



Research Article

Economic Contribution and Employment Potential of The Orange Economy

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Abstract

The orange economy or creative economy of India includes media, entertainment, gaming, OTT platforms, digital content, advertising, publishing, performing arts, and cultural tourism. The orange economy has become a rapidly expanding contributor to India's gross domestic product and employment after COVID 19. This paper presents an analysis of the contribution of the orange economy to the economy and jobs of India from 2020 to 2025, using secondary data provided by government reports (FICCI-EY, NASSCOM, UNESCO, and Ministry of Information & Broadcasting) and primary data obtained using a structured questionnaire from 120 respondents (professionals in the creative sector, students, policy makers and consumers).

According to the findings, India's media and entertainment industry has now surpassed the INR 2.32 trillion mark in 2024, and the digital segments of this economy have been growing at a compound annual growth rate (CAGR) of around 18% to 22% since 2020. Creative sector employment also exceeded eight (8) million direct jobs, with youth and women making up more than sixty percent (60%) of the newly-created position in digital creative jobs. Multiple linear regression analysis shows that digital penetration, government expenditure, investment levels and skills availability are statistically significant predictors of creative industry employment growth and that IP protection and formalisation of employment are the best predictors of positioning for a stable income.

In conclusion, all three of the research hypotheses were supported: (1) the Orange Economy is a significant contributor to the Gross Domestic Product (GDP) of India; (2) The digital creative industry is experiencing significantly greater growth rates than traditional cultural industries; and (3) The digital creative industry has strong potential to provide inclusive job creation opportunities for youth and women. The paper suggests policy-related actions to ensure the enforcement of intellectual property and digital skills, and to assist in the formalisation of employment.

The creative gig worker environment and an overall national creative economy data framework.

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1. INTRODUCTION

In The term “orange economy”, as defined by Felipe Buitrago Restrepo and Ivan Duque Márquez in their 2013 book for the Inter-American Development Bank. It describes economic activities based on the value of human creativity, cultural heritage and intellectual property, rather than on physical capital or natural resources. The importance of this concept is heightened in India by three structural convergences: 1) rapid increase in broadband (to over 880 million users by 2024) 2) the wide availability of low-cost smartphones that have allowed new ways to consume content 3) steady government policy momentum via flagship initiatives like Digital India, Startup India and the National Creative Economy Policy 2023.

It is estimated that India's orange economy is around 2.5%–3% of the country's GDP and has provided direct employment to over 8 million people and an estimated support of over 20 million additional people through indirect employment (FICCI-EY). This sector spans everything from centuries-old artisan crafts and folk performance traditions to technologically advanced gaming studios, animation studios, and multinationals producing OTT content. In 2023, Bollywood produced 1,754 films, and the Indian gaming industry generated approximately USD 3.8 billion in revenue which highlights both the scale and the vibrancy of India's creativity.

The transformation from 2020 through to 2025 was significant. Lockdowns due to the pandemic increased online streaming content consumption, while the number of OTT subscriptions in India grew from 29 million in 2019 to over 100 million by 2024 (Statista). Additionally, the intersection of the gig economy and creative work has resulted in the emergence of a new category of employment — independent content creators, independent digital artists, social media influencers, and remote animators, most of which are not captured in conventional employment statistics. Likewise, the arrival of generative artificial intelligence tools between early 2023 and early 2024 will continue to fundamentally change the landscape of the creative economy.

The creative industries have an established growth trajectory, offering a wealth of possibilities for employment and income for creative individuals and companies, while concurrently creating new forms of competitive pressure and opportunity. The claims made by creative industries supporters that the creative sector is rapidly developing, however, are not supported by any empirical evidence based on updated secondary data and unbiased survey research. Existing studies tend to be either limited to examining particular sub-sectors such as Film or Gaming or rely on data that predates the post-COVID period of rapid digital transformation. This paper attempts to fill these data gaps by developing a mixed-methods model whereby secondary data from the period 2020-2025 are analysed in conjunction with primary survey evidence (n=120) and regression modelling to determine the relationship between employment growth and income stability across the orange economy of India. The structure of the paper is as follows: Section 2 will provide a summary and review of existing literature pertinent to the creative industries, Section 3 will provide an overview of study purpose and objectives and total study hypotheses, Section 4 will provide a description of the conceptual framework for the study, Section 5 will describe

the research methods used to carry out this analysis, Section 6 will report the results and provide analysis and commentary on those findings, Section 7 will conclude with an overview of the major findings during the study, and Section 8 will draw overall conclusions from the results of this study and make recommendations for public policy. A reference section and three supporting appendices containing a copy of the survey instrument utilised in this study, a copy of the

secondary data record sheet developed for the analysis, and a coding sheet used to carry out regression analysis.

2. REVIEW OF LITERATURE

2.1 Global Perspectives

UNESCO (2022) estimated that creative industries globally contribute USD 2.25 trillion to world GDP and employ over 30 million individuals. The report underscored that digital technologies have significantly expanded the growth potential of creative industries and highlighted the growing role of low- and middle-income countries, including India, as exporters of creative content and services. UNCTAD (2022) found that global trade in creative goods and services reached USD 1.02 trillion in 2020, with digital delivery becoming increasingly dominant. India ranked among the top ten exporters of creative services globally. WIPO (2023) noted that intellectual property-intensive industries account for 45.5 percent of GDP in developed economies, establishing a direct quantitative link between IP protection and creative sector economic performance.

2.2 Indian Context

According to the report by FICCI-EY for 2024, India's media and entertainment industry grew by 11.5% to reach a value of ₹2.32 trillion in 2023, driven by growth in digital advertising, OTT subscription income and gaming. The report estimated that the sector is projected to achieve an overall value of ₹3.08 trillion by 2026 with increased share of revenues from all digital segments. NASSCOM reported that Indian gaming and animation industries exceeded USD 3.8 billion in 2023. Over 1,500 active game development companies contributed to the sector's employment growth (22% year-on-year) among youth. The Ministry of Information & Broadcasting noted that OTT platforms had approximately 100 million paid subscribers in India as of January 2024 and the introduction of the Broadcast Services Regulation Bill (2023) will provide regulatory oversight for digital content. Handicraft exports (USD 4.35 billion) for 2022-2023 were enabled via ecommerce channels which allowed rural based artisans easy access to international markets (Export Promotion Council for Handicrafts, 2023). NSDC reported that between 2020 and 2024, over 1.2 million people had been trained in Animation, VFX and Digital Media skills through National Skill Development Corporation partnerships.

2.3 Research Gap

Studies to date have been conducted regarding various creative sub-sectors (e.g. film, video games, arts and crafts) as discrete entities; no integrated cross-sectoral analysis has been done on

the total contribution of the orange economy to increased economic activity and job creation. Additionally, many of those previously published studies are prior to the shifts brought on by the pandemic induced digital transformation (2021 to 2024) - particularly as it relates to OTT growth, expanding digital advertising, and the maturing gaming market; therefore, these publications are not able to report on how these shifts have changed the creative workforce landscape. Additionally, no evidence exists via a primary survey from professionals working in India's creative sector that looks at their employment experiences, income realities, and/or perceptions of the adequacy of current creative policies and

infrastructure. This study will address all three of these research gaps through a combined secondary data and primary survey approach using regression-based hypothesis testing to do so.

3. OBJECTIVES AND HYPOTHESES OF THE STUDY

3.1 Objectives

The objectives of this study include the following:

1. An examination of the current contributions of the Orange Economy to the GDP of India from 2020 through 2025.
2. An analysis of employment patterns and trends by sectors, with particular emphasis on women, youth, and freelance workers.
3. Compare the Growth Patterns of Digital Creative Sector and Traditional Cultural Sector --Current Phase
4. Identify Major Factors in the Creation of Employment and Stability of Income in Orange Economy.
5. Examine the Role of Both Government and Digital

6. Infrastructure in Determining How the Sectors Perform Economically.
7. Provide Evidence-based Recommendations for Strengthening the Orange Economy in India.

3.2 Hypotheses

The study tests the following three hypotheses:

H1: The orange economy makes a statistically significant and growing contribution to India's GDP during the period 2020 to 2025.

H2: Digital creative sectors, including OTT platforms, gaming, animation, and digital advertising, demonstrate significantly higher growth rates compared to traditional cultural sectors such as handicrafts, folk arts, and live theatre in the current period.

H3: The orange economy has statistically significant potential to generate employment for youth aged 18 to 35 years and for women, in both urban and rural contexts.

4. CONCEPTUAL FRAMEWORK

This research employs an input-process-output framework to examine the manner in which enabling conditions produce economic and employment outcomes in relation to the Orange Economy. The framework conceptualizes the development of the Creative Sector as being the product of the interaction of structural enablers, processes, and resulting economic and employment outputs.

Table 1: Conceptual Framework for Orange Economy Analysis

Input: Enabling Conditions	Process: Creative Sectors	Economic Outputs	Employment Outputs
Digital infrastructure	Film and Television	GDP contribution	Direct employment
Government policy	OTT and digital media	Export earnings	Youth employment
Skill development	Gaming and animation	FDI attraction	Women's participation
IP protection	Advertising and design	Startup ecosystem growth	Gig and freelance work
Investment capital	Music and performing arts	Tax revenue	Entrepreneurship
Consumer demand	Handicrafts and artisanal	Cultural diplomacy value	Rural employment

Independent Variables: The following independent variables were selected for this study: sector growth rate; digital penetration index; government expenditure on the creative economy; investment levels; IP enforcement index; and skill availability score.

Dependent Variables: The following dependent variables were identified for this study: GDP share of the creative sector, total and disaggregated by youth and gender employment in the creative sector, export earnings from the sale of creative goods and services, and self-reported income stability of creative workers.

5. RESEARCH METHODOLOGY

5.1 Research Design

The research study utilizes a mixed-method design, with descriptive analysis of secondary time-series data being combined with the inferential statistics of primary survey

results. The primary data portion of the study will use a cross-sectional design. This mixed-method approach is necessary, as we are using secondary data to identify macro-level trends in each sector and primary survey evidence to document individual-level employment and perceptions of policy.

5.2 Secondary Data Sources

The information included in this report has been collected from multiple sources during the years 2020 to 2025 using previously identified secondary data types: FICCI-EY Media and Entertainment Industry Reports (annual for 2021-2024); NASSCOM Strategic Review (annual for 2022-2023); Ministry of Information and Broadcasting Annual Reports (annual for 2022-2024); Periodic Labour Force Survey published by the Ministry of Statistics and Programme Implementation; UNESCO Global Report On Culture And Sustainable Development (2022); UNCTAD Creative Economy Outlook (2022); RBI Handbook Of Statistics on Indian Economy

(2024); and Export Promotion Council (Hindustan Hardware) Annual Reports.

5.3 Primary Data Collection

In an effort to study 120 people, a structured questionnaire was conducted between January and March 2005 utilizing both online (Google Forms) and offline methods. The questionnaire was made up of four sections; demographic profile, their awareness of sectors and participation in sectors, and them

experience with employment and income, and their opinions on policies and infrastructure. Attitudinal items were measured on a five-point Likert scale (ranging from "strongly disagree" to "strongly agree"). The respondents came from four groups of people: creative sector professionals, students in creative courses, government/policy makers, and consumers of creative content.

5.4 Sampling

Respondent Category	Sample Size (n)	Sampling Method
Creative Sector Professionals	50	Purposive and Snowball
Students in Creative Disciplines	30	Convenience
Policymakers and Government Officials	15	Purposive
Content Consumers and General Public	25	Random
Total	120	—

5.5 Statistical Tools

Statistical methods used in this study include descriptive statistics (frequency distribution, mean, standard deviation) for demographic/attitudinal data; two models with multiple linear regression (model 1: employment growth as a function of digital penetration, government expenditure, investment levels, sector-specific skill availability; model 2: income stability as a function of IP protection, years' experience, educational qualification, type of employment); hypothesis testing (t-tests and ANOVA) at 5 percent significance; and chi-square tests to

analyse the association between demographic variables and reported employment outcomes.

6. DATA ANALYSIS AND FINDINGS

6.1 Sectoral Revenue Trends, 2020 to 2024

Table 3 presents the revenue trajectory of principal creative sector segments between 2020 and 2024, compiled from FICCI-EY (2024) and NASSCOM (2023).

Table 3: Sectoral Revenue Trends, 2020–2024 (INR Crore, approximate). Source: FICCI-EY (2024), NASSCOM (2023), KVIC (2023).

Sector	2020 (INR Cr)	2022 (INR Cr)	2023 (INR Cr)	2024 (INR Cr)
Film and Television	68,000	82,000	1,02,000	1,10,000
Digital Media and OTT	22,000	48,000	68,000	88,000
Gaming and Animation	11,000	22,000	30,000	38,000
Advertising and Design	45,000	62,000	74,000	81,000
Music and Streaming	8,000	14,000	20,000	26,000
Handicrafts and Folk Arts	25,000	30,000	35,000	38,000
Total	1,79,000	2,58,000	3,29,000	3,81,000

Revenues for the aggregate industries will have increased from INR 1.79 lakh crores in 2020 to INR 3.81 lakh crores in 2024 accumulated over a growth period of nearly 113%, within a four-year period. The sectors with the largest amount of growth are Digital Media and Over the Top (OTT) which increased in size by 300% from the original size for those time periods. Gaming and Animation had similar/growth rates for the same

time periods with cumulative growth rates of approximately 245% each as compared with the original sizes of their respective industries. Handicrafts/Folk Arts have shown moderate growth based upon data available and have grown at a cumulative rate of approximately 52% from the original values that have been collected and compiled.

6.2 Employment in the Orange Economy

Table 4: Employment in the Orange Economy, 2024 (Direct Employment Only). Source: PLFS 2023–24, FICCI-EY (2024), EPCH (2023).

Sector	Total Jobs (2024 est.)	Youth Share % (18–35)	Women Share %	Gig / Freelance %
Film and Television	4,20,000	55	28	35
OTT and Digital Content	3,80,000	72	41	62
Gaming and Animation	2,50,000	78	32	25
Advertising and Design	4,50,000	60	45	40
Music and Performing Arts	1,80,000	50	38	70
Handicrafts and Artisans	72,00,000	35	65	88
Cultural Tourism	15,00,000	40	30	55

The largest sector by far in terms of total employees still consist of Handicrafts and artisanal industries with approximately 72 million total employees (out of which ~65% are female and ~88% are in informal/self-employed forms). The digital sector

has lower total employee numbers but has high percentages of young people employed (72–78%, respectively, for OTT and gaming) and an increase in the number of women in advertising, design and digital content jobs.

6.3 Comparative Analysis of Traditional and Digital Creative Sectors

Table 5 presents a systematic comparison of traditional and

digital creative sectors across nine indicators relevant to economic growth and employment in the current scenario.

Table 5: Comparative Analysis of Traditional and Digital Creative Sectors.

Indicator	Traditional Sector	Digital Sector	Current Scenario Remarks
Revenue CAGR (2020–24)	6–8%	18–22%	Digital growing approximately 3 times faster
Employment Density	Very High (rural-dominant)	Moderate to High (urban)	Handicrafts: 72 lakh workers
Skill Requirement	Craft and artisanal	Tech-creative hybrid	Demand for AI-creative skills rising in 2025
Export Potential	Stable (USD 4.3 billion)	Rapidly expanding	Digital exports up 28 percent in 2023
Women's Participation	High (65% in handicrafts)	Growing (32–45%)	OTT and advertising sectors gaining
Youth Employment	Low to Moderate	Very High (72–78%)	Gaming: 78 percent youth workforce
Informal Employment	Very High (90%+)	Moderate (40–60%)	Formalisation challenge persists
Technology Dependency	Low	Very High	AI tools reshaping digital workflows
Policy Attention	Moderate (KVIC, GI tags)	High (Digital India, PLI)	Digital sector receives stronger support

6.4 Regression Analysis

6.4.1 Model 1: Determinants of Employment Growth

Dependent Variable: Employment growth rate in the creative sector (percentage, year-on-year).

Table 6: Regression Model 1 — Determinants of Employment Growth in the Creative Sector.

Variable	Coefficient (β)	Std. Error	t-value	Significance
Digital Penetration Index	0.52	0.08	6.50	p < 0.001 ***
Government Expenditure on Creative Economy	0.38	0.11	3.45	p < 0.001 ***
Investment Level (INR Crore)	0.29	0.09	3.22	p < 0.01 **
Skill Availability Score	0.41	0.10	4.10	p < 0.001 ***
R ² = 0.74; Adjusted R ² = 0.71; F-statistic = 38.5 (p < 0.001)				

All four predictors were statistically significant at or above the one percent level. Digital penetration had the greatest positive effect on employment growth (Beta = 0.52), followed by availability of skills (Beta = 0.41), and also government spending (Beta = 0.38). The R-square of 0.74 indicates that the model explains 74 per cent of the variation in the employment growth rate, demonstrating the cumulative influence of the

enabling conditions. Therefore, these results support hypotheses one and three.

6.4.2 Model 2: Determinants of Income Stability

Dependent Variable: Income stability score on a five-point Likert scale, self-reported by respondents.

Table 7: Regression Model 2 — Determinants of Income Stability among Creative Workers.

Variable	Coefficient (β)	Std. Error	z	t-value	Significance
IP Protection Index	0.44	0.09		4.89	p < 0.001 ***
Years of Professional Experience	0.31	0.08		3.88	p < 0.001 ***
Educational Qualification (Ordinal)	0.26	0.10		2.60	p < 0.05 *
Formal Employment Dummy (1 = Formal)	0.39	0.12		3.25	p < 0.01 **
R ² = 0.68; Adjusted R ² = 0.65; F-statistic = 29.7 (p < 0.001)					

The strongest predictor of stable income is the protection of intellectual property (Beta = 0.44). This demonstrates the key structural importance of IP rights to creative practitioners. Another strong predictor is whether a person has a formal/employed job or not, which has been shown to provide a security premium with regard to income stability compared to those in informal/gig-based employment arrangements (Beta = 0.39). The model explains 68% of the variance (R squared = 0.68) in income stability.

7. Key Observations

The insights gained from the analysis are outlined below for the period 2020-25:

India's overall Orange Economy Revenue grew by more than IRN 3.81 TRILLION by 2024, which has nearly doubled (+113%) from 2020; thus, demonstrating strong growth throughout the period being measured. The digital creative sub-sectors, including OTT platforms, gaming, animation and

digital advertising, have all consistently achieved 18-22% CAGR during this period, and significantly outperformed both the overall economy as well as traditional creative sectors. This also supports hypothesis 2.

Traditional sectors like handicrafts and artisanal industries still employ far more creative individuals than any other sector. They are also regular dominated by women, although they are still very similar to traditional funding models, rely on a large amount of informal activity, and have limited IP protection leading to continued income instability.

The gaming and animation industry presents the most rapidly growing opportunity for young digital talent in India's creative economy with 78% of the workforce being composed of youth, who work in an industry worth over US \$3.8 billion. The introduction of generative AI tools in 2023/24 has created a double-edged effect, providing productivity

improvements and new creative opportunities and also pressure towards job displacement for entry-level creative jobs such as basic graphic design, copywriting, and junior animation positions.

The measurement of female participation in the creative production roles has experienced significant growth due to the rapid development of the OTT service industry in India. In the ad and design sector, women represent 45% of those employed, while the production sector of OTT content has seen a forecasted increase of 28% from 2021 to 2024.

The informal job market presents the greatest structural obstacle to India's orange economy. An estimated 70- 90 % of individuals working in handicrafts or performing arts do not have a formal contract or access to social benefits, which limits their income stability and the ability of that sector to contribute to GDP using formal methods.

According to regression analysis, digital penetration and availability of skills are the most significant drivers for growth of employment, while intellectual property protection and formalisation are the most critical factors for income stability. These findings will directly inform prioritisation of future policies.

8. CONCLUSION AND POLICY RECOMMENDATIONS

8.1 Conclusion

Between 2020 and 2025, India's orange economy has shown immense strength and agility. It has gained the title of being one of the most vital and quickest growing contributors to India's economy and job creation. The increase in digitalisation, high levels of broadband access and an ideal population make up a growing creative industry in India that encompasses all ranges of creativity, from traditional handicraft groups to advanced technology-based industries including gaming studios and Artificial Intelligence assisted content creation platforms.

The results of this analysis support all three hypotheses. Hypothesis 1 showed that between 2020 and 2025, the amount created from the orange economy towards GDP more than doubled, supporting this hypothesis. Hypothesis 2 further demonstrated strong support, with the most researched growing sectors of digital creativity at a compounding annual growth rate of between 18-22% compared to traditional sectors growing at an average compounding annual growth rate of 6-8%. The last hypothesis, Hypothesis 3, also supported this analysis, with females, who are the fastest growing demographic within digital creativity, contributing to the new entrants of the sector at over 60%.

Despite all three hypotheses being proven correct, the industry still has significant structural challenges to overcome in achieving its maximum potential. The majority of the handicraft and performing arts sectors operate with a high level of informality, affecting their income security and visibility to policymakers. The rapidly evolving generative artificial intelligence technologies globally will continue to affect the competitive landscape of creative workers and require timely

responses from governments. Additionally, the data infrastructures are not yet comprehensive enough to enable thorough analysis across sectors.

With adequate support through advance policy measures, it's possible for the Orange Economy to grow into a sector of 100 billion dollars by 2030. The listed recommendations are based on a thorough review of all relevant constraints found during the course of this study.

8.2 Policy Recommendations

The use of digital enforcement mechanisms, as well as grievance redressal systems, will help protect the intellectual property rights of independent creators in the creative economy such as, musicians, artists and content creators.

The National Skill Development Corporation (NSDC) and the Skill India initiative should work to scale up digital skilling for the creative industries by creating dedicated 'Creative Economy' tracks to get 5 million new entrants by 2027, targeting primarily tier 2 and tier 3 cities with these tracks due to the lack of current programming to support the needs of creative talent in those areas.

The government should introduce a Creative Worker Social Security Scheme for informal gig and freelance creative workers, which could include using the existing e-Shram portal to provide all of them with portable social protection, which provides that to them regardless of what their employment form is.

The Government should create a National Creative Economy Data Observatory under the Ministry of Statistics and Programme Implementation to collect, maintain and disseminate unique annual data on creative economy workforce employment and GDP contribution broken out by sector. This will help to address the current fragmentation of data on the creative economy that makes it hard to do comprehensive policy analysis on the creative economy.

The Government should launch new women-focused entrepreneurship and skilling programs for women working in digital creative roles and particularly for those women living in tier-2 cities and women who are part of rural creative clusters, such as the craft cluster.

Lastly, a dedicated National Creative Economy Policy should be created with a corpus fund of INR 10,000 crore to offer established and new creative startup incubation, creative infrastructure development and to promote globally Indian originated creative content.

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