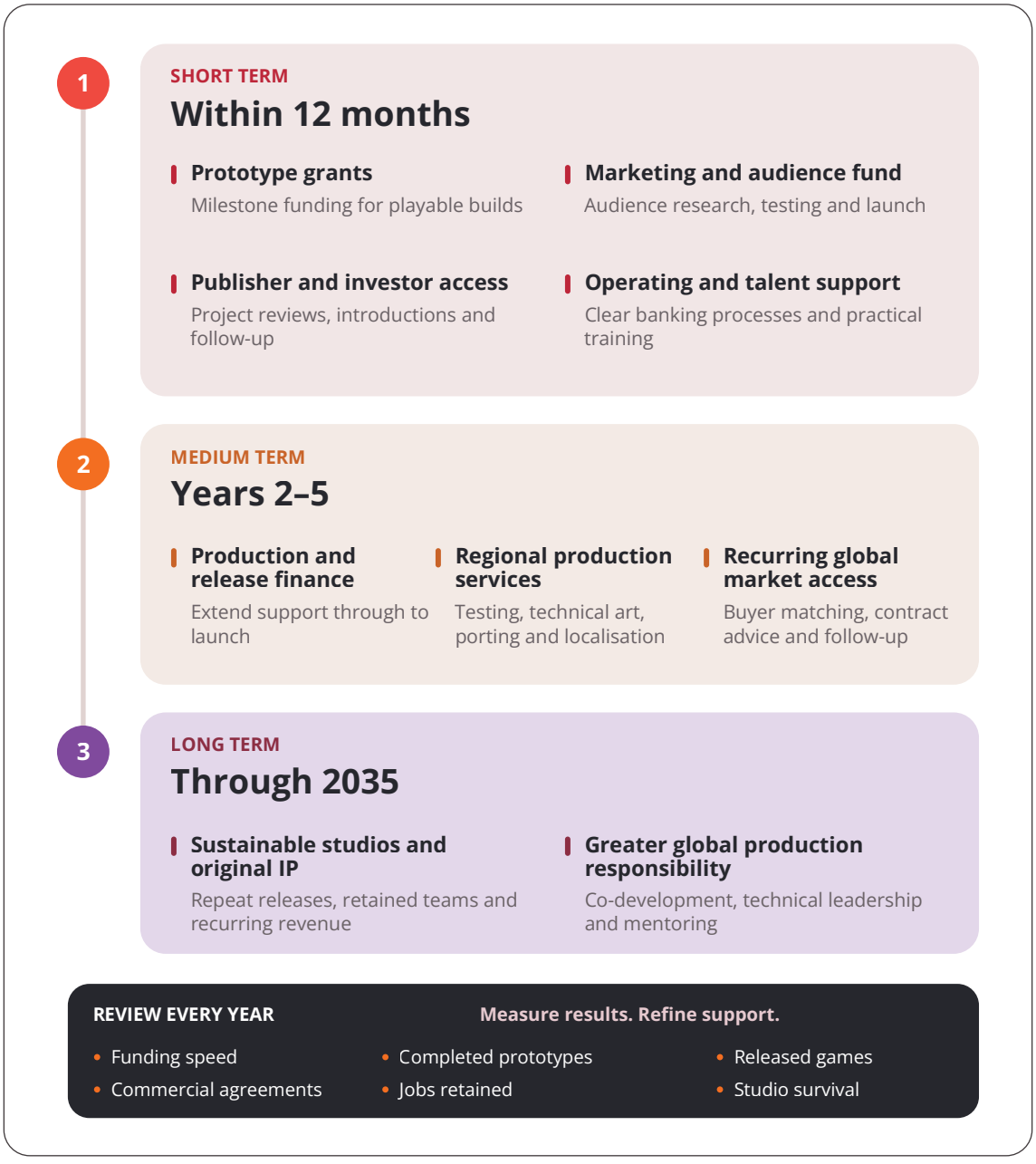
1. **Extend support from prototypes to production and release.** Governments should use pilot results to establish separate production and commercialisation windows. Funding decisions should reflect project scale, genre and platform, while allowing studios to revise scope when testing identifies weaknesses. Public support should help teams attract publisher or private investment, with clear rules preventing duplicate reimbursement of the same expenditure.
2. **Strengthen regional access to production expertise.** State AVGC-XR facilities, academic institutions and industry partners should provide shared testing, technical-art, porting and localisation services. Regional institutions and remote mentoring should enable studios outside major centres to participate without repeated travel. Training should connect specialist instruction with supervised production work and assessed portfolios.
3. **Make international market access a recurring programme.** Industry associations like GDAI and relevant export-promotion bodies can combine overseas showcases with advance buyer matching, contract advice and post-event follow-up. GDAI has led several successful delegations to international events for this purpose like at Gamescom Cologne, Tokyo Game Show among others. Support should help studios develop direct relationships with players, publishers and clients across successive releases. Performance should be measured through completed agreements, follow-on investment and repeat business.

Long term: through 2035

1. **Build sustainable studios and original-IP portfolios.** The objective should be more Indian businesses capable of completing successive releases, retaining experienced teams and earning recurring domestic or international revenue. Financing, production services and publishing expertise should support this progression from individual projects to durable businesses.

2. **Increase responsibility within global production.** Industry partnerships and gaming GCCs should create pathways into integrated co-development, technical leadership and production management. Experienced professionals should have opportunities to mentor new teams and contribute to original-IP development.
3. **Maintain an annual delivery review.** Government agencies should track grant disbursement times, completed prototypes, released games, commercial agreements, employment retention and studio survival. Findings should inform revisions to funding criteria and programme design. Progress towards 2035 should be assessed through sustainable production and commercial outcomes.

Infographic 5: Development priorities and the 2026–2030 trend radar



A proposed delivery sequence and monitoring agenda; horizons run from programme adoption.

9.4. Key takeaways for stakeholders

The findings call for coordinated action across funding, production capability, market access and the operating environment. Each stakeholder has a distinct role in helping studios progress from promising concepts to completed games and sustainable businesses.

1. Government

- **Provide finance that reflects the development cycle.** Introduce dedicated seed-grant windows for playable prototypes and separate support for production and commercialisation. Assessment can involve game-development expertise and consider genre, platform, team capability and audience evidence. Initial disbursements followed by milestone payments would help studios begin work without having to finance all eligible expenditure upfront.
- **Treat marketing and audience development as part of commercialisation.** Support should extend to player research, localisation, promotional assets, store preparation and measured marketing trials. Overseas event assistance should connect studios with relevant publishers, investors and players through advance preparation and follow-up. Funding a completed game without supporting its route to market leaves a substantial commercial risk unresolved.
- **Make banking and compliance processes predictable.** Develop practical guidance that helps banks and payment providers distinguish game-development businesses from real-money gaming. Publish consistent documentation requirements for account opening, payment onboarding and international transactions, with designated officers responsible for unresolved cases. Foreign investment and overseas earnings should become available promptly once applicable checks are completed.
- **Assess whether policy commitments translate into usable support.** State AVGC-XR programmes should publish application procedures, eligible expenditure, review criteria and disbursement timelines. Monitoring should cover applications, approvals, processing time and completed projects, alongside evidence of studio growth. This would help identify whether difficulties arise from eligibility, awareness, administrative delays or programme design.

2. Industry associations like GDAI and industry players

- **Industry associations like GDAI can connect project preparation with commercial access.** Build continuing programmes that combine expert reviews, pitch preparation, publisher matching, contract advice and follow-up. Studios should enter these engagements with playable demonstrations, credible budgets and clear ownership records. Progress can be tracked through testing requests, negotiations, funding agreements and publishing outcomes.
- **Studios should test creative ambition against production and audience evidence.** Define the intended player, platform, production scope and commercial model early, then revise these assumptions through testing. Budgets should provide for quality assurance, localisation, launch preparation and post-release support. Specialist hiring and shared services should address identified production gaps, while contracts should establish ownership of code, art, music and other commissioned assets.
- **Publishers and investors should make project assessment more transparent.** Communicate the evidence required at prototype, production and launch stages, recognising that premium games and mobile live-service games require different commercial measures. Milestones should reflect achievable development progress, with feedback explaining weaknesses and potential remedies. Publishing agreements should clearly address rights, recoupment, marketing responsibilities, reporting and termination.

3. Academia

- **Organise learning around completed, playable work.** Students can undertake assessed projects that connect design, programming, art, testing and production management. Assessment can examine the quality of the game, the team's working process and its response to player feedback, giving employers clearer evidence of practical readiness.
- **Use studio partnerships to improve teaching and production exposure.** Establish recurring curriculum reviews, practitioner-led assignments and faculty development linked to actual production workflows. Each partnership should identify a coordinator, agreed activities and a review schedule, so collaboration produces measurable learning outcomes.
- **Make internships structured and supervised.** Institutions and studios should agree on learning objectives, assigned tasks, supervision and assessment before placements begin. Students **should** contribute to appropriate production work and receive documented feedback. Regional partnerships and remote mentoring can widen access where nearby studio opportunities are limited.

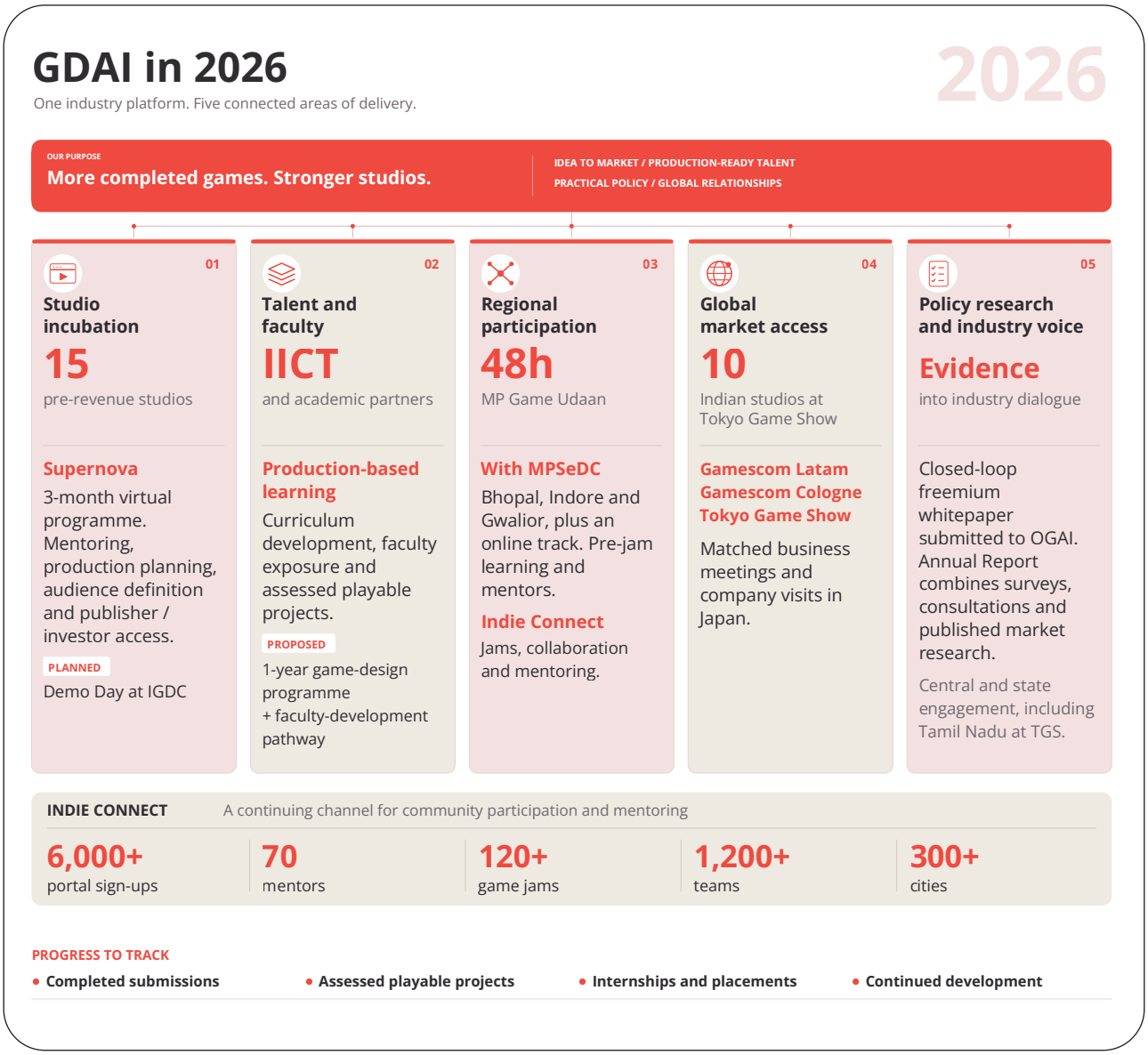
GDAI in 2026

1. An industry platform built around delivery

The Game Developer Association of India (GDAI) is the apex industry-led association working to strengthen India's games ecosystem across development, talent and skilling, incubation, policy, research, industry collaboration and global market access. In 2026, GDAI expanded from convening the ecosystem to building connected delivery programmes. The year's work was organised around four practical questions:

- How can studios move from idea to market?
- How can talent become production-ready?
- How can policy recognise the realities of game development?
- How can Indian teams build durable global relationships?

These questions sit against a market that has already crossed USD 1 billion in annual video game revenue and continues to expand. **GDAI's role is to help more studios in India convert that consumer scale opportunity into completed games and sustainable businesses.**



2. Incubation and commercial readiness

Supernova was established as a structured virtual incubation programme for 15 pre-revenue studios. The three-month programme combines mentorship with publisher and investor access, helping teams strengthen their production and commercial readiness. Its curriculum follows the journey from game design and production planning to audience definition, publishing preparation and demonstration.

Mentors and ecosystem partners bring studio, platform, publisher and investor perspectives into the programme. Their guidance helps teams assess project scope, allocate resources and prepare for commercial discussions. The programme is designed to culminate in a Demo Day at the India Game Developer Conference (IGDC), connecting incubation with opportunities to present projects to prospective partners.

Alongside Supernova, GDAI launched Indie Connect, a broader community portal through which independent developers can connect with mentors, peers and potential publishers. It provides a continuing channel for sharing work, exchanging knowledge and accessing opportunities beyond an individual incubation cohort.

3. Talent and faculty development

GDAI's skilling agenda addresses the gap between completing an educational programme and contributing effectively to a production team. Its work with the Indian Institute of Creative Technology (IICT) and other institutions focuses on curriculum development, faculty exposure, practical learning and structured connections with studios.

Alongside this ongoing engagement, the proposed one-year game-design programme with IICT and the proposed faculty-development pathway aim to strengthen production-based education. The faculty pathway combines self-paced foundations, live applied learning and master-trainer development. Across these initiatives, the objective is to connect design, programming, art, production and commercial understanding through playable, assessed projects.

Progress in academic partnerships will be assessed through recurring curriculum review, faculty development, studio-reviewed projects, internships and placements into identifiable industry roles.

4. Regional participation and game jams

Game jams provide an accessible route into game creation, particularly outside established development centres. GDAI's 2026 programme included women-focused and international collaborative jams, as well as state-level activations.

GDAI's Indie Connect provides a shared platform for this community, bringing together opportunities to participate in game jams, find collaborators and access mentoring. It has more than 6,000 portal sign-ups, 70 mentors, 120+ game jams, 1,200+ teams and reach across 300+ cities. These activities create opportunities for emerging developers, artists and storytellers to work together, test ideas and gain practical experience.

In Madhya Pradesh, GDAI partnered with Madhya Pradesh State Electronics Development Corporation Ltd (MPSeDC), under the Department of Science and Technology, Government of Madhya Pradesh, on MP Game Udaan, a 48-hour game jam for college students, aspiring developers, artists and storytellers. The programme combined participation across Bhopal, Indore and Gwalior with an online track, pre-jam learning sessions and access to mentors. This approach widened opportunities for emerging creators to develop and showcase their work beyond the established studio centres. Indie Connect also hosts community creation and competitive programming events, connecting its mentoring and networking functions with practical opportunities to participate.

Future reporting will track registrations, completed submissions, participant locations, gender participation, mentor engagement and progression into further programmes or continued game development. These measures will help assess how regional participation translates into sustained opportunities.

5. Global market access

In 2026, GDAI supported Indian participation and relationship-building across Gamescom Latam, Gamescom Cologne and Tokyo Game Show, engaging studios, publishers, platforms, government representatives and international industry organisations.

At Gamescom Cologne, GDAI supported Indian studio presence and opportunities to connect with the international games industry. At Tokyo Game Show, its delegation brought together 10 Indian studios, with a programme of matched business meetings, curated industry mixers and company visits across Japan. This provided a structured route for participating studios to present their capabilities and build prospective commercial relationships.

The value of these delegations depends on preparation, suitable introductions and continued follow-up. Helping studios respond to feedback, refine demonstrations and sustain discussions can improve their prospects of securing publishing, investment and co-development agreements. The recurring commercial requirements were clear: capital for complete production cycles, senior talent capable of helping teams ship, and stronger co-development capability. These efforts are particularly relevant to the report's findings on overseas revenue dependence and difficulties attracting international partners.

6. Policy research and industry voice

GDAI's policy work in 2026 covered online social gaming regulation, state game-development frameworks, skilling, incubation and international market access. Engagement with central and several state government stakeholders also addressed the distinction between video-game development and transaction-led real-money gaming.

State engagement extended to international industry platforms. At Tokyo Game Show 2026, K. Vivekanandan, Special Secretary, Industries, Investment Promotion and Commerce Department, Government of Tamil Nadu, inaugurated the GDAI India Pavilion. Representatives from Guidance Tamil Nadu and ELCOT also participated, bringing state investment-promotion institutions into direct contact with the international gaming ecosystem.

This Annual Report strengthens GDAI's industry representation by bringing primary survey findings together with stakeholder experience and secondary market evidence. It provides a basis for identifying priorities, discussing practical responses with government and industry, and tracking changes across future editions.

Purpose, Scope and Methodology

1. Understanding the development ecosystem

Game development combines creative work, technical capability and commercial decision-making. A game moves through concept development, design, programming, art, testing and release, often followed by updates and player support. A studio's ability to sustain this work depends on people, finance, production discipline and commercial relationships.
India's ecosystem includes teams creating original intellectual property, businesses contributing to larger productions, specialist service providers, publishers and tool companies. These models involve different production cycles, investment requirements and routes to market. They may also coexist within the same studio: service work can provide revenue and production experience while an original product is developed separately.
Understanding this ecosystem therefore requires attention to both overall market scale and to the practical conditions under which individual studios operate.

2. Scope of the report

The report examines four connected questions:

- **Who is building games? -** the composition of the development ecosystem, including studio experience, team size, location and development activity.
- **How do studios sustain their work? -** revenue sources, access to finance, publishing capability, monetisation and relationships with domestics and international partners.
- **How talent is prepared for production? -** hiring requirements, readiness of new entrants, curriculum coverage, faculty experience and collaboration between studios and educational institutions.
- **What operating conditions support growth? -** regulatory clarity, banking and payment processes, access to public programmes, protection of IP and responsible player experiences.

The report brings together primary evidence from industry and academia surveys with consolidated stakeholder consultations. Secondary market data are used to establish the broader industry context against which survey findings are interpreted.

Market conditions are considered through their practical implications for developers, including the ability to finance production, recruit specialist talent, reach audiences and generate income.

3. How to interpret the evidence

The report brings together industry and academia surveys, in-depth stakeholder consultations and secondary research to examine the conditions shaping India's game-development ecosystem. The Industry Survey received 104 submissions and the Academia Survey received 13, capturing perspectives on studio operations, commercial priorities, talent requirements and educational capacity. The industry survey includes 8 additional submissions from 8 repeat studios, while the academia survey includes 2 additional submissions from 1 repeat institution. Surveys were circulated through email, GDAI networks and social media, with voluntary participation.

In-depth stakeholder conversations helped unpack the practical challenges behind the survey findings. Discussions examined how studios finance prototypes, approach publishers and investors, recruit specialist talent, reach international markets and navigate routine business processes. Accounts of individual projects and operational difficulties provided context on how these constraints affect development schedules, team continuity and commercial decisions. Institutional inputs offered a complementary perspective on curriculum, faculty experience and industry engagement. Bringing these perspectives together helped identify connected challenges and develop recommendations grounded in the working realities of studios and educational institutions.

All submissions were retained and given equal weight. Percentages therefore describe responses, rather than unique organisations or national estimates, and multiple-response totals may exceed 100%. The findings provide directional evidence from participating organisations. The sample may overrepresent those connected to GDAI networks, is not a census, and is not weighted by revenue, workforce or institutional size.

This edition also establishes a foundation for sustained research and dialogue. Future editions will introduce more stable respondent identifiers and seek to establish a recurring panel, strengthening comparability and enabling closer tracking of industry needs and progress over time.

ACKNOWLEDGEMENTS

This report brings together the knowledge, experience and collective effort of individuals and organisations across India's game-development ecosystem. We are grateful to everyone who participated in the industry and academia surveys, contributed to stakeholder consultations, or supported the study through their inputs and feedback. Their willingness to share their experiences, challenges and aspirations helped ground the research in the realities of building games and developing talent in India.

We thank The Dialogue, our knowledge partner, for undertaking the research and supporting the development of this report. We extend our special appreciation to Ms Kriti Singh and Mr Kazim Rizvi for their guidance throughout the research and drafting process. We also acknowledge Ms Roshni Mallick for her contributions to background research and proofreading of the report.

We are grateful to PhonePe Appstore for sharing industry and consumer insights that enriched the analysis and brought an additional perspective to the findings. We gratefully acknowledge the support of our Associate Sponsors - Gameberry Labs, Chimera, 1312 Interactive and NODWIN Gaming - whose partnership has been instrumental in making this initiative possible. We also thank the GDAI team for its sustained efforts in extending the reach of the surveys, facilitating stakeholder participation and supporting the report's development. These contributions helped bring a wider range of industry and institutional experiences into the study.

GDAI Team

Shruti Verma

Shruti Verma is the CEO of the GDAI. She plays a key role in driving initiatives that support and grow the Indian game development ecosystem, including industry collaborations, community building, and developer-focused programs. She has been actively involved in shaping platforms that connect developers, studios, and stakeholders across the country.

Machaiah Kalengada

Machaiah Kalengada is a Program Director at the GDAI and Head of the India Game Developer Conference (IGDC), where he manages marketing, operations, and partnerships for India's largest gaming industry events.

Swati Sudhakaran

Swati Sudhakaran is Director, Government Affairs & Incubation at GDAI. As part of the role, she works closely with the Union and state governments representing various policy issues on the industry's behalf. She also oversees GDAI's Supernova incubation programme for pre-revenue studios.

ACKNOWLEDGEMENTS

The Dialogue Team

Kriti Singh

Kriti Singh oversees programme execution and leads policy initiatives across Online Gaming, fintech and emerging technologies. She drives stakeholder engagement, government advocacy, and strategic research to advance balanced, growth-oriented gaming policies. Formerly a journalist covering political and digital policy, Kriti works at the intersection of media, governance, and tech regulation to inform impactful public policy.

Aman Mishra

Aman Mishra is Programme Manager, Public Policy and Government Affairs at The Dialogue, where his work focuses on the intersection of policy and law. A lawyer by training, he has over five years of experience in competition law, public policy and consulting, working across sectors including gaming, manufacturing, footwear, AI, FMCG, insurance and financial services.

PhonePe Appstore Team

Abhishek Thakur

Abhishek Thakur is Head of Strategy and Growth for Appstore and Ads at PhonePe, with a charter spanning strategy, consumer growth, strategic partnerships and ads strategy, along with the business mandate for Appstore's digital goods marketplace. He brings over a decade of experience in consumer tech and advertising across strategy consulting and operating roles, including helping build a new advertising channel in India. His focus areas include digital goods commerce, monetisation, platform and gaming policy, and AdTech.

Harshita Raj

Harshita is a growth leader with 7+ years of experience in consumer tech, spanning gaming, e-commerce, OTT and entertainment, quick commerce, and travel and commute. At PhonePe Appstore, she leads partnerships with global gaming companies, helping them crack growth in India through user acquisition, revenue growth, and audience intelligence. Her work sits at the intersection of ad tech, digital goods monetisation, and platform strategy, helping global studios build durable businesses in one of the world's fastest-growing digital markets.

The Game Developer Association of India (GDAI) is India's apex industry body for the video gaming ecosystem and a non-profit organisation that unites game developers across every state into one shared national ecosystem. GDAI is committed to enabling business opportunities, upskilling of talent, and shaping policy framework with the government to position India as a global hub for game development. GDAI is supporting the journey from individual talent to strong studios with access to global markets, incubating 5,000 game start-ups and impacting 25,000+ students nationwide in choosing games as a career.

For more information visit www.gdai.in

PhonePe Appstore is India's digital goods marketplace, accessible via both mobile and web. Designed as a single destination for digital lifestyle spends, it allows users to download apps and games, as well as purchase digital top-ups and gift cards with discounts across gaming, tech, entertainment and more.
For developers, PhonePe Appstore offers a fair platform to reach a vast audience. Beyond distributing their apps and digital catalogues, developers can leverage the broader PhonePe ecosystem—including integrated payments, ads, and insights—to monitor, promote, and grow their business with improved margins.

For more information visit www.phonepeappstore.com

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