Broadcasting in Transition: Over-the-Top (OTT) Platforms, Telecom Integration, and Media Convergence in India

Ph.D. Thesis

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I hereby certify that the work which is being presented in the thesis entitled **BROADCASTING IN TRANSITION: OVER-THE-TOP (OTT) PLATFORMS, TELECOM INTEGRATION, AND MEDIA CONVERGENCE IN INDIA** in the partial fulfillment of the requirements for the award of the degree of **DOCTOR OF PHILOSOPHY** and submitted in the **SCHOOL OF HUMANITIES & SOCIAL SCIENCES, INDIAN INSTITUTE OF TECHNOLOGY INDORE**, is an authentic record of my own work carried out during the time period from JANUARY 2020 to OCTOBER 2025 under the supervision of under the supervision of Dr. Akshaya Kumar, Associate Professor, Indian Institute of Technology Indore.

The matter presented in this thesis has not been submitted by me for the award of any other degree of this or any other institute.

22-10-2025
signature of the student with date
(NAME OF THE PhD STUDENT)

This is to certify that the above statement made by the candidate is correct to the best of my knowledge.

22/10/25

Signature of Thesis Supervisor #1 with date   Signature of Thesis Supervisor #2 with date
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Mahima Singh has successfully given her Ph.D. Oral Examination held on **16 January 2026**.

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Dedicated to my parents,

whose unconditional love, sacrifices, and quiet strength have shaped every

step of my journey.

SYNOPSIS

1.1 Introduction

In 2016, free SIM card of Reliance Jio which provided unlimited 4G data changed the debate around the technological aspects of the communication and consumption of media in India. I vividly remember all these queues before the mobile shops where people stand in a line and collect a free Jio SIM so that they can stream YouTube videos or even IPL matches without any concerns about the data cap. The memory is an important occurrence in the Indian broadcasting history. However, even greater than the personal memory, this memory is a reflection of a greater change that is happening on a structural scale, which is as a result of the convergence of telecommunications, media and digital platforms. Jio has enabled the limitless access of information/ entertainment that its subscribers are already enjoying as well as a systematic transition of legacy television network towards digital distribution and new monetization models. More to the point, the shift is a significant challenge to media studies: that the traditional broadcast paradigm of TV cannot be used to interpret the current changes in the modern media. Telecommunication and (Over-The-Top) OTT service providers are no longer producers as they now hold a centralist and strong position regarding the distribution and monetization of content. Although these platforms and conceptual frameworks of platforms are important and extensive, little focus has been placed on them in the media studies research. The relationship between telecommunications, OTT services and television ecosystem has not been explored fully yet. Therefore, we must have something new in conceptual and empirical terms, a new theoretical and empirical premise of analysis.

The thesis discusses that change in the principles of convergence of media and platform capitalism, addressing the process of telecom infrastructure keeping centre of the new ecosystem of digital broadcasting. By 2024, India had 547.3 million OTT viewers (Ormax Media, 2024), which was driven by affordable data, smartphone penetration and the demand for vernacular and regional content. This is

not just a matter of digital audience expansion, however, as platforms like Netflix, Hotstar, and JioCinema take advantage of algorithmic recommendation systems and infrastructural dominance to figure out what and how we watch (Lotz, 2017; Gillespie, 2010; Madrigal, 2014).

Central and fundamental to this change, incorporating the idea of "convergence culture" proposed by Jenkins (2006), is the area in which old and new media representations intersect with each other to create new relationships amongst audiences, technologies and content. This has been more so noticed in the example of IPL which is a sporting event that has gone on to become a digital giant. Its media rights increased to record-breaking of 1.03 billion in 2008 to 6.2 billion in 2023 (Gollapudi, 2022; Business Standard, 2008), which can be viewed as not only commercial but also the pivotal role of live content in the platform strategy. The acquisition of the digital broadcasting rights of IPL valued at 3.1 billion dollars and the ad-free, free streaming model demonstrates a different logic of value - less about subscriptions, more like making the users a part of comprehensive digital systems (Gollapudi, 2022).

This represents the archetypal platform capitalism, in which the value is not made in the content but through the action itself of the intermediary as an access broker as an extractive process that gathers data and monetize behaviour at scale (Srnicek 2017). The bundling of media with telecommunications services, and the institutionalization of the integration of mobile, and broadband, and commerce on the same platform by Jio is an unusual infrastructural consolidation. The fact that JioCinema offers free access to IPL, unlike Disney + Hotstar whose business model relies on subscriptions, offers the company not just a user base, but as a gateway into a larger data driven marketplace - a marketplace that is entirely subservient to the principles of platform capitalism.

More to the point, this change has been brought about through a regulatory silence, a term Parthasarathi (2018) applies to explain a form of policy inaction within the context of rapid platform expansion. Whereas legacy television is still the subject matter of licensure, competition law, and content regulation, JioCinema and other

telecommunication companies, which are mostly acting as platforms, existed in a relatively less regulated environment. This has been used to consolidate control across industries without having to struggle with the regulatory regime that used to restrain broadcast media (Athique & Kumar, A., 2022).

The effects of this regulatory vacuum become a lot more evident as we consider the struggle of the content-first website such as ALTBalaji. Having first made a splash with aggressive, youthful programming such as *Gandii Baat* (2018), ALTBalaji could not afford to grow in a market that was now more bundling-focused, more infrastructure-focused, and more deep-pocket concentrated. Its collapse underscores a critical fact that infrastructure and distribution power are more vital than content. Winseck (2016) claimed an ironic twist and said, "bandwidth is king", which is ironic against the slogan of "content is king".

Through these dynamics, Connected TV (CTV) has become the new frontline of digital consumption. The 30 percent increase in the CTV advertisement rates of IPL 2025 (Exchange4media, 2025) indicates a resurgence of large-screen, communal viewing that has now been salvaged with digital infrastructure. The idea of remediation presented by Bolter and Grusin (2000) can be used to explain that: the current OTT experience is not that which has been substituted by television but has rather recast itself in the style of the mobile viewing experience, as well as the comfort of the television screen.

Combined, these changes indicate that change in television towards OTT is not a technological break but, instead, a platformization process (Nieborg and Poell, 2018)- where control over infrastructure, visibility of algorithms, and the absence of regulation carve out the competitive landscape. The rise of Jio, the side-lining of ALTBalaji, and the amalgamation between JioCinema and Disney Plus Hotstar is not just an industry phenomenon, but a sign of a larger change of influence coming off content creators and on to those that can push the digital tracks.

YouTube poses a special challenge in this landscape. Although it is arguably the most successful digital video platform in India- mobile-first, multilingual and everywhere on the daily slide of digital life- it is not on

an institutional trajectory that such a thesis aims to trace. Unlike an OTT, such as Hotstar or JioCinema, that lies within legacy media institutions or structured models of commissioning; YouTube is an integrated service of streaming, social media, search and user generated participation. It is the creator economy of India and it was catalysed by the groups such as *The Viral Fever* (TVF) and *All India Bakchod* (AIB), as well as personalities such as Bhuvan Bam and CarryMinati. Nevertheless, the model of participation and the algorithmic approach to YouTube, as well as its worldwide infrastructure, makes it methodologically different. To analyse the phenomenon of YouTube thoroughly, one would have to apply a different corpus of analytical lenses that would be concerned with platform governance, algorithmic curation, targeted advertisement, user-generated content, and the participatory culture (likes, dislikes, comments, and sharing). These are mostly missing in other OTT applications such as JioCinema and Hotstar. In that way, although YouTube is involved in comparative references, it is not counted as one of the main case studies. The thesis rather focuses on the manner in which the legacy television players have shifted to the OTT platform market by telecommunication convergence, infrastructural consolidation, the initiation of CTVs and regulatory loopholes.

1.2 Research Objectives

The main research objective that this thesis aims to explore is how the television business in India has been transformed by political, economic and technological forces and specifically the conglomeration of telecommunications, Information technology (IT) as well as digital media. It examines the transformation of broadcasting from a state controlled to a competitive and increasingly consolidated OTT ecosystem. This thesis explicitly looks at the changing nature of telecom infrastructure, in particular the emergence of Jio, which is shaking up the broadcasting business through the integration of content delivery system and data access, and how this has reshaped the competition and consumer preference. This thesis examines the mechanisms of the media convergence of the three cases of ALTBalaji, Disney+ Hotstar, and

JioCinema, including content forms remediation, genres innovation, and monetization of live sports. This thesis is also interrogative of the manner in which legacy TV networks and new digital platforms perk out business feasibility with respect to algorithmic visibility, the pressure of censorship, and regulatory imbalances. The key focus in this thesis is on vertical integration and regulatory silence that enables the major participants to take over and dominate the markets. This thesis aims at offering a comprehensive understanding of shifts in infrastructure, policy and platform strategies in the production, distribution and consumption of contents in the digital television market in India.

1.3 Literature Review

The increasing body of literature concerning the transition of India's television and digital media can be categorized under three broad sets, i.e. (1) historical discourse of the transformation of television in India in terms of how it has moved out of a state-owned public service to a commercial and competitive broadcasting system; (2) theoretical discourse on media convergence, platformization and the modern prosperity of OTT in India; (3) structural discourse on telecom-media convergence, infrastructural power and regulatory silence that has determined the modern-day media landscape in India.

Historical development of Indian broadcasting has been discussed by several scholars like Nalin Mehta (*India on Television*, 2008), Robin Jeffrey (*India's Newspaper Revolution*, 2000), and Purnima Mankekar (*Screening Culture, Viewing Politics*, 1999), who trace the manner in which the Indian television has been a space of public pedagogy, national integration and subsequently, as a space of commercial entertainment. Arvind Rajagopal was particularly critical on this matter in *Politics After Television* (2001) showing that the political communication of the 1990s was beginning to be transformed by the media liberalization that enabled the new forms of the middle-class consumer life through new channels such as Star and ZEE. This institutional view has been formulated relying on the culturalist view presented by Sen and Roy (2014), Aswin Punathambekar (2010), and Shanti Kumar (2022). In *Channeling*

Cultures: Television Studies in India, Sen and Roy (2014) reveal that the Indian television has already become localized in its contact with the audience, its plot development, and has integrated both intimate moral in discourses and regional conceptions of gender, kinship, and community which national television lacks. They challenge linear histories of media by providing how Indian television had been mediated into different social situations, and created fragmented but interconnected publics.

In the same manner, discussion of convergence are informed by Dwyer (2010) who discusses convergence in the media and Jenkins (2006) who discusses convergence culture. The recent work by Athique and Kumar, A. (2022) has contributed to this debate with an Indian perspective of reference and has addressed how the role of telecom platforms and mobile ecosystems to facilitate flows within the digital infrastructures and content is increasing. Moreover, Diwan (2023) examines streaming viewership and audience responses (likes/ comments) to show how online platforms process this information about the users to make an impact on the content, production, and distribution strategies. Furthermore, the studies of the television news offered by Devi (2022) also add to the body of knowledge since it implies that an institutional regimen still structures the contents within OTT space. Instead, it is rather disruptive, which means that OTT platforms to a large degree enact television logics.

The concepts of comprehending how OTT platforms alter content and generate new dimensions of market concentration, flows of money across the globe, and corporate acquisition are based on the ideas of Lobato in Netflix Nations (2019) and Doyle in Media Ownership (2002). These frameworks globalize the singularity of India's mobile-first expectant telecom landscape linking it with the history of programming distribution in the country. Moreover, Athique and Kumar, A. (2022) argue that the issue of digital media growth in India should be perceived through the lenses of infrastructure consolidation, especially when the opportunities of platforms such as JioCinema to modify the price structure, access by users, and visibility of the content are considered.

This body of literature has provided a complex understanding of India's streaming economy, but a few critical gaps still remain. First, much of the studies continue to see television, and OTT as two separate systems, concentrating on disruption but overlooking how streaming television enhances live event transmission, the aesthetic of television, as well as seriality. Second, not much attention is paid to the institutional downfall of independent content-first platforms such as ALTBalaji that demonstrate that bundling patterns and infrastructure access are becoming sensitive to platform sustainability. There is very limited research that has investigated the state of marginalization between ALTBalaji as a symptomatic element of more extensive market-consolidation within telecom ecosystems, even though it recognizes the value of this platform in testing genre and format.

Moreover, an issue that Athique and Kumar, A. (2022) address is the convergence of infrastructure, yet the study in progress does not devote much attention to understanding the role played by the regulatory silence in the development of India's digital media landscape. Despite the fact that the idea of regulatory silence introduced by Freedman (2010) offers a rather useful framework, there is no information about how the latter can be applied to the case of India and particularly to the works (or lack thereof) of regulators such as Competition Commission or TRAI. This thesis will proceed to contribute to that line of research by empirically researching how regulatory inaction has supported the telecom-media consolidation in India.

This thesis fills all such gaps by establishing the OTT explosion in India within the broader historical context of television and media convergence. This study grounded in political economy, infrastructures studies, and cultural studies, that this move towards streaming through telecom resulted in enclosure, platformized visibility, and regulatory non-intervention as an indicator of continuity and not disruption. The study will help to understand how the power of the platform is shifting in India via content innovation, infrastructure monopoly and the non-intervention of tactic policies via the footprints of JioCinema and Disney+ Hotstar and ALTBalaji.

1.4 Theoretical Framework and Methodology

The theoretical basis of this thesis applies a multidisciplinary approach, combining the political economy of communication, theories of media convergence, and concept of regulatory silence in discussing the institutional change of the Indian broadcasting in the era of digital streaming and telecom convergence. This framework explores how convergence of such elements as infrastructure, content, platforms, and policy change the media landscape in India as OTT platforms grow increasingly.

To a large extent, this research is based on the political economy of communication which theorists such as McChesney and Schiller (2003), Mosco, (2009) and Golding and Murdock (1997) have developed. Their theories come in handy in offering information on how the determinant of the media power shifted not so much in the ownership of the content but rather the control of business and infrastructure. The concepts of vertical and horizontal integration by McChesney and Schiller are the foundation through which theorization of the strategy of consolidation can be done in which the telecom platforms, in this case Reliance Jio, has power over control of content and the methods of distribution and delivery of that content (2003). As demonstrated by Mosco, media content and user information are regarded as products on the sites, such as Netflix can use viewing history to determine what to produce and how to advertise it (2009). Meanwhile, according to Golding and Murdock, a handful of media conglomerate can control the media and its implications for content diversity and democratic access (2009; 1997).

Besides political economy, this thesis also utilizes Jenkins and other scholars in the media convergence theory to explain the shift in the media system not an analogue broadcast but a hybrid form of media including traditional television and digital OTT platforms. Convergence culture, by Jenkins, is essential in the way in which the older media, especially the television shows, are reformulated to the new platforms (2006). Such intersection can be very much seen through the examples of the OTT platforms showing television shows, serial programming, live sports, digital and algorithmic recommendation, and user data analysis.

The third prominent theoretical framework that will be discussed in this thesis is regulatory silence, the works of which were written by such authors as Parthasarathi (2018), Freedman (2010), and Li (2020). Regulatory Silence, in contrast to the deregulation approach that is explicit, is described as the lack of action, usually, as a result of their political and economic interests of the state, which agrees to change the market relations, without the required monitoring and control by the relevant authorities. The concept is applied to the strategies of the Indian state towards the regulation of OTT, the cross-sector ownership, and net neutrality. The inaction form of government provides a site of sanctioning monopolization of infrastructures, and harming plurality in content.

The chosen research design, the qualitative and multi-method case study research, will be applied in this thesis because it will analyse the trends of OTT media ecology and change of the digital landscape in India. It is a study of three platforms, that is, ALTBalaji, Disney+ Hotstar, and JioCinema, which have been chosen to be compared purposefully. They are markedly different in their convergence in the Indian media: ALTBalaji as an independent producer of content wants to achieve a digital autonomy; Disney+ Hotstar as an institutionalized broadcast of entering the digital world, and JioCinema as an example of a telecom-enhanced platform that operates in the turn of the Indian media infrastructure.

The thesis is based on case study approaches that were developed by Yin (2018) and Stake (1995), who emphasize the value of case studies in the study of real-world, context dependent aspects. The primary method of data collection is the analysis of secondary data that includes the examination of policy documents (TRAI consultation papers, Ministry of Information and Broadcasting), trade reports and white papers in the industry (published by FICCI-EY and KPMG), investor presentations and corporate filings, as well as journalistic media coverage and academic commentaries. These sources give essential details on the institutional self-representation of platforms as well as the wider field of discourse where platform development, convergence and regulation are placed.

This institutional focus is further supplemented by a qualitative content analysis of the ALTBalaji's catalogue. The study uses the analysis of genre selection, branding strategies, and the creation of identity of imagined audiences by the platform to reference the work of Lotz (2017), who contends that genre needs to be discussed as a place of industrial strategy and cultural negotiation, especially in the case of streaming television.

Though the initial research design was to consider substantial primary data comprising of interviews with the media professionals, this aim was faced with immense challenges. Corporate gatekeeping, strict confidential protocols and constant lack of responsiveness hampered the attempts to secure interviews. Irrespective of these limitations, a small number of semi-structured interviews were carried out with the executives of MX Player, JioCinema and Viacom18. The fact that these interviews helped in providing context but these are supplementary interviews and do not form the essence of empirical analysis. Considering all these limitations, this research is based on the contribution of triangulating an extensive array of secondary materials and is considered a cautious, interpretive method of analysing the institutional forces and the strategic decisions of the chosen platforms. This methodological approach allows rooted and thoroughly examining the changes of the OTT ecosystem in India caused by the changes of various industrial structures and platform logics.

1.5 Structure of the Thesis

Introduction

This thesis examines how the Indian media is changing due to platform-based convergence whereby the traditional television networks, digital platforms, and telecom supported ecosystems are reorganizing the way media is constructed, shared, and turned into profit. Instead of recovering the concept of OTT as the replacement of television, I will suggest that the change was more complicated, as the increasing interdependence of television content with proprietary digital infrastructures characterized by the priority of data-driven advertising, algorithmic visibility, and

integration across platforms indicates this new direction. This thesis is structured in chapters based on the case studies, which are examples of various elements of this change carried out to indicate how legacy networks, national streaming platforms, and services managed by telecom, encounter power negotiations in India to face the changing media economy.

Chapter 1: Tracing India's Television Evolution – From State Monopoly to Digital Convergence

The first chapter provides historical and structural grounds of the media industry in India, whereby the history of television starting with the state control is followed through the evolution of the same to privatization and transformation to digital media. Such study of history is significant in that the modern move to OTT is not merely an accidental occurrence, but is instead another step in a more protracted process of technological and regulation change which has steadily transformed the Indian media landscape. This chapter touches on the Doordarshan, the state broadcaster, the liberalization of media in 90s, dramatic increase in the number of the private satellite channels and consolidation of the television channels in the hands of big companies. The thesis elucidates this with the exploration of the key events in the history of television in India (example: the introduction of cable networks, the shift to DTH and the regulation constructs of the broadcasting process) by the normative changes that occurred in these formats that provided the precursor to the modern platform-based change. What is important about this chapter, specifically, is that it highlights that when considering the reasons why the television industry is more susceptible to platformisation in India, one must keep in mind how the progress of the Indian television industry differs with their counterparts in the Western media markets in which the legacy network had substantial autonomy. Another distinction between the Indian media market and the West is that the business of the Indian television has remained under mediation by forces outside the television screen (be it state mediated, corporate media conglomerates, now platforms). By analysing these changes, this chapter also sets the stage of

the case studies that follow each of which explores a different aspect of this ongoing change.

Chapter 2: ALTBalaji and the Struggles of Domestic OTT Platforms

The second case study is based on ALTBalaji, an OTT platform that is designed to be greenfield and was established by Balaji Telefilms, one of India's most successful television production houses. This case study is significant in the sense that it shows how legacy media houses are adopting the digital media with the pressure of the worldwide streaming service and telecom operated aggregators. ALTBalaji is an attempt by a traditional content producer to avoid middlemen and create a direct-to-consumer (DTC) structure. The ethos of the company points to structural issues faced by domestic OTT operators, both to maintain sustainability of revenue and the sustainability of subscriber retention, to compete with Netflix, Amazon Prime video, and Disney + Hotstar. I illustrate the shortcoming of the independent OTT platforms by using this case study of the Indian streaming industry with regards to the dependence on infrastructure (data charges, content packs, etc.) to the impediments of the price-sensitive market. This chapter adds to the overall argument as it shows that to succeed in India digital media industry, it is not sufficient to just create content. The control of distribution is a strategic factor of successful streaming services, which are based on distribution platform integration, telecom partnership, and data subsidies. The case of ALTBalaji is a larger example of the race of Indian content creators where, despite their background in the television industry, they are becoming more and more reliant on platforms supported by a telecom or even international aggregators to gain audiences and market access.

Chapter 3: Star, Hotstar, and Live Sports Streaming

Hotstar, thus, offers a very crucial counter point to ALTBalaji as it represents a hybrid model that bridges television and OTT. Hotstar is owned by Star India which is one of the largest television networks in India and has a significant market share in the area of sports and entertainment. The chapter will examine how Hotstar could use their television legacy and their live sports services (mostly the cricket) in their

market pricing strategies to grow into India's most popular streaming service. The relevance of the case of Hotstar is that it can serve many models in delivering free content, ads-based content, and attempt at the same time to build a subscription model over premium content delivery. It reviews that the initial move by Hotstar towards streaming cricket, the ability to package services with telecommunication providers, and subsequent merger with Disney+, identifies the complexity involved in the television networks in international platform strategies. The thesis via Hotstar argues that Indian OTT market is not simply a battlefield of digital and television, but also a setting where the established television networks are reconfiguring to ensure their relevance in the digital environment. In the chapter, it is evident that OTTs are not driving television broadcasters out of the market, but rather they are using online streaming as one of their business models. The rise of Hotstar is indicative of a transformation process whereby television networks are not being displaced, but are instead utilizing the digital platform to stretch further and redefine interaction with the audience.

Chapter 4: The Telecommunication Engine: Reliance Jio's Vertical Integration

Reliance Jio, which disrupted the Indian digital economy by making the internet cheap, will be examined in the final chapter. It is Jio that has changed streaming in the sense that it introduced gradual transformation to the OTT in India and ultimately, JioCinema entered the market. This chapter is relevant as it shows how this is a significant shift in the Indian media industry not to be dominated by large players in the media in terms of broadcasters and media content producers but telecom service providers who regulate and facilitate data infrastructure and digital consumption. Jio is also providing free (or at minimum subsidized) data, streaming subscriptions on top of mobile and internet capabilities, and making JioCinema the single content location/application. Accordingly, this has led to Reliance developing a paradigm of media consumption where even content-based consumption now is being mediated by data, and not subscription. I will argue that the effect of Jio is a form of a new

type of platform capitalism where ecosystems such as telecom controlled the access and revenue of content. This is particularly relevant in the Indian environment, where telecom control is emerging as the key gatekeeper of digital entertainment due to the cheap nature of the data, the use of widespread mobile streaming, and the lack of a robust standalone subscription framework. Thus, the chapter examines the role that the infrastructure power of telecom conglomerates plays in forming India streaming industry in addition to the rivalry between the content platforms.

Conclusion

Drawing on the analysis of the case studies, the concluding chapter will summarize the reflection of the transition in the television to OTT transition of India on other structural changes in the power of the media. Instead of a disruption as such, the transition to OTT is a new stage where the control of content is a new connection to digital infrastructural control. The ALTBalaji, Disney+ Hotstar and JioCinema case studies reveal how different categories of players such as established networks, independent content creators and telecom companies are making inroads in the Indian media that is changing significantly. It concludes that the future of the Indian media is not going to be shaped by the dilemma of competition between television and digital but also by the growing role of digital ecosystems, which are operated by corporations. Convergence between the media, telecom, and technology is not neutral, and access, controller and regulation circumstance is troubling. Who will determine who has the control of the distribution of the content? How widespread are proprietary digital platforms in deciding which content is at least seen and can be monetized? What is the implication of this to the media access in India? By asking these questions, this thesis presents an argument that will result in the discussion of platformization and media governance, and presents opportunities of understanding digital capitalism as it is changing the media infrastructure of the world.

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AIB	All India Bakchod
AIR	All India Radio
AVOD	Advertising-Based Models
BARC	Broadcast Audience Research Council
BCCI	Board of Control for Cricket in India
BBC	British Broadcasting Corporation
BJP	Bharatiya Janata Party
BoP	Bottom of the Pyramid
CAB	Cricket Association of Bengal
CBFC	Central Board of Film Certification's
CCB	Communication Convergence Bill
CTV	Connected TV
DAS	Digital Addressable Systems
DMA	Digital Markets Act
DoE	Department of Electronics
DoT	Department of Telecommunications
DPCGC	Digital Publisher Content Grievances Council
DTH	Direct-to-Home
DTC	Direct-to-Consumer
DTS	Department of Telecommunication Services
DTT	Digital Terrestrial Television
ECIL	Electronics Corporation of India Limited
EPL	English Premier League
EU	European Union
FCC	Federal Communications Commission

FDI	Foreign Direct Investment
FICCI-EY	Federation of Indian Chambers of Commerce & Industry–Ernst & Young
FTA	Free-to-Air
GEC	General Entertainment Channels
GVCs	Global Value Chains
HD	High-Definition
ICL	International Computers Ltd.
ICT	Information and Communication Technologies
IMG	International Management Group
IPL	Indian Premier League
IPTV	Internet Protocol Television
ISPs	Internet Service Providers
IT	Information Technology
ITES	IT-Enabled Services
IITK	Indian Institute of Technology Kanpur
KBC	*Kaun Banega Crorepati*
KPMG	Klynveld Peat Marwick Goerdeler
LSD	Love, Sex Aur Dhokha
MIB	Ministry of Information and Broadcasting
MRI	Microsoft Research India
MPT	Ministry of Posts and Telegraphs
MSOs	Multi-System Operators
MTNL	Mahanagar Telephone Nigam Limited
NASSCOM	National Association of Software and Service Companies
NASA	National Aeronautics and Space Administration
NDTV	New Delhi Television Ltd

NFL	National Football League
NGOs	Non-Governmental Organizations
NTP	National Telecommunications Policy
OTT	Over-the-Top
PEC	Political Economy of Communication
PPP	Public-Private Partnership
PSB	Public Service Broadcasting
ROI	Return on Investment
SEZs	Special Export Zones
SITE	Satellite Instructional Television Experiment
STBs	Set-Top Boxes
STPs	Satellite Terminal Points
STAR	Satellite Television Asian Region
SVOD	Subscription-Based Models
TIFR	Tata Institute of Fundamental Research
TIFRAC	TIFR Automatic Computer
TRAI	Telecom Regulatory Authority of India
TRP	Television Rating Points
TVF	The Viral Fever
TWI	Trans World International
US	United States
USO	Universal Service Obligation
VSNL	Videsh Sanchar Nigam Limited
ZEE	Zee Entertainment Enterprises

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Introduction

In 2016, Reliance Jio's free SIM cards (which offered unlimited 4G internet) changed the digital lifestyle of millions of Indian overnight. I remember the queues in front of Jio stores and the sense of excitement when we could stream YouTube videos or watch the Indian Premier League (IPL) without having to worry about data usage. It was very shortly thereafter that we were engrossed in YouTube marathons, film streaming and watching IPL matches.

After that we struck gold with Netflix, which made me think why would someone buy online content when they can watch hundreds of free TV channels and infinite YouTube videos. In fact, we still experienced scarcity in our association with digital media; we were parsimonious with our mobile data usage, being precise about which video to watch and how long they would take. However, Netflix changed to appear as something bizarre- an essential getaway. It became normal to binge-watch a whole season on a smartphone which a few years prior was inconceivable. The years of my confusion and interest experienced a seismic change in the Indian media sector. This thesis is grappling with that change - evaluating the changed rules of engagement and consumption amid convergence of telecommunications, media, and technology.

The Indian media business is experiencing a radical shift that reflects a global change with regard to content production, dissemination, and consumption. Where a few years ago television dictated its own rules and controlled the public discussion with a firm hand, nowadays the operation of the media is characterized by the emergence of streaming platforms and over-the-top (OTT)[1] services, and the growing power of telecom and technology corporations, and the integration of digital

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[1] OTT platforms refer to streaming services that deliver audio, video, and other media content directly to consumers via the internet, bypassing traditional cable, satellite, or broadcast television networks.

infrastructure into content ecosystems (Athique et al., 2018; Mukherjee, 2018). In India, which has one of the largest diversified media marketing systems in the world, cheap mobile data, spearheaded by telecom giants such as Reliance Jio[2] (hereafter, Jio) and ubiquitous internet-capable devices have triggered the rapid adoption of OTT with ormax media estimating the number of video streaming viewers at 547.3 million (Ormax Media, 2024). The linguistic and cultural diversity of India is another stimulus of the demand to the regional content, which is why the OTT sphere is peculiar in its dynamics and competition. On-demand[3], non-linear viewing experiences and the practices of binge-watching[4], especially due to advanced algorithms to recommend what to watch, now are available on platforms like JioCinema, Disney+ Hotstar, and Netflix (Lotz, 2017; Herbert et al., 2018; Gillespie, 2010; Madrigal, 2014). Also, broadcasters such as Disney+ Hotstar and ZEE5 combine the strong aspects of regional TV with digital innovation to introduce the hybrid and localized viewing experiences (Athique, 2012; Cunningham and Craig, 2019). This is especially noticeable in the field of sports broadcasting, as the OTT services have transformed the access through subscription system and ad-based platform, and, in the end, redefined the market consolidation and regulations. The variety of Indian OTT market, such as ALTBalaji, MX Player, Eros Now, Voot, SonyLiv, YouTube, and Amazon Prime Video, therefore, demonstrates how the heritage of traditional media is being replicated and reinvented to suit the changing tastes of the modern audience.

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[2] India's leading telecom and digital services provider

[3] On-demand content refers to media—such as movies, TV shows, music, or videos—that viewers can access anytime and anywhere, rather than being restricted to scheduled broadcasts. This content is typically delivered via digital platforms like streaming services or on-demand services from traditional broadcasters.

[4] Binge-watching refers to the practice of watching multiple episodes of a television series or movies in a single sitting or over a short period. This behaviour has become more prevalent with the rise of streaming platforms that release entire seasons at once, encouraging viewers to consume content continuously.

The Indian Premier League (IPL)[5] that is a combination of cricket, consumerism and entertainment merged with international media is the theatrical example of how digital voices are becoming the predominant tool in redefining consumer interaction and market forces. The broadcast rights of the IPL have been increasing by leaps and phases since the inception of this business in 2008, reaching 1.03 billion in 2023, and later 6.2 billion in 2020, all with the idea of shifting the industry to being digital-first (Business Standard, 2008; Gollapudi, 2022). The core of this revolution lies in what Henry Jenkins (2006) refers to as the *convergence culture*[6] a place where traditional media meet with new media, challenging how audiences and content creators interact, and changing relationships among them. Relying on the television and cinema, the Indian media is in the midst of a paradigm shift as the distribution channels, engagement and monetisation of audiences become controlled by the digital platform. It is not simply the replacement of the legacy by the digital media but rather a blend of the formats, in which streaming services can combine live sports, catch-up television, and capability to engage the viewer, so as to keep the television relevant in a digital environment. Consequently, the internet has become the pivot in the development of the popular culture of India and telecom-supported ecosystems and worldwide platforms have come out to fight their ways on the popularity arena with the IPL, where digital supremacy based on platform strategy, data-centric commercialization, and content packaging has become a priority in shaping the India's popular culture.

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[5] Established by the BCCI in 2007, the IPL is a premier T20 cricket tournament featuring ten franchise teams. Known for its entertainment-driven format, the IPL was the first sports event to stream live on YouTube in 2010 and inspired similar leagues in India. With a 2022 valuation of $11 billion, it significantly impacts India's economy (Chadha, 2022).

[6] In Convergence Culture: Where Old and New Media Collide, Henry Jenkins introduces the concept of "convergence culture" to describe the merging of traditional and new media landscapes, where consumers actively participate in the creation and distribution of content. Jenkins uses examples such as the *Survivor* (2000) fan community, which collectively analyses and predicts outcomes of the show, to illustrate how audiences collaborate through grassroots platforms, thereby redefining their relationship with media producers (2006).

One event that took place in the transformation of media in India was when Jio won the IPL digital rights for the 2023-2027 cycle at record $3.1 billion, breaking down the monopoly of television and digital rights held by Star India (Gollapudi, 2022). This point marked several developments: the increasing strength of telecom-enabled convergence of the media, the emergence of platform capitalism[7], the speeding up of India's shift from television to digital streaming technologies, and the rising prominence of ad-supported business models compared to those based on subscription. In contrast to Star India with the use of subscription model on the Disney+ Hotstar platform, Jio applied ad-based free streaming model with the use of IPL to lock users into its platform ecosystem (Athique and Kumar, A., 2022). The idea of platform capitalism as developed by Srnicek (2017) sheds some light on this change, in which the digital giants gain control over the production of culture due to the data-driven advertisements and lock-in of their ecosystem. The shift of IPL to online media is not only one of alteration of the viewing population but also a reassignment of power within the Indian media economy with telecom-based platforms now determining access to the high-value content. Compared to the traditional broadcasters, the strategy of JioCinema[8] is multi-sided because the free IPL streaming increases the engagement of the user in its product, enabling Jio to use data to monetize across platforms. It is contrasted with previous IPL streaming strategy that Star uses, which is based on subscription model, and indicates the growing strength of platform capitalism, in which the ownership of the distribution infrastructure is a source of market power. This acquisition by the streaming rights of the IPL by the JioCinema is the most recent among series of such purchases of the streaming rights by Amazon (English Premier League) and YouTube (National football league). Such acquisitions and their

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[7] Platform capitalism describes an economic model where digital platforms like Amazon and Netflix extract value by connecting users, producers, and advertisers through data-driven operations, emphasizing scalability and network effects (Srnicek, 2017).

[8] JioCinema is an Indian OTT streaming service owned by Reliance Jio.

dominance of the dispersion of live sports stand as a testament to their reconstructions plans in the heart of their respective marketing programs. This marks a clear movement towards the economy of distribution of live content and heightening media content consolidation in India and other nations.

The age old-phrase that "content is king", has been undermined by the emergence of platform-based media economies, where the power of infrastructure and distribution takes precedence over the content itself. Regardless of the fact that television networks may still come up with lively storyline, the economics of platforms has become the new reality compared to telling stories. Winseck (2016) states that the primary variable, which determines the effectiveness of the media content suggested by distribution and monetization, is bandwidth. The example of ALTBalaji is applicable in this connection, as the platform briefly left impressions on the market with its contrarian approach to content and targeting the young generation with the idea of organizational digitalization. However, it was unable to maintain itself in the market, as the approach to it became a stronger market determinant than the content itself. The erotica-based series such as *Gandii Baat* (2018) and experimental ones such as *The Test Case* (2017) also helped ALTBalaji carve a niche at the height, yet the inability to integrate with the telecom-based ecosystems or be supported by large-scale infrastructures eventually contributed to its demise. However, today, it appears that ALTBalaji has slipped from the headlines, and now the market has forged with JioCinema and YouTube, both of which generated the facility based engagement dynamic where the capacity to enclave audiences due to facility control is the new measure of the market performance where content is not always the primary/only determinant of viewership.

Also, it is not only transactional of a viewer engagement process, which facilitates this transition, but a condition created deeper by the processes of political-economic control and the silence of regulation thereof; such as, altering consumers preference; centralizing corporate control and changing the additional functions of state based policy processes more deeply and formerly, in the context of digital media input

(Parthasarathi, 2018; Athique and Kumar, A., 2022). JioCinema has succeeded in disrupting sports broadcasting because it is symptomatic of the larger process of vertical integration, where by small, concentrative telecoms have grown their control on both the distribution media (internet networks, mobile systems) as well as the content production (OTT platforms, streaming rights, and original programming). This is what scholars call *platformization*, where the media industries grow increasingly mediated by digital platforms, which act to provide a source and/or mediate the interaction between the user (Bouquillion and Ithurbide, 2022; Athique et al., 2018). As digital infrastructures are consolidated, they are altering the nature of access and control to cultural experience. Such large businesses have gained such virtual unilateral power and capability to drive distribution behavioural pathways and user experiences, and to control the access to material, without incurring any liability on the regulatory rules.

This relocation of power in the media introduces useful questions into the processes of how the role of the state and relative control of the Indian ecosystem operate in all its complexity. The television companies have a history of being licensed and their output and advertisement were stringently restricted by the government under the Ministry of Information and Broadcasting (MIB) and Telecom Regulatory Authority of India (TRAI). However, these regulatory restrictions have thus far been exempted of OTT platforms who have been enjoying what Parthasarathi (2018) defines as regulatory silence, the absence of explicit policy intervention on digital platforms that allowed digital platforms to thrive in their absence of content regulations, licensing fees, and broadcast taxes paid by traditional television[9]. This regulation and deregulation have enabled these other companies to monopolize the

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[9] Traditional television encompasses modes of content delivery that are broadcast, cable, or satellite-based, including digital transmissions like Digital Terrestrial Television (DTT) and Direct-to-Home (DTH) services.

market which in turn has posed the question of the fair competition and media pluralism, e.g., Jio, Amazon, and Google (YouTube). Therefore, the lack of a consistent regulatory framework has conducive to the rise of digital conglomerates and reinvented the competitive landscape of Indian media whereby the content is generally distributed and accessed by the infrastructure ownership.

The case of Hotstar-Jio merger shows the changing power in the streaming industry in India. As a previously dominant force in the digital streaming sector, Disney + Hotstar failed to remain profitable due to the ability of telecom-based service providers (such as JioCinema) to use their technological and internet dominance to provide free content. The merger did not only encompass the inclusion of one large streaming platform into the telecom ecosystem of Jio, but it also represented a more general change in the competitive dynamics of the market, where the platforms have come to compete based on bundling, infrastructure coverage, and a multi-sided platformization concept (Athique and Kumar, A., 2022). This is an indication of a shift in the approach to monetisation in which value has been extracted through the incorporation of streaming into telecom products, the exploitation of content as a user retention tool, monetisation of data and cross-platform synergies. At the time I started my PhD in 2020, Jio was not a large OTT but in several years, the company has transformed itself into one of the strongest streaming sites in India. It has been fuelled by the high rate of its growth through aggressive pricing, infrastructure supported by telecom and strategic acquisition of content, especially live sporting events. The availability of marquee events such as the IPL was free; JioCinema could exploit the customer base in India which had an affinity to the sport of cricket and grow its user base by an unprecedented rate. The other aspect that enhanced its dominance was seamless integration with the telecom service offered by Jio, and hence, streaming became a built-in feature instead of an additional subscription. This content, connectivity, and affordability has transformed the Indian digital entertainment environment. Most importantly, this rise has been enabled by regulatory

silence in that, India has not provided any rules regarding the impact of a vertical integration of telecom and media.

The quick and successful ascent of Jio into the top streaming service provider in India, after acquiring Disney+ Hotstar, its success in telecom, retail and sports franchising has ensured Jio is a force to reckon with in the Indian digital media ecosystem. Nevertheless, Jio is not the only entity to dominate, and with such global technology firms as Netflix, YouTube, and Amazon Prime Video still offering content libraries, algorithms to earn recommendations and has a substantial global subscriber base, the company can leave an impact on the Indian streaming market (Lobato, 2019). As Jio has been employing aggressive bundling and free content to push streaming service uptake, Netflix, Amazon, and YouTube are concerned with retention and keeping users and adherents by using user-driven personalization and high-end content. Although Jio has successfully aired the IPL and incorporated telecom into their products in order to reach foaming masses, Jio continues to have issues in engaging their users to their platform past the big marquee events as competitors continue to innovate on monetizing platforms through charging subscription levels, inserting advertisements and also, the ability to secure exclusive offerings. The strategies of Jio have been seen to be reactive at times rather than more disruptive with intent of creating technology or content to reach audiences. A newsletter, released following the purchase of Hotstar, stated "it was Jio time in the world. We are simply following it, we are watching it, you know, it's watching you, too" (Krishnan, 2024). This is a statement that Jio is a successful company in terms of scale and infrastructure and distribution rather than technology and content. More to the point, there is no visibility as to whether Jio is in a position to translate view of such a large audience into monetary sources of advertisement revenue in a market where a multinational player is setting the standards regarding audience interaction and advertisement monetization.

The creation of Jio as the most successful streaming company in India is stipulated by acquiring Disney+ Hotstar and general coverage of telecom, retail, and sports franchises and has established itself as the

company of significant presence in the Indian digital media landscape. Nonetheless, Jio has to contend with the international technology giants such as Netflix, YouTube, and Amazon Prime Video that control the Indian streaming industry with extensive content packages, quality algorithms, and international fan bases to a degree (Lobato, 2019). Jio is not like other platforms as it uses aggressive bundling and free content to promote consumption in contrast to its competitors who use personalization information-driven by the data and premium content to create long-term viewership behaviours. IPL telecasting and integrated telecom services have certainly helped Jio to gather mass audiences but the added value of the audience cannot last long unless other significant value chains are put into consideration since competitors are monetizing with tiered subscriptions, advertisements, and exclusive content. Besides, although Jio has set a strong foundation in India, its entry policy can also be viewed as reactive as the company tends to acquire content or applications instead of creating disruptive content strategies or technological solutions. Finally, it is not known whether Jio could successfully transform a mass audience into affordable advertising revenue stream when competitors base on universal customer engagement and ad target criteria. The attempts of Reliance to research brain mapping to determine advertising ROI[10] underscore the current battle to estimate the impact of brands in live sports coverage, which has been overcome by competitors such as YouTube and Amazon in their methods of hyper-targeted advertisements, interactive sponsorships, and integrated e-commerce strategies. Consequently, even though Jio has

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[10] The ROI (Return on Investment) in this context refers to the impact or effectiveness of specific investments or strategies in achieving measurable outcomes in live sports broadcasting. In the case of Reliance's experiments with brain mapping research to measure advertising ROI, it suggests that Reliance is exploring innovative, scientific methods to gauge how effectively their advertisements impact viewer engagement and brand recognition during live sports broadcasts. Traditional methods, like viewership ratings or post-event surveys, may not fully capture the subconscious or emotional responses viewers have to ads during these high-stakes events. Brain mapping attempts to tap into deeper neural responses to understand how ads influence consumer behaviour, offering a more refined measurement of ROI.

already earned its status as a key player, it is functioning within an ecosystem where competition has evolved into a more difficult area with a global platform still defining the standards of innovation, monetization, and retaining its audience.

Simultaneously, streaming through telecom does not positively influence the evolution of the digital landscape of the production of digital entertainment in India exclusively. Although, websites such as JioCinema have used connectivity power in centralized market power, the overall spectrum of media is also being redefined due to changing consumer behaviour, technological innovation, and strategies of the industry. The correlation between traditional and digital television is not that of a direct replacement but that of transformation whereby the new distribution and technologies of the screens are defining the manner in which the audiences consume content. The emergence of Connected TV (CTV) can be stated as one of the most prominent developments in this space. It has become one of the main stakeholders in the digital shift of India, moving the boundaries between television and streaming. In contrast to mobile OTT platforms which are characterized by customizable, mobile-based experiences, CTV restores the large screen, shared viewing experience by making digital platforms seem as natural extensions of the traditional television rather than substitution. The case in point is the IPL 2025, in which the price of advertising on CTV has increased by 30 percent compared to 10-15 percent on conventionally used TV and mobile digital platforms (Exchange4Media, 2025, January 23).

The dramatic increase in CTV ad rates is an indication of its constantly increasing dominance, as more advertisers realize that it has the ability to combine the coverage of television with the precision targeted of the advertisement found in digital platforms. According to Krishnan and Dharmakumar, (2025), the TV screens officially replaced mobile as the major device used to watch YouTube in the US, which is one of the signs that YouTube is the new television. The trend promotes the recuperation of television in the digital space, where streaming platforms are becoming more comprehensive in adopting the aesthetic,

form, and patterns of interaction of the traditional broadcast media (Bolter and Grusin, 2000). Instead of seeing television fall, I see it being turned into a much more engaging and interactive tool that still needs to share the traditional television viewing habits but adopt algorithms and personalized content. Connecting the principle of linear broadcasting and interactive digital components, CTV strengthens the long-term topicality of the space and social dynamics of television and inserts the streaming functions in the process of viewing home television. This convergence of the media is especially relevant to India since the television continues to dominate the Indian market and the various trends of digitization adoption by various sections of the society. The surfacing of CTV serves to highlight the shift in the traditionality of the broadcast forms simultaneously pointing to a more complex media environment in which television and streaming have been developed into two aspects of an inseparable network, a complex digital system.

The shift of television to OTT in India is not simply the scope of one medium dominating other and is better characterized in a complex and ultimately circular journey of connecting the media whereby the telecommunication, digital and broadcast come together to make a cohesive media environment. It is not just the technological transformation or changing consumer behaviours but rather a so-called radical reorganization of media power within the context of platform capitalism, concentration across the media industry and regulatory silence. OTT platforms therefore do not merely represent different media, indeed remediated legacies but in reality they socialize broadcast across the platform-centric, algorithmic, and information centric spaces. It is a conflict between content-creator and infrastructural ownership which is connected with content monetisation and distribution that they are bargaining about, without necessarily intending to. Although such platforms as JioCinema and other multinational corporations as YouTube and Netflix not only transform the behaviour of the audience to the content, but can also speak about how power is exercised within the framework of Indian broadcasting. On the whole, this is reflected as how these platforms integrate content in their proprietary ecosystems via data-

driven advertising, algorithmic visibility and entangling and embedding either content in their ecosystems to exert ownership and monetisation of content.

Therefore, the transition to OTT is not the break with television, it is the continuation of the same logic of corporate power, in which the owning of infrastructure, data harvesting, and monetization of advertising determine the new principles of media dominance. The de-politicization of the OTT leaves us asking ourselves whether we can believe that the digital platforms are democratising ownership/ access to the content because the telecom enable platforms together with the bigger international technology companies are exerting their power over the media commons via advertisement, algorithmic curation and controlled eco-systems. The Indian broadcasting digital future is not simply the growth of streaming platforms, but the more profound battle over media infrastructure, in which telecom providers and cross-global streaming giants are defining terms of media distribution and viewer interaction.

With the gradual penetration of OTT platforms into this new media format, more research is necessary to better place into account the possibilities of their ontological aspects, economic definitions and mediation of their connection with television. As much as OTT services offer on-demand, internet-based content distribution, the services do not exist in a vacuum. Rather, they are at the convergence of the broadcasting, digital media, and platform industries. A study on the existence of OTT as a revolutionary turn against the past or an increment of the long-standing progress of television assists in understanding the importance of these services to the transformations in the media industry in India.

1.1 OTT and Television: Continuities, Platformization, and Persistence

OTT platforms refer to service providers that deliver content to the consumers via the internet and do not depend on the traditional broadcasting services such as cable and satellite TV. Such services

provide on-demand access to professionally edited content (TV shows, films, and live events) whereby the viewers have greater choice of when and where to stream the media (Lotz, 2017). As digital products gain popularity and access to the internet, OTT usage enables them to access the recommendation algorithms and user information, creating the personal viewing experience (Madrigal, 2014). As these platforms as Netflix and Amazon Prime Video are seized as the monopolists of the world streaming market, they have transformed the logic of television by bringing nonlinear and on-demand access to the TV, which challenges the linearity of the television schedule (Lobato, 2019, p. 15). This shift creates a principal question of the field of media studies; the answer to which Lobato answers rather exhaustively: Are OTT sites becoming a next stage in the evolution of television, or is it a paradigm shift in the digital media ecosystem (2019)? He finds out that the position of these platforms such as Netflix is somewhere in the blind spot that lies in between continuity and disruption. Although they maintain a lot of the television traditions, e.g. the serial structure of stories, the edited catalogue, they also challenge the fundamental broadcasting traditions by introducing the ideas of algorithmic personalization, the non-linear access, the transnational distribution. He calls such service providers as Netflix the boundary objects, which challenge the already existing terms, forcing scholars to reconsider the ontological place of television in the era of platformization (Lobato, 2019, pp. 26-29). Based on arguments adduced in television analysis and platform analysis, Lobato proposes an analysis model in which the OTT platforms are influenced by much of the old media but are being increasingly determined by the computational and data-driven logics.

A major component of this discussion is that OTT platforms are not similar to other online services, including social media and live-streaming services. Whereas social media and live-streaming generate content and limit communication with viewers to real-time people responses, OTT platforms emphasize content that is professional and can be consumed on demand (Lotz, 2017; Herbert et al., 2018). Social media

platforms such as Twitch, Instagram, and Facebook have created interactive ecosystems that are dynamic, highly interactive, and creators can orientate the space around socialisation and instant involvement. Contrarily, OTT usage is more or less passive because viewers choose between some already-made content, and consumers are not engaged in creating it (Cunningham and Craig, 2019). The composition of these platforms demonstrates how OTT services preserve key features of television even during their adoption of digital distribution platforms.

More than the models of content delivery, OTTs differ in terms of commercialization, and engagement patterns to users. In the Chinese live-streaming services, such as, e-commerce has been implemented in the site, in which consumers are encouraged to shop as they watch content, prioritizing entertainment over commercial value (Gillespie, 2018). This is unlike the conventional ways OTT providers massive content delivery and subscription on demand (SVOD), advertisement on demand (AVOD), or hybrid commercial revenue mechanisms. Traditional OTT offerings have their own content consumption model, independent of platforms such as YouTube that heavily push and promote the creation of content by users as well as by professional actors. The initiative taken by YouTube to create original content, including its YouTube Originals, is arguably a confirmation of the company as an OTT platform that proves that some companies can move across categories or forms of distribution (Lobato, 2019). Such model content and commercial approaches are in flux and these substantively depict the fact that OTT services are not discontinuous category as they evolve to meet technology and audience needs.

The greatest change is a new experience of viewing, or consumption pattern, adjacent to binge-watching. In the traditional television, episodes of the show were released on a specific day of the week, at a specific time, but in OTT platforms consumers can watch episodes one after another or season after season (Herbert et al., 2018). Such versatility in experience initiates a significant difference from linear

programming and makes it even clearer that the OTT services are more concerned with viewer engagement than scheduling. Where other services provide clients the live-streaming model as a means of delivering sports and major events, OTT is a content model aimed at delivering on-demand content, which places it in a different context to traditional television and interactive media (Lotz, 2017). Although OTT on-demand services are still defining the experience of audiences, academics remain speculative about the implications of change on the frontier. They, among others, like Lotz (2017) find the conclusion that television is not replaced, services are being added to television, and that the television is being extended, enabling audiences to opt to watch non-linear programs. In the case of television studies, it represents a state of television in which non-linear programming can be made even though it is not necessary to abandon the celebrated history of television (serialized story shapes, episodic, long form type). These parallels signify the fact that the delivery process changed but the structural and narrative elements of the television remains (Tryon, 2013).

Other researchers introduce OTT platforms into the grander digital platform economy, with the focus on relying on data analytics, recommendation algorithms, and cloud-based infrastructure. As opposed to social media sites, which have been built on user-generated content and the participatory culture, OTT sites exist in a very curated ecosystem where the content is not placed socially but algorithmically (Madrigal, 2014). This contrast draws attention to the fact that the operation of OTT platforms is embedded in the broader context of platform capitalism, where the importance of computational infrastructure, big data, and algorithmic interaction is major (Gillespie, 2010). The rising popularity of custom recommendations and user profiling proves the latter even further, as OTT services are not just the heir of television as an entity but a constituent of the digital economy (Pariser, 2011; Blakley, 2016).

1.1.1 Platformization and the Structural Continuities Between OTT and Television

Among the most convincing cases to support the idea of defining OTT as the continuation of television, is the presence of the concept of platformization, which can be defined as the growing influence of digital mediators in arranging the distribution of media and the perception of content. Although, the introduction of streaming services has changed some of the aspects of information delivery to the viewers, it has not altered the essence of centralization of media network. Instead, the platformization principle has entrenched the hierarchical aspect of television with control vested on the hands of a few streaming platforms who are functionally identical to the previous television networks (Evens & Donders, 2019). The OTT platforms have reshaped the industrial relations instead of decentralizing the media environment without eliminating the key activities of television. Lotz disapproves the perception that OTT can be a drastic alteration to media by stating the fact that the applications such as Netflix and Amazon Prime Video are present in the reality of the long-established television networks (2018). The platforms control content licensing, publishing, distribution, monetisation as well as visibility to influence the content audiences view based on the algorithm of recommendations and the timing of sustainable content release. This is the historical role of TV networks, which used programming schedules to structure audience engagement and maximize viewership.

The increasing consolidation of streaming platforms also helps to support this continuity. While the early theorists of digital media saw OTT as a substitute to the centralized control of the media, scholars such as Chalaby assume that the process of the concentration of the streaming business in a small portion of multinational corporations resembles the impact of the media concentration in the television period (2023). Such companies as Disney, Warner Bros. Discovery, NBCUniversal have ended up streaming instead of being replaced by it and as a result,

traditional media conglomerates remain in their positions. This has brought with it the aspect of vertical integration whereby the OTT services dominate content production, distribution and monetization the same way as it used to be witnessed with the studio-network type of the television over decades. The use of algorithms to make the content more visible also makes the boundary between television and streaming even more blurred. The channels of traditional television are depending on the programmers and their schedulers to identify what the audience is going to engage in whereas the OTT platforms are depending on machine learning and big data analytics to curate their own custom-made content feeds (Madrigal, 2014). Nevertheless, both the models serve to organize attention on the audience, and special attention should be given to certain content, making it more visible and available compared to others. This controlled form of curated content therefore, supports the claim that OTT is an extension and not a substitution of television industrial logic.

1.1.2 Economic Imperatives and the Continuation of Television Revenue Models

Although the streaming services have effectively established itself as a disruptor that is innovative, the economic frameworks of the services are quite similar to traditional television. Among the most important instances of such continuity, one can mention the SVOD, which is a reflection of the premium cable business model of HBO. According to Strangelove (2015), platforms like Netflix and Disney obviously work like premium television channels, where subscribers pay a subscription fee to access ad-free premium content. It is a copy of the financial logic of the cable television, in which it gets the stability of its revenues by direct payments of consumers, rather than depending on advertisements alone. Nonetheless, the revival of AVOD implies that it is not the OTT that is taking over the aspects of television in reported revenue models, but a combination of both. The video streaming platforms, including Hulu, YouTube, and Peacock, have assumed the approach of dual-revenue model, which combines subscriptions with content backed by

advertisements, a business model that has long supported broadcast and cable television (Evens & Donders, 2019). The model enables the platform to increase quality of viewers as platforms are provided with premium, and free ad-supported accounts, similar to the long history of television where a distinction existed between a free-to-air TV platform and a paid platform operated on a cable.

The trends towards cost-plus production arrangements, in which Netflix provides financial assistance in content development and ensures producers a set profit margin, also indicate classic TV financing models. According to Lotz (2014), the present model is similar to television syndication whereby networks would make an initial investment without necessarily worrying about profitability among production studios. Similarly Chalaby (2023) has surveyed the role of global value chains (GVCs) in digital television that have perpetuated the economic order of dominance held by the legacy media, that is, the economic functions of content producer, aggregator and distributor are not disrupted by alternative functions.

Up to this extent, the streaming era of media ownership consolidation emulates the television history tactics of being owned by corporations. Rather than being replaced by independent digital platforms as a substitute platform to the traditional networks, the legacy broadcasters have strategically ventured into streaming. Lotz (2018) argues that such media companies as Walt Disney Company, Warner Bros. Discovery and NBCUniversal have had the opportunity to create their OTT products, thus strengthening their market position and ensuring that key media companies control the content and distribution. Hence, switching to the streaming model did not democratize media ownership, instead strengthened the economic hierarchies of television.

1.1.3   The Persistence of Television Viewing Habits in the Streaming Era

Although some researchers claim that OTT platforms have dramatically redefined the process of consuming the media, however, viewers still follow the television habits that have been internalized over the years. Bennett et al. (2011) note that digital platforms offered on-demand viewing experience but the viewers still watched the material in fixed frames such that they only imitated earlier TV viewing habits. The revival of pre-determined content release on streaming sites may be considered one of the most powerful examples of this. Although binge-watching was first perceived to be the hallmark of OTT, most platforms have gone back to releasing episodes weekly, imitating appointment-based watching. Examples of companies that have implemented this concept purposefully have been Amazon Prime Video and Disney +, where viewers are encouraged to view the content of one season at a time but to remain engaged throughout the season (Lotz, 2018). Such practice resembles the traditional television which viewers watch at certain times to enjoy their favourite shows, which supports the thought that OTT services do not reject the television structure but rather modify it.

Live-streaming has also become a significant part of OTT convergence with television. There has been a strong emphasis on live sports, news and reality programming on platforms like Disney + Hotstar, YouTube TV and Peacock, implying that viewers still prioritize live, communal viewing processes (Bennett et al., 2011). Chalaby (2023) goes a step further to claim that event-driven programming: live sporting events, award shows, and political debates is the focus of audience activity, and that live TV has not been displacing its streaming counterpart. The growing use of CTV devices also highlights the fact that people continue to stick to the traditional habits of watching television in the digital era. The article by Spigel (2008) demonstrates that the media consumption interface has been made to be dominating through the television screen by means of smart TVs, digital set-top boxes and

streamers like Google Chromecast, Apple TV, and Amazon Fire Stick. Rather than going all the way into mobile and personal computing devices, viewers continue watching OTT material on the television screen. This also confirms the view that OTT services work to become a part of the existing television watching instead of cutting across them.

1.1.4 Television's Influence on the Digital Media Landscape

Besides the audience behaviour and revenue model, there were scholars who opined the influence of the legacy of the television over the digital media platform evolution. Grainge (2011) discusses how the notions of ephemerality on television have also transferred onto digital media formats through programming streaming services which have given access to large bodies of content on-demand whilst simultaneously 'churning' out content materials and swapping out of accessibility often. Television has traditionally been pegged on programmed scarcity which offers content as a means of creating artificial demand. Similarly, Mehta (2020) cites the manner in which structured television programming has made the shift to creative talent into OTT/streaming. Storytelling formats which have been developed in television have also been applied in these platforms. OTT has not only strengthened or superseded television forms but has also offered a new outlet for stories and narratives that cannot conform to the structural codes of televised programs.

Chalaby (2023) continues this argument by stating that the growth of television into a global product has been influencing the transnational distribution strategies in OTT. The expansion and ability to stream content as a way of distribution began with the introduction of the satellite broadcasting, the introduction of cable networks, the introduction of global syndication agreements, starting in the late 20 th century. Streaming has found its niche not replacing the traditional television networks, but it actually makes use of familiar infrastructures and international channels of media. This helps to reaffirm the theory that streaming is merely the second phase in the internationalization process of television, and not a disruptive concept. Streaming has certainly

transformed how users consume and interact with media content, although its structural sectors, income policies and methods of appealing to audiences are over-and above hooked to the tradition of television. The existence of television-like financial formulae; that the viewing together still provides an appointment; that live TV formats still prioritize the involvement of the audience; and that streaming is provided through linked television portals proves that streaming is not the end of television, just continuing its development in a digital ecosystem.

Traditionally, the changes in the media are usually perceived as radical ones, but the changes are more often the long-term evolution instead of sudden change. On the same note, just like cable TV, e.g., never replaced analogue TV broadcasting, but rather, it built on it. Similarly, OTT is not the indicator of disappearance of television, but its further evolution in digital terms. By applying the OTT knowledge to television studies, provides a firmer frame to the purposes of analysis regarding the economic, regulatory, cultural effects of OTT on the media environment, and that of OTT as an addition to the overall way that television has changed. Taking OTT as a kind of a continuation of TV placement allows the scholar and policy-makers to understand greater the power relations of the digital content delivery, the continuation of corporate media, and the regulatory challenges of the media systems based on platforms. Instead of having to consider television and OTT as the rival forms of media, the latter can also be regarded as the convergent elements of the same media environment, whereby the conventional institutions will have a hand in shaping the future of digital entertainment.

In order to effectively analyse how the development of the OTT platforms has been an extension of television, one will need to evaluate the process of the historical development of the Indian television itself. The state controlled television, the satellite television, the privatized television, and lastly the development of the digital television have all experienced the Indian television industry. It is a relationship that has

been dynamic in accordance to the changes in technology, the demand of an economy and the shift in regulations. This historical document gives us the essential background to see how television has developed with the course of time. OTT is merely the recent novel in the history of television and not a radical one as many would want it to be.

1.2 The Evolution of Indian Television

Television is not a stable medium, whether it was the state television, commercialization or upheaval by the digital world, it has always been a subject of change with the technological shift and also subject to the control of the state, as well as the cultural production. In contrast to the cinema that used to be considered an escapist form of entertainment, the television was seen as a tool of nation-building, mass education, and cultural assimilation (Sen and Roy, 2014; Rajagopal, 2001). Nonetheless, the entry of satellite broadcasting in the 1990s and emergence of private networks displaced the television out of its mandate of providing public service and transformed it into a consumer-oriented sector governed by the logics of market and advertising income and targeting (Mehta, 2008). This change preconditioned further changes of the 21 st century when the actions of digital convergence and the development of OTT platforms started to undermine the conventional basis of television.

The introduction of 1959 Television in India was in the form of an experimental project. The Indian government was also very strict in regards to programming in its initial decades whereby the television content was to support its development agenda. In 1975, it collaborated with National Aeronautics and Space Administration (NASA) in the Satellite Instructional Television Experiment (SITE). An example of this vision was done by NASA through the help of television where it was able to deliver educational programs on health, family planning and agricultural practices to the rural population (Rajagopal, 1993). In contrast to the commercialized version of the Western broadcasting, Doordarshan was a kind of a branch of the state, strengthening its grip on the social discourse, and putting entertainment options in the second place (Ninan, 1995).

The television after this time was development based but still concentrated in the urban and elite controlled areas with little accessibility in out towns. The expensive nature of TV sets and absence of a widespread transmission system ensured that majority Indians depended on community viewing in educational institutions, government institutions and rural community development centres (Rajagipal, 2001). This limited scope echoed the larger infrastructural and economic constraints, which reinforced the gap between viewers of cities who had access to standard programming and those in rural areas who still were exposed to television as a new concept. Television sets were also a luxury item and even in urban areas the content was controlled by state institutions instead of ownership by individuals. The control of the distribution of television by the state made it be concentrated in advantaged spaces such that its potential could not be really a mass medium. During the Emergency (1975-77) Doordarshan was openly used as a propaganda vehicle with content that reinforced policies of Indira Gandhi and quashed other sources of opinion (Page and Crawley, 2001). Meanwhile, there was a change in the economic pattern of the television, with the slow surfacing of commercialization indicating the preliminary process of commercialization (Mehta, 2008, p. 79).

The year 1980s saw a major transformation with Indian television no longer being confined to the developmental concepts but the idea of entertainment taking the main role in drawing audiences. The visual appeal of the medium dramatically changed with the adoption of colour television in the 1982 Asian Games and greatly increased the audience of the medium (Ninan, 1995). The middle-class ambitions and social struggles were found in the serials, like *Hum Log* (1984) and *Buniyaad* (1986) that prefigured a transition away surprising simple instructional programming to a more character-oriented story that found the echo in domestic viewers (Mankekar, 1999). Nonetheless, *Ramayan* (1987) and *Mahabharat* (1988) were the ones that proved television as an undeniable mass cultural phenomenon. These serial epics gained historic viewership resulting in television being a ritualistic and shared experience. These shows were closely connected to religious and cultural identities, unlike

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the earlier developmental shows which strengthened the idea of television as an influence in developing the collective memory and the conscious of the nations (Rajadhyaksha, 1990). They had an influence not just on entertainment but also on the power of television in the ability to bring people together, preserve certain cultural habits and influence the national dialogue.

Although this increased focus on the entertainment industry, Doordarshan remained monopolistic with respect to the programming content; content was adjusted to the interests of the state. Demand however was rising on more varied content and vigorous television industry that opened way to structural changes. The history of Indian television took a turning point through economic liberalization in 1991 when the government enacted the "open sky" policy which enabled the entrance of the market by the other players and the monopoly of Doordarshan was cultivated (Sinclair and Hemphill, 1997: 13-21). The birth of Zee TV in 1992, Star TV and Sony Entertainment Television changed the nature of content production and consumption with the emergence of satellite television (Mehta, 2008, p. 79). In contrast to Doordarshan, which was funded by the state, the performance of the private networks was based on the principle of advertisements, which resulted in a surge in the number entertainment programs that helped increase commercial incomes to the maximum. The 1990's established the transformation of television as a state-owned industry into a competitive industry where commercial interests and the demands of the audience defined the approaches to content.

Another event of the 1990's decade was the Indian IT sector that boomed after an economic liberalization. Such enterprises as Infosys and Wipro became the members of the global software market, enjoying such policies as the promotion of technological development and inflow of foreign direct investment(Rajaraman, 2015). The technological growth created the basis upon which convergence of the internet services with the traditional media took place or place where digital infrastructure was taking over the television, as well as media consumption pattern (Chandrasekhar, 2006). The concurrent era of IT and individual TV

operators preconditioned digitization of Indian television, which finally resulted in the leading position of OTT services.

During the growth of the satellite television, foreign television companies like Star TV started with the broadcasting of the western content but soon acclimatized to the Indian market switching to the Hindi language based programs in order to reach the local markets (Thomas, A. O., 2005). Segmentation of the television viewers also increased as a result of which the channels attracting certain groups of demographics like music-oriented channels like MTV India, Bollywood-oriented networks, and network dedicated to the news began to emerge. Television was turned into more consumer-oriented, responding to the demands of the audience instead of state orders. The 1990s also saw the introduction of cable television that increased consumer choice by allowing the households access to a number of private channels. Cable TV was also very decentralized and competitive as opposed to the Doordarshan's terrestrial network since its channel relied on local distributors. With the advent of the pay-tv in the late 1990s and early 2000s, there has been an expansion of premium content and this has solidified the move away from state-funded broadcasting to subscription-based industry.

Further development occurred in the television sector with the introduction of the DTH satellite services in the year 2003, which enabled the management and control of the viewing and consumption (Thussu, 2005). The shift of analogue transmission to digital transmission enhanced the quality of viewing by increasing picture clarity and sound in between 2004 and 2005. This was again enhanced when high-definition (HD) channels were introduced in 2010 and this helped in meeting the growing needs of consumers in regards to quality. Reality television also got its share in the 2000s and introduced novel interactive formats, as well as acquired closer interaction with the audience. The television programs like *Indian Idol* (2004) and *Bigg Boss* (2006) moved the frontiers of television as a market place by having a voting system as well as SMS interaction with the viewer (Punathambekar, 2010). The reality TV pushed the entertainment further to the social context of discourse as contestant's background sparked discussions about their

cultural or regional affiliation at the national scale (Kraidy & Sender, 2011). In this period, the expansion of 24-hour news channels provided a space for political discussions.

During the period of 2000s, the traditional television started to merge into the development of the digital television through its introduction of the Internet Protocol Television (IPTV) and the use of DTH. The emergence of IPTV and digital television through DTH where there were smooth transitions between broadcast and television into digital media formed the platform upon which the hybrid media system in India is developing. But, another requirement to convert all systems to a digital broadcast marked the biggest difference between the analogue and digital broadcasts with the introduction of Digital Addressable Systems (DAS) in 2011. This not only enhanced the quality of the content but also drove the interactive capabilities such as video-on-demand and made the television to have the same digital experience with the new OTT media (Kumar, S., 2019). As of 2017, it is estimated that 90 million households in India had switched to digital television but there was still a digital divide in the rural household (Kumar, S., 2019).

In the case of television, it is arguably at the stage of market saturation never before witnessed by the early 2010s. The introduction of digital cable services in addition to the digitization requirement of the government in 2012 converted the access to television to more reliable quality signals that were less reliant on the analogue infrastructure. But with the growth of the television, it has become commercial in nature. Subscription models were strengthened through the introduction of set-top boxes (STB) as part of the digital switchover changing the basis of revenue collection not on ad-based networks. Even with such technological advancements, these changes were accompanied by increased concentration of media in the hands of a small number of conglomerates, which cast doubts on the editorial autonomy and politicing of the media (Devi, 2022). In the meantime, the rise of the regional television networks was still gaining ground and was meeting the language and culture needs of the country. Regional oriented contents such as Sun TV in Tamil Nadu, ETV in Andhra Pradesh and Asianet in

Kerala were a spotlight of the growing importance of regionally oriented content (Thomas, P. N., 2010).

Although TV broadcasting in the first decades of its development was a unifying component contributing to the integration of the nations, growing disintegration of the viewing in the language and genre-specific channels was a pointer to the transformation of television into a more polarized experience. Introduction of infotainment, commercialized contents and the sensationalization of news content was a break with the early purpose of television, as a medium of education that was state owned. Rather, television turned into a commercial industry that was functionally defined by advertising, ratings, and business personnel. Although television worked hard to transform its priorities basing on the market, it nonetheless played a crucial role in culture and politics. The trend of the television as a single-channel public services to a commercial industry is symptomatic of the economic policy shifts in India, both in terms of regulatory policies and media consumption. The power of television to transform at the same time preserving the same and impacting the public debate is representative of the significance of television to media ecology of the country.

The media ecology in India experienced a radical change that was marked with experimentation as new players emerge, new business models are formed, new technology formed and the ways of production and distribution of content was changed. The shift was facilitated by the fact that the Indian government was shifting to a Digital India project (2015) to maximise access to broadband, optimise digital infrastructure, and expand access to internet connectivity to both urban and rural citizens (Mukherjee, 2018; McChesney and Schiller, 2003). The digitisation roll out policy was just when mobile networks were in a fast track to provide better connectivity especially the introduction of faster 4G networks that were made more attractive to broadband connectivity.

Digital media, the biggest of which was YouTube which was launched in 2008, became a disruptive power offering a free, accessible platform that democratized content-creation and also evaded entry through the traditional gatekeepers of broadcast. With the emergence of

YouTube, the independent content producers such as TVF and AIB had a chance to establish themselves and attract the attention of Indian youth by providing innovative and youth-centric content that mainstream television had largely overlooked. TVF was started by Arunabh Kumar in 2010 who has been rejected by the traditional networks and soon had a fan base due to shows like *Permanent Roommate* (2014) and *TVF Pitchers* (2015) (Fleming, 2016). Similarly, the Indian comedy had been redefined by AIB, with its biting satire sketches and social commentary, reaching an urban audience that is digitally inclined (Sharma, P., 2017). Their accomplishments demonstrated the promise of internet-based content and exemplified the initial outlooks of a new cultural economy through digital engagement - a phenomenon that was later conceptualized by Henry Jenkins (2006) in his convergence culture.

At the same time, the traditional broadcasters started to realize and test the digital distribution. The big players such as Star Plus, Colors TV, Zee TV and Sony Entertainment Television had initial digital experimentation that were less risky in nature by uploading the episodes and selected clips in YouTube. It has enabled them to gauge the extent of their attention on the audience and understand better the dynamics and interaction of the digital consumption process (Burgess and Green, 2018). The experience of such early experimentations aroused a strategy shift: broadcasters no longer considered YouTube as the only auxiliary platform and developed their own devoted OTTs. Star developed an example in 2015 of Hotstar which is a conglomeration of a vast collection of its television properties and on-demand, flexible streaming service. Hotstar pioneered the new format that also made use of lucrative rights to the sports broadcasting such as the IPL was a polar opposite of the linear scheduling and was a demonstration of how legacy broadcasters would rebrand to fit the digital age (Kohli-Khandekar, 2021).

The introduction of Reliance Jio in the telecom industry in 2016 was one of the turning points of this change. Jio was able to speed up the level of digital adoption by providing free 4G data and disrupting wireless internet prices and introduced millions of new customers to the online Indian ecosystem (Athique and Kumar, A., 2022). This

phenomenon extensively influenced the media sector, which triggered the consumption of OTT and pushed the broadcasters with a strong legacy to enhance their presence on the Internet. The universal access to low-cost and high speed internet triggered a geometrical increase in streaming especially among mobile-first customers, leading to the further shift of the industry on-demand, data-centric content delivery (Mukherjee, 2018).

The variety and richness of the digital media environment in the country can be seen through the example of Indian OTT market, including JioCinema, Hotstar, ALTBalaji, MX Player, Eros Now, ZEE5, and Voot, Sony Lives, YouTube, Netflix, and Amazon Prime Video. Initially, MX Player was used as a video player but it has evolved to the full-fledged OTT system, a free ad-supported business approach was designed to meet the needs of the price-sensitive Indian audience, with more international and local content. ALTBalaji entered the scene with the edgy and unconventional stories like *Gandi Baat* (2018) and *Ragini MMS Returns* (2017), which hint at a connection with the erotica and horror genre, both of which pushing the boundaries of tradtional media content. This type of programming took advantage of the innovative licensing of OTT in which niche audiences were receptive to consume something that would be unavailable on traditional media. Eros Now also enjoys the rich heritage of cinema in India and offers as a catalogue of program content, Bollywood movies, and original shows, which combines both classic films and the distribution of digital media. Other platforms like ZEE5 and Voot, also supported by Zee TV and Viacom18, respectively are assisted by the huge library of television shows and simultaneously provide original content that is showcased in various languages. This intersection of TV and OTT is manifested in their combination of catch-up TV, regional content, and exclusive content. SonyLiv is an extension of Sony Pictures Networks India; the brand relies on the well-known brands of its parent company and concentrates on programming which comprises of live sports and classic entertainment which creates areas to view programming both streaming and linear TV. Simultaneously, YouTube is also a significant participant in the OTT

arena because it is associated with user-generated content and has developed a large base of professionally produced content using music videos, social web series, and regional content. There are also popular global platforms such as Netflix and Amazon prime video, which have huge content repositories, and have tailored localization policies to the India audience, creating tough competition for the national OTT players.

This era also be the time when business model experimentation would stretch the limits of the traditional pay TV model. The traditional television was mainly run on a fixed rate subscription and on-demand programs. Increasing digital platforms, AVOD and hybrid models were implemented that comprised subscription income and advertising targeting (Cunningham & Craig, 2019). This situation of streaming services being bundled with telecom offerings (like Jio bundled JioCinema with its mobile and broadband plans) disturbed the conventional price modes, and content access-related audience expectations, as well (Parthasaratith, 2023). Such models were specifically applicable in a price-sensitive setting like India and were more flexible to broadcasters that offered them a wider range of revenue and response to the financial penchant of their audience.

Social media further enriched this dynamic period, producing interaction viewing and immediate contact with the audience. Facebook and Twitter became more participatory and, though platforms like Tik Tok would emerge later, it was the kind of interaction that promoted more of a participatory culture. This interactivity helped to support the various types of engagement of the content with the audience, including likes, share and comments to provide creators with direct feedback and implement the information in content strategies, which were thoroughly analysed by Sangeet Kumar (2016). Simultaneously, CTV turned out to be another important step of promoting consumption/use of TV. The drop in price of smart television as well as the streaming devices such as Amazon Fire Stick and Google Chromecast allowed consumers to watch and easily integrate the online programs to their television watching behaviours. Rather than the acculturation of digital expansion basing on

mobile consumption, CTV presented yet again a focus on big screen and living room watching with the modification of on-demand content.

Subsequently, Mehta and Valdovinos Kaye (2019) observed that this era provided a co-existence of two categories of content: professionally created industry content and a grassroot digital media. Independent content creators, including TVF and AIB, who started on YouTube and then gathered massive viewership, started their own production houses that in turn started collaborating with the new OTT platforms where the boundaries between amateur and professional production were further blurred. These digital-first companies built their business strategies based on social media interactivity, community and viral content strategies, unlike legacy broadcasters who initially viewed digital platforms as an experimental channel. Telecom-based streaming platforms, including JioCinema and Airtel Xstream, also became dominant players in this shift with the purported infrastructure control using this to bundle content with the mobile and broadband service offerings. Telecom and media convergence altered how content is distributed, where the telecom companies not only offer a channel through which the media are transmitted but the telecom companies influence the production, licensing and advertising policies as well (McChesney and Schiller, 2003). Their shift was the ultimate democratization of the content creation process, in which new technologies and novel forms of business allowed creators to circumvent the traditional channels of communication to access their audiences directly.

Contrary to the belief that it is a disruption that violated the concept of television, OTT platforms have, expanded it and remodelled its core structures. It is not the replacement narration of digital streaming TV by the old-fashioned one but rather the face of customization of it; in which platformization, economic pressure, and habits of viewing have all guaranteed continuity rather than disruption. As much as OTT platforms have offered alternative channels of delivering content, their branding, business processes, and practice of engagement are almost similar to the older forms of television. Similarly to how the television rating points

(TRP) ratings assessed the number of people watching TV and how much companies paid to advertise on TV, OTTs are using advanced user data analytics and algorithmic suggestions to assist in personalizing video consumption, as well as maximizing the retention of their audiences (Lotz, 2017).

The long-format television programming which relied on the set time-frames has been filled with void of on-demand programming which literally is the same thing provided by cable television which allowed the viewer to have more freedom in choosing what to watch and even allow them to avoid channels or advertisements. Telecom operators are also beginning to develop into audiences as part of their content distribution and programming including the JioCinema in India which packages its film and television offerings with those of Jio telecoms implying another structural change of traditional broadcasting to platform-based gatekeeping. Therefore, the telecom and technology companies can now control the access to the infrastructure and content.

In spite of these continuities, OTT unlike the broadcast television that needs analytic adaptability, is different in various ways. An example of this is that OTT platforms have a worldwide subscription, with Indian content being made accessible to an international audience with an Indian viewer also being exposed to the imports of programming made by other countries. The movement of the content across national boundaries is a basic challenge to the historic domestic orientation TV had been steeped in with apprehensions of homogenisation of culture and recruitment of localisation efforts. Besides, the relations of constitution in a legal code do not define OTT platforms which have not been carefully regulated like the television has. Without clearly defined legal questions such as regulated content, and censorship, a lot of questions are perceived regarding accountability. In accordance with that, as opposed to the television networks, which are controlled by the Ministry of Information and Broadcasting, OTT platforms have mostly been left to self-regulate, which has brought about content regulation and digital government debates.

Discussion about OTT platforms as movements or occurrences in the historical flow of Indian television can offer viable frames of reference to analyse them as a consciousness of their shift in– the technology, the distribution infrastructure, the experience of users. While the platforms have changed, this has happened without the radical shift in the broadcasting and viewing economy. The technological affordances of OTT, like access to interactivity, discursive and algorithmic personalization of the content, interoperability between devices are new; however the popular economics in the segmented audience, advertising and corporate consolidation is not a novel pathway of the broadcasting system. It is more fruitful to argue against OTT as disruptor, but, as an overlay of the existing interim system in India, as a critique of how products of technology and consumer corporate practices are compounding the current one instead of destroying it.

However, all digital video platforms don not have the same path or pattern; as YouTube is a fundamentally different model, not only in comparison with the principles of broadcasting, but also with the shifts on an institutional level, numerous questions arise concerning categorization, approach, and demarcation. It founded on an entirely new paradigm, as I will show in the following section, challenging traditional broadcasting paradigm and institutional change. This puts serious questions on how we categorize, analyse and define OTT platforms.

1.3 Too Vast, Too Fluid: The YouTube Conundrum

YouTube has become the most notable and most popular digital video service in India to interfere in the broadcasting and streaming ecosystem. It supports a gross of more than half-a-billion users in the world, and India comprises the most percentage of users. Mobile first design with free access and support to communicate in a variety of Indian languages contribute to the successful operation of YouTube. It has become entrenched in the digital practices in both socio-economic classes and geographical locations. In contrast to OTT platforms like Netflix, Disney+ Hotstar, or JioCinema, which are run under the framework of a curated service, featuring subscription-based business models, YouTube

is a wide-ranging environment of operability combining streaming, social networking, search, and user interaction capabilities (Mohan and Punathambekar, 2018).

The impact that YouTube has had in the Indian scenario is hard to overrate. It is the turn to site of literally everything such as devotional videos, cooking instructions, education options, short films, breaking news, music videos, humorous sketches and political commentaries. The lack of barriers between entertainment, information and learning as well as its genre elasticity and perpetual stream of personalized recommendations allows users to seamlessly move through all of these. According to Amanda Lotz (2014), such websites as YouTube are the era of the post-network, where users have greater control over their media experience, being unimpeded by broadcasting time and high-value subscriptions. The other importance of YouTube is the fact that it is the birthplace of the Indian creator economy. It was the big stage to the currently established ones like TVF, AIB, Bhuvan Bam, and CarryMinati who transformed digital entertainment by having humour, relatability and cultural specificity. These pioneers introduced web-native content forms that were frequently cited by individuals, not created through the aegis of such bodies as television studios or film corporations. Such creators are not isolated examples since they represent a new form of media that is often referred to as "social media entertainment" by Cunningham and Craig (2021) this type of media incorporates individuals who are brands, entrepreneurs, and producers at the same time. This ecosystem which is centred on the creator contrasts with the OTT models which are fuelled by corporate commissioning and vertical integration.

One of the most powerful elements about YouTube is that it has an architecture of interactivity and personalization. Community posts, likes, comments, sharing, subscribing, and shared comments are some of the features that facilitate participatory culture. The audience is not only an object of offering but an actor of making appearances and involvement. The two-sided nature of YouTube, according to Gillespie (2010) is that it is both a neutral platform and a gatekeeper: of pushing, pushing down and monetizing content based on underlying logics. By so doing,

YouTube is not merely a delivery service but an infrastructure force that dictates success in content. Another important role played by YouTube is its role in the ecology of regional and vernacular content. Its algorithm system allows cultural localization and the video in Tamil, Telugu, Marathi, Bengali, Bhojpuri, etc., blossom. In their argument, Mohan and Punathambekar (2018) claim that YouTube promotes the idea of cultural regions by introducing the adjacent content to local viewers, as well as linking local audiences to the global content channels. The way it has been able to respond to the multilingual and mobile-first environment of India has brought YouTube into an everyday media usage routine that has influenced how individuals utilize media to access entertainment content, education, and discourse in general.

Nonetheless, as vast as it may be to this study, YouTube falls outside the scope of this study, as it specifically focuses on institutional change of the legacy broadcasters into OTT services, i.e. Balaji Telefilms into ALTBalaji, Star India into Disney+ Hotstar, and Viacom18 into JioCinema. These take the form of organized industrial changes that entail change in production logics, revenue model, regulatory framework and audience engagement policies. They symbolize platformization and depict the definite trends of corporate pathways and reform. In comparison, YouTube did not come out of the broadcasting sector. It is an indigenous web platform, which is subjected to platform capitalism and controlled by an international technology corporation (Google). Its very nature of operation, open publishing, decentralized content, algorithmic curation, and advertising as a monetization model makes it very different compared to the ex-TV broadcaster SVOD or AVOD services (Athique & Parthasarathi, 2020; Lotz, 2014). Freek Vermeer (2011) argues that YouTube is being *televisualized*, which is taking on the elements of television, including genres, flow of events, and serial, though it continues to have a hybrid ontology that is neither television nor OTT.

Besides, the analytical instruments required to examine YouTube, e.g., platform governance, algorithmic visibility, participatory culture, and audience labour are different than those applied to analysing media

institution and industry convergence. Even the application of YouTube to view trailers or provide response to an OTT clip counts as a paratextual activity that is in need of being analysed via the theories of viewer interactivity and networked culture, as opposed to institutional transformation, as Sai Diwan (2023) remarks in his dissertation on streaming audiences. Involving YouTube as a full case study would thus necessitate a radically different approach of methodology as well as the increase of scope of research, which would make the study lose the narrow comparative analysis which has been the main focus of this thesis.

Altogether, one can say that the YouTube is at the core of the digital media in India and one of the leading sources of cultural, technological, and economic innovation. It is stamping the content production, viewing, and distribution in the streaming market. However, its hybrid character, globalization of form, and decentralization of logic of production place it out of the specific analytical purview made by this thesis that is interested in the institutional change and platformization of the old media entities. Though the use of YouTube has been mentioned as an example of comparative reference point in pursuance of the thesis, however, one can state that the core analysis will revolve around telecom-supported platforms and platforms, originating in television which were facilitating convergence in forms. To carry out such convergence analysis, a theoretical background will have to be developed and take into consideration the political, economic, infrastructural and regulatory factors involved.

1.4 Theoretical Framework

The digital media environment in India is experiencing a radical shift, which is based on the integration of the traditional broadcasting and telecommunication infrastructure coupled with digital media. This is not just technological, hence, it is providing a concentration of power in the media; the parties that operate the architecture are those who are heavy handed in determining how to exercise the market, the privilege to possess an access to the audience as opposed to just owning the content.

With these changes in mind, this thesis will elaborate an interdisciplinary theoretical approach to the political economy of communication (PEC), media convergence and regulatory silence in general. All these will give provisions to comprehend re-composition of streaming context of the Indian media business through corporate consolidation, infrastructural control, and selective regulatory inaction.

1.4.1 Political Economy of Communication (PEC) as the Foundation

Political economy of communication (PEC) approach will provide an alternative analytical stance through which the transfer of power in the India media business can be critiqued between content creators to telecom-delivering platforms that will have control over the distribution system. Following the arguments of scholars (McChesney and Schiller, 2003; Mosco, 2009; Golding and Murdock, 1997), the media industries are put in capitalistic market structures in which economic power can determine accessibility of the content, nature of the content, and audience reach. This aspect of the argument is particularly vital in light of the idea that in India, the streaming context is being formed with Reliance Jio emerging victorious in the market of telecom infrastructure, transforming the market of the media economy. In contrast to other, older broadcasters like Star, Sony, whose business models relied on the use of satellites and pay-tv subscriptions, JioCinema represents a novel paradigm where the control of digital infrastructure overtakes the traditional ownership of content as the key to market dominance.

As an example of this McChesney and Schiller use the example of corporate conglomerates that are increasingly monopolizing their content production and distribution systems whereby they can control who can access the media (2003). In India, which is observed through the development of Jio, infrastructure control is an instrument to acquire influential footing within the digital media marketplace and to influence content pricing, viewership, and the competitive scenery. One of the ways JioCinema has violated that pay-tv paradigm would be the fact that they chose to stream the IPL free of charge. This free streaming of the IPL was

a direct challenge to other competing models including the subscription based model of Disney+ Hotstar which required subscription fee to stream the content. The fact that the ownership of infrastructure had a lot to do with shaping market relations can be traced on the case of the overthrowing of the pay-tv and subscription model by Jio. This backs up the deliberations of that McChesney and Schiller put forward that deregulated media markets are an avenue where corporations can amass powers against competition and market heterogeneity (2003).

Golding and Murdock (1997) also build on this point with regards to the functions of vertical and horizontal integration with the support of media concentration. Vertical integration refers to taking of different levels of production and distribution of different media whereas horizontal refers to purchasing of other players with an aim of removing market competitors so that access to advertisements and licensing is achieved. The growth of Jio media follows both model, as they control telecom networks, the fibre-optic broadband and cloud-serviced (vertical integration) and then have acquired or merged streaming services (Disney+ Hotstar) to their infrastructure-based business operations (horizontal integration). Greater media concentration to vertical and horizontal pools may eradicate the layers of intermediation of production and also reducing consumer mediation to a limited number and reducing consumer choice regarding the platforms they are engaging with in regard to content. According to Golding and Murdock, corporate concentration compromises the ideals of media pluralism and serving the benefits of the public and reduces the availability of diversity and an alternative choice (1997).

Mosco's (2009) commodification, spatialization and structuration are also used to offer a framework on which the economic logic of the shift can be explained, in lieu of ownership structures. Commodification signifies the process of turning the cultural goods including movies, television programs and live sports into profit-making commodities. Instead of the old TV business model that is typically subscription-based and relies on advertising, in a data-driven media economy, JioCinema focuses on user behaviour, user engagement rates, and online

advertisements as the power behind the monetization. Jio provided IPL streaming free, which means that not only was it a service but Jio used it to gather and use huge consumer data to optimize advertising strategies and cross-sell its telecom and e-commerce solutions. This is consistent with the idea that Mosco points out, in support of the infrastructural dependencies, in the digital age, media business houses are more actively turning the viewer data into a commodity and not merely the content though, (2009).

The idea of spatialization, the increase in the distribution of the work of media companies over geographical and institutional space, also speaks in favour of the infrastructure advantage of Jio. This is contrary to the UK where the expense of satellite transmissions, carriage agreements, and local laws restrict the operations of the broadcasters; Jio works in the digital economy, which is boundaryless; any JioCinema content distribution would be seamlessly incorporated in its more extensive telecommunication system. The advantages of Jio compound as JioCinema can access viewers at low cost than the established pay-tv networks and as the new technology of CTV as a second screen viewing platform develops. Van Dijck et. al. emphasize the rising role of the digital infrastructure to become gate keeping mechanisms of controlling access to content and monetization the nature of the communication Jio, is utilizing its infrastructural dominance and ensures its share of the mobile consumption market (2018).

Looking more closely at the structuration, where regulatory, as well as institutional structures define the media power structures, describes how the idea of considered silence, developed by Parthasarthi, could be applied to the example of Jio (2018). The control over the lack of action has enabled the telecom-sponsored platforms to capture the Indian media industry. Telecom OTT services such as Jio, as well as those funded by telecom companies, have less regulatory controls than do other types of broadcasting, which integrates licensing payments, spectrum expenses, and content control. This unequal regulatory space has created an unequal playing field in which traditional broadcasters have been confined within the old restrictions and finding themselves leave to platforms funded by

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telecommunication companies in their capacity to adapt and operate and benefits financially.

The shift of a media infrastructural ownership is a radical change in the Indian media economy. In the past, media companies fought against each other based on media purchasing ability; that is, film and TV studio or sports leagues. However, Srnicek (2017) goes further and states that in platform economy, the possession and the power of distribution is more desirable than the contents since it gives companies control to access, control prices, and arrange monetization. This is evidenced by the fact that Jio has been able to pack premium content into its mobile and broadband offerings therefore trapping consumers in its ecosystem and also it is becoming harder and harder to be a standalone OTT platform. According to McChesney and Schiller (2003) those firms capable of having the distribution infrastructure also have significantly more power than companies producing the contents a fact we witness being played in the Indian streaming market today.

Whereas much has been studied regarding media concentration and platformization, no one has understood how telecom-supported OTT platforms are altering market power in India. The bulk of the academic studies of political economy of media have concentrated on the conventional television, the newspaper business, or international streaming services such as Netflix and YouTube, but little of the academic research has been directed at investigating when the telecom players will connect content and infrastructure so as to have a stranglehold in the digital entertainment markets. This gap will be filled by this thesis by focusing on the case study of JioCinema in attributes of business model membership during a period of platformization through telecom as a key source of market power where ownership of infrastructure, and not content has become determinants of power. The ideas of McChesney and Schiller (2003), Mosco (2009), and Golding and Murdock (1997) are utilized in formulating how the forces of corporate consolidation, the imbalance of the regulations, and the infrastructural control are reorganizing how competition and media diversity as well as the access of the audience in the streaming industry are being redesigned

in India. It also offers a contribution to the growing body of literature on telecom-media convergence that is a complex approach to conceptualizing interactions between corporate strategies, market consolidation and policy gaps in relation to influencing digital media power. Ultimately, the thesis proves the point that the change in media power is going to continue to transform the content access, competition and regulatory power in India well into the future.

1.4.2   Media Convergence

Media convergence is a dynamic process being built around the effects of technological advancements, restructuring of industries and amendment of regulations that have effects in the production, distribution and consumption of media. This thesis mentions the phenomenon of media convergence in India, in which the process of convergence is determined by the interaction of the traditional broadcasting, digital streaming and telecommunication with the referral to some of the most significant theoretical approaches of convergence culture (Jenkins, 2006), platformization (Nieborg and Poell, 2018) and corporate consolidation (Doyle, 2002; Winseck, 2011).

According to Jenkins, convergence culture is defined as interaction of old and new media which are present in more than one platform and not in perspective of substituting each other (2006). He argues that audiences engage with content in an interconnected media environment that results into the shifts in creation of content, distribution and user participitation. This to appear particularly timely in the case of an Indian setting as television channels, video on-demand and telecommunication converged and thus making it feasible to have hybrid expositions of live television broadcasts, video on-demand archives and an algorithmic-based interaction with users. Dwyer explains that convergence in media is an organisational redesign which happens as a response of the market where industrial practices are diversified to respond to consumer behaviour and business models (2010). This aligns with the growth of Indian OTT platforms like Disney+ Hotstar, ZEE 5 and SonyLIV that

extend legacy broadcasters into digital environments without replacing the current television frameworks.

Another feature of media convergence is platformization, in which the process of digital platform mediate and control content flows through an algorithmic practice based on the user data in even greater multi-sided marketplace (Nieborg and Poell, 2018). Platformization enables telecom providers, streaming platforms, and content creators to exist in closed digital ecosystems compared to traditional media which depended on the linear distribution models (Helmond, 2015). In a case of India, telecom led SVOD services, i.e. of JioCinema, Disney + Hotstar and ZEE5 are examples of technologies where the digital platform is not merely a distributor of content, but also a fundamental determinant of access to the market, visibility and monetization.

Whereas researchers such as Nieborg and Poell (2018) place more emphasis on the economic rationale of platformization, Lobato (2019) examines the platformization of services such as Netflix by taking advantage of the overall platform economy, or more precisely, using its global, internet-based structure to circumvent nation-specific rules and dominate the traditional markets in the field of media consumption. These processes are part of the very unequal competitive landscapes in which a few powerful middlemen control the distribution of the digital content. The case of the Jio-Hotstar merger can be seen as an example of such a change, in which telecom infrastructure, digital content, and algorithm-based engagement between the user and the company are placed in one corporate ecosystem because of which the monopolistic control of the convergent media environment in India becomes even more concerning (Athique & Parthasarathi, 2020).

Though platforms supported by telecom are leading in the Indian digital landscape, the example of ALTBalaji proves the existence of another possible model of convergence; not based on telecommunications but on content. ALTBalaji is an Indian based company owned by Balaji Telefilms, which is one of the largest companies dealing in production of television. It is an example of the legacy content creators seeking to transcend the television and enter

direct-to-consumer streaming. Rather than riding on an ecosystem sponsored by a telecom like JioCinema and Disney Plus Hotstar, ALTBalaji has strategically made a decision to rely on original content as a mechanism of creating audience loyalty. Existence of ALTBalaji in conflicting media environment in India indicates the diversity of OTT business models in a market with levels of convergence that exist at. Its presence in the converging media industry in India points to the variety of OTT business models, with some of the platforms actually integrated into the broader telecom ecosystem and others depending on subscription based or a hybrid monetization business model to stay in business.

The ALTBalaji model nonetheless points out at the difficulties that are facing content centric platforms when a converging media market is evolving where accessibility to digital infrastructure is becoming a definition of culture. The direct subscriptions imply that the direct competitors like ALTBalaji have an original disadvantage in a converging telecommunications market, in which companies that can control traffic to networks can package or subsidize content, establishing a developing telecommunications-based media culture (Athique and Parthasarathi, 2020). Creation of original content has helped ALTBalaji to capture the niche audience especially in regional and youth genres. Though the focus on original content has helped ALTBalaji develop a niche following, especially in regional, youth-focused content, its inability to achieve scale and subscriber retention indicates the problem that independent content providers are experiencing in the converging media environment in India. Although, the global platforms are riding their digital delivery models which permit them to bypass large majority of the national restrictions (Lobato, 2019), the local content oriented platforms such as ALTBalaji are working in a more challenging market environment without the identical infrastructure or fiscal benefits.

Winseck (2011) laments the argument that digital convergence equates to media democratisation arguing that the tendency of corporate consolidation in the telecommunications sector as well as in the digital sector, most often results in additional consolidations in the control of the different media markets. As an analysis of media and telecom mergers in

Canada, he creates valuable points of comparison to what has occurred in India, where Reliance Jio, Bharti Airtel or Vodafone-Idea has connected their telecom infrastructure to streaming platforms and each has also changed the structure of how content is accessed and consumed, but also how competition is organised. Enhancing the points, Doyle (2002) narrows down to the direction in which the vertical and horizontal integration into converged markets impacts content diversity and audience interest, and with equally concerning implications on market concentration and competition in the Indian OTT market. Bundling of telecom and streaming services is an example of how content is developing in dependence on infrastructure-based distribution instead of competitive open markets and this is witnessed in India where telecom services like JioCinema or Airtel Xstream are packaged along with mobile and broadband services.

Based on this theory, I would repeat the concept of convergence culture by Jenkins (2008), the platformization structures of Nieborg and Poell (2018), and the accounts provided about the understanding of corporate consolidation by both Doyle (2002) and Winseck (2011) to provide a comprehensive picture on India's evolving media landscape. The interaction between television and OTT platforms that depends on the streaming infrastructure provided by telecom corporations is an example of how the product and economy of platform-driven content is transforming the structures of the industry, the competition, and the audience practice. The study of the convergence of technology, industry, and policy in the Indian digital media sector shows that digital and traditional broadcasting are not substituting each other, but are modifying and creating a hybrid, interdependent media environment.

1.4.3 Regulatory Silence

The regulatory silence is a strong analytical tool to study how the policy action or inaction leads to shapes markets, corporate power, and the boundaries of digital economies. The concept of regulatory silence, or the strategic non-enforcement of the regulatory involvement to the advantage of the market participants by the state, is an opposite of an explicit

deregulation or formal elimination of a regulation system (Parthasarathi, 2018). Various researchers have explored various aspects of regulatory silence (Freedman (2010); Parthasarathi (2018); Li (2020); Bouquillion and Ithurbide (2022); Menon (2004)), and unanimously, their aim is to investigate the issue and highlight that the silence of regulators in all forms (or selective intervention) can and/or does assist market dominant firms in increasing their market share.

Therefore, regulatory silence should be seen not merely as such the lack of policy, but as structures of governance that generates effects in terms of competition among market participants. Freedman (2010) describes regulatory silence as such a thing as "negative policy" and this is the active policy of the government not to regulate economic activity in specific sectors or provisioning whereby in this case, the market or the industry will decide how the industry is to be developed. According to Li (2020), there are three variants of regulatory silence, such as the most relevant: the silence of elephants in the room, i.e. the most relevant regulatory issues that are simply not mentioned as issues to be brought to the table to be discussed during policy processes; that of policy nature, i.e. taking specific decisions to generate motion in policy processes, but at the same time it allows the dominant sector to benefit by their ambiguity; and silence by the government agency/governmental entity i.e. the governmental agency is simply not doing anything with it. This aligns with the concept of "non-decision making" formulated by Bachrach and Baratz (1962) that explains the idea of power that should be achieved by ensuring that no action is taken concerning this or that matter and through guaranteeing the satisfactory state of affairs that would make sure that this or that matter is not placed on the policy agenda.

The Indian path of historic stagnancy of media and telecommunication regulation moves along the lines. The term used by Menon (2004) in his analysis refers to the regulatory policies as oscillating between selective liberalizing in broadcasting and a regulated corporatization of the telecommunications sector of the most influential corporate players then. Although the Cable Television Networks

(Regulation), 1995 and Indian Broadcasting Bill, 1997 signalled a tremendous change in media towards the role of involvement of the market players into the television broadcasting, they could not make substantial protection to the competition which led to the consolidation of the power of few leading media business. . Likewise, the telecom policies like the National Telecommunications Policy (NTP), 1994, and NTP, 1999, corporatized the industry and without liberalizing it completely and fully, such that the state-backed companies and a few players in the industry retained dominance of digital infrastructure. Therefore, letting the state-funded media companies and other stakeholders shape and impact the implementation of digital infrastructure. This process had a close connection to the Communication Convergence Bill (CCB, 2001) wherein the legislation generously offered power to telecommunications-Broadband Voice-on-Demand (VoD) providers (e.g. JioCinema) to reserve the media content distribution with network service, which further cemented this vertical integration.

Parthasarathi (2018) also connects the conception of considered silence, regarding the OTT and telecommunication landscape in India, as the government was not capable, or simply did not want to, to regulate the new VoD services, resulting in telecommunication-supported media business controlling the distribution of media content. This is particularly evident in the example of the growth of Reliance Jio, when due to the absence of strict regulations concerning the possession of several areas, the company was able to integrate the telecommunications, VoD, and Cloud services that it offers, creating a closed digital system that leaves those that produce independent content and platforms in a disadvantageous situation. The example of the Jio-Hotstar merger is the same trend, where regulatory ineffectiveness has enabled streaming services to be consolidated (under telecom control), limited consumer options, and strengthened infrastructural dependencies. According to Bouquillion and Ithurbide (2022), it is an active process involving regulatory silence and the role of private corporations rather than the state in governing the creative industries to decide on the distribution of

content, models of revenue, and cultural creation in India through the platformization of the industry.

A Comparatively perspective reveal that it is obvious regulatory silence is not only a by-product of developing into a digital economy but also a premeditated decision-making. Unlike India, the European Union (EU) has established tougher enforcement of rivalry principles over digital markets including the Digital Markets Act (DMA), which cuts off the capacity of leading tech and telecoms companies to become involved in anti-competitive conduct (Graef, 2019). The United States (US) has also had a controversial popular debate on net neutrality, in which the policy has alternated between high enforcement and deregulation, depending on political administration (Pickard, 2019). However, in India, net neutrality has been applied insufficiently, allowing a company Jio to give favouritism to its streaming services, effectively disabling competition in the OTT market. Unlike the active attitude of the EU, which urges the regulators to avoid digital monopolies, India seems to have a less strict and more permissive regulatory culture allowing telecommunication-fuelled platforms to be far apart and have less regulation. Pragmatically, such regulatory silence is occasionally defended as the effort to keep abreast with rapid rate of digital innovation where some policymakers claim that one can restrict growth by imposing strict rules on the new and dynamic digital markets. This claim however lacks appreciation as the postponement of regulatory intercession favours the established players, and not necessarily the competitiveness of the market. Even though digital markets are quite unpredictable, some countries have adopted flexible regulatory frameworks that adapt to the technology change. India is reticent regarding making such interventions implies that regulatory silence is not only a question of complexity, but also, a state-industry nexus.

Freedman (2010) critiques that the regulatory silence in the environment of digital systems is used when telecom-supported platforms can package, prioritize their content and use consumer data without significant regulation. The situation of passive attitude of India is reflected in the situation, which provides feeble regulation and

dominance power of platforms. According to Pickard (2019), the US Federal Communications Commission (FCC) has not taken active regulatory measures on tech giants, which allows growing uncontrollably such companies as Google, Amazon and Facebook. In a similar issue, Breznitz and Murphree (2011) observed that through selective silence, the tech giants in China have been able to reach global scale as well as develop without excessive government interference to support domestic champions like Tencent and Alibaba. Such are signs that regulatory silence is usually propelled by the state-corporate nexus but not the inability of regulation.

The second critical outcome of regulatory silence is the privatization of cultural government. The metropolitan cultural governance never invests in structure or implements tactics of assisting the creative industries in India, but rather allows platform to enable governance bodies which have traditionally been managed by the public institutions. A clear and easy example of such partnership in the governance of culture is the collaboration of Google Arts and Culture with the Indian Ministry of Culture, and the cooperation of Netflix with the UNESCO where the platforms, rather than regulating agencies, are governing cultural management, content distribution, and content monetization. This indicates a wider issue of concern across the world in relation to a limited number of platforms, which are consolidating cultural production and constraining free media and non-commoditized production (Van Dijck et al., 2018).

Regulatory silence so operates in both ways, on the one hand it encourages the growth of the digital industries with minimum governmental interference, and on the other it forms a structural imbalance in favour of the market to fall within the hands of a few, with the deterioration of responsibility. Applying the theoretic approach to the situation in India where the telecom-OTT sector is just beginning to emerge, it becomes immediately apparent that the non-regulation method of corporate development advancement is a chosen strategy. In this aspect, the Jio-Hotstar deal is not so much of a business transaction as it is the way in which the Indian state is complicit in infrastructural

monopolization by not saying anything about the matter, especially as it relates to the consumption of the OTT content within a digital economy.

Once again, this kind of combination of PEC, media convergence and regulatory silence provides a theoretical framework of the events that take place in the Indian digital media environment. These three approaches consider the different, yet interrelated, aspect of the changes in the media industry: the power relation is considered in PEC, structure change in media convergence and the absence of regulations in the regulatory silence. Their synthesis provides a multidimensional analytic prism to supersede the explanations based on the technological determinism or in the market regulation and place the evolutions of the media space in the view of political and economic circumstances.

PEC provides the tool of thought which is how the control (in this case, economic and infrastructural control) functions in digital market of communication. Inspired by McChesney and Schiller (2003), Mosco (2009), and Golding and Murdock (1997), this method opens up to the fact that the distributions of power have been there concentrated around telecom-related media firms. A case in point is the arrival of Jio as a media distributor and telecom provider, in which the infrastructure is owned and controls the market. Contained media and distribution used to be distinct structures in media industries already founded, but Jio company reinvents industry hierarchies to strengthen monopoly and diminish competition and consumer choice.

Media convergence contributes to the PEC by signalling the changing industry organization as a response to the processes of digitalization and the platforms. Convergence as Jenkins (2006) argues is not merely a technological thing but convergence is a phenomenon in an industry where both traditional and digital media are becoming less and less distinct. Television and streaming providers as well as telecommunication firms in India are no longer standalone organizations; because they are convergent parts of a media system that coexist. Data and content-bundled together in the Jio-Hotster merger and the persistence of network television formats on OTT are examples that the media industries are reconstituting, and not imploding. Remediation by

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Bolter and Grusin (2000) explains why television remains relevant in the digital world based on how it is redefined by live sports broadcasting on JioCinema or in series on ALTBalaji.

The regulatory silence reveals itself as the last front of the structure and then we can still see why these changes are taking place with the least involvement of the state. According to Freeman (2010), Parthasarathi (2018) and Li (2020) the threat of state apathy is not to be seen as having nothing to say but rather a tactical measure to delegate the management of communications to established groups of corporate interests in the industry to persist in the growth of monopolistic players. Unlike the European Union, which has some of the strictest competition policy, the current regulatory regime in India has greatly enabled the content and distribution bundling of telecom-supported platforms. The example of Reliance Jio, an organization that exploited regulatory laxity to integrate digital services, streaming platforms and cloud service infrastructure is indicative of the fact that states influence corporate growth instead of ensuring a competitive market.

Despite the fact that this hybrid framework offers a solid interpretation on the changes in digital media of India, shortcomings to the account have to be realized. Other researchers have also recorded technology and market forces, as opposed to regulatory inaction, as the prime consequence of the change within the sector (Iosifidis, 2011; Lotz, 2017). Theorists in this school of thought can argue that Jio was more successful through pricing competition, irrational expansion and demand among the consumers, and not through regulatory silence. What this argument lacks, however, is a privilege to telecom-sponsored platforms pursuing regulatory inaction; lax cross-sector ownership restrictions; discriminatory deregulation; and access to digital infrastructure. Similarly, although market forces determine the competition within the industry, they do not exist in isolation of policies or regulatory decisions, as they could be seen in the contrasts of market intervention (e.g. Digital Markets Act in EU) and market competition (as compared to the markets in India).

This framework elaborates the picture of the digital media transition in India, and so does by adding an account of the PEC framework, media convergence and regulatory silence. However, in contrast to technological determinism or free-market models, this framework explains the ways in which the changes in digital media in India become elements of a more and more complex combination of factors. This multi-dimensional policy does not only explain the changing balance of power in the streaming industry but also reveals the more general consequences of telecom-media convergence on competition and the diversity of content and regulatory control.

1.5 Research Questions & Objectives

This thesis examines television, telecom, and digital convergence in India and how Jio and Disney+ Hotstar are being reinvented and taken up by telecom and digital platforms in transforming the media sector in the country. It discusses the changing competition patterns, regulatory considerations and consequent effects of these changes on content diversity and independent platforms. Placing these changes in a larger context of changes in the historical and policy context, this paper aims to offer a multifaceted interpretation of the proliferating character of digital media in India.

Research Questions

1. What impact have political, economic, and technological factors had on the development of the television industry in India, and how state-owned analogue broadcasting has developed into a competitive OTT market, on which has the parallel development of telecommunication and IT influenced the overall impact of media market structure, competition, and content?

2. How does the transition of ALTBalaji from television to OTT platforms reflect the broader trend in media convergence, remediation and commercial viability of the Indian digital entertainment market?

3. How do legacy television-based media conglomerates in India, through platforms like Disney+ Hotstar, negotiate the challenges posed by internet-based digital media, and how does live sports streaming feature prominently in this shift to cement their market presence and content strategy?

4. How does Jio leverage vertical integration and regulatory silence to transform India's streaming market by merging telecommunications infrastructure with OTT content distribution, and what are the implications for competition, consumer choice, and digital content aggregation?

Research Objectives
1. To examine the ways in which forces of political, economic, and technological change have driven the television business in India from state-controlled analogue broadcasting to competitive OTT platforms and questions how the simultaneous development of the telecommunications and IT industries has co-determined a shift in the media market structure, competition and content.

2. To analyse how the shift of Balaji Telefilms from television to streaming services can explain the forces of media convergence, remediation, and business sustainability of streaming services in the Indian digital entertainment market through the changes in genres, censorship frameworks, and financial feasibility.

3. To examine the way in which the mainstream television based media conglomerates in India (like Disney+ Hotstar) are struggling to cope with the game of internet based digital media, and rely on their live sports streaming services as a central element in securing their market presence and content development.

4. To study the importance of vertical integration and regulatory silence to the transformation of the streaming market in India by Reliance Jio, integrating telecoms infrastructure with OTT content distribution, and, to study the consequences of the changes in the competitive markets, consumer choice, and the aggregation of digital content.

By responding to these research questions and objectives, this thesis is added to the critical discourses associated with media convergence, platformization and regulation because it tries to illuminate structural changes that have taken place in the digital media in India.

1.6 Methodology

1.6.1 The Research Methods and Design

This thesis is grounded in a qualitative multi-method design, which focuses on political economy and the institutional case study analysis to elucidate the response of the Indian OTT ecosystem to, and influences of, platformization, telecom-media convergence, and regulatory silences. This thesis has been strategic in that it uses a triangulated approach to the avenues of the same digital media terrain in India including; non-transparent business tactics, regulation variation gaps as well as infrastructure entanglements. This approach has their grounds in secondary data, a qualitative content analysis, and semi-structured interviews and puts more emphasis on context and depth over breadth, reflexivity over standardization in line with the critical traditions of media and communication research.

The essence of this thesis project shall be answering the question on how the platform era of digital entrants by the legacy telecommunication companies and broadcasters has transformed the Indian television industry. It does not merely refer to monitoring what was going on with institutions but also to looking at how platforms are capitalizing on infrastructural control, selectively filtering information and consuming it. As a result, the given approach is capable of meeting

the consideration of the restructuring of the structures which can be traced in the media economy, and the power dynamics that they generate.

The explanatory case study is taken as the primary methodology of the thesis (Yin, 2018). This technique is more suitably used in exploring the how and why questions in the real life scenario where the boundaries between the phenomenon and the context are not normally delineated easily. This emphasis on embeddedness and causation can be associated with this study because it focuses on the institutions of media as embedded and entangled within the broader infrastructural and regulatory environment. Moreover, Stake argues that case studies allow for "particularization" rather than generalization, a feature which is especially relevant to this research, as it enables the foregrounding of the distinctive logics and narratives that shape each platform's trajectory within the Indian OTT landscape (1995).

The three case studies chosen as the key empirical sites of the project include ALTBalaji, , a production house exemplifying a transition from television to streaming and the negotiation of a distinct platform identity; Disney+, a legacy broadcaster adapting to digital disruption; and JioCinema as a telecoms infrastructural convergence and vertical integration. These cases were chosen not just for their market visibility, but because they reflect three distinct institutional logics—broadcast, creative, and infrastructural. It was aimed at tracking the ways of each of those actors respond to the challenges and opportunities of the platformed environment and how their journey shed light on broader structural dynamics.

The methodology of the case study is also rationalized by the fact that it has the capability of accommodating complexity and heterogeneity. Merriam (1998) and Eisenhardt (1989) suggest that case studies are especially useful in media and communication, whereby historical legacies, regulations and cultural meanings cannot be reduced to a measuring scale. Through this, the cases are not just the empirical units, but heuristic sites, out of which to acquire knowledge of more inclusive infrastructural realignments. The ground of my decision is also informed by the Flyvyberg (2006) critique of nomothetic approaches and

induces the idea that careful attention to actual institutional practice is one of the means of making grounded critique of abstract theories and in a highly mediated elite dominated area.

The general research design will consist of three qualitative designs, which are secondary analysis of data, qualitative content analysis, and semi-structured interviews. There is a difference in the extent to which these approaches are applied in relation to each case as determined by the accessibility, reliability and applicability. One of the reasons for selecting this technique is that, following Brewer and Hunter (2005), it functions as a means of cross-validating data, identifying discursive inconsistencies, and generating deeper insights, thereby strengthening the interpretive robustness of the study.

The primary method of the research is the secondary data analysis. It involves the management of different textual objects in a systematically manner like academic research reports, platform press releases, regulatory filings, TRAI consultation papers, policy reports, industry white papers and long-form journalism. These materials facilitated longitudinal continuity and strategic transparency and in large part can be read as how platforms render both their actions and institutional discourses. Frankfort-Nachmias, Nachmias, and DeWaard (2015) recommend using secondary data in political and institutional studies as secondary data can track the overtime change and make inferences at the macro level. These arguments come out by Johnston (2014) and Bryman (2016), who insist on the need to recontextualize secondary data to derive brand new findings on the already available data- especially in elite or commercially controlled settings such as the media industry in India.

The use of secondary data in this study was conceptualized not as an impartial record, but discursively positioned writings. Neuendorf (2017) and Boslaugh (2007) say that institutional values, communicative ends, and the target audiences are usually crafted into secondary sources. Therefore, the analysis was conducted with a reflexive and critical stance, interrogating who is speaking, for whom, and toward what strategic ends, thereby situating the study within the broader dynamics of institutional power and media practice. This was particularly required in connection

to the corporate strategy, where the story of the JioCinema of digital belonging and innovation was unravelled against the criticism of industry and academic-based stakeholder of market grabbing and infrastructural capacity (Athique & Kumar, A., 2022).

One of the strongest points of the secondary data is that it created triangulation of different areas - business strategy, policy discussions, and the discourse in masses. As in line with Flick (2009), and Saunders, Lewis, and Thornhill (2012), triangulation was not only used in the study to verify claims, but also to identify discursive tensions. To illustrate, the chronicle of using sports rights to generate a high-value subscriber base adopted by Hotstar was followed through the content bundling and pricing reports submitted by Disney internationally in the content industry sectors, and Indian industry reporting through TRAIs. These sources have been analysed comparing and contrasting this has revealed the strategic intent, regulatory loopholes and market manipulation.

The second pillar of the methodology was qualitative content analysis; in this case, in regards to ALTBalaji. In a sense of interpretive and descriptive approach to the concept of series, visuals, themes, and aesthetic decisions, this method is a product of institutional logic and the approach to the audience. The analysis aimed at making visible symbolic work of the corpus of ALTBalaji of the manner it was mobilizing genre (erotica, horror, thriller), tone (melodrama, satire), and language to construct a platform identity as efficiently described by Schreier (2012) and Mayring (2000). It depended on broad theoretical areas such as convergence culture, as explained by Bolter and Grusin (2000), and a platform capitalism as explained by Srnicek (2017), which makes it possible to view content as an element of a larger technological play at economy, and converged ecosystem. Programs of ALTBalaji, especially such as *Gandii Baat* (2018) and *Virgin Bhaskar* (2019), were viewed as having a genre strategy to seek the permissiveness and familiarity of OTT, and were addressing the provincial audience. These readings helped to explore the relations between the content strategy and the institutional situation such as the production budgets, evading regulatory structures and positioning of the brand in the competitive market.

Purposive sampling strategy was applied and it tried to find some content that was used to depict the brand and segmentation of the audience of the platform. Series have not been selected based on popularity, rather, on narrative experimentation and strategist presence. Furthermore, the discussion explored the particular ways in which the concepts of sexuality, regional identity, and gender were applied to appeal consumers to the content of emerging adult app, navigating the grey area between titillation and taboo, and highlighting the managerial strategies developed in response to market opportunities and regulatory loopholes (Mehta & Valdovinos Kaye, 2019).

The third one was semi-structured interviews, which became an additional information source to shed some light on the understanding of the industry. Three executives of MX Player, Viacom18, and JioCinema were interviewed virtually and were chosen based on professional experience in the area of content, product and strategic leadership. The issues discussed included segmentation of viewers, AVOD versus SVOD model, regional content expansion, and the use of data to develop regional content. The semi-structured interviews were not intended as a source of insider information, but were instead a performance of an institutional discourse that industry professionals publicly constructs notions of innovation, audience management and platform futures (Kvale & Brinkmann, 2009).

Although the interviews are short and shallow in terms of gatekeeping and access control, they contributed to the contextualization of the thesis that are available publicly but provided an insight on some of the recurring discursive tropes such as democratization, vernacular turn, and mobile-first design. In accordance with the interpretive approach provided by Maxwell (2013), the review of interviewing transcripts transparently occurred in three separate times with the prism of what was said, how, and what was not said. The interview data were particularly productive to comprehend the affective and aspirational messages according to which platforms can legitimize their business concept and reach their audience.

The reason to employ a multi-method approach was both strategic and reflexive. In relation to studying opaque, elite-dominated sectors, methodological reflexivity is essential, which refers to the readiness to change the research design to conditions in the field, as discussed by Cheryl Poth (2023). Based on this, the strategy to focus on interviewing was refocused early in an instance when it was clear that the field must be practically inaccessible and challenging to manoeuvre. The original plan to focus on interviews was changed when it became clear that accessing the field would be difficult. Instead of viewing this as a problem, the shift to using secondary data and content analysis was seen as an advantage, helping the study stay based on real-world evidence while also widening its focus and theoretical goals.

Finally, the study involves a qualitatively based, reflexive, yet institutionally conscious method of exploring the OTT-based changing broadcasting landscape in India. The study develops a complex story of power, intersection of content and infrastructure in the platform capitalism, with the triangulation of secondary information, content analysis, and elite interviews. The triangulation approach develops on the basis of validity and the reliability as well as addresses the methodological concerns of research strategies to analysing digital media industries in a rigorous, flexible and vivid way.

1.6.2 The Interview Method and its Challenges: Reflections from Fieldwork in Mumbai

Interviews have gained much popularity in the qualitative research owing to their ability to provide profound subjective information in the areas of professional setting as well as institutional cultures. Interviews in the areas of researching elite settings and particularly the corporate setting is full of challenge, in the sense of access, hierarchical gate keeping, institutional obscurity and politics of discretion My fieldwork in Mumbai in August 2023 showed these challenges, as I tried to talk with professionals from India's OTT and content production sectors for a broader study on the political economy of streaming media.

I assume that Mumbai is the media capital of India, so the city should offer an opportunity to meet industry participants, and therefore my outreach plans included emailing and messaging professionals in such companies like JioCinema, ALTBalaji, MX Player, and Disney+ Hotstar prior to my visit. Also, even after sending more than 30 targeted emails and many LinkedIn messages, there were low response rates. The contact information of many executives could not be viewed publicly and no content teams or decision-makers could be reached via corporate websites. These circumstances are reminiscent of what Gillham (2000) asserts the "time-expensive" nature of the elite interviewing that usually involves some institutional contacts and social arm-twisting.

Eventually, I got an affirmative reply from the executive of MX Player, Abhishek Vakil, who consented to a virtual interview. The discussion was, even though it was somewhat informative in terms of information about the industry, very general and tentative. Abhishek did not comment on platform-related choices, and did not talk about organizationally sensitive issues, which is also in line with the study by Rubin and Rubin (2011) findings that elite respondents often avoid speaking on behalf of their organizations. The follow-up offer on his part to offer assistance in organizing further access did not happen, with the additional conversation dwindling as obligations on his part turned potentially professional.

Two more virtual interviews were made with the professionals in the domain of content and strategy and both interviews had the same pattern: the polite interaction, yet general answers. Much was restricted to release-to-the-world accounts of market trends, user grrowth, or technology development, with very little suggestions to disclose the methods of its monetization, its internal processes, or its content regulation. Such interviews, useful as they were in mapping the discursive divides of the talk of the public industry, did not provide much on the case-specifics.

In parallel with this, I tried to make physical visits to the offices of the major OTTs as well as medium-sized production companies. I received solid rejections when visiting MX Player, ZEE5, SonyLIV,

ALTBalaji, and Jio Studios. Unexpectedly and without any prior arrangement or contacts, I could not get past reception desks. In the vast majority of cases, even sending a request letter in printed form was impossible because front-desk staff did not agree to send materials to communications and HR units. Visiting the address of ALTBalaji where the company is listed, I found out that the company moved and minimized the operations. My efforts to visit the Balaji Telefilms premises also failed because I did not have an appointment highlighting the infrastructural obscurity of such organizations as well as the strict organizational hierarchy-based access rules.

These instances were influenced not just by contenting to the calling of institutional gatekeeping but by the wider infrastructural environment that existed in Mumbai. Fieldwork was logistically daunting due to long commutes, traffic jams and heavily scattered office locations. Also, numerous organizations had transitioned to hybrid work patterns after COVID, which severely suppressed the chances of accidentally bumping into each other or randomly arriving at the workplace. There have been a number of cases when security members told me that no administrative staff was on-site, and the content and creative teams had to work online. Interviews, as Kvale and Brinkmann (2009) note, are integrated in the larger power relations not only between interviewer and interviewee, but also the researcher and the institution. In my situation these dynamics were definitely skewed towards the institutions, which had strict PR boundaries and access gates.

Due to multiple denials and the slight success in big OTT companies, I started focusing my efforts on small and mid-sized production houses. I wanted to know how these independent players interact with new digital spaces - what are the issues that they confront, the partnerships that they seek to make and how and on what terms do they have to negotiate their infrastructural and institutional reliance. I also communicated with such companies as GSEAMS, Solflicks Filmworks, Ding Entertainment, and Mango People Media via informal platforms in Instagram, WhatsApp, email. At first, some people, especially at Solflicks and GSEAMS, were friendly and open, but later

they stopped responding. Promises to "reply soon" were never kept. Even after many follow-ups, the conversations ended suddenly, showing that personal friendliness does not always lead to real institutional support.

One useful experience happened at Solflicks, where I was welcomed politely in a small but functional office. After a friendly talk with a PR team member who asked me to send my questions on WhatsApp, there was no reply after that. When I sent a follow-up message later, the response was irritated, so I decided not to continue. At Ding Entertainment, I found the office mostly inactive, and online searches showed that the company had reduced its work or shut down. Other production companies listed on Google Maps—like TReFL Media, Ding Infinity, and Still & Still Media Collective could not be found at their addresses, showing how unstable mid-sized media firms have become after COVID.

The present patterns, which are the opening with open-ended questions, an absence of follow-up, dead addresses of offices, and unwilling communication, highlight the difficulties associated with the interviews as the ways of exploring media in highly controlled and resource-scarce contexts. They also show that smaller production houses are often unstable and short-lived. Many now work on a project basis or operate virtually, which makes it harder to meet or interact with them in person.

Collectively, these experiences led to a paradigm shift in the way the interview approach was used in the context of this study. Although qualitative research tends to embrace interviews as a brilliant means of research because of their depth and subjectivity, its capacity varies based on the availability of access, trust, and institutional transparency, which none of the aforementioned was easy to find in my field research. Interviews should be used only in cases where the data cannot be attained using alternative methods, as Gillham (2000) believes. As an example, the structural opaqueness of the OTT industry, the discretion of executives in elite industries, and the persisting shocks in the logistics precipitated by the hybrid work cultures each had a drastic limiting negativity on the returns that could be realized in case of interviews. But

the interview approach was not as ineffective as they assisted them in seeing how the industry players put themselves into perspective and gave them the publicly visible reasons of their stance to innovation, vernacular dispersion, and engagement with users. Such interviews were inclusive of establishing the symbolic language of the OTT industry in India, though it was not critical to engage some of the institutional politics that were entangled. The silences, refusals and closed spaces established in the field work phase created data in itself and therefore articulated follies to what was to be said, what was to be defined and what were the architectures of control that depicted India media of industries.

Based on these constraints, I refocused my methodological interests toward secondary sources, with less interactivity and some level of reliability which yielded a wealth of information about the strategy of platforms, financial trends and genres of commissioning the content. Triangulation tactics implemented using secondary sources were supposed to help in validating, attaching context or doubting using scanty information collected by use of interviews. Frankfort-Nachmias et al. (2015) suggest that it is necessary to consider the suitability of a research technique based on the scenario of the research and not on idealism in theory. The transition of interviews to the study of documents in this instance was not a backup, but a formal requirement of its methodology.

Altogether, the present fieldwork in Mumbai highlighted the challenges of interviewing within the Indian OTT and content production industry, where gatekeeping, discretion and logistics restrain access and hamper open discussion. Those experiences suggest that field methods will require a flexible and critical approach, where means of silence and refusals will not be understood as nonexistence, but as practice of structural power. They also confirm the significance of the triangulation of a variety of data sources to construct an analytically solid and context-specific description of the transformation of the institution of media.

1.6.3   Chapterisation

This thesis explores how the media landscape in India has changed due to platform-based convergence that legacy television channels, digital

platforms and telecom-supported ecosystems are reconfiguring how media is created, distributed, and monetized. Instead of creating an interpretation that OTT is a disruptive technology that could lead to the replacement of television, I would like to suggest a more complex process of television content becoming increasingly dependent on proprietary digital technologies that include the interest in data-driven advertising, an algorithmic appearance, and cross-platform integration. This thesis is divided into chapters that are framed by case studies illustrating various facets of this change how legacy networks, domestic streaming platforms, and other services based on telecom negotiations play out in the changing media economy in India.

Chapter One: India's Television Evolution: Analog to OTT

The The first chapter defines the historical and structural backgrounds of the Indian media industry with the beginning of television when it was owned and controlled by the state to the process of its privatization and the digitalization to come. This historical analysis is essential since the recent transition into OTT is not the first step in the process but rather the most recent in a more extended process of technological and regulatory transformations, which has repeatedly reformed Indian media. This chapter explores Doordarshan as the state broadcaster, the liberalization of the media industry of the 1990s, the explosive growth of the private satellite networks, and the centralization of the television networks of large corporate organizations. My mapping of the major events in the history of television in India helps me to trace how the structures of power of television have been changing over time that lead to the present platform-based change. The chapter has importance since it offers historical contexts needed to realize why the television industry in India has been especially vulnerable to platformisation. In contrast to the autonomy enjoyed by legacy networks elsewhere in the Western TV market, Indian TV has continuously been influenced by outside powers, initially through state ownership, followed by media mergers and acquisitions and, most recently, with dominance of the digital platforms.

It is this chapter that begins to provide a structure for the case studies that follow, which take a closer look at each element of this continuing shift.

Chapter Two: Streaming the Alter-Ego: ALTBalaji, between Saas-Bahu sagas and Fast-Fashion Erotica

Hotstar is a good comparison to the ALTBalaji because it is a hybrid platform that combines television and OTT. Although the former chapter concentrated on independent services only, the initiation of Hotstar was done by Star which is a major television network and a leading player of premium sports and entertainment. This chapter will point out how Hotstar expanded on its TV business, its live streaming of sports (particularly cricket), and its pricing model to emerge as the most popular streaming service in India. The significance of Hotstar is not only in terms of popularity, but it also signifies a service that continues to multiply in the form of several models, through offering an ad-based and free content to millions of people, and is actively exploring a subscription model simultaneous with premium access. To demonstrate the importance of this case study, I first unravel how Hotstar began with adopting streaming of the cricket game, how it bundles with the telecom companies and how all this is included in the Disney + as a subset of the connection with the growing global streaming endeavours. The case study argues that, the OTT space in India is not only a television vs digital but also a field where the traditional networks had and will rebrand themselves in order to match up in the digital sphere. A case of Hotstar reveals that television broadcasters do not have to fail, but may promote their television practices through the use of OTT services. Hotstar shows how television networks whose place is expanding is not dying, and consumption of television content is increasing among the viewers.

Chapter Three: Star, Hotstar, and Live Sports Streaming

Hotstar serves as a crucial counterpoint to ALTBalaji, as it represents a hybrid model that bridges television and OTT. Unlike independent platforms, Hotstar was launched by Star, a dominant television network

with a stronghold over premium sports and entertainment content. This chapter examines how Hotstar leveraged its television legacy, live sports broadcasting (especially cricket), and strategic pricing models to become India's most widely used streaming service. The significance of Hotstar's case lies in its ability to operate across multiple models—offering free, ad-supported content to a mass audience while simultaneously pushing a subscription model for premium content. It explores how Hotstar's early adoption of cricket streaming, its bundling with telecom services, and its eventual integration into Disney+ highlight the increasing entanglement of television networks with global platform strategies. Through this case study, I argue that the Indian OTT landscape is not simply a battleground between television and digital but a space where legacy networks are reconfiguring themselves to remain relevant in the digital ecosystem. This chapter demonstrates that television broadcasters are not being displaced by OTT but are instead integrating streaming as a core part of their business models. The rise of Hotstar reflects a shift in which television networks, rather than disappearing, are leveraging digital platforms to expand their reach and reshape audience engagement.

Chapter Four: The Telecommunication Engine: Reliance Jio's Vertical Integration

The final case study shifts the focus from content platforms to the infrastructure that enables their success. This chapter analyses Jio which is an Indian telecom conglomerate that has transformed the digital economy of India by making the internet affordable specially by democratising it. It cannot be considered a similar impact that Jio has had on streaming in Indian setting. It assisted in taking India closer to an industry-driven streaming to OTT, yet Jio has turned itself into a direct content distributor through JioCinema. The case study is also significant because it created an impetus regarding the changes in the power structure in the Indian media industry to enable telecom organizations, which own the data infrastructure to access the digital ecosystem, to become participants in the industry. By delivering free or heavily

subsidized content and bundling streaming subscriptions with telecom plans, Jio has reshaped how audiences access entertainment. Through JioCinema's positioning as a distinct content platform, content consumption is now driven less by traditional subscription models and more by data access. I will argue that Jio is a fresh model of a platform capitalism whereby telecom organizations support the ecosystem to access and monetize content. This is of importance to the Indian context where the cheapness of connecting to the data as well as the widespread streaming of content through mobile as opposed to stand-alone subscription scheme means that telecom access may well become the deciding factor to the streaming of content in the digital sphere. That being said, in this chapter, the author will take a closer look at the way in which the forces that shape the dynamics of the streaming market in India are predetermined by the competitive interactions between discrete content platforms and the infrastructural authority of telecommunications companies.

Conclusion:

During the synthesis of all the observations done on the case studies, in conclusion, it can be found that the transformation of television to OTT in India is another structural shift of the media power. Rather than linear disruption, OTT market evolution is a growing trend of dominance over content that is co-located with domination of digital infrastructure. The case analysis of ALTBalaji, Hotstar and JioCinema all deduce how various organisations are trying to reach their niche in this developing ecosystem regardless of whether they are a legacy content network, an autonomous content platform or a telecom business.

On the whole, this thesis states that television and OTT will not shape the future of Indian media but the increase in the importance of corporate dominated digital streaming access ecosystems. The merging between the media and telecommunications and technology is not a harmless development; it brings up important issues about access, ownership and regulation. Who is to control the distribution of content? Which effect do proprietary platforms have on access and monetization

to various content in the platforms? So what happens to media plurality in India?

Reflectively addressing these questions and implications, this thesis can make some profound contributions to the way of a wider insight into platformisation and media governance in India, and how digital capitalism is reconstituting the world media.

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Chapter 1

India's Television Evolution: Analog to OTT

The Indian television industry has experienced notable changes due to programming, technology, and ownership changes. The conceptualization of television as a "technology of development" that would "educate and inform people" was gradually overtaken by the realities of market- and politically-driven television. Although technological development, such as cable & satellite TV and, later, internet-enabled television systems, initially praised an increased freedom and democratization associated with decentralizing authority and opening access to information media, technology has since come under the purview of economics and politics. Multinational media corporations have consolidated their investments and interests into privatized, advertiser-supported systems and manipulated the television industry's content and ownership patterns. This chapter examines intertwined development of television and Information and Communication Technologies (ICTs) and how they converged with time. This convergence is reshaping the media landscape within broader political and economic controls. The emergence of OTT platforms is relevant in discussing convergence as streaming experiences link broadcast television content with internet-based media to a new world of Indian television.

With the evolution of television, both in India and globally, it is clear that politics and economics are determining the content and policing the business of the television industry. Countries around the world have shown different business models. They have also followed different media policies over the years. Some providers offer free content supported by advertising. This model is similar to Free-to-Air (FTA) [11]

broadcasts. While others, like Pay TV[12], charge for access while featuring minimal advertisements. These varied business models are often a direct result of the regulatory frameworks and media policies of different countries, which dictate the permissible structures, funding mechanisms, and levels of market competition within the television industry.

In the US, broadcasters rely on a revenue mix of subscriptions, sponsorships, and advertisements. Their cable and satellite providers charge subscribers for access to channels, and advertisers pay for commercial slots during programs. In contrast, the media landscape in the UK is dominated by Public Service Broadcasting (PSB), where broadcasters generate revenue through the television license fee paid by households and from advertisements. The license fee is a mandatory payment that funds public broadcasting services. The British Broadcasting Corporation[13] (BBC) receives funding from both the license fee and advertising, enabling it to fulfill its public service mission. Broadcasters such as Channel 4 and ITV, however, rely on advertising alone and do not get any license fee (Ramsey, 2017).

The contrast between these two models can be ascribed to differences in their economic and political history. The roots of American television lie in the economic framework of corporate capitalism, with major corporations consolidating control over telecommunications. Companies like AT&T, Western Union, RCA, Westinghouse, and General Electric played pivotal roles in monopolizing the telephone, telegraph, radio, and electric appliance industries. The 1930s marked a fierce battle for hegemony in the telecommunications industry between AT&T and RCA, with conflicting strategies for television transmission.

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[11] FTA services are television broadcasts that are free to air signals that can be acquired by anyone (using the appropriate equipment) to obtain the signal and watch it with no fees or requirement or obligations. These services primarily rely on an advertisement-based model for revenue.

[12] Pay Television (Pay TV) refers to television services that require viewers to pay a subscription fee to access content. These services can be either advertisement-based or ad-free.

[13] The BBC is the UK's national public service broadcaster, known for its extensive range of television, radio, and online services.

Ultimately, a compromise was reached in the 1930s and 1940s, solidifying the foundation of the American television system (Kellner, 1981). While government efforts were made to regulate monopolies, the broadcast industry's dominance persisted, with major networks shaping regulatory agencies and prioritizing private interests over the public good (McConnell, 1966). In the UK, on the other hand, the establishment of PSB, exemplified by BBC, was driven by a welfarist provision of cultural and educational service to the public. This approach, rooted in the early 20th century, viewed broadcasting as a means of fostering national unity, education, and cultural enrichment. The UK opted for a publicly funded model through the television license fee to ensure the BBC's independence from commercial pressures. The inception of television in India drew inspiration from this BBC model, as opposed to the American-style private, commercial networks (Singhal & Rogers, 2001).

2.1 The State's Short-Sighted Vision for 'Doordarshan' and the Dawn of ICT in India (1959-1990)

2.1.1 The Inception and a Curious Battle with Radio

Television was widely considered a luxury due to its high costs, a perspective frequently expressed by the then Prime Minister Jawaharlal Nehru, who argued that India could not afford such an expensive toy (Chatterji, 1991). He contended that the potential of radio had not yet been fully exploited. Robin Jeffrey has argued that the Nehruvian state's neglect of television stemmed from three factors: the colonial straitjacket, the puritanism of the Gandhian national movement—Mahatma Gandhi, the then preeminent leader of the freedom struggle, viewed the medium as frivolous and disapproved of advertising—and the fear of inflaming social conflict (2008). Consequently, television first came to India by accident rather than by planning. When Philips India Ltd. left behind some television equipment after an industrial exhibition in New Delhi, All India Radio (AIR) utilized it to launch the first broadcast on 15 September 1959. This initial phase was a pilot project aimed at

experimentation, training, and evaluation. The early broadcasts, managed by radio professionals experimenting with the new medium, consisted of two one-hour transmissions each week, on Tuesday and Friday evenings. These were watched by 'tele-clubs'[14] organized around the 21 television sets, installed within a 25-km radius of Delhi, including rural areas in the neighborhood. UNESCO further supported the initiative with an additional 50 television sets, which were also installed in rural areas (Ninan, 1995).

During this early period of broadcasting, programs were predominantly centred on the objectives of national development, integration, and education, illustrated by programs such as *Krishi Darshan* (1967), which sought to educate farmers about various aspects of agriculture, including herbs and cultivation practices. According to Rajagopal (1993), this agenda closely resembled the earlier formats of state media such as radio, reflecting a continuity in programming themes. The roots of this agenda can be traced back to the late colonial period (1920–47), where British administrators worked on radio formats and broadcasting plans (Punathambekar & Sundar, 2017). British administrators believed that Indian peasants should be addressed via radio programming designed for an introduction to modernity, covering topics such as hygiene, sanitation, child welfare, agricultural methods, and marketing, alongside entertainment (Hardinge, 1934). Post-independence, the Indian state continued this legacy by broadcasting programs focused on social awareness, national development, and education. However, the paradoxical situation with this agenda, as highlighted by Rao, was that only the prosperous upper middle class had the potential to bought television sets. Moreover, broadcasting capacity

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[14] Tele-clubs were community-based viewing centres established primarily in rural and remote areas during the early days of television broadcasting. They served as venues where people could gather to watch television programs collectively. These clubs were particularly significant in regions where individual ownership of television sets was rare due to economic constraints.

was limited to the metropolitan areas resulting in urban-rural gap in television broadcasting (1999).

The expansion of television in India progressed slowly during the first decade of broadcasting, with programs initially aired twice a week for an hour a day. Significant changes began with the appointment of Indira Gandhi as the Minister of Information and Broadcasting in 1964. She commissioned the *Chanda Report*[15], which recommended the swift implementation of a national television service by 1966 (Chanda, 1966), leading to the establishment of seven television broadcast stations by 1975 (Chatterji, 1991). Daily transmissions started in 1965, and the first major expansion occurred in 1972 with the launch of a second television station in Bombay, followed by stations in Srinagar and Amritsar in 1973, and Calcutta, Madras, and Lucknow in 1975. To address the urban-rural gap, the Government of India launched the SITE in 1975 under the patronage of Dr. Vikram Sarabhai, the then Head of the Atomic Energy Commission, aiming to provide educational programs for children and instructional content for adults.

The *Kheda* Communication Project (1975-1990) was instrumental in decentralizing television broadcasting in India. It was an instructional television initiative focused on empowering the rural community through addressing social issues. Using 650 community television sets across 443 villages, the project actively involved villagers as actors, scriptwriters, directors, and visualizers, fostering constant interaction with the community. Programs, presented in the *Charotari* dialect of Gujarati, tackled various issues such as alcoholism, caste discrimination, minimum wages, family planning, gender discrimination, and cooperatives (Kumar, K. J., 2021). Notably, popular serials like "*Chatur Mota*" addressing dowry and widow remarriage garnered widespread acclaim, along with successful weekend series tailored for women. However, the

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[15] In 1964, under Indira Gandhi's leadership as Minister of Information and Broadcasting, the Ministry formed a committee led by former Auditor-General Ashok Chanda to assess Indian broadcasting. The Chanda Committee's main goals were to review the operational policies of AIR and Doordarshan, both under strict government control, and to offer recommendations for their improvement.

Indian government did not replicate the *Kheda* Communication Project's community-based television model in other regions of India. Instead, in 1985, when a high-powered transmitter was commissioned in Ahmedabad with a range covering *Kheda* district, the government decreed that the *Kheda* transmitter should be shifted to Chennai to facilitate a second entertainment channel for urban residents (ibid.). The decision was influenced by the perception that spending money on running a rural community-based communication project was considered less valuable compared to potential advertising income from metropolitan audiences.

2.1.2   Emergency & Commercialisation

Indeed, television experienced some growth during the tenure of Mrs. Indira Gandhi, but the situation changed dramatically after the declaration of the National Emergency[16]. Following the Emergency declaration, the Indian government significantly tightened its control over mass media. Indira Gandhi, the then Prime Minister, exerted a firm grip, particularly on radio and television, as both mediums were already owned and operated by the government. Throughout the two-year Emergency period, she not only controlled television but also manipulated it for her purposes. She utilized the national television network, Doordarshan, for propaganda purposes. As Page and Crawley (2001) argue, the primary objective of radio and television during the Emergency was to showcase the personas of Mrs. Gandhi and her son, Sanjay Gandhi. During this period, Sanjay Gandhi asked the popular singer Kishore Kumar to sing for a Congress party rally in Bombay, but he refused. As a result, Information and Broadcasting Minister, Vidya Charan Shukla put an unofficial ban on playing Kishore Kumar songs on state broadcasters AIR and Doordarshan from 4 May 1976 till the end of Emergency (Mehta, 2008). Artists like Kumar and Dev Anand, who were

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[16] In the early hours of June 26, 1975, the then President Fakhruddin Ali Ahmed declared a state of Emergency in India mentioning risk to the national security by "internal disturbances". During the emergency, journalists, Opposition leaders, and activists were thrown in jail under the oppressive rule of Indira Gandhi government.

vocally critical of the Emergency, later faced unofficial bans from government and state broadcasters. There were no private news TV channels that time. VC Shukla[17] tried a petty trick. Before the rally called by a unified opposition, he announced that Blockbuster film *Bobby* (1973)[18] would be shown on Doordarshan at the time. But so powerful was the anti-Congress mood that people preferred to attend the rally rather than watching *Bobby* (1973) (Dabas, 2019).

During the height of the Emergency, three significant events reshaped the landscape of television in India: firstly, television was separated from AIR and placed under a new entity named Doordarshan, although it still fell under the jurisdiction of the Ministry of Information and Broadcasting; secondly, the government slashed excise duties on television sets, encouraging local manufacturing; and thirdly, advertising was permitted on television for the first time (Mehta, 2008). These measures collectively propelled the expansion of television. The establishment of Doordarshan signaled the acknowledgment of television as an independent medium distinct from radio, while the reduction in duties spurred a surge in television set production. From merely one company producing 1,250 sets in 1969, India witnessed the emergence of 40 companies manufacturing a quarter of a million sets by 1977 (Page & Crawley, 2001). The decision to allow advertising was arguably the most impactful as it initiated a process of commercialization that fundamentally altered the essence of Doordarshan and fueled the extensive growth of television in urban areas during the 1980s (ibid.). Prior to advertising, Doordarshan had relied solely on TV licenses and allocations from the national budget for funding. The abolishment of TV licensing and the introduction of advertising were aimed at bridging the budgetary gap, a move that hastened the rapid expansion.

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[17] The then Information and Broadcasting Minister of India.
[18] In 1973, the film "Bobby" emerged as a blockbuster hit, generating a gross revenue of ₹11 crores and a nett gross of ₹5.5 crores. It achieved extraordinary success in regions like Delhi/UP, East Punjab, and South India, solidifying its popularity and earning the verdict of a blockbuster (Boxofficeindia.com, 2011).

Advertising and capitalist expansion have been integral to the development of mass media since its inception. Benedict Anderson famously characterized print as "the first modern-style mass-produced industrial commodity," highlighting its inseparable link to capitalism (1983). This link between media and capitalism extends across different forms of media, including television. In India, the transition from state-controlled to commercialized broadcasting illustrates this broader trend. In 1976, the transition from license fee to commercial services prompted a shift in programming focus from development to entertainment. Thomas, A. O., (2005) classifies the span from 1982 to 1991 as the *Commercial Entertainment Phase* for Doordarshan. During this period, there was a shift in emphasis from social-educational to commercial-entertainment programming (ibid.). *Hum Log* (1984), India's pioneering television soap opera, consciously combined entertainment with education, setting a precedent in the country's broadcasting history. The rationale behind *Hum Log* (1984) was to merge two domains, using entertainment to educate viewers—a strategy known as *entertainment-education*—addressing themes such as family harmony, the status of women, alcoholism, national integration, family planning, health, urban challenges, and public welfare services (Singhal and Rogers, 1989).

Hum Log (1984) also holds significant importance as it marked the first instance of a sponsored program on Doordarshan, signaling a pivotal shift in the production and financing of television content. Traditionally, programs were produced in-house by the state broadcaster. However, a novel concept emerged, inviting private producers to create serials sponsored by commercial entities, which would cover the associated costs. In this arrangement, the sponsoring entity received a designated amount of airtime to advertise its products before, during, and after each episode (Ghose, 2005: 31). *Hum Log* (1984) served as a notable example of this model, being sponsored by Maggi Noodles, a brand owned by Nestle India. Nestle covered the telecast fee and production costs for TV serial and, in return, received approximately five minutes of free commercial time (Mehta, 2008: 154). This strategic partnership not only

contributed to the success of the brand but also established it as a household name in a short period. Following the triumph of *Hum Log* (1984), numerous other TV producers and filmmakers crafted a plethora of TV series that aired on Doordarshan, including *Yeh Jo Hai Zindagi* (1984), *Buniyaad* (1986), *Malgudi Days* (1986), *Shrikant* (1987), *Ramayan* (1987), *Bharat Ek Khoj* (1988), *Mahabharat* (1988), and *Mirza Ghalib* (1988). This modest growth in television programming during the 1980s led Punathambekar and Sundar (2017) to characterize this period as the 'time of television.' The detailed analysis of the impact of commercialization on 1980s TV content is presented in Chapter 2.

In 1982, another pivotal moment for television unfolded with the New Delhi Asian Games, widely regarded as the catalyst for unleashing its potential. The Games provided a platform for the government to showcase a prosperous India to both domestic and international audiences, with television serving as the primary tool. Symbolizing the advancing, prosperous nation-state, *Appu*, the Games' mascot, underscored the need for a unified national service and enhanced technology capacity. Consequently, the Asian Games prompted significant upgrades to television infrastructure. One immediate outcome was the introduction of color television and the establishment of a 'national service'[19]. As the host broadcasting country, India was tasked with providing live telecasts of the games to other participating nations, revealing Doordarshan's technical inadequacies, particularly its reliance on black and white transmissions. Despite facing opposition from the Prime Minister's scientific advisers, who raised concerns about costs, the decision was made to transition to color transmissions (Ninan, 1995), ultimately fueling the growth of television. Furthermore, in Indira Gandhi's tenure from 1980 to 1984 witnessed reductions in import duties on color television sets and relaxed controls on electronic imports,

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[19] The launch of the indigenous satellite program in 1982, including INSAT-1A and later INSAT-1B, paved the way for the National Services. This satellite system transformed television broadcasting by utilizing low-power transmitters to relay signals bounced off satellites, eliminating logistical hurdles for Doordarshan (Mehta, 2008).

signaling an early phase of economic liberalization. Rajiv Gandhi's administration furthered this trend with explicit moves towards economic reform, including liberalizing import restrictions, particularly in electronics, in the 1985 budget (Kohli, 1989). These measures, alongside the expanding reach of Doordarshan's transmitters, contributed to a surge in television set sales in the 1980s.

However, the advertising-centric business model and the establishment of a 'national service' had oriented television content more towards the urban population, given their status as the primary target group for advertisers. Advertising predominantly targeted the burgeoning middle class, perceiving television as instrumental in their evolution into consumers (Mankekar, 1993). This perception fueled television advertising, firmly establishing Doordarshan's dependency on this new revenue stream. While embracing commercialization, Doordarshan navigated a delicate balance between catering to the middle class and upholding the ethos of national development (Mehta, 2008). This tension underscored Doordarshan's strategy of co-opting the upwardly mobile classes, who served both as consumers of advertised goods and as an audience for nationalist programming.

However, despite the surge in television growth during the pre-liberalization era in India due to the commercialization and nationalization of broadcast media, there was only one channel, 'Doordarshan,' criticized for uninspiring programming (Singhal & Rogers, 1989. The absence of competition contributed to the uninspiring performance of Doordarshan. Additionally, television remained predominantly in urban areas, exacerbating the urban-rural broadcasting divide. Nevertheless, in parallel with television, fields like telecommunications and computing were gaining momentum, with leaders like Nehru actively promoting the country's broader commitment to technological progress. Hence, the realm of computers was gradually gaining ground in India, transcending the ideological debates surrounding the expansion of technology in the country.

2.1.3 Tracing India's Computer Evolution

India's modern state grew alongside a turn towards techno-rationalism. An ideological struggle in the twentieth century shaped this. At the centre of the debate were opposing views of technology. One side saw it as a path to progress (techno-utopia). Others feared it as a source of problems (techno-dystopia). Two key figures of Indian leadership reflected fundamentally opposed perspectives on techno-rationalism: Jawaharlal Nehru and Mahatma Gandhi. Nehru expressed that he viewed television as an expensive luxury, yet he firmly believed in modern technology within this perspective (Biju, 2016). Nehru believed that science and technology were key mechanisms for countering India's long-standing, complex social and economic issues, particularly through heavy engineering, research and development in science, and electrification to support growth (Khathing, 1990). Historian Ramachandra Guha (2005) noted that Nehru's policies advanced the educational and scientific sectors. These areas benefited from significant investments, including technological innovations in ICT. In contrast to Nehru's techno-rationalism, Gandhi offered a different view of technology and industrialism. He warned against adopting new technologies without care and argued that they could take away traditional forms of humanity.

This tension over technology was evident in India during the First Five-Year Plan (1951–56). The plan aimed to reduce poverty in the agrarian sector through investments in infrastructure. Consequently, between 1955 and 1970, India explored technology with no definite government policy space for this developing field. However, educational initiatives related to technology included establishing the Indian Institutes of Technology and beginning the design and production of computer technology. In this context, India started to develop digital computing, with the TIFR Automatic Computer (TIFRAC) constructed by R Narasimhan's team at the Tata Institute of Fundamental Research in Bombay (Rajaraman, 2015). It commenced work in 1959, demonstrating India's ability to design and construct its computer technology. The

development of TIFRAC[20] was the first of its kind, with subsequent efforts at the Indian Institute of Technology Kanpur's (IITK) computer installation using a Fortran compiler in 1963, an IBM1620, and formal educational teaching in computers. Throughout the 1960s, importation of computer technology was not straightforward due to foreign exchange restrictions, which redirected local refurbishing and manufacturing efforts to respond locally to computer needs of the Indian economy, such as those from IBM and International Computers Ltd. (ICL). Recognizing the critical role of electronics and computers in national development, the Bhabha Committee, appointed by the Government of India in 1963, recommended the creation of the Department of Electronics (DoE) to foster the rapid growth of these sectors. However, the growth of the computer industry faced hurdles in the 1970s, exacerbated by import restrictions and political events such as the 1971 war with Pakistan and the 1974 nuclear test. The Bhabha Committee's 1968 Report[21] advocated for local manufacturing of computers, leading to the funding of the Electronics Corporation of India Limited (ECIL) to produce computers domestically. Despite challenges, ECIL's contributions included ruggedized computers for the Indian Air Force's defense systems.

In the 1970s, the Indian State initiated rural development programs incorporating ICT elements, predating global recognition of ICT's developmental potential. These initiatives, such as the *Dharampur* Sub-District Infrastructure Planning for Development (1977) and the Karwar Rural Development Information System (1984), aimed at optimizing decision-making while addressing governance concerns. This monitoring program, facilitated by computer applications, reflected an evolved concept of e-governance in developing contexts (Kaul et al., 1989). A

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[20] The TIFRAC, developed at the Tata Institute of Fundamental Research (TIFR) in Mumbai, was India's first indigenous computer.
[21] At the end of 1950, the newly independent Indian government established a Committee, known as the Company Law Committee and chaired by Shri H.C. Bhabha, to review and revise the Indian Companies Act. This revision aimed to better support the growth of Indian trade and industry by addressing relevant legal and regulatory aspects.

significant turning point occurred in 1978, following the defeat of the Congress party-led government in 1977. At that time, IBM, which was refurbishing obsolete 1401 computers in India, was asked by the government to reduce its equity, take on an Indian partner, and start manufacturing IBM 360 series computers. IBM refused these terms and subsequently ceased its operations in India in 1978[22]. The new government decided to open up computer manufacturing to the private sector, leading to the emergence of several companies producing minicomputers using imported microprocessors, with UNIX becoming the preferred operating system.

Furthermore, in 1984 and 1986, under Prime Minister Rajiv Gandhi's leadership, the government removed numerous controls on the industry and on imports. The new policies permitted the import of fully assembled motherboards with processors and reduced import duties, significantly lowering prices and accelerating the spread of computer use (Rajaraman, 2015). Efforts toward liberalization catalyzed joint ventures with multinational companies, leading to the establishment of over forty multinational companies setting up operations in cities like Bangalore, Hyderabad, Gandhinagar, and Pune, primarily focusing on software export and back-office operations, including call centers (ibid.).

The technological advancements witnessed during this period, particularly in ICTs, facilitated significant social and economic changes, promising greater flexibility, efficiency, and cost-effectiveness. This era marked a transition towards information-centric societies, with information emerging as the primary resource. One of the most impactful initiatives of the 1980s was the Train Reservation Project, which aimed at computerizing the passenger reservation system of the Indian

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[22] The Indian government's refusal to allow IBM to retain its share of the domestic market lead IBM to exit the marketplace in 1978 and opened space for Indian-owned companies to manufacture computers. It is also credited with an increased level of domestic manufacture of minicomputers and the general growth of the domestic computer marketplace, allowing for the specificity of the technology marketplace to move away from a foreign ownership monopoly to a competitive and diverse market.

Railways. Despite bureaucratic delays, its eventual implementation during Rajiv Gandhi's tenure exemplified the ambitious high-technology endeavors of that era.

2.2 Transformative Pathways: Television, Telecom, and Internet in Post-Liberalization India (1990- 2000)

In the 1990s, India's liberalisation initiated a significant change in the development of television, the internet, and the telecom industries. The television industry moved from a public sector monopoly to a lively, multi-channel system of production and consumption due to deregulation of the industry and the entry of private players. This change significantly increased diversity and access to content. The telecom industry also experienced considerable growth during this time, allowing for a substantially higher mobile phone usage and internet infrastructure development. The rapid expansion of television, telecom, and the internet was essential for contemporary mass media because it enabled media to combine in a multi-media environment, provide breaking news, offer interactive content, and proliferate social media. The government and businesses competed to leverage these emerging industries, with the government generating regulations to maintain authority. In contrast, businesses dedicated a lot of capital to capture market share and change consumer behaviour, resulting in significant innovation, expansion, and consolidation in the mass media landscape.

2.2.1 Television's Odyssey from Monopoly to Multitude

After After the liberalization of Indian Economy by PV Narsimha Rao the then Prime Minister of India, Indian television witnessed a significant transition (Roy, 2008). Under the new policies the government allowed private and foreign broadcasters to engage in limited operations in India. It is the era of transnational communication through cable and satellite television that began with the flow of global content to Indian viewers. Foreign channels like CNN and Star TV, along with private domestic channels such as Zee TV, ETV, Sun TV and Asianet, started satellite

broadcasts. India began transitioning from the media policy shaped by a public-owned monopoly to a deregulated broadcasting market shaped by an increasing number of private channels with "stiff competition" among them (Vijayalakshmi, 2005). During this period, a series of technological, industrial, and policy changes in the media and cultural industries paved the way for the shift from state-run, development-oriented media to an advertising-driven media culture that gained tremendous force after 1991 with the entry of transnational media conglomerates. Commercial programming had already existed since the 1980s with shows like *Chitrahar* (1982), *Hum Log* (1984), and *Buniyaad* (1986) on Doordarshan, but the advent of satellite television and liberal policies led to the development of a wide range of consumer-oriented programming (Athique, 2012).

The de facto 'open sky' policy marked the gradual decline of Doordarshan, particularly in urban areas (Thomas, 2005). Economic liberalization provided viewers with access to a broader range of channels and content. Before the economic reform, Doordarshan operated on a telecast fee model. For instance, a program producer, like the one behind a series such as *Circus* (1978) or *Dekh Bhai Dekh* (1993), would pay a minimum guarantee ranging from Rs 1,00,000 to Rs 5,00,000 ($3454 to $17,271) for a thirty- to sixty-minute time slot to Doordarshan. Subsequently, the program producer would sell the advertising slots provided by Doordarshan within the show to recover costs and generate a modest profit (Kohli, 2010). However, the concept of sponsorship was entirely foreign to the Indian market. As an example, Star TV acquired the rights to programs like *Santa Barbara* (1984) and *Baywatch* (1989), packaged them, aired them on Star Plus, and handled the sale of advertising time. When Star TV first approached the market, Indian advertisers swiftly embraced the opportunity. Brands like *Godrej*, British Airways, and *Amul* Butter eagerly joined the lineup of advertisers who were delighted to reach an audience beyond Doordarshan's viewership. Even though Doordarshan offered differentiated programming at the time, it was the sole choice. Advertisers began

placing ads on channels like MTV[23] and on programs such as *Santa Barbara* (1984). These shows were not top-tier American productions, but Indian viewers found them captivating (Kohli, 2019). The fact that English is seen as an aspirational language in India helped viewers overlook the quality of this programming. The objective was not merely to acquaint them with television but to make television itself a more aspiration object of urban middle-class domesticity, encompassing international news, music, and sports.

The liberalization of the Indian economy not only opened the market to foreign investment but also encouraged private media enterprises to experiment with television programming. As a result, the 1990s saw a significant shift in content, marked by the emergence of new genres and formats. One prominent experiment in television content during the 1990s was the integration of Bollywood film music into various formats, giving this long-standing staple of Indian popular culture a new home on television. Private channels recognized the immense popularity of Bollywood music and sought to capitalize on it by creating programs that showcased film songs in various ways (Leante, 2013). Shows such as *Antakshari* (1993) and *Sa Re Ga Ma* (1995) on Zee TV became pioneering examples of this trend. *Antakshari* transformed a popular household game into a nationwide television event, engaging viewers with spontaneous song competitions and Bollywood music. Similarly, *Sa Re Ga Ma* (1995) provided a serious platform for aspiring singers to showcase their talent, aiming to break into Bollywood playback singing.

In addition to these music-based game shows, several channels introduced countdown programs dedicated to popular Bollywood songs. In the 1990s, Indian television was characterized by shows such as

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[23] By late August 1991, Star TV launched five 24-hour analogue channels, including MTV, an American music network. Originally cantered on music videos and VJs, MTV gradually transitioned to reality programming targeting teenagers and young adults.

Philips Top Ten (1994) and BPL Oye! (1994) that presented weekly lists of song rankings based on viewership requests and sales (ibid). These programs demonstrated the audience's desire to keep up-to-date with Bollywood music trends while at the same time speaking to the relevance of film songs to popular culture. Music networks, like MTV India, that originally programmed music content focused on Western music, acknowledged Bollywood music consumption preferences by developing music programming that included Bollywood music formats.

Another fruitful area was the testing of new styles of news programming. The liberalization of the media allowed a private news network to enter the space and alter the media environment for producing and consuming news. Emerging news channels, like Zee News and Star News, provided an alternative to Doordarshan (the state-run news network) and opened space for more dynamic and varied programming. However, in a rapidly competitive news sector, the channels began to test their programming style to attract larger audiences and increase advertising revenues. This testing led to what has become labelled *infotainment*, or programming that combined news and entertainment, seeing spectacle, sensationalized stories, and personality (Thussu, 2007). Doordarshan's formal and authoritative style ceased to exist, replaced by a much informal and visually dynamic style of presenting news to get the audience engaged for a more immediate and emotional response. The incorporation of entertainment into news is evident in the coverage of Bollywood and celebrities, which became a regular feature on many news channels in the 1990s (Thussu, 2016). The manner in which audience engagement was a primary concern provided the news a slippery line between journalism and entertainment. This blurred boundary shows a broader shift in media content, which increasingly became a product to generate ratings and viewer interest.

Moreover, the introduction of horror shows in the 1990s was one of the more unique experiments in television content, bringing a new genre of entertainment to Indian audiences. Prior to the 1990s, horror in

India had largely been confined to B-grade films produced by studios like those of the Ramsay Brothers, whose low-budget productions were known for their reliance on supernatural elements, haunted mansions, and rudimentary special effects (Nair, 2012). However, with the advent of private television channels, horror found a new platform on the small screen. Shows such as *Zee Horror Show* (1993-1997) and *Aahat* (1995) on Sony were among the first horror series to be broadcast on Indian television, introducing the genre to a broader and more diverse audience (Barat, 2020). The success of these shows helped to establish horror as a popular genre on Indian television, paving the way for future productions in the 2000s and beyond.

As private channels such as Star TV, Zee TV, and Sony gained traction with their innovative programming, Doordarshan, facing increasing competition, aimed to broaden its reach. To adapt, it set up 403 program production centres and 792 transmitting stations to sustain its presence in the changing television landscape (Agrawal & Raghaviah, 2006). Consequently, with the stabilization of the cable and satellite television market in the 21st century, the revenue models were split across the urban-rural schism: FTA model, led by Doordarshan, shifted its focus towards rural demographics, while pay channels predominantly targeted urban areas.

2.2.2   Urban Exodus: Doordarshan's Decline and Rural Renaissance

In 1993, the then Union Minister for Information and Broadcasting, KP Singh Deo, spearheaded an ambitious but ultimately unsuccessful effort to defend state television by launching five new satellite channels under Doordarshan's banner. Unveiled with considerable fanfare on 15 August 1993, these channels were promoted with a nationalistic appeal. However, the political urgency behind the launch led to a hasty rollout without sufficient preparation. Doordarshan's producers, struggling to generate enough content for the additional airtime, resorted to airing reruns of old programs. The channels' performance was dismal; even the

Prime Minister PV Narasimha Rao expressed frustration after repeatedly encountering the same old film on the so-called Sports Channel (Bhatt, 1994). Unsurprisingly, the channels failed within a year. Deo was compelled to announce their closure in Parliament and reconsider his strategy.

In 1994, as satellite channels gained popularity, Doordarshan devised a strategy to reclaim its elite audience with the introduction of an upmarket, informed current affairs channel, DD3. This channel was intended to offer live news and business programming from around the world, aiming to attract viewers who preferred BBC World and Star Plus over Doordarshan. Bhaskar Ghose, a former Director General of Doordarshan, envisioned DD3 featuring independent news bulletins produced by private entities, avoiding Doordarshan's typical propaganda. The programming lineup included live discussions, chat shows, and foreign entertainment (Mehta, 2008). Formally launched in October 1994, DD3 soon faced a critical challenge. PM Narasimha Rao, concerned by the prospect of live news, urgently inquired whether the channel would indeed feature such programming. Upon confirmation from Ghose, Rao promptly ordered the channel's shutdown, citing the dangers of live broadcasts. His primary concern was the lack of control over content, fearing that live programs might allow criticisms against the ruling Congress Party. This fear was exacerbated by electoral setbacks, with the Congress having lost two state assembly elections and facing four more. Rao, persuaded by his information adviser PVRK Prasad, believed live television could undermine his government (Ghose, 2005). Despite investing nearly Rs 200 million in DD3, the Rao government decided to shut it down. Facing severe criticism from the press, the channel was relaunched a year later, but significantly, without many of its originally planned components (ibid.).

Moreover, Doordarshan, which had long enjoyed a privileged role in Indian cricket broadcasting, eventually lost its exclusive broadcasting rights for cricket. Before the 1990s, Doordarshan had a unique position

in Indian cricket broadcasting. The network not only had exclusive rights to air cricket matches but also charged the cricket authorities for its coverage, leveraging its position as the sole broadcaster (Singhania, 2007: 60). This arrangement began to shift with the advent of satellite television and the Indian government's deregulatory stance, which encouraged a more competitive media environment. The turning point came in 1992 when the Board of Control for Cricket in India (BCCI) decided to sell the television rights for the England tour of India to Trans World International (TWI), a subsidiary of the US-based International Management Group (IMG). Doordarshan paid $1 million to TWI for the rights, with a significant portion of this amount going to the BCCI. This move indicated a new approach where cricket authorities were willing to sell broadcasting rights to the highest bidder, breaking the existing pattern (Hutton, 2008). This transition in broadcast rights is discussed in greater detail in Chapter 3.

In an effort to enhance the overall user experience, the *Sam Pitroda* Committee recommended transitioning of Doordarshan from analog terrestrial transmission to DTH services. This shift was considered more cost-effective, allowing *Prasar Bharati* to reduce operational expenses for maintenance and operations (Pitroda Committee Report, 2014: 27). However, Doordarshan fails to deliver contemporary and innovative programming to its users. In his research, media educator Rommani Sen Shitak (2023) engaged with experts from the programming division in Doordarshan, uncovering key factors contributing to the insignificance and substandard quality of its programs. Respondents highlighted Doordarshan's historical focus on producing content without adequate measurement of its impact, leading to its loss of dominance to private channels. The study also emphasized that Doordarshan struggled to keep up with evolving technology and programming trends. Limited recruitment and training in new technologies hindered its adaptability to emerging challenges. In addition, insufficient funds, capped at Rupees 6 lakh per episode, posed a significant challenge, creating a disparity in resources compared to private channels with higher budgets.

The study also indicated that Doordarshan did not have vision or foresight when prioritizing infrastructure expansion over content development and production. Doordarshan's free, advertisement-based model struggled to compete with private broadcasters. These private channels targeted urban audiences, who were more likely to pay for subscriptions and had greater purchasing power for advertised products than rural viewers. This further contributed to the widening of the urban-rural divide with the rural folk being denied the benefits of the modern programming.

2.2.3 The IT Sector's Evolution in India: A Tale of Reform, Growth, and Disparities

The development of the IT sector in India is a significant transformation in a sequence of lasting economic reforms, technological advancements, and policy actions. This development story begins in the early 1990s during significant economic transformations and technological development. The rise of the Indian IT sector began in 1991, when India faced a severe financial crisis. This crisis saw the Indian rupee decline sharply from Rs. 17.25 to Rs. 26 per US dollar. The economic instability brought about a series of reforms meant to liberalize the economy. In response to the severe financial situation, the Indian government dismantled many of the control measures that had previously limited industry and foreign investment. The liberalization of the economy presented an improved environment for foreign investment, which supported opportunities in the IT sector. At this time, Indian software firms took advantage of worldwide demands to solve the Y2K problem and fulfil Euro conversion demands, allowing them to expand their export earnings. The Indian community in the US, which had developed a substantial amount of technological expertise, was crucial to this growth phase.

Along with improvements in satellite communication, an English-speaking and skilled workforce, and an emphasis on quality and project management, these factors allowed Indian software firms to obtain

necessary contracts from Western countries, particularly the US. As a result, the exports of the IT industry proliferated from US$128 million in 1990 to US$1,759 million in 1997, averaging an annual growth rate of 45 percent (Rajaraman, 2015). Additionally, the industry created jobs for about 160,000 software engineers (ibid). The accelerated growth of the IT industry also created growth opportunities in industries related to the it, particularly in telecommunications, as the rapidly growing IT industry began to increase demand for better connections and data services.

The relationship became even more apparent in the telecommunications industry in the mid-1990s when deregulation allowed for the growth of internet services[24]. In August 1995, *Videsh Sanchar Nigam Limited (VSNL)* provided India's first public internet service. In the early days, internet access was restrictive due to costs and lack of infrastructure, and access was primarily in the cities and to the higher-income strata. But this period was also marked by necessary policy reforms and technology developments, which boosted growth in internet usage. The New Telecom Policy of 1999 was a watershed policy that implemented a framework for competition and promoted a role for the private sector (Kumar K. J., 2021). This policy direction was critical for reducing internet access and infrastructure costs, allowing internet use to reach a larger section of the demographic. Another notable event was the formation of the National Task Force on IT by the Vajpayee government in 1998, which MGK Menon led to develop a national IT policy. The Task Force suggested, among other things, privatizing VSNL's monopoly on internet services, abolishing the license fee from private ISPs as an incentive to grow internet usage in India, and suggested utilizing existing infrastructure to improve the provision of internet

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[24] The liberalization of telecommunications market in India occurred in the mid-1990s and involved several important components: allowing new entrants to the market, creating competition for the provision of telecommunications services, and restructuring government enterprises. The opening of the market led to the entry of private sector firms, reductions in the price of telecommunications and related services, and the expansion of infrastructure.

(ibid.). The task force recommended converting ISD/STD booths into "information kiosks" and suggested a significant investment in the software export and IT economy. A few of these ideas led to policy implementation supported by the next Congress-led coalition, which established Special Export Zones, focusing on IT and IT-enabled services (ITES), further promoting investment in the IT sector.

The DoE was exploring data communication options because of the monopolistic nature of the telecom agencies. An opportunity was presented with a bilateral agreement with France to provide telecommunications equipment from French companies. Specifically, the DoE purchased telecommunications equipment from CGR, a French company, and established satellite data links from STP(s) and the earth stations leased by the VSNL. These satellites from the STP allowed high-speed data circuits to be offered to exporters at a much lower cost than the VSNL. The price for use of the DoE equipment was $60500, compared to $250,000 for use of VSNL/DoT (Sharma, 2015). The changes in competitive pricing brought about a dramatic increase in high-speed links used by software exporters from 3 in 1992 to a rise to 200 by October 1994, of which 90 links were rented from earth stations managed by the DoE.

Furthermore, the Department of Science and Technology also played a pivotal role in the creation of ERNET, a network designed to link science and technology institutions across the country. This network was later extended to include universities and various educational and research organizations. The Indian government also launched several other networks to support different functions: NICNET was established for administrative and planning purposes, Indo-net was introduced to facilitate access to specialized information through satellite communication, and Rail-net was created to manage ticketing, scheduling, and planning for Indian Railways (Rao & Natesan, 1996). By mid-1998, a broad spectrum of Indian institutions had established a significant online presence. This included major newspapers, magazines,

publishing houses, political parties, commercial enterprises, banks, and state governments, as well as organizations like AIR, Doordarshan, police departments, municipalities, and various non-governmental organizations. During this period, entertainment content began to dominate internet use, overshadowing informational content. The surge in popularity of online games, pornography, sex chat lines, and cross-national prostitution highlighted the lack of regulatory measures for internet content. In response to these concerns, software solutions such as NetNanny and SurfWatch were developed to protect children and young users from inappropriate material (Kumar, K. J., 2021). Additionally, some technology companies implemented algorithms designed to alert users when they had spent excessive time online.

The rise of advertising and commercial activities on the internet further propelled the growth of the IT sector, with e-commerce witnessing substantial expansion. Amazon.com emerged as a notable success, functioning as a virtual bookstore that, despite lacking physical locations, offered an extensive array of titles with discounts reaching up to 40%. The use of online orders and credit card payments became increasingly prevalent (ibid.). Similarly, the marketing of computer software, browsers, games, music albums, and films gained significant traction, setting the stage for the internet's evolution into a global shopping hub. Despite these advancements, issues related to personalized advertising on search engines and social media platforms emerged, with users being inundated by targeted advertisements on virtually every page. Privacy concerns were also raised, particularly regarding search engines like Google, which faced criticism for retaining individual search histories for database development and marketing purposes. The European Union contested Google's practices, including the preferential treatment of its own products in search results (ibid.). Additionally, Google Earth faced scrutiny for privacy concerns, as it displayed the interiors of homes and roadside shops, leading to protests from the Indian government over the unintended exposure of sensitive defence establishments.

Since the late 1990s, India has experienced substantial growth in the earnings from its software and ITES sectors. These industries have been frequently highlighted as key contributors to a revitalized Indian economy. The expansion in IT and ITES sectors has been used to illustrate how the information technology revolution provides new opportunities for developing nations within the global market. India's experience, where export revenues constitute a significant portion of the sector's total income, is seen as a potential model for service-based, export-oriented growth in developing countries. This opportunity is largely attributed to two major impacts of advancements in ICTs: the acceleration of IT and ITES outsourcing by companies in developed countries and the subsequent increase in offshoring these services to countries like India (Chandrasekhar, 2006). Consequently, the phenomenon of outsourcing has attracted considerable attention due to its perceived effects on the global economy. According to estimates from the National Association of Software and Service Companies (NASSCOM), revenues from software and IT services rose significantly from Rs 108.99 billion in 1997-98 to Rs 378.40 billion in 2000-01, and further to Rs 708.60 billion in 2003-04. During this period, the proportion of software and services within the total IT market increased from 59% to 67%, and then to 79% (ibid.).

In the late 1990s and early 2000s, the 'electronic governance' (e-governance) strategy emerged as a significant component of India's administrative reform based on the principles of 'good governance'. It aligned with structural adjustment policies promoted by the World Bank and global institutions. This period marked a movement toward using IT for different applications in various sectors, with the national IT Task Force being formed in addition to initiating state IT policies. These policies were intended to improve service delivery across rural and urban areas with the involvement of non-governmental organizations (NGOs) and private sector actors. International agency support was also made available in the context of 'E-Governance for Development,' which enabled increased use of IT in public administration.

The Indian government launched various pilot projects to explore the potential of e-governance, with state governments also implementing e-governance initiatives at different administrative levels. A significant national conference held in Bangalore in 1999, attended by senior bureaucrats, reinforced the goal of achieving efficient, transparent, and citizen-centric governance through information technology. The conference emphasized the need for process re-engineering, upgrading skills, and fostering partnerships among industry, community, and government for effective service delivery. Despite these aspirations, many proposed projects were eventually discontinued. Despite many proposed projects being discontinued, e-governance in India has grown substantially, with most state governments and union territories focusing on infrastructure development, capacity building, policy reforms, and private sector participation (Madon, 2004; Chakravarti, 2003). However, there has been a reluctance to fully integrate civil society into these initiatives (Sreekumar, 2002).

In addition, in the late 1990s, tele-centres emerged as vital tools for extending ICT benefits to underserved communities with limited technological infrastructure and high individual costs. These centres, often referred to as kiosks, provided shared public access to ICTs, addressing a broad spectrum of needs including education, social interaction, personal development, economic opportunities, and entertainment (Fuchs, 1998; Harris, 1999). The tele-centre movement gained significant momentum in India with pioneering projects such as the Information Village Research Project in Pondicherry and the *Warana* Wired Village Project in Maharashtra. These projects were intended to take advantage of ICTs for rural development. They were soon followed by other tele-centre initiatives across the country, such as *Gyandoot* in Madhya Pradesh, SARI in Tamil Nadu, and *Tarahaatin* Bundelkhand. Supported by government and NGOs, these projects aimed to provide rural populations with access to information and services they could not otherwise obtain. Many kiosks operated in public places such as shops and community health clinics. Some tele-centres were privately funded,

like those by *Drishtee* and n-Logue. Others were supported by corporations, such as ITC-IBD's *e-Choupals*, which significantly increased the number of rural kiosks (Mukerji, 2008). These tele-centres worked to address many of the social and economic development challenges faced by rural populations by narrowing the digital divide between urban and rural populations, and providing access to information, educational resources, agricultural development, health services, e-government, and economic opportunities (e.g., e-commerce) (Roman & Colle, 2001). By removing barriers of distance or location, tele-centres facilitated equitable access to information and fostered social cohesion and community interactions (Young et al., 2001). In rural regions, public access points to technology — primarily internet kiosks established by local government and NGOs— have served to introduce the internet to rural underserved communities. Rangaswamy (2007) noted that these rural kiosks might provide the first exposure to ICT for as many as 700 million Indians. Both government initiatives and NGO efforts have been actively engaged in bridging the digital divide, ensuring that rural areas also benefit from the advancements brought about by the digital era.

Sparks underscores the perspective of 'new times' theorists from the now-defunct magazine *Marxism Today*, who argue that communication technologies have the potential to directly challenge entrenched power structures (Sparks, 1994, p. 38). However, this view tends to overlook the inherent contradictions within informational capitalism, which is characterized by growing income disparities that perpetuate developmental divides, social exclusion, and dependency (Parayil, 2005). The cyber-libertarian perspective on ICTs and development is framed by two interconnected arguments regarding the political economy of development. Firstly, it suggests that widespread use of ICTs in advanced industrialized nations would foster a more equitable and democratic society, reducing the necessity for radical social change. Secondly, it argues that the dissemination of ICTs in less-developed countries, particularly in rural areas, would help bridge the

development gap. According to this viewpoint, addressing the digital divide is crucial for alleviating poverty, with the belief that new technologies such as ICTs will drive rapid economic growth. Singhal and Rogers (2001), in their publication *India's Communication Revolution: From Bullock-Carts to Cyber-Marts*, highlight a stark contrast within India: while some regions remain in a state reminiscent of the bullock-cart era, others are immersed in the cyber-cafe age. This dichotomy illustrates that broad generalizations about such a vast and diverse country are inadequate. India, therefore, embodies a 'transitional society' as well as a 'network society', encompassing a variety of intermediate social conditions.

While information technology, including both traditional and modern media, has profoundly impacted urban and industrial sectors in India, its effect on the majority of rural and tribal communities has been minimal (Thomas, 2001; Kumar, K. J., 2021). The expansion of the public sphere, through mass media and information technology, has primarily benefited the affluent urban population, leaving the rural majority largely untouched.

2.2.4 Outpacing TV and Internet: The Affordable Rise of Mobile Telephony

Historically, the Indian telecommunications sector, much like the television broadcast industry, has been dominated by a centralized government authority. The origins of India's telecommunications infrastructure date back to 1856, when the first telegraphic network was established. Up until the early 1980s, the Ministry of Posts and Telegraphs (MPT) held exclusive control over the provision and regulation of telecommunications services. In 1985, the MPT was divided into two distinct entities: the Department of Telecommunications (DoT) and the Department of Posts. This reorganization assigned the DoT the roles of operator, regulator, and licensor within the telecommunications sector. To modernize the telecommunications sector and enhance its adaptability to market demands, the DoT established

VSNL. The following year, the DoT also launched *Mahanagar Telephone Nigam Limited* (MTNL) to provide basic fixed-line services in Mumbai and Delhi. Since then, the role of the private sector in wireless telephony has grown a lot. Domestic companies like Tata Telecom, Bharti, and Reliance, along with international players such as Orange and Hutchison Whampoa, joined the market. They competed alongside the earlier government-owned VSNL (Menon, 2004).

The mid-1990s were an important turning point for telecommunications in India. This period saw major reforms aimed at liberalizing and expanding the country's telecom framework. The National Telecommunications Policy of 1994 outlined the approach to liberalization and expansion. This important document expressed strong ambitions, including a pledge to provide twenty million telephone lines by 2000. The National Telecommunications Policy of 1994 introduced competition to local and value-added telecommunication services, dividing the country into twenty-one Telecom Circles to enable various forms of market competition (Ibid.). Dividing the country into segments helped regulatory efforts. It made assessing market size and profit opportunities easier, which was important for creating a competitive telecommunications environment. The New Telecommunications Policy 1999 aimed to expand and modernize the telecom market. It also changed the role of the DoT by creating a separate institution, the Department of Telecommunication Services (DTS), to handle service provision. The policy added to the competitiveness and efficiency of the telecommunications sector in India, serving a clear solicitation and appeal for greater public and private sector participation and investment (Ibid.). The government's support for expanding telecommunications infrastructure was relatively explicit in aiming to improve connectivity to all population groups across the country, including rural areas. The National Telecommunications Policy of 1994 aimed to provide telecommunication access to all villages in India, enabling people to request telephones by May 1997. Nonetheless, by mid-June 1998, the goals for basic telephone services had not been achieved, especially in

poorer regions like Bihar, Odisha, and the North-East (Kumar, K.J., 2021). Many bidders, including several multinational companies, showed interest in the value-added sector. However, achieving the goals for basic telephone services remained uncertain, especially in economically disadvantaged areas.

The government's efforts to use telecommunications to reduce the digital divide were limited. Further plans aimed to provide affordable public telecom services in villages and public call centres with integrated communication facilities. The plans progressed and introduced tele-medicine, tele-education, tele-marketing, and e-commerce in rural areas. These initiatives aimed to improve the quality of life and income levels of rural citizens. The New Telecommunication Policy also established the 'Universal Service Obligation' (USO) to extend telephone connectivity to all 600,000 villages in India. However, despite this policy mandate, few of the 22 private telecom companies made significant efforts to expand basic landline or mobile services to rural India. Private investors were hesitant to risk their capital in economically challenged telecom circles and were reluctant to launch basic services even after winning licenses. Half of the 20 telecom circles in the country lacked bidders among private operators. The primary concerns were the exorbitant license fees (₹21 crore to be paid over three years) and unreasonable tariffs (Menon, 2004). Many feared that the telecommunications market in these areas might not be large enough to support profitable ventures. With only 11% of the 39 million fixed-phone lines reaching rural areas, private providers like Bharti Airtel, Reliance Communications, and Tata Teleservices cited high license fees (now waived) and unreasonable tariffs as major obstacles. These providers advocated for the 'local loop unbundling' of copper infrastructure, which would allow them to use BSNL's broadband-compatible copper lines for the 'last mile' connectivity, making rural landline penetration more economically viable. Despite these efforts, it was primarily public sector companies like BSNL that expanded their reach into rural villages, though over a third of villages still remained unconnected.

Mobile telephony emerged as the most dynamic and rapidly growing sector within telecommunications, outpacing both television and internet growth (Kumar, K.J., 2021). The mobile phone quickly became a ubiquitous and essential tool, blending traditional media elements with new media capabilities. Its affordability, user-friendliness, and portability made it particularly attractive to middle-class consumers. The expansion of mobile telephony also had a significant impact on rural areas. Initiatives by mobile service providers, often in collaboration with NGOs, aimed to extend telecommunication services to underserved communities. Notably, Escotel's *Grameen* Phone *Sewa* initiative provided one cell phone per village at reduced cost, connecting 3,000 villages that previously lacked communication infrastructure (Thomas, 2001). This approach demonstrated the potential of mobile technology to bridge the digital divide and improve access to information and services in rural regions.

The distinction between mobile phones as tools for interpersonal communication and mass distribution mediums for SMSs, web pages, videos, and games blurred, with mobile telephony gradually merging with mobile computing. This convergence held potential for empowering individuals and communities, contributing to the emergence of a new public sphere and development initiatives. Furthermore, the reduction in rates for national and international calls, alongside the legalization of internet telephony, fostered additional growth in telecommunications and internet usage.

2.3 Contrasting Trajectories: Concentration in Television Market vs. Internet's Expanding Business Horizons (2000-2015)

2.3.1 Broadcasting Power and Politics

In the early 2000s, India witnessed a significant expansion in cable and satellite television, offering viewers a wide range of channels catering to various interests. This period also saw DTH services expand, as Dish TV,

Tata Sky, and Airtel Digital TV began offering viewers an expanded range of options with better quality pictures. Soap operas, especially Balaji Telefilms, heavily dominated television content at this time. With shows like *Kyunki Saas Bhi Kabhi Bahu Thi* (2000) and *Kahaani Ghar Ghar Kii* (2000) on Star Plus, soap operas became cultural landmarks. These *saas-bahu* serials were aimed at female homemakers and explored domestic complexities and melodrama in joint family settings. They focused on civility, intra-family politics, and the drama across successive generations. By holding their targeted demographic in mind, the soap operas worked to build narratives among their audience. Unlike previous shows, the soap operas were designed to appeal to niche viewers, rather than an aspirational or broad audience, reflecting the emerging diversities of satellite television. Additionally, Reality television shows began to gain popularity. Shows like *Kaun Banega Crorepati* (2000), hosted by Amitabh Bachchan, and the Indian adaptation of *Big Brother* (1999), *Bigg Boss* (2006), attracted substantial audiences. Coupled with the soap operas and reality television shows, the early 2000s saw the emergence of other types of programming that began to change Indian broadcasting. This included the rapid growth of news channels, where 24-hour news channels became a staple for viewing in Indian homes. News channels, such as Aaj Tak, NDTV, and CNN-IBN, began to supplement domestic news coverage and were offered in two- or three-way coverage with other domestic and Western viewpoints, indicating the growing interest in political and social discourse.

With its complex power structures, India's changing political landscape continues to influence media, regulation, and ownership. It influences the regulatory framework, ownership patterns, and the content. The state, government policies, and political support often guided media growth across countries. The media acted as a channel to reflect and shape public opinion and political discourse. For example, in 1995, Prime Minister Narasimha Rao shut down DD3 because he feared live news was a threat. This moment showed strong state control over the medium. Less than ten years later, live news broadcasting transformed

into an essential component of the political process when Atal Bihari Vajpayee began his 2004 election campaign on Doordarshan's newly developed 24-hour news channel, DD News. That election was covered by nearly 30 independent news channels and Bharatiya Janata Party (BJP) wanted to put its own gloss on the campaign through Doordarshan. Despite Doordarshan being under the nominally independent Prasar Bharati Corporation, its DD News channel was widely regarded as a 'propaganda tool', highlighting the persistent influence of political agendas on state broadcasting (Mehta, 2008). Moreover, regional political parties also began to leverage television for their agendas. Channels like Sun TV in Tamil Nadu, controlled by the Maran family aligned with the Dravida Munnetra Kazhagam (DMK), exemplified how television became a powerful tool for political propaganda in the 21st century, with programming often reflecting the political and cultural narratives that supported the DMK's policies and leadership (Thomas, 2010).

News television, despite attracting a smaller audience share and less advertising revenue compared to entertainment channels, saw a proliferation of channels. More than half of India's licensed TV channels were news channels by 2014, driven by political and business interests rather than market demand. The entry of politicians into the television business, as seen with channels like Sakshi TV and Captain TV, underscores the use of media for political propaganda. This trend was not limited to a few states but became widespread across India, reflecting the broader intertwining of media and politics.

Moreover, large companies and investors play a significant role in news broadcasting, which makes the media environment more complex. Mukesh Ambani recently exemplified this by buying a substantial share in the TV news sector. These ownership trends capture the larger trend of media ownership concentration and what that concentration ultimately means for the content that is produced, as well as the editorial independence of the newsroom. The impact of large corporate ownership

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also demonstrates continuing relationships and tensions within the political and economic spheres of Indian society. The Network18 acquisition by Reliance Industries illustrates the complexity of media ownership, as Reliance's ownership has brought increased scrutiny to the editorial independence of its newsrooms based on Reliance's business interests. Similar concerns were voiced about the influence of major business houses on media narratives, potentially skewing coverage to favour their interests. In May 2012, another major Indian conglomerate with deep interests in telecom, the Aditya Birla Group, announced that it was acquiring a 27.5 percent stake in Living Media India Limited (Aditya Birla Group, 2012), the company which runs the India Today Group, including several channels such as Aaj Tak and Headlines Today. In this case, though, full control remained in the hands of India Today chairman Aroon Purie (Mehta, 2015). Similarly, in December 2011, Oswal Green Tech, acquired a 14.17 percent shareholding in New Delhi Television in two separate deals from the investment arms of Merrill Lynch and Nomura Capital (Thakurta & Chaturvedi, 2012, p. 12).

From 2008 onwards, the television landscape saw increased corporatization and consolidation in television market. Five major players—Star, Zee, Sony, Sun, and Viacom—dominated the TV entertainment business, controlling a significant portion of the viewing market. This concentration of ownership reflects broader trends in the global media industry, where a few conglomerates wield substantial influence. The regional markets became key growth areas, with intense competition in certain language groups and complete network dominance in others. For example, Sun TV's dominance in Tamil Nadu and Karnataka highlights the role of linguistic and cultural factors in shaping media markets. For these media conglomerates, success is less about establishing a single dominant channel and more about gradually developing a strong presence through a varied mix of programming, including general entertainment, music, movies, and children's shows (Mehta, 2015). Conglomerates with broad and diverse portfolios, along

with substantial financial resources, inherently have an edge in this regard, making it challenging for standalone channels to remain viable.

The marketization of India's television sector has led to the rise of local media firms like NDTV, UTV, and Network 18, along with increased partnerships between these companies and global media giants. Unlike the early 1990s, when Star was the sole international player in Indian television, the landscape now includes numerous global media companies such as Time Warner and Viacom (Chadha & kavoori, 2012). These companies have formed strategic alliances with local media firms to leverage their resources and expertise, creating entities like Viacom18 and Imagine TV, a joint venture between NDTV and Time Warner. Although some partnerships, such as Imagine TV, have not succeeded, their frequent attempts highlight the ongoing effort to capitalize on India's growing television market. These collaborations aim to combine local programming advantages with international capital to thrive in the competitive industry.

The impact of market concentration in Indian television is evident in the predominance of specific programming formats during prime time. Historically, as Ananda Mitra noted, Doordarshan's prime-time line-up featured a diverse mix, including sitcoms, dramas, children's shows, quiz programs, and soap operas (1993). However, despite the expansion of Hindi and regional channels, today's prime-time television is largely dominated by just two types of programs: soap operas, also known as serials, and reality shows. These formats are prevalent not only throughout the day but also during prime time, similar to Latin American telenovelas. For instance, reality shows like *Indian Idol* (2004) and *Khatron Ke Khiladi* (2008) have become prominent, offering a platform for ordinary viewers to gain visibility (Bansal, 2011). The success of channels like Colors, launched by Viacom18 in 2009, illustrates this pattern (Chadha & Kavoori, 2012). Colors became the second most-watched channel by focusing on serials and reality shows, surpassing competitors like Zee and Sony. According to a FICCI/KPMG report,

34% of programming on general entertainment channels is dedicated to serials, while reality shows make up 10%, with other formats occupying much less airtime (2010). The focus on these dominant formats has overshadowed discussions about programming diversity. Despite the proliferation of channels and shows, the actual variety of entertainment options remains limited. The dominance of serials and reality shows restricts true diversity in programming, with many options appearing similar to each other.

Moreover, alongside the government's "considered silence"[25] to issues like market concentration, vertical integration, and the dominance of major players like Reliance, it also spearheaded significant technological advancements in television (Parthasarathi, 2018). The mandated shift from analogue to DAS by 2014 represented a crucial transformation in India's television industry. Enacted through the Cable Television Networks (Regulation) Amendment Act of 2011, this transition aimed to modernize broadcasting infrastructure, enhance signal quality, and broaden digital access, particularly in underserved rural areas. The effort, however, experienced setbacks and legal challenges, postponing the actual date of digitization until March 31, 2017. In any case, the government and the media sector believed the shift from analogue to digital was essential. This was part of Prime Minister Narendra Modi's Digital India initiative of 2015, which aimed to transform India into a digitally empowered society and knowledge economy. The initiative also emphasized that some digital access was necessary for a contemporary media experience. While the digitization

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[25] Parthasarathi describes what he terms "considered silence" as the Indian government's strategic use of avoidance in response to media concerns, and its unwillingness to act on issues related to concentration of ownership in the media, vertical integration, or concentration of power in the hands of large companies. By remaining passive and not interfering in the media dynamics of the marketplace, the government is able to abide fully by market forces and corporations while expressing minimal concerns through regulation. This is indicative of a larger strategy that supports avoiding any manifestation of intervention in the media landscape, indicating instead where or whether the government prioritizes issues, media policy, or technology advancements and by separating the important from the contentious (Parthasarathi, 2018).

initiatives were ambitious, they also had challenges. Local cable operators in smaller towns and villages had difficulty buying and supplying set-top boxes to their customers. They also struggled to raise local fees for the boxes and cable network, highlighting the economic challenges. On the flip side, however, the digitization initiatives also revealed entrepreneurial activity in the media sector with the emergence and growth of multi-system operators and local cable operators, with varying levels of success since the late 1990s. The expanding access to DTH satellite TV, as well as the push from new competitors that focus on Internet Protocol Television (IPTV) (e.g. Tata Sky and/or Dish TV), has fuelled exceptional diversity and complexity within the market.

Kumar, S. (2019) offers political insight into the role of digital addressability on the broader industry and technology environment. The emergence of the DAS systems and technology presupposes a more harmonised approach to telecommunications policy at national and international levels. This directly challenges the debates around standardization versus diversification. Kumar, S. argues that new digital technologies like DAS, Aadhaar, and IndiaStack need a fresh understanding of digital address systems and their implications (ibid.). The topic of privacy and surveillance is a growing issue among media consumers. While media users increasingly worry about privacy and surveillance, digital infrastructures make programming and service delivery more convenient and efficient. Companies like Dish TV and Reliance Industries are attempting to combine DAS with IndiaStack and Aadhaar, which generate arguably complex issues around privacy and surveillance and the shifting relationships between public and private spaces. The example of companies aiming to combine DAS, Aadhaar, and IndiaStack provides the need for a more nuanced and sophisticated exploration of the impacts of digital systems and media, culture, and industry in India. Ultimately, the transition to DAS shows the broader economic aspirations of India's media industries, aiming to capitalize on growth potential in rural markets and maintain relevance in a digital future. This chapter highlights a key moment in Indian television's

development, ushering in the new opportunities afforded by the digital era.

In summary, the early 2000s saw politics and big business strongly shaping Indian television. State intervention, such as regional parties controlling channels, shows how television became a tool for political agendas. At the same time, media monopolies limited the variety of content available. As ownership of media conglomerates became concentrated, so did the diversity of programming, where soap operas and reality shows took up prime time over all other programs in the content landscape. This focus on similar programming pushed viewers to seek alternative content, leading to greater use of online media (discussed later in this chapter). Further, the transition to DAS represents an essential step in bridging the content gap and improving access to content in endless rural areas. Looking ahead, the future of digital television in India will likely be shaped by the ongoing interplay between traditional media giants and new digital platforms. Both will influence the media landscape as they aim to meet the demands of an ever-changing audience.

2.3.2 Unveiling India's Digital Tapestry

The growth of ICTs in India from 2000 to 2015 was significantly influenced by a combination of political, economic, and technological factors. The Indian IT industry, epitomized by major firms like Infosys and Wipro, exemplifies India's integration into the global information economy. By 2008, this sector contributed 5.5% to the national GDP, reflecting its pivotal role in the country's economic landscape. The rise of the IT sector was catalysed by the government's deregulation of the telecom industry in the mid-1990s, opened up the market for multi-national corporations, including call centres (McMillin, 2008). The IT industry, especially IT enabled services industry, became a vital career destination for many young Indians. The proliferation of IT infrastructure and services has driven innovations in various sectors, including education, healthcare, and governance, underscoring the transformative influence of ICT across different facets of Indian society.

ICTs are also viewed as a tool for addressing the needs of those excluded from India's technological advancements through initiatives aimed at harnessing these technologies for developmental purposes. Various ICT for development projects across the nation receive funding from a broad range of sources, including national and state governments, corporations, NGOs, and both domestic and international foundations. These technologies are used to provide e-government services, enhance education and healthcare, and stimulate economic growth, with a particular emphasis on addressing gender and caste disparities. While there was initially strong enthusiasm for the transformative potential of ICT for development programs, this has evolved into more nuanced evaluations. There is now a heightened recognition of the need to integrate these programs within their specific political, economic, sociocultural, and technological contexts (Brewer et al., 2006; Sreekumar, 2005).

Successful projects like *Gyandoot* highlight the impact of these initiatives. *Gyandoot*, a benchmark in e-governance and e-commerce, was launched with the aim of catering to the needs of rural consumers through ICT kiosks managed by trained local youth (Sood, 2001). Local authorities, in partnership with government officials, established ICT kiosks run by unemployed youth who were selected and trained by the *Gyandoot* Samiti. These kiosks were designed to address the everyday needs of a broad range of rural consumers. The project, which aims to achieve social engineering and development through ICTs, represents a significant shift in how government officials engage with the needs of impoverished communities. Initially launched in a predominantly tribal and underdeveloped region, the initiative remains a managed program with minimal involvement from civil society.

ICTs have also been enthusiastically inserted into education, especially at the marginalized end of the Indian society. After initial efforts by India's Human Resource Development Ministry, in collaboration with the Indian Institute of Science in Bangalore and the

Indian Institute of Technology in Madras, to develop a $10 laptop failed, the government turned to the One Laptop per Child program to provide technology to schools. In April 2009, the government purchased 250,000 laptops for 1,500 schools (Paul, 2009). Prior to this, the Andhra Pradesh government, known for its strong investments in ICT, had hired Silicon Valley's nComputing to equip computer labs in 5,000 schools with virtualization software, which enabled multiple users at separate stations to access a single computer. Additionally, Microsoft Research India developed multi-mouse technology, allowing several children to use their own mouse to interact with a single computer, thus boosting student engagement (Pawar, Pal, & Toyama, 2006).

Alongside these efforts, commercial interests significantly shaped ICT practices. Companies like Microsoft Research India (MRI) contributed to academic research on ICTs for development. By 2008, India's Ministry of Human Resource Development began recommending the incorporation of digital tools—such as blogging and robotic kits—into public education, underscoring the growing importance of ICTs in shaping critical thinking and education policy (Schwittay, 2011). Simultaneously, India witnessed a rapid transformation in internet access, driven largely by the widespread adoption of mobile phones. While owning a landline remained a luxury for many, mobile technology dramatically increased connectivity across the country. By March 2009, India had 391.8 million mobile phone subscribers (Live Mint, 2009). Affordable data plans made mobile phones the primary means of internet access, particularly in rural areas, democratizing digital participation. Public access points like Internet cafés continued to play an essential role, especially for young users seeking an entry point into the digital world (Rangaswamy, 2007). Mobile technology further empowered economic activities, with fishermen in Kerala using mobile phones to bypass middlemen and secure better market prices (Jensen, 2007). Initially focused on voice and text, mobile phones soon became a crucial tool for internet access, playing a vital role in expanding digital inclusion (Donner, 2009). As internet connectivity expanded, it reshaped social and

cultural practices. Social media platforms like Orkut altered social norms, and matrimonial websites revolutionized traditional matchmaking practices (Sharma, 2008). The internet also emerged as a platform for political engagement, as demonstrated during the 2009 general elections, which were dubbed India's first "digital election" (Mishra, 2009). The Mumbai attacks later that year highlighted the power of digital platforms like Twitter, which were used to coordinate relief efforts.

The convergence of ICT and traditional media industries further accelerated with the advent of OTT platforms. These platforms represent the blending of traditional television with digital technology, described by Jenkins & Deuze (2008) as the flow of content across multiple platforms, facilitating collaboration between media industries and transforming audience behaviour. By 2019, India had over 30 OTT platforms (KPMG India, 2019), with YouTube emerging as the most consumed OTT platform. YouTube channels like TVF and AIB have become remarkably popular, explaining how content consumption is shifting from traditional television to relatable youth-focused digital media (Cunningham & Craig, 2016). Following this trend, traditional broadcasters began making their own moves in the OTT area. Star TV launched Hotstar in 2015 and quickly secured a strong position in the market after obtaining the streaming rights to the IPL (Palepu & Dey, 2020). Global players like Netflix and Amazon Prime Video also established a presence in India, providing localized versions of high-quality content to Indian consumers. The growth of OTT platforms sped up after the Jio revolution 2016, which made data cheap and expanded internet access across India, especially in rural areas. The mobile phone was now the device of choice for digital media exposure (KPMG India, 2017). Ultimately, this convergence of traditional broadcasting and digital streaming has changed India's media landscape and improved access to content for millions of people.

The convergence of traditional broadcasting and digital streaming has changed India's media landscape. Earlier, television was the primary

source of entertainment, but it was restricted by fixed schedules and the control of a few powerful owners, which limited viewer choice. OTT platforms such as Hotstar, Netflix, and Amazon Prime Video have changed this landscape. They offer on-demand access to a variety of content options built on personal choice. This shift has greatly diversified the media landscape. Unlike traditional television, OTT services have created fresh and innovative programming that breaks away from old viewing habits and the overload of shows on traditional broadcasting. Innovations and alternative programming challenged the methods of traditional television. The fragmented TV ownership also opened space for newer and more flexible players in a limited market.

2.4 Conclusion

The trajectory of television in India has always been complicated and has evolved due to multiple actors in the history of television content and ownership. Originally recorded as state sponsored media with the rationale of education and development at national levels, television has expanded into a large commercial enterprise led by a small number of large players. This transition occurred under a path of evolution of technology, policy, and economy, which has led to the current state characterized by consolidation, commercialization, and a more competitive or aggressive stance from digital platforms. There is some evidence that this transition, along with technological gains, has narrowed the gap between market and political motives.

In the beginning, Indian television was tightly controlled and run by the state. Doordarshan was the sole source for development-focused programming during the first few decades. For Doordarshan, its programming was more focused on education and development/welfare through state-sponsored content on education mostly based in the context of agriculture and rural development. The Indian vision for television was to educate and promote nation-building in one manner or to take shape through content. Nevertheless, this approach provided very few opportunities for creativity or variety in programming, particularly in

urban areas where audiences were seeking more entertainment programming. Doordarshan was the main source for development-focused programming during the first few decades. Rural audiences, who had very limited access to television, were largely disconnected from this state media. This further deepened the divide between urban and rural media consumption.

The shift in India's economic policy, which began with liberalization in the early 1990s, represented the next significant change for the television industry. When private broadcasters and cable and satellite TV arrived, Doordarshan no longer had a monopoly. Indian viewers could watch many channels and types of shows for the first time. This brought diversity and new ideas in programming. Private media producers could now make content for specific groups of viewers. While urban television audiences got to experience this choice, rural audiences were still essentially reliant on Doordarshan, and taking up cable and satellite television put this into a slower mode of expansion. The uneven pace of television expansion was another indication of the socio-economic divide evident in India at the time separating urban, industrialized India from rural India.

With continued maturation in the television sector in the 2000s came a new challenge with the concentration of power in the hands of a few influential conglomerates. In fact, the emergence of larger multimedia conglomerates began to define the industry and wield significant influence over much of the content they were bringing to market and in the distribution channels. The purpose of these organizations was always revenue generation. This led them to create programming that appealed to a mass audience and ultimately brought in advertising revenue. This approach took the form of soap operas, reality television, and family dramas that became part of the landscape of Indian television. The quest for higher TRP created an environment that did not support innovation. Producers relied more on familiar formats that attracted viewers but did little to challenge conventions of programming.

At the same time as broadcasters were developing entertainment in authoritative ways, a connection started to develop between media, business, and politics as multibillion-dollar conglomerates began to have an interest in producing television. Media enterprises began to represent their political interests through media resulting in complicity between media, corporate interests, and political influence. The potential complicity of media and politics became relevant as what was called content entering the industry could serve to relay bias towards those in positions of power. The addition of news media by corporate conglomerates added a layer of interaction between content and entertainment when news media would add sensationalism or infotainment to their newscasts. The slight differentiation between journalism and sensationalism started to disappear with the rise of mass media.

At the same time these changes occurred, the operation of media began to be influenced by ICT. The rise of the internet and mobile technologies made additional delivery channels available that had been made possible by the first media forms of delivery. OTT platforms gave audiences more choice in what to watch and when to watch it. There had previously been a limit to what content could be scheduled in a scripted/televised format and what was viewed in a mobile/ICT delivery environment. The convergence of ICT and television was similar to the earlier shift brought by cable and satellite TV. However, it went further by giving audiences unprecedented access to content and changing ideas of ownership in television.

The launch of OTT platforms changed India's media landscape. They offered on-demand content, expanded choices, and changed consumer's media viewing habits. While traditional television provides content primarily catered to mainstream tastes, OTT platforms introduced new and contemporary forms of content that relieved the saturation that was prevalent in traditional television programming. This shift allowed new and smaller players to enter the media industry.

Moreover, the changes facilitated by the digital revolution, associated mainly with the Jio data boom, strengthened access to the media among urban and rural participants in ways that were previously impossible. Prior to mobile and affordable mobile internet, rural regions had limited access to quality entertainment, but mobile technology allowed millions of rural consumers to consume the same media content being accessed by urban counterparts. This democratization of access to media reduced the socio-economic divide, which has produced a distinct rural and urban media landscape for the majority of the twentieth century. Yet despite the plurality and innovation in content made possible from OTT television platforms occurred primarily over the last decade, the television industry is beginning to witness consolidation as a small number of major players seeks to institute a competitive dominance over a media landscape that is progressively more competitive.

Among those players seeking to navigate these shifts is ALTBalaji, which was developed by the media company Balaji Telefilms within the OTT wave brought on by legacy media companies migrating to move into the OTT space. Known primarily for family dramas and soap operas, Balaji Telefilms expanded through ALTBalaji and began to explore new and innovative content, which diverged from the conventions typical to mainstream television. For instance, as it relates to controversy, the programs *Dev DD* (2017) and *Gandii Baat* (2018) were deceptive in terms of their themes because they both challenged the notion of traditional family programming while also directly confronting socio-political issues.

With the growth of OTT platforms, ALTBalaji had to compete with bigger players like Netflix and Amazon Prime Video. These companies had more resources to create high-quality local content. The challenge increased for ALTBalaji even more when Disney acquired Hotstar and provided live sports and vast media content – thereby becoming the market leader with large conglomerates. The next chapter will engage further in the dynamics of OTT television platforms, with a focus on

ALTBalaji, in terms of how they are adapting to the OTT revolution in order to survive. It shall also examine how regulatory, content-oriented, technological, and financial codifications are shaping the future of the Indian media ecosystem.

Chapter 2

Streaming the Alter-Ego: ALTBalaji, between *Saas-Bahu* sagas and Fast-Fashion Erotica

One of the great challenges posed by the internet, as the increasingly pre-eminent distributive force for popular culture material, is the appropriation of competing media platforms. This is particularly evident in the case of news, where distinctions between print, television, and web-exclusive formats blur into interpenetrating multimedia forms circulated across algorithmically curated feeds. Many of these tendencies are symptomatic of what Jenkins (2006) calls convergence culture—a context where media content flows across multiple platforms, audiences assume new roles as producers and circulators, and distinctions between formats are increasingly unstable. Convergence, however, does not equate to homogeneity. Instead, it coexists with friction: between formats, between regulatory regimes, and between commercial strategies and infrastructural limitations.

Nowhere is this tension more evident than in the domain of streaming platforms. As media companies grapple with the challenges and opportunities of digitization, they are forced to contend with the economic and ideological legacy of television, the creative liberties associated with cinema, and the monetization constraints of internet-based distribution. Simultaneously, the nature of the internet being open, ephemeral, and resistant to centralized control poses difficulties for the control strategies that traditional broadcasters and studios have relied on for a long time. In this sense, streaming services hold an unstable position. They work as TV alternatives but are controlled by profit demands.

These tensions are real, and platforms experience them directly as they try to find their place in India's diverse and competitive media landscape. The focus of this chapter is an example of this: ALTBalaji, the OTT platform launched by Balaji Telefilms in 2017. Balaji Telefilms is a production house that modelled the aesthetics and structure of Indian satellite television in the early 2000s; as an older production house moving into the growing digital space, Balaji allows us to consider how older production houses negotiate the affordances and constraints of the streaming economy. Indeed, Balaji Telefilms, in many senses, was the prototypical television production house of the early 2000s, which was synonymous with a genre of melodramatic family drama that became the staple format of Indian multilayer television.

However, in its digital avatar, ALTBalaji took a radically different turn—venturing into bold, youth-oriented, often erotically charged content such as *Gandii Baat* (2018), *XXX: Uncensored* (2018–2020), and *Ragini MMS Returns* (2017), alongside productions by its parent company, Balaji Motion Pictures[26], which has long been known for pushing the envelope with provocative and edgy cinema. These series, in their tone, aesthetics, and subject matter, marked a distinct departure from Balaji's earlier "*sanskaari*"[27] brand and instead extended the creative experimentation begun in Balaji's parallel venture, ALT Entertainment, which had produced provocative films like *Love Sex Aur Dhokha* (2010) and *The Dirty Picture* (2011)[28].

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[26] Balaji Motion Pictures has a track record of producing successful low-budget films such as *Love, Sex Aur Dhokha* (2010) and *Once Upon a Time in Mumbaai* (2010), as well as establishing lucrative film franchises in the erotic genre like *Ragini MMS* (2011) and *Kyaa Kool Hai Hum* (2005).

[27] "*Sanskaari*" is a Hindi term broadly connoting culturally virtuous or morally upright values, often used ironically to describe conservative portrayals of women and family in Indian media.

[28] Both films were seen as milestones in Indian cinema's turn toward more experimental storytelling and bolder thematic content.
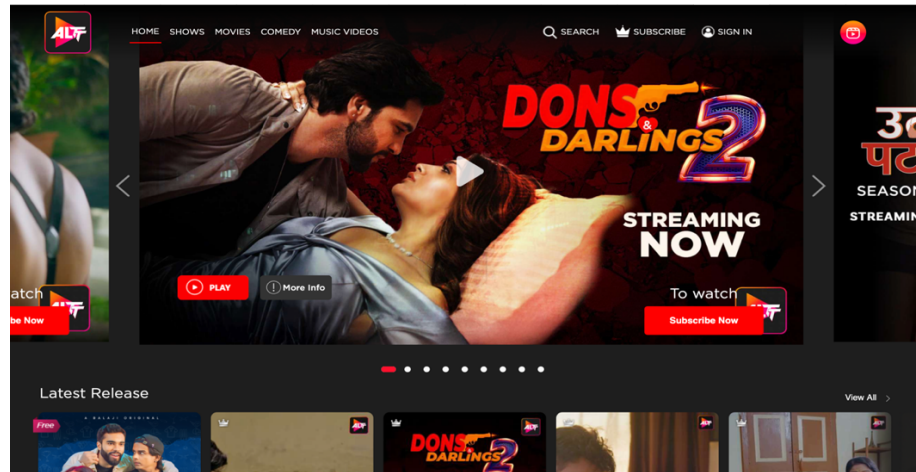
Figure 3.1 ALTBalaji homepage featuring sexually suggestive, genre-specific content designed for mobile-first audiences—signalling a shift from broadcast television aesthetics to platform-driven visual strategies. *Source*: ALTBalaji. https://www.altbalaji.com (Accessed: 6 June 2025).

The case of ALTBalaji thus enables us to trace multiple fault lines within India's digital media transformation: between content and infrastructure, between autonomy and enclosure, between regulation and freedom. Grappling with Balaji Telefilms' transition to ALTBalaji helps assess the extent to which the medium shapes the encoding of the message in the contemporary Indian media industry (McLuhan, 1964). It also allows us to think about how freedom is used on the internet. This includes both creative and technological freedom, unlike the more regulated world of television and film. In doing so, the chapter contributes to the broader thesis argument: that India's digital media revolution is not just about platform choice or user agency, but a deeper restructuring of media power shaped by infrastructural control, regulatory silences, and the convergence of telecom and entertainment capital.

While there are clear continuities between content produced for traditional television and that created for streaming platforms, there are also significant differences in aesthetics, audience address, and the political economy of distribution. ALTBalaji's trajectory provides a particularly useful entry point into this convergence. As a company that transitioned from broadcast television to OTT, it encapsulates both the affordances and constraints of such a shift. Unlike newer platforms such

as TVFPlay or regional YouTube channels[29] that emerged natively online, ALTBalaji carries the baggage of television—both in terms of narrative conventions and brand identity—yet attempts to reframe itself through strategies of "edgy" content, serialized erotica, and genre experimentation.

This transition cannot be understood in isolation from the broader dynamics of Indian television. As Chapter 1 of this thesis demonstrates, television in India was not only the dominant entertainment medium for decades, but also a highly regulated, advertiser-driven, and infrastructurally stable industry. Television's structure—rooted in scheduling, TRP ratings, and state oversight—gave rise to forms of content that privileged continuity, family values, and normative social order (Mankekar, 1999; Mehta, 2008). Balaji Telefilms flourished in this environment, creating highly serialized, emotionally hyperbolic soap operas that spoke directly to India's aspirational middle class. Shows like *Kyunki Saas Bhi Kabhi Bahu Thi* (2000) and *Kahaani Ghar Ghar Kii* (2000) not only defined Star Plus's identity but also came to signify a distinct televisual genre—slow-paced, intergenerational melodramas centred on patriarchal households, piety, and sacrifice (Munshi, 2020).

ALTBalaji, by contrast, signalled a deliberate rupture with this past. Its catalogue emphasized short-format storytelling, urban settings, sexually explicit themes, and characters far removed from the joint family setups of its predecessor. Its boldness, however, was not without precedent. As previously stated, Balaji's entry into film production through ALT Entertainment had already traversed the realms of erotica, horror, and other unscripted genres. In many ways, ALTBalaji continued these trends in a digital format. Because India had no OTT regulations in its early years, platforms were able to explore new possibilities.

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[29] For example, channels like *Karikku* (Malayalam) and Black Sheep (Tamil) gained substantial online traction with vernacular humour and drama formats.

Unlike telecom-backed platforms, such as JioCinema, ALTBalaji allows us to assess what vulnerable spaces for brands may exist as content-led platforms operating without the advantages of business infrastructure or regulatory support. As this thesis continues, ALTBalaji plays out as important integration between the aggressive telecom-focused infrastructural consolidation of Jio and the hybridized broadcast-streaming logic and linear approach of Star's Hotstar. In doing so, it deepens our understanding of how legacy media entities adapt—or fail to adapt—within an increasingly platformized media environment.

These larger structural issues are at the same time speaking to the longer term tensions enfolded within the Indian media ecology, in particular, the unresolved inconsistencies within television's inertia and the flexibility of formal emergent digital storytelling. At its centre, this chapter is concerned by the prospect of media producers negotiating the commercial prospects autofocused through the web and simultaneously being extremely wary of their "unreliable" publics. Web-based content, unlike media, can now be accessed entirely at will and from any locale, while strongly standing at the precipice of un-authorized access (peer-to-peer communications), compromise and a far more flaky attention span. Web-based content does not inherit more traditional media forms or shapes, but instead introduces intrusion, re-articulation and cross-dressing across the established boundaries of windowed media distribution.

In other words, emergent digital platforms for storytelling have disrupted the relatively disjointed film and television economies, roughly since 2013. Unsurprisingly, it is television – already a hotbed of cross-promotional intersections with the film industry (Kumar, A., 2018) – which has come under a compounded attack over the last decade. Indian television in general has stubbornly stood its ground over the last two decades as an *incommensurate force* that refuses to match steps with the dominant patterns of television productions worldwide. This is where the substance of the discord lies – films as well as web-based series adopt the

contrary tactic of "correcting" their course in order to be commensurate with their Western counterparts, while television remains defiant.

3.1 Between film and television

I briefly reckon with two contrasting ventures which pioneered the key tensions under discussion. In 2013, Colors TV[30] aired an official Hindi adaptation of the American thriller, *24* (2001-2014) aired over nine seasons; the adapted action thriller lasted two seasons between 2013-2016. The series was a fundamental challenge to the narrative design of Indian soap operas, which progress as if they were suspended in time, defying the slightest sense of real time progression. *24* was a series designed to narrate the story in real time, in order to shock the Indian audience out of the slumber that sustained the habituation to never-ending television soaps.

In 2014, a YouTube channel popular for mockumentary videos, TVF, launched its first web-series, *Permanent Roommates* (2014). For a YouTube channel of viral videos, it was an audacious move, even though the idea was in keeping with the TVF logo that makes a declaration of smashing television itself. The series cleverly adapts the cathartic template of Indian television, while also reinforcing the familial order, albeit with qualifications. In the most remarkable narrative manoeuvres made by the series, the lead couple come to learn that they have more in common with their previous generation than they imagine. While showing that the resilience of the traditional order must never be underestimated, the series offers an allegorical reading about the relationship between web-based and television series: "The cathartic tendencies of television need not be seen as fundamentally antagonistic

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[30] Colors TV, launched on July 21, 2008, is an Indian general entertainment channel owned by Viacom18. Its programming includes family dramas, comedies, fantasy series, youth reality shows, crime dramas, and TV films.

– they could be just as resilient as the parental control in the series" (Kumar, A., 2019: 200).

This conciliatory approach was in relative contrast with the standard TVF stance against television, best reflected in its "*The Making of...*" (2014) series that spoofs the behind-the-scenes production environment of competing media. In an episode titled "*A Decade Long Daily Soap*", it pans the signature style of Ekta Kapoor's soap operas produced by Balaji Telefilms, marked by a characteristic reluctance against narrative progression, and penchant for dramatic exaggerations conveyed in extreme close-ups. However, just as *24* did not alter the course of Indian television, let alone revolutionizing it, TVF's admittedly rhetorical promise of smashing television hasn't yielded any damage to television. What is worthy of consideration is the importance of these rhetorical gestures in accommodating new media environments and niche target audiences.

The question of where streaming platforms are located in the media milieu, especially in terms of television and the internet, is an issue that scholars are becoming increasingly interested in (Edgerton 2013; Lobato 2019; Lotz 2017). This chapter argues in the following paragraphs that instead of being engaged in a pitched battle with television as they yell, web-based platforms are providing variations of televisual programming that draws its entire house of cards from the cinematic industry. To put it differently, streaming platforms have theorized a rapprochement of televisuality within commensurate coexistence, setting aside their obstinance, towards a conciliatory in-between media milieu. One cannot understand the development of this emergent sector of the media market without inclusion of film and television industries in the analytical frame. Punathambekar and Mohan, for example, insist that in order to examine digital platforms, "we require an approach that takes into account the complicated layers of media structures and in-between sites," thus requiring intercultural frameworks (2019). As the interpenetration of film and television programming is underway with all major platforms

including Amazon Prime, Netflix, ZEE5, Disney+ Hotstar, and JioCinema[31], I highlight the important intersection and inflection points in this trajectory by highlighting the advent of ALTBalaji.

Bolter & Grusin (2000) argue that every act of mediation is always already an act of *remediation*. The way to understand new media, such as OTT platforms, is therefore not to take on face value their assertion of newness, but to investigate how they remediate their media ancestry. The key question to follow may be whether and how OTT platforms remediate television or cinema. Operating at the intersection of long-form storytelling and the new vistas of "free" exchange offered by the internet, streaming cultures appear to give more control to their uses even as they are robust manifestations of the infrastructures of control. The algorithms play a *curatorial* role to organize recommendations for individual preferences, in a way as to nudge the users instead of forcing their hands. In the following pages, the chapter will argue the following. First, in stylistic and generic terms, streaming cultures borrow more from cinema than television, primarily because of the ideological commensuration with the former, in which censorship plays a vital role. Second, cinema took the lead in confronting the challenge of digital capture, which has produced an alternative visuality beyond the editorial stranglehold of mainstream media. Streaming cultures' relatively playful grappling with the digital has thus been derived from cinema instead of television.

Third, and most importantly, the remediation of an admittedly struggling film industry—characterized by capital-intensive and celebrity-driven storytelling—into streaming platforms grappling with

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[31] The case of Reliance Jio is somewhat unique in this regard. As a MegaCorp which first entered telecom business first and then unleashed a massive platform ecosystem (Athique and Kumar 2022), its predatory pricing launched in 2015 created the Indian streaming market. But it remained a content aggregator platform until recently; only now, it has declared an enormous content slate of films, web-series and mini-originals (Frater, 2023).

low subscription revenues foregrounds the question of commercial viability. Given that many OTT platforms originate from television production houses, analysis is often distracted by stylistic contrasts with television, rather than recognizing OTT platforms as symptomatic of a film industry attempting to adapt to the affordances of the digital ecosystem. While films function as discrete cultural artefacts situated within genre matrices, OTT platforms construct broader curatorial experiences across their catalogues. *Farzi* (2023) and *XXX*: *Uncensored* (2018–2020), for instance, both began as films before being reformatted into web series. The former—a big-budget crime thriller with a star cast—was acquired by Amazon Prime, while the latter, an erotic anthology, was repurposed by the budget-conscious ALTBalaji. As the discussion moves down the hierarchy of budgetary models, the curatorial logics of individual platforms emerge as central to their content strategies.

As this chapter will show, Balaji Telefilm's journey from conservatism to sexual liberation on the narrative front is also simultaneously a journey from professional logistical discipline to amateur cash-burning on the production front. Unsurprisingly, then, profits from television cannot endlessly support experiments on the web; the latter must settle into a curatorial habitus, as it does, on cheaply produced titillation in the name of servicing the provincial demographic.

Before delving into the transformation of Balaji Telefilms from a conservative content producer to a proponent of sexual liberation and its evolution from a production house to a key distributor, it is essential to provide a brief overview of the company's history across various media platforms. This exploration will reveal how Balaji Telefilms has consistently positioned itself as a prominent player by leveraging its innovative approach to low-budget, experimental content, thus reinforcing its influence in the shifting landscape of Indian media.

3.2 Balaji Telefilms: The Content Queen's Legacy

In the early days of Balaji Telefilms, the company faced many difficulties and gained many learning experiences that later contributed to the company's growth within the Indian television industry. Founded by Ekta Kapoor in 1994, Balaji Telefilms had a tough beginning, with early projects not meeting expectations. These difficulties were encountered in many aspects of running a production house: it was not only about facing financial loss, but also about getting a better understanding of the nuances of how television is produced, what audiences enjoy, and the logistics that it takes to operate in such a competitive environment. However, these challenges also set a foundation for the company's success - ultimately leading to the success of Balaji Telefilms with the family comedy *Hum Paanch* (1995).

Hum Paanch (1995) was a significant milestone in the history of Balaji Telefilms as it was the company's first success story in Indian television (Khosla, 2001). The show had a very good cast including Ashok Saraf, Priya Tendulkar and debut actress Vidya Balan, and their acting contributed significantly to its success. *Hum Paanch* (1995) was based on a middle-class Indian family and all of the comedy stemmed from this household and its interactions in an often humorous, and chaotic way. The show made people across India connect through everyday humour. The success of *Hum Paanch* (1995) demonstrated the quality of the programme, and the ways in which audiences could identify with representations of familial relationships, intergenerational conflict, and other life storylines of everyday life. This success at the early level was crucial to Balaji Telefilms for building reputation and recognition to establish themselves in television. Moreover, *Hum Paanch* (1995) represented Balaji Telefilms' capability to produce programming based on familial relationships, an important emphasis in the Indian context. In addition, *Hum Paanch* (1995) succeeded in ushering a new phase of Indian television which was driven by more serialization and family dramas, thus laying the groundwork for the company to explore

other genres. While *Hum Paanch* (1995) positioned Balaji Telefilms as a notable television production company in the Indian television context, it was not the company's main turning point as a business. The turning point for Balaji Telefilms came with its partnership with Star Plus[32] in 2000.

The year 2000 marked a new beginning for Balaji Telefilms in its formal partnership with the Hindi entertainment channel Star Plus, one of the biggest television networks in India, that also served a significant role in revolutionizing Indian prime-time television (Munshi, 2020). Through this partnership, Balaji Telefilms produced two hallmark family television daily soaps on Star Plus called *Kyunki Saas Bhi Kabhi Bahu Thi* (Because a Mother-in-law Was Also Once a Daughter-in-law) and *Kahaani Ghar Ghar Kii* (The Story of Every Home). Their popularity and immediate success was recognized as perhaps one of the most defining times for Indian television due to the large step it provided to produce similar soap operas across Hindi entertainment channels. Each programme became a cultural phenomenon in their own right by setting the new precedent for Hindi television as a genre, while also allowing Star Plus to transition from English entertainment channel to one that contributed substantially to Hindi programming.

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[32] Star Plus was launched in 1992 as a part of the Star network as primarily an English-language entertainment channel in India whose programming consisted of content purchased from international networks such as Hugo Boss, Fox, and BBC. Nevertheless, and with the expectation of local programming, Star Plus partnered with Balaji Telefilms in 2000.

Figure 3.2: Still frames depicting from *Kyunki Saas Bhi Kabhi Bahu Thi* (2000) highlighting the joint family system in addition to the focus on female central characters, as promoted as important decision-makers within that system. The soap attempted to target Indian housewives by legitimizing traditional values and family customs and emerged as one of the pillars of Indian television in the early 2000s. Source: Screen grab by the author from publicly accessible media, for educational purposes.

Kyunki Saas Bhi Kabhi Bahu Thi (2000) and *Kahaani Ghar Ghar Kii* (2000) achieved tremendous success for Balaji Telefilms and solidified their emergence as a major contributor to the television space. They also opened the door for other family dramas to emerge. These two shows developed patterns that were rooted in complex family relationships, generational disputes/ tensions, and tradition within an alluring serialized narrative that resonated with many viewers (ibid). The competitive impact of these two shows spurred the development of many soap operas, including *Kkusum* (2001), *Kabhii Sautan Kabhii Sahelii* (2001), *Kasautii Zindagii Kay* (2001), *Kasamh Se* (2006), and *Pavitra Rishta* (2009), that influenced Indian television for many years following these two shows. In fact, their success was reflected in Balaji Telefilms' reported turnover of Rs 113.11 crore in 2001-02, a massive increase from Rs 49.67 crore in the previous year, a whopping growth of 127.70 percent (Balaji Telefilms, 2002).

In this way, Balaji Telefilms, having captured the television space, was interested in also being a film producer, and started Balaji Motion Pictures in 2001, thus entering the formidable Bollywood film industry. Yet, it would not be easy to transition to films. For Balaji Telefilms, despite its success on television, two of the films it produced, *Kyo Kii... Main Jhuth Nahin Bolta* (2001) with Govinda and Sushmita Sen, and

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Kucch To Hai (2003), were not successful at the box office. These early projects showed how television and film production were different. Balaji Telefilms had to change its approach and learn about the film industry. The company understood quickly that achieving success in television was not tantamount to achieving a similar goal in cinema, and subsequently made a strategically adept rethink of its film production approach.

In 2005, Balaji Motion Pictures produced and released the film, *Kyaa Kool Hai Hum*, which surprised the industry by becoming a box office success despite mixed reviews. The film went on to earn ₹21.5 crore (roughly US$2.6 million) at the box office, and became one of the top ten films of 2005 (Box Office India, 2005). *Kyaa Kool Hai Hum* (2005) was the first of a handful of 'successful' films to assist in establishing a cult adult comedy genre in Hindi Indian cinema, and demonstrated that Balaji Telefilms was capable of making successful work that audiences wanted to watch even if the critics did not agree. With the triumph of *Kyaa Kool Hai Hum* (2005) the company followed up by producing and releasing the sequel titled *Shootout at Lokhandwala* in 2007. This was another critical and commercial success, earning ₹46 crore worldwide at the box office (Box Office India, 2007). *Shootout at Lokhandwala* (2007) further established that Balaji Telefilms was capable of making films that audiences wanted to watch and which also garnered favourable reviews from critics. Overall, these two film presentations showed a growing comfort level by Balaji Telefilms to produce output from the film space and navigate the complexities of filmmaking, while carving out a space for itself within Bollywood.

By 2010, Balaji Motion Pictures had established a footing in the film business. It launched ALT Entertainment, a division to make provocative, experimental, youth-oriented fare. ALT Entertainment was mean to shake up and shake off Indian cinema's mainstream traditions in Bollywood, with a mission to make alternative genres and stories. The production company surprised audiences with its first feature film, *Love*

Sex Aur Dhokha (2010), directed by Dibakar Banerjee. The film broke through the mould with its use of digital camera technology and an anthology film structure of three interconnected stories of voyeurism, honour killings, and the media. *Love Sex Aur Dhokha* (2010) received nods for its raw and unadulterated look at modern topics, a massive disruption of escapism the Bollywood tradition of films.

After the success of its first feature film, ALT Entertainment wanted to deepen the provoking nature of its films, so it made *Ragini MMS* (2011), a film that fuses horror and erotica. *Ragini MMS* (2011) became a cult classic, and helped ALT Entertainment's reputation for provocative and innovative work. After *Ragini MMS* (2011), ALT released a sequel Unconventional and often controversial content are not without challenges. ALT Entertainment has had its battles with censorship, public backlash, and sued for the content of their films. For instance, the release of *Ragini MMS* (2011) presented graphic sexual content and warranted outrage from the conservative community who demanded that the film be banned as it pushed too far in subject, resulting in several lawsuits for the production company (Times of India, 2014). The production house was also subject to severe censorship during the production of *Kyaa Kool Hain Hum 3* (2016), directed at the sex comedy. Significant cuts were made to appease the Central Board of Film Certification (Bollywood Hungama, 2016). These cases of outrage and censorship helped build the company's image as a disruptor in the Indian film industry. They continued to boldly tell stories to a wider audience. Along with their provocative subject matter, they have made strides in developing the new generation of performers. ALT Entertainment has carved out a space for creativity among a risky network of fresh filmmakers and actors who are willing to experiment with unorthodox stories. A good example of this is *Shor in the City* (2011) directed by Raj Nidimoru and Krishna D.K., and set in chaotic Mumbai, in which the film was infused with dark humour and incisive social criticism. The project had an up-and-coming actor Sendhil Ramamurthy, while Radhika Apte's career took off due to being able to share her gut-wrenching

performance as a struggling artist publicly (Dutt, 2016). The portrayal of urban life with gritty urban elements exemplifies how ALT Entertainment's investments in unconventional films have nurtured an undefined talent pool. *Ragini MMS 2* (2014) which exploited the emergent trend of horror within Indian cinema, while also looking at sexuality and the supernatural. One of ALT Entertainment's more notable films was *The Dirty Picture* (2011), a biographical drama about the life of South Indian actress Silk Smitha. Starring Vidya Balan, the movie delved into the exploitation and objectification of women in the film industry. *The Dirty Picture* (2011) was an award-winning blockbuster that was not only a commercial success but critically acclaimed for its brutal indictment of the sexualized challenges women face within patriarchal oppression in the film industry.

Balaji Telefilms expanded its media business. In 2017, it launched ALTBalaji in the growing digital content market. ALTBalaji was initiated primarily to leverage the existing trust of ALT Entertainment factory and develop content for the Indian audience, while somewhat alleviating some rapid demand for digital content. Launching a platform for Balaji Telefilms to develop a response for a growing digital ecosystem in India provided space for ALTBalaji to create and enrich original and bold and diverse content that stands apart from linear television content. ALTBalaji quickly began to navigate towards niche segments of the Indian audience and create content that is habitually left out of or mildly critical of on Indian television, addressing urban issues and relationships and wider social issues. One of ALTBalaji's first hits was *Dev DD* (2017). It was a modern take on the 1917 Bengali classic *Devdas*, with the genders swapped. The show explored female sexuality and independence and attracted a young audience. Another notable show, *Gandii Baat* (2018), looked at sexual taboos in rural India and approached the topic boldly. ALTBalaji also had success in reformatting its original film series, *Ragini MMS* (2011), into the web series format as well. The original *Ragini MMS (2011)* was a film series containing horror

and erotic elements, so the launch of the web series allowed ALTBalaji to reach a new audience while retaining the spirit of the films.

Outside of the erotic web series like *Gandii Baat (2018)*, ALTBalaji produced series in other genres. *Bose: Dead or Alive*, which aired on ALTBalaji in 2017 was a historical drama produced by Hansal Mehta. The web series was about Subhas Chandra Bose, an important leader in India's independence. It showed the mysterious and controversial parts of his life, including his disappearance. Rajkummar Rao played Bose, and people praised the series for its story and accuracy. *Bose: Dead or Alive* (2017) was an extensive undertaking of research and filming that spanned approximately 18 months, and was shot on location in Poland, Thailand, Ladakh, Kolkata, and Mumbai (International Business Times, 2017). The total launch budget stayed under ₹5 crore. About 70% went to digital marketing, and the rest to traditional media. To raise awareness and gain paid subscribers, multiple versions of creative assets were developed to reach various audiences in contextualized ads in Hindi, Bengali, and English. Within 10 days of airing, it received 5 million views and became one of the top binge-watched shows in India, with data analytics indicating viewers watched all 9 episodes, back-to-back (ibid.). ALTBalaji, however, did not continue to produce historical drama's due primarily to the high cost involved in producing dramas of this nature. The need for level of production cost of historical period authenticity which involved research, construction and material effect generated expensive programming. Therefore, in order to generate original scripted series and respond to the consumer demand for more diverse programming, ALTBalaji shifted its content strategy and produced more affordable content.

ALTBalaji's content strategy has clearly demonstrated, and supported by its strategy of producing a breadth of original series at a low production value. By mid-2020, ALTBalaji had released more than 60 original series, showing its focus on creating content. The extensive library has been a major point of differentiation in a crowded marketplace

that includes other OTT platforms, including Netflix and Amazon Prime Video, where ALTBalaji has successfully converted consumers into subscribers. Even with this success, ALTBalaji faced its own challenges. Much like ALT Entertainment, ALTBalaji also has its share of criticism over content and controversy, relating both back to its commitment to producing bold, daring content. For example, shows like *XXX: Uncensored* (2018) contained some level of explicit material, for which generated legal issues, as well as successfully rallying the audience to petition for censorship on the digital media landscape further relaying the battle between society and artistic freedom in the country. Despite ALTBalaji's challenges, the fact that ALTBalaji continues to produce programming that challenge the limits of acceptable in domestic audiences to explore the boundary between bold, brave and cultural in representation has defined its mark as a disruptive entrant in the Indian OTT space.

ALTBalaji's partnerships helped increase its subscription numbers along with its original content. In particular, the partnership with telecom provider Jio opened ALTBalaji up to an expanded distribution network, enabling ALTBalaji to access greater swaths of the relatively vast and varied content market present in India. ALTBalaji has gained more subscribers through partnerships like the one with Jio. They have been especially effective in smaller cities and rural areas where internet access is growing fast. Additionally, the integration of ALTBalaji with Jio's ecosystem means that ALTBalaji can better reach Jio's volume of users by providing content bundled with Jio services, offering a larger array of channels with which to compete with commercially-promoted platforms in the Indian market.

ALTBalaji is successful but faces tough competition. Platforms like Hotstar, JioCinema, Amazon Prime Video, and Netflix have more resources. These competitors are well-resourced, financially, through which they can commit considerable financial resources towards the website, content production, and promotion, allowing them to continue

their market advantage. Comparatively, ALTBalaji is smaller, budget-wise, and its offerings fall short in comparison with these platforms. In the face of competition, ALTBalaji became increasingly pressured to change and innovate strategies to keep and grow their audience. The competition doesn't take away from ALTBalaji's accomplishments, it only highlights how difficult it can be to sustain growth and visibility in a crowded and ever-changing marketplace of digital media content. In order to get a complete picture of how ALTBalaji occupies this contested space it is also necessary to analyse the legacy of Balaji Telefilms, the parent company to ALTBalaji, and which has defined and shaped one the most prominent and dominant narrative forms in Indian television, the soap opera.

3.3 Balaji Telefilms and the Paradigmatic Television Soap

As discussed in the previous chapter, the inception of India's broadcast television dates back to 1959 when it was initially established with a strong emphasis on community development and formal education. Consequently, the vast majority of the early content on television in India was driven by community development and education objectives. There were early attempts at educational programming, such as on Krishi Darshan (1967), where the concept behind the program was to educate farmers on every aspect of agriculture, from horticulture to practice. Commercials surfaced on television for the first time in India in 1976, before Doordarshan was separated from the AIR[33]. This shift contributed to a modest growth in television programming during the 1980s. Punathambekar and Sundar (2017) characterize this period as the "time of television" due to the emergence of progressive melodramas that explored themes such as family planning, education, progress, and

[33] Doordrashan and AIR are India's Public Service Broadcasting services, which were previously operated under a single entity. Doordarshan primarily focused on television broadcasting, while All India Radio focused on radio broadcasting. This separation aimed to streamline operations, improve efficiency, and better cater to the evolving media landscape by allowing each entity to focus on its respective medium.

modernization. Notable examples from this era include *Hum Log* (1984) and *Buniyad* (1986), which introduced socially relevant themes and depicted everyday life in a realistic manner.

The early growth of television had much to do with the decline of Dadawala (2023) calls the 'literature-cinema nexus of the Indian New Wave', referring to the two-decade period ending in 1989, in which New Wave films had 'functioned as a unique contact zone between the cinema hall, printing press, and coffee house intellectuals' (2023: 46-47). This literary orientation of storytelling derived from Hindi literature was however set aside by a raging phase of commercialization during which economic deregulation allowed foreign and domestic companies to launch their own television channels and Doordarshan's monopoly was loosened through the 1990s. The viewers gained increasing access to a wider range of television channels, particularly in urban areas. At least in the early years of the transition, this growth was mostly confined to what are termed General Entertainment Channels (GEC).

The two most iconic serials of this period of transition were *Junoon* (1993-1998) and *Tara* (1993-1997) – aired on two of the most prominent channels, DD National and ZEE TV, respectively. Apart from *Ramayan* (1987) and *Mahabharat* (1988-1990), *Chanakya* (1991-1992) and *The Sword of Tipu Sultan* (1990-1991), serials on the Hindu epics and historical figures, most Doordarshan serials were commissioned for 13 or 26 episodes. Both *Tara* (1993) and *Junoon* (1993) were, however, designed as long-running soap operas with one main narrative trajectory branching occasionally into myriad small ones as the story progressed. They were also contemporary stories that showcased various elements of the upper/middle class urban lifestyle, highlighting the feuds, disputes and conflicts that were embedded in it – whether in terms of the split between licit and illicit or between gender roles in post-liberalization India.

Essentially, these serials had a faint resemblance to their cinematic counterparts, such as *Qayamat se Qayamat Tak* (1988) and *Maine Pyar*

Kiya (1989). Their cultural imaginary was ensconced within the legacy of Hindi melodramas termed 'feudal family romance' (Prasad 1998), in which revolting against the normative boundaries of the patriarchal setup was used as narrative device to suggest a defiant rupture. The two serials provided a novelistic narration of the dramatic elements by taking an episodic route to resolutions and transformations. The key difference between cinema and these soaps – and those which followed in their wake, particularly *Swabhimaan* (1995-1998) – was in the handling of the spectacle, mainly in terms of pacing. Most importantly, the understanding of the audience was not yet graded, or specific to demography. This is what changed fundamentally with Balaji Telefilms' soap operas, which birthed a new era, for at least Hindi television of the twenty-first century.

Balaji Telefilms rose to prominence with *Kyunki Saas Bhi Kabhi Bahu Thi* (2000) and *Kahaani Ghar Ghar Kii* (2000), both aired on Star Plus[34]. These "*saas-bahu*" sagas soon became a massive cultural phenomenon, by focusing on the key target demographic: housewives. By focusing on the melodramatic valences of domestic disputes, especially kitchen politics of joint families, the soap operas stretched their narrative across generations. Instead of addressing a mass audience like its long-running predecessors, the new soaps' targeted design was born in a climate of the widening palette of satellite television. They were designed with the awareness that it was no longer possible, or even necessary, to address the widest cross-section of audiences in a television economy with increasing expansion and generic segmentation.

A decade after economic liberalization, the discourse and appeal of consumerism was powerful enough to overwrite the distinctly *austere* middle-class domesticity of the early 1990s tele-serials. A much more

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[34] Balaji chose not to start its own TV channel and kept producing shows for all the major TV channels beginning with Star, whose own trajectory into the streaming space has been discussed elsewhere.

fashion-savvy and opulent display of wealth and status was now available on television, especially focusing on the joint families of merchant communities, including Gujaratis, Agrawal *baniyas* and Punjabi Khatris. There are at least two reasons why this deliberate cultural identification offered via sartorial and culinary choices, language, stereotypes and several cultural artefacts and mannerisms gained significant relevance to the trajectory of Hindi television. First, the data harvesting of audience engagement via third-party agencies, beginning with the monopoly of TAM India and since 2015, Broadcast Audience Research Council (BARC). Through the TRPs, advertising was integrated within the television ecosystem, and went on to determine its future ever since early 2000s. Second, the increasing regionalization of Hindi television, beginning with *Kyunki…*, became the key navigational tool for both production companies and the audience.

The Gujarati cultural orientation of *Kyunki…* and other Balaji Telefilms' early productions was owing to the fact that television viewership was high among the Gujaratis (Singh, 2010). Its massive success set off the precedent for using regions as a vital dressing on the televisual platter of the twenty-first century. The cultural consistency of the productions was entirely unlike the older precedent of Hindi serials, where cultural markers were abstracted in such a way as to invite attention from across the spectrum of cultures addressable in Hindi language. Serials, as a result, became a hotspot of regional "flavouring", even as the central idea across the televisual palette remained the same: homebound female protagonists would arrest their due status in entertainment media, by making the implicit declaration that it was the domestic arena where real power struggle took place. Indeed, such a declaration was entirely at odds with Hindi films where much of the key conflicts were resolved in full public view; this was especially the case beginning with the rise of action melodramas in the 1970s up until the late 1990s.

However, it was in the 1990s that a few 'family films' established a lucrative trend of what has been termed the cinema of 'panoramic interiors', marked by 'the coming together of art directors, the advertising world, fashion designers, and the film industry' (Mazumdar 2007: 120). For Mazumdar, the panoramic interiors in 1990s blockbuster films, such as *Hum Aapke Hain Kaun* (1994), are 'lavish and ornate, spectacular and garish' (ibid.: 122). The panoramic interior, among other things, is an 'architectural spectacle of light space' marked by the absence of dark spaces; it expresses 'a crisis of belonging, fear of the street, and the desire for the good life—all at once (ibid.: 148). While much of Hindi cinema was still ruled by the fear of the street, as in gangster films of the period, it is this slice of opulent family melodramas that contemporary television was modelled on. The paradigmatic long-running soap had a distinct resemblance with the rising appetite for consumerist lifestyle in these films; in both the industries, the panoramic desires were anchored within a rather jarring moral rhetoric of Hindu traditionalism (Fernandes 2007; Uberoi 2006).

Indeed, Balaji Telefilms' aggressive monetizing of the prime-time slot (8pm-11pm) was not without competition. India's first 24x7 Hindi news channel, *Aaj Tak,* was launched roughly six months after *Kyunki*… Regardless of the soaps' foregrounding of the joint family, the actual family audience was being increasingly segmented across television genres, including news, soaps, reality television and sports. The attendant tug of war was intensified by the fact that most families owned a singular television set. For the paradigmatic soap, however, the bid for the family audience was launched via housewives. On the ideological front, it is by addressing the women of the household as key decision makers and the vital force behind the stability of conservative values that soaps tried to arrest the biggest audience slice possible. On the tactical front, the paradigmatic soap after *Kyunki*… not only uses the leading female protagonists for elaborate promotional campaigns, but also narrate the entire series as the story of her desires and struggles.

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While this conservative triumph over the domestic arena by television is generally well-acknowledged[35], what is less well understood is the anchoring of this triumph within censorship. The paradigmatic assertion of television soaps in India, as an incommensurate medium in the neoliberal period, was to stand the conservative ground with respect to the integrity of the Hindu family at a time when both cinema and more importantly the web were seen as potent threats to the social order, of which the joint family became a protected prototype. Balaji Telefilms was at the forefront of devising the scheme of things in which the de-facto matriarchs would defend their "territory" in prime-time via a moral rhetoric steeped in melodramatic valences. In doing so, they acted as proxies for the Indian state, which barricaded the middle-class domesticity within *stricter censorship norms than any other media platform*, at a time when its integrity was threatened by neoliberal economic reforms and their attendant liberal worldview. Regulation, as the polite pseudonym of censorship, provided a minimum guarantee to the conservative worldview, which has only expanded its televisual territory via the reign of long-running soaps.

3.4 Medium, Censorship, Content

The adoption and impact of streaming platforms are heavily refracted via shifts in media policy and the history of control exercised over the media by respective territories that constitute a regional or national media market. Unsurprisingly, the regulatory dynamics have been at the forefront of the messaging specific to different media platforms. Censorship policies vary across different media platforms, including television, films, and OTT platforms. Traditional television is distributed via over-the-air transmission, cable, satellite, or IPTV to reach a wide

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[35] To put this reign of conservatism in perspective, it may be added that the adherence to conservative values was routinely balanced with, or rationalized against, assertive and headstrong female characters who fight back and eventually find support within the domestic arena. Examples of such serials include both productions by Balaji Telefilms, such as *Bade Acche Lagte Hain* (2011-2014), and those by others, such as *Balika Vadhu* (2008-2016), *Diya Aur Baati Hum* (2011-2016) and *Anupamaa* (2020-).

audience. Given its extensive reach and accessibility, television is subject to a more stringent regulatory framework compared to other mediums, with the aim of maintaining a programming environment devoid of offensive, vulgar, or disruptive elements that may disrupt public order. As Kumar, A. (2018) has noted elsewhere,

> owing partially to their distinct histories within the media economy, media are not only constituted by their formal and aesthetic constraints, but also continue to uphold an ideological function. [Since television was developed in India as a broadcast medium, its] intersection with middle-class domesticity further ensured that the state was built into the imaginary it offered to law-abiding citizens. This imaginary was not substantially overwritten by the emergence of cable and satellite television in the 1990s.

The Cable Television Networks (Regulation) Act of 1995, along with subsequent amendments, governs television channels, impose significant restrictions on content (TRAI, 1995). Notably, two channels, AXN and Fashion TV, faced a temporary ban in 2007 for broadcasting explicit and adult content during daytime hours. But more importantly, the television cut of films is a re-certified or re-censored version, which is often too disheartening for the directors to watch. The tampering is tolerated only because the satellite television screening rights are an important revenue stream, especially for low-budget independent films.

The greatest challenge for films, already force-edited and certified by the CBFC (India Today, 2019), is to pass through the regulatory hoops enforced by the TRAI as well as the restrictive hoops installed by respective channels. While many filmmakers ensure that their films remain on the favourable side of the censorship norms of both CBFC and TV channels to begin with, others like Anurag Kashyap would test the limits of CBFC and either risk relinquishing satellite rights altogether, or accepting a television cut only for the financial support. A-rated movies, for example, can only be televised with further restrictions, since the

Ministry of Information and Broadcasting has issued guidelines specifying designated time slots after 11 PM to prevent access by minors. However, the channels may yet not buy the rights for an A-rated film; the only safe option for the filmmakers is to go for re-certification. After re-applying the films seek either a "U" (unrestricted public exhibition) or "U/A" (unrestricted public exhibition subject to parental guidance for children below the age of 12) certificate for television viewing. But the state-owned broadcaster Doordarshan only accepts films with a "U" certificate. This re-certification provision is still not officially part of the Cinematograph Act, but the production companies such as Balaji Telefilms and Viacom18 have far stricter oversight by their content regulation teams (Jha, 2016). Also, certain unsuitable scenes or content may yet be subject to editing or censorship over and above all the above-mentioned letter of the law, in the spirit of protecting middle-class domesticity from "unsuitable" content. Those production houses like Balaji Telefilms which have championed the cause of television as the ideological battleground of conservative values, not only align with strict state censorship, they go overboard in trying to set the standards for the *protection* of televisual publics within the changing media landscape.

With the entry of streaming platforms, however, this arrangement between films and television has been destabilized. OTT content in India is regulated by the Ministry of Information and Broadcasting and follows a self-regulatory mechanism. The Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021 require OTT platforms to adhere to a code of ethics, including provisions related to content classification, age restrictions, and self-regulation (MEITY, 2021). Because these guidelines merely facilitate self-regulation and demand self-identification by the viewers, they effectively endorse the disruptive prowess of streaming platforms in at least two ways. First, in order to bypass television's position within the revenue stream, OTT platforms began to offer a higher revenue support to films at a time when satellite rights value was already on a steady decline towards a market correction across revenue sharing streams (ibid.). Second, OTTs have

become a more "natural" ecosystem for films since they offer far more modest self-regulation for the so-called adult content (nudity, abusive language and violence). This has reinforced the preference of filmmakers towards digital platforms, which do not hold any brief for censorship and content regulation practices; this is true even for those platforms which have a shockingly contrary approach on their television channels (e.g., Colors versus Voot; Balaji Telefilms vs ALT Balaji). Censorship has therefore been critical to the emergent solidarity between the film industry and OTT platforms, both of which however do not have the reach of television.

The above illustrates how the content circulated on apparently distinct media platforms is not necessarily determined by the volition or character of media production outfits; instead, it prospers as per the manoeuvrability offered within the letter and spirit of regulations. The case of Balaji Motion Pictures (BMP) is illustrative here. While an arm of Balaji Telefilms, it started producing films only a year after *Kyunki…* Yet, unlike its television soaps, BMP's ethos would be best described as the media industry equivalent to investing in "penny stocks". On one hand, Ekta Kapoor's approach is known for blending superstition with method in a way as to never stray away from the key tenets of the *television soap system*. On the other hand, BMP's catalogue showcases its considerable appetite for experimentation, as long as it did not come with a big price tag. Commentators who launched many a diatribe against her soaps often failed to consider that the regressive ideology of television soaps reflected not Kapoor's ideological bearings as much as the systemic stability of a culture machine that she built on the platform of regulation.

As we shall argue hereafter, ALTBalaji's inclinations could be traced back to ALT Entertainment, which began its career in 2010 as a re-branding effort towards a 'bold' production outlook (DNA, 2010). This was required for *protecting* BMP and Balaji Telefilms from the possibility of a compounded loss of the brand image and financial

uncertainties of a stronger risk profile (Tanvir 2015). But this freedom from a legacy outfit and its legacy investment in the apparatus of production 'standards' also created the space for 'Low-Res Horrors', often marked by digital capture's characteristic grainy images (Sen, 2014). The notable films showcasing ALT's bold relationship with digital capture were *Love, Sex Aur Dhokha* (LSD) (2010) and its successor, *Ragini MMS* (2011). As a critical voyeuristic assembly of what may be termed *alternative visuality* – CCTV cameras, cell phone cameras, spy cameras, webcams etc. – LSD showcased the slippery multiplication of digital capture, which was fundamentally invigorated by the idea of a scandal. This alternative visuality was constituted by the spectre of an always lurking camera-eye. Precisely because the *Ragini* franchise directly bridges ALT Entertainment and ALTBalaji, its OTT successor – but also helps establish the film industry-based ancestry of OTT platforms – we must take a deeper dive into it.

3.5 Ragini, Leaked Online

Both *LSD* and *Ragini MMS* are films about the leaking of a digital recording into the public domain. This digital record may be kept for a range of intentions – security, housekeeping, 'sting' videos, casual camera fetish or betrayal of trust for personal profit or redemption. But in all these scenarios, the audience is implicated within the act of voyeurism since its access to the narration itself comprises of a collaged alternative visuality. The attendant dark pleasure is what distinguishes the grainy low-res images from the legacy of well-lighted images grabbed by a film camera, which then go through rigorous cosmetic treatment at the editorial desk. The idea of an MMS scandal refers to the discreet peer-to-peer circulation of a "sextape" – an amateurish recording of sexual intimacy, situated on the opposite end of the visual spectrum from professionally mounted productions.

However, *Ragini MMS* also successfully rehashed a well-established recipe of amateurish productions of 1970s-80s Hindi cinema – the horror-cum-sleaze blend reigned supreme in the B-circuit (Singh,

2008). The public attention around the first major MMS scandal in 2004 offered the possibility of multiplying amateurish horror with the often-inadvertent circulation of digital sleaze. This recipe went on to pile on what became the formidable *Ragini franchise*. The film sequel, *Ragini MMS 2* (2014) was followed up with a web series – two seasons of *Ragini MMS: Returns* (2017-2019) – which premiered on ALT Balaji. Even the sex comedy film *Great Grand Masti* (2016), produced by ALT Entertainment makes a clear reference to the *Ragini franchise* via the female ghost-protagonist, who is named *Ragini*. The primary narrative premise of the franchise revolves around a group of characters who find themselves entangled in paranormal experiences while residing in a haunted location. The franchise adopts a found-footage-style approach, utilizing a blend of handheld cameras and surveillance footage to enhance its reality effect. In the first season of *Ragini MMS: Returns* (2017) the first episode titled *Sex Shaadi MMS* opens with an aerial shot of a village, gradually zooming into an out-of-use, eerie mansion. This is where the viewers are treated to several erotic encounters. The first layer takes place *along* the narrative – private sexual intimacy followed by public display of erotic dance as an item song. The second layer aborts the first with an orthogonal incision, when the characters stumble upon a pornographic CD that contains a secretly filmed intimate scene captured by a CCTV camera. The interruption adds perspective by navigating us away from direct consumption of erotic pleasure towards its "accidental" digital capture.

Indeed, ALTBalaji's penny stocks strategy forces its hand further to prioritize *faster* gratification. But the shift to digital capture has also facilitated a shift in cultural acceptability towards *amateurism*. The amateurish qualification may even enhance the value of media-texts, since it amplifies the truth-claim by bypassing media industry's trademark professional sophistication. It is the broad appeal of digital amateurism that eventually gave ALT Balaji the recipe for their low-budget productions. Amateur media production, however, is not confined to the flat, grainy digital images and low resolutions. It also incorporates

a production ethos which is fundamentally opposed to production studios' editorial overreach. Carrying forward the legacy of B-movies, here we witness a deliberate offering which uses amateurism as a sign of pirate predation. These production techniques extract value in the way fast-fashion knockoffs do – via faster production lines and supply chains that invest much less time and resources on design, material and production. The story and screenplay, therefore, only prepare a broad arena in which the audience gathers for the erotic compensation.

What we witness in the *Ragini* franchise is the wedding of cultural anxiety about leaky sexual intimacy with the apparatus of voyeuristic alternative visuality; the latter facilitates a quick and amateurish process of value extraction from the former. The smooth transition of a found footage erotic horror film into a web-series with stable generic credentials illustrates how OTT platforms' succession are not merely an internet-based extension of television. Cinema in the twenty-first century went through certain key transformations – one of which being the incorporation of digital capture – which have been central to the stylistic as well as ideological blends available on streaming platforms. While streaming cultures have been rather boastful about "revolutionizing" television, by and large they have only adapted cinematic screenwriting and genres towards long-form episodic storytelling. But of course, ALTBalaji's inheritance is of those cinematic practices which have delivered substantial returns at the low-budget production end. Unwilling to burn their hands with lavishly mounted productions, ALTBalaji targets that portion of the market with streaming platforms which has limited scalability. Which is why the target demographic must be chosen appropriately. The following section addresses the most vital demographic cluster for ALTBalaji: provincial north India.

3.6 *Gandii Baat*: The Provincial Calculus

Figure 3.3: Promotional Images from *Gandii Baat* Seasons 1-6 (2018-) showcase the series' provocative exploration of sexuality, relationships, and societal taboos. Each season highlights female characters in central, bold roles, with a focus on their desires, struggles, and empowerment. *Sources*: Posters from *Gandii Baat* Seasons 1–6 (2018-). ALTBalaji Originals, 2018–2023. Screenshots compiled by the author for academic use.

Gandii Baat (2018-), an erotic series about the sexual proclivities of provincial north India has completed seven seasons of varying length. It is quite probably ALTBalaji's biggest success to date and one that the platform is known for. Each episode presents a distinct story, which allows the series to meander across a number of generic orientations, including horror, crime, comedy and thriller. Just as the long-running soap shifted the key site of conflicts over value systems within the domestic arena, *Gandii...* diverts attention away from urban sex comedies – a genre in which BMP and ALT Entertainment have themselves indulged a lot, such as *Kyaa Kool Hai* Hum (2005), *Kyaa Super Kool Hai Hum* (2012), *Kyaa Kool Hain Hum 3* (2016) and *Great Grand Masti* (2016) – towards provincial India; key examples of other ALTBalaji series set in provincial north India are *Helllo Jee* (2021) and

Virgin Bhasskar (2019-2020). The idea that the series rails against is that provincial north India is the domain of dull and arduous struggles. The series is driven by a libidinal imperative and showcases all sorts of sexual adventures to scandalize its audience.

To be fair to *Gandii…*, ALTBalaji draws upon one of the key shifts in preferences that cinema in north India has also gone through over the last two decades. This pertains to the emergence of Bhojpuri cinema on one hand (Kumar, A., 2021), and the emergence of 'small-town' Hindi films on the other hand (Kumar, A., 2013). Both the trends began roughly around 2003, with *Haasil* (2003) and the Bhojpuri blockbuster, *Sasura Bada Paisawala* (2003). The trajectories of both Hindi and Bhojpuri cinema, therefore, were driven by the desire to re-invite those situated outside the shifting worldview of metropolitan cultures, shaped as they were in the wake of neoliberal economic reforms. If Bhojpuri films assert cultural pride in the region via an industry feeding the working-class audience spread across the country, the provincial turn in Hindi cinema offered a new imaginary for the "small-town" – marked by relentless buffoonery while also cautioning against its capacity for uninhibited violence. Unsurprisingly, then, ALTBalaji also aired the first ever Bhojpuri language web-series, *Hero Vardiwala* (2019). However, unlike Hindi language ALTBalaji productions which only feature relatively unknown actors, the Bhojpuri web-series featured one of the most prominent Bhojpuri stars, Dineshlal Yadav.

ALTBalaji's provincial constellations push the provincial imaginary forward by giving it an erotic surplus. Just as the engagement with the low-res digital capture in the *Ragini* franchise, the substantial engagement with provincial worlds is dismal in *Gandii…* The series clearly uses the backdrop of provinciality to give a rustic flavour to the scandals that occasion multiples erotic encounters. The imprecision and inconsistency of regional markers – for stories set in Rajasthan, Haryana or Bihar – is also glaring here, unlike the *saas-bahu* sagas where sartorial, culinary and linguistic inclinations were relatively carefully mapped,

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even if in a stereotypical manner. The reason why that sort of careful cultural coding is not necessary here is twofold. First, the series is not targeted at the specific cultural demography it addresses, but at the widest cross-section of interest around rustic provinciality, much of which prevails among the urban audience. Second, the budget constraints do now allow the time or resources required for such an elaborate mapping, also because amateurism is built into the production ethos of fast-fashion erotica.

However, ALTBalaji is fully conscious of the burdensome legacy of Balaji Telefilms, not merely as the powerhouse of Indian television, but as an ideological force, which they are often measured against. *Gandii…* also presents a scenario which mocks the legacy by making a snide reference to it, before violating its ideological basis. The first episode of the first season opens in a village located in western Uttar Pradesh with the *Karwachauth* ritual, wherein the married woman (Gunja) is seen worshipping her husband on the terrace at night. *Karwachauth*, in particular, has been central to the films and television soaps characterized the panoramic interior. It represents a cultural fabric which refuses to bother with contemporary criticisms of the gender politics of traditional rituals. But having made a reference to the conservative social fabric that Balaji Telefilms often upholds obdurately, the episode goes on to establish the charade behind the ritual, and ends with a threesome to save Gunja's dysfunctional marriage with a gay man. Both *Karwachauth* and the threesome are used as for their scandalous potential, pitched against each other.

The series is also peppered with double-entendre and playful titillation via the elaborate verbal and gestural vocabulary that generally features all across the B-movie and fast-fashion erotica segment. Often enough, this means re-using the staple diet of cliched witticisms, which reek of amateurism at the level of screenwriting too. Most of these verbal duels in *Gandii…*, but also in other ALTBalaji series, are meant to amplify the primarily sexual value of female bodies; except that in

several instances, it is women themselves who deploy their sexuality to extract value. While this may appear to reverse or critique the sexualization of female body, such workarounds only give gender-equal opportunities to showcase the cynical manipulation of sexuality. For ALTBalaji series, *the scandal is the pre-eminent dressing for sexual encounters of all sorts*. They help not only showcase eroticism for titillation, but also in extracting the full "value" of sexuality, in a professionalized cynical manipulation of identity politics.

Figure 3.4: These images from the first episode of *Gandii Baat* (2018-) showcase the series' subversion of traditional rituals, specifically the Karwachauth ritual, which is later followed by a provocative threesome to 'save' a dysfunctional marriage. The show critiques and challenges the conservative social fabric upheld by mainstream Indian media, particularly the legacy of Balaji Telefilms, by using scandalous twists to disrupt societal norms. *Sources*: Screenshots by the author from *Gandii Baat*, Season 1, Episode 1. Directed by Sachin Mohite. ALTBalaji, 2018. Used here for academic critique under fair use.

The idea behind a whole spectrum of sexual "revolution" is to "break social boundaries" by giving its apparent due to "taboo love" – as declared explicitly in the trailer of another ALTBalaji series, *Hai Taubba* (2021, both seasons). Disappointingly though, breaking social boundaries and challenging social evils only amounts to romances contained within LGBT relationships. None of these are given their due in terms of (inter)subjective emotional complexity, because the purpose

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is to manipulate the scandalous value of sexual desire from across the preference spectrum. In the ALTBalaji paradigm, therefore, sex is often the scandal, the crisis event as well as the redemption. However, going so strategically and aggressively after the post-censorious vistas often activates other regimes of censorship.

3.7 Crowd-Sourcing Censorship

In an episode of *X.X.X.: Uncensored* (2018), a web-series co-produced by ALT Balaji and a rival platform ZEE5, there was a scene in which a woman married to a soldier makes her lover wear her husband's army uniform. The scene was considered by some to be offensive to the Indian armed forces, and it was promptly removed by both the platforms. In another case, the minister of Information & Broadcasting, Prakash Javadekar, is said to have intervened to censor *Virgin Bhasskar* (2019), another show co-produced by ALT Balaji and ZEE5. This was because a ruling party member of the Indian Parliament took offence to a signboard in the show that mentioned the name *Ahilyabai*, and claimed that it defamed Ahilyabai Holkar, an 18th century Maratha ruler (Deep, 2020). In 2019, ZEE5 and ALTBalaji had announced an alliance to collaborate on original content production, which allowed both to leverage each other's strength in the streaming market and reinforce their respective catalogues. While the alliance still continues, both of the shows along with *Gandii…* have been removed from ZEE5 since the announcement of above-mentioned IT Rules.

One may however ask why the shows were considered in violation of the rules by ZEE5, even though ALTBalaji took the opposite stance. To be clear, the content regulation for digital media has a three-tier structure, and must be initiated by user grievances. One of the many self-regulatory bodies set up for this purpose is Digital Publisher Content Grievances Council (DPCGC), under the Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021. After the first step in which users file complaints to be resolved by respective OTT platforms, the user could approach DPCGC if she is not

satisfied with the resolution. The third tier is where a committee set by the Ministry of Information and Broadcasting could be approached (Mitaksh, 2023). The interpretation of these guidelines, therefore, depends on platforms' anticipation of the threat posed by viewers' grievances. But of course, if the above-mentioned cases are anything to go by, crowd-sourcing politically motivated grievances is a potent threat.

Since the government of India is controlled by a political party known for its prowess for crowd-sourcing and unleashing terror and organized boycotts, the platforms are in no mood to run afoul of it over compliance, even as the country's apex court deliberates upon the legal validity of IT Rules. In fact, the fear of crowd-sourced censorship is so intense that even self-regulatory bodies with no constitutional powers to order removal of content take direct inspiration from the "censor board", as CBFC was known prior to 1983. In a rather striking example of this, DPCGC, which is 'neither a court nor a tribunal, and can only issue guidance or advisories to platforms', *ordered* another fast-fashion erotica platform, ULLU, to take down several of its web-series (Srivastava, 2023). The complaint was indeed raised by an "aggrieved" user, even though there are no legal bases to take down content on account of obscenity. In another recent instance, which was a direct reminder that the OTT platforms are not free of regulatory oversight, the Ministry of Information & Broadcasting has moved to block 18 OTT platforms found distributing 'obscene, vulgar, and in some cases, pornographic content', after consultations with other Government of India departments and domain experts in media, women's rights, and child rights (MIB, 2024).

ALTBalaji's position can be regarded as a bold one in a streaming market where its deliberately provocative erotic content often risks offending sensibilities. This necessitates a critical awareness of the rhetorical strategies that frame such erotica within legitimizing discourses. These include appeals to alternative sexuality, identity politics, feminist media production, and sexual liberation—discourses that historically stand in contrast to the normative worldview associated with Balaji Telefilms. Despite the fact that the platform's primary

audience consists largely of young men between the ages of 18 and 35—who outnumber female viewers by a factor of three (Jalan, 2020)—many of ALTBalaji's series are fronted by female protagonists. By foregrounding women as assertive agents in their own sexual narratives, the platform gestures toward redressing long-standing gendered repression. Whether such symbolic gestures are sufficient to offset the financial challenges faced by ALTBalaji, however, remains an open question.

3.8 ALTT: Balaji No More

While ALTBalaji appeared to be a successful force within the streaming market, it was rapidly burning the capital earned by Balaji Telefilms. That is the key front on which most OTT platforms cannot be delinked from their long career in television, or ancestry based in other media as in the case of The Times Group owned MX Player. ALTBalaji's primary struggle was to acquire enough direct subscribers so that its losses could be covered by the profits made by TV and film business (Jalan, 2019). The vital concern here is that ALTBalaji was never able to streamline and optimize production work in the way its parent company Balaji Telefilms did for television. In spite of the evident amateurism of its productions, 'the cost of 20 to 30 minutes of fiction content on digital can be as high as Rs 12- Rs 15 Lakh… which is almost twice of that of TV' (Pahwa, 2017). The logistical and financial discipline practiced at Balaji Telefilms, along with its choice of new actors and recurrently-used sets and post-production equipment, gave it an advantage it has not been able to replicate on the streaming platform.

ALTBalaji's preference for fast-fashion erotica mounted atop the rhetoric of sexual liberation, I argue, emerged from the desire to find a stable production ethos, so as to find the optimized logistical grid. Its failure to square off cheap erotica with feminist rhetoric has resulted from its inability to find viewers' support for series such as *The Test Case* (2017), which deviated from the recipe. The paradigmatic soap's triumph must be seen as a result of Balaji Telefilms' Fordist production design,

which does not extend easily to streaming cultures. In Ekta Kapoor's assessment, the standardization of television soaps followed from the televisual mode of address, which remains tied to a mixed demographic setting. Streaming cultures, however, are expected to address private individuals' 'slightly darker' sensibilities, and are premised upon *individual taste* (Ramachandran, 2022). In this distinction too, OTT platforms resemble cinemagoing and its attendant investment in engulfing darkness that isolates the individual even as one participates in a collective experience. The inability to downsize production costs for web-series has, however, compelled the re-branding and downsizing of the platform itself.

ALTBalaji is now ALTT, with a new logo. On one hand, the new brand allows the legacy of Balaji Telefilms to disengage, pretty much in the same way as BMP floated ALT Entertainment for its experiments with digital capture. It has also allowed the Kapoors to step aside from possible legal hassles born out of crowd-sourced censorship, while ALTT has hired executives from fast-fashion erotica platform ULLU (Broadcast and CableSat, 2023). Along with the rebranding, Ekta Kapoor and her mother, Shobha Kapoor, have stepped down from their leadership roles at ALTBalaji (Economic Times, 2023). On the other hand, it clears the way for ALTT to pursue its destiny with low-budget amateur erotica, while Balaji Telefilms focuses on producing content for other platforms, including Netflix; as it did and continues to do with its television productions. For ALTT, however, fast-fashion erotica is not their genre preference, but that of their audiences, 'especially from non-metro, tier-II and III areas' (ibid.). If the cladding of feminism and LGBT rights over cheaply produced erotica is the first layer of curatorial deception, the championing of provincial north India's colourful desires provides the second layer.

Figure 3.5: The changes in the logo, from ALTBalaji to ALTT, depict a significant rebranding that symbolizes the platform's shift in strategy and focus. While ALTBalaji initially aimed to replicate the success of Balaji Telefilms with high-quality, content-driven productions, the transition to ALTT reflects a pivot toward low-budget, fast-fashion erotica catering primarily to tier-II and III audiences. This rebranding highlights a move away from its legacy roots to address audience preferences more effectively, acknowledging the platform's struggle to adapt to the data-driven, algorithmic culture of streaming services. *Sources*: Image compiled by the author using official logo screenshots from the ALTBalaji and ALTT mobile applications. Used here under fair use for academic critique.

The problem, however, remains that these claddings are unsecured in terms of business. In a climate of data driven media production, especially for streaming platforms which often insist on third-party agencies' traction reports, it is the securitization of content by data that must endorse capital investment and manage financial risk. As discussed above, as a media production outfit primarily invested in television, Balaji Telefilms' entered streaming with a content-centric approach, without developing the armoury required for the predictive calculus that forms, by and large, the fulcrum of streaming cultures. Kapoor herself admitted ALTBalaji's shortcomings about the algorithmic extraction of usage data (Ramachandran, 2022). This marks ALTBalaji not as a "digital native" but more as a legacy media platform, which was never prepared to invest heavily in flagship crime thrillers that are prohibitively expensive to mount. Its struggles in the streaming space must therefore be seen as a problem faced by the model built on ideology and censorship. Having launched its alter-ego to shift the balance, ALTBalaji's foray into

fast-fashion erotica and the provincial calculus was shaped by how it shifted gears from conservatism into neoliberal identity politics, and from relishing censorship to flag-bearing the "rebellion" against it.

3.9 Conclusion

In a 2021 conversation with Mumbai-based producers, Karan Johar, the owner of Dharma Productions—active across both theatrical and streaming circuits—spoke about the unprecedented rise of corporate legal cells and market research agencies like Ormax Media in the industry (YouTube, 2021). While the legal cell represents a corporate response to the threat of crowd-sourced censorship, Rastogi (2023: 73) argues that data prophecies play an increasingly central role in platform curation, where audience surveys help define the "framework for the curatorial logic of platforms" by mapping cultural preferences to demographic categories. This remaking of media production in the service of computational capital—most evident in companies like Netflix, Disney+ Hotstar, and Amazon—is driven not just by the desire to attract audiences but to demonstrate algorithmic capability to investment banks, venture capitalists, and asset managers. In Asia, this logic has fuelled the rise of "super apps" backed by megacorporations such as Tencent and SoftBank Vision Fund (Steinberg, Mukherjee, and Punathambekar, 2022). The Indian equivalent of this tendency lies in the figure of Jio, which has yet to fully mobilize its capacity to turn oligopolistic capital into predictive data capital via an original productions catalogue. In the meantime, legacy media companies—particularly those without infrastructural integration—find themselves lacking the ecosystem leverage required to survive in media portfolios increasingly driven by predictive calculus (Kumar, A., 2018).

As this chapter has demonstrated, Balaji Telefilms' digital alter ego charts a journey from the plush, panoramic interiors of its television heyday to the visually sparse and thematically repetitive terrains of provincial erotica. The infantilization of characters, the over-reliance on titillating premises, and the absence of sustained world-building are not

merely aesthetic decisions; they reflect a deeper hesitation—or incapacity—on ALTBalaji's part to engage audiences with complex storytelling or to invest meaningfully in production quality. These limits show the service's small role in the streaming economy. Legacy media must meet the demands of data and profit, or they risk becoming irrelevant. Although ALTBalaji successfully took advantage of the regulatory conditions offered by the early OTT field, it has yet to materially adapt to the investment-heavy, data-oriented logic of platform capitalism. As the media ecosystem is increasingly shaped by the displacement of firms pursuing advantages in asset management—including Vanguard, BlackRock, and Fidelity—the idea of distinctiveness of voice and vision matters much less than that of algorithmic metrics and audience analytics, and the entirety of this embedded within the infrastructural ecosystem. ALTBalaji shows how cultural capitalism shapes India's streaming economy. It focuses on financial control rather than ideological control.

In spite of Balaji Telefilms' impressive legacy in television and cinema and across streaming, the technological shifts signalled by OTT distribution have opened up new constraints for legacy production houses. While platforms like ALTBalaji enabled Balaji to vertically integrate and bypass traditional gatekeepers, the ease of digital distribution also brought with it a highly unstable and competitive audience environment. With the proliferation of similar low-cost content across platforms—especially in genre-specific formats like erotica or thriller—the uniqueness of a catalogue becomes less decisive than the platform's infrastructural and algorithmic affordances. Content, in this context, is rapidly eclipsed by the network architecture that makes visibility, personalization, and monetization possible. It is no surprise, then, that the OTT ecosystem has shifted decisively in favour of technology companies over traditional media production houses. This new hierarchy—where "content is no longer king" and data becomes the ruling force—is what defines the platform media economy. These

dynamics will be explored further in Chapter 4 through the case of JioCinema.

In the next chapter, however, the thesis turns its focus to a very different model of OTT dominance: that of Star and its streaming arm, Disney+ Hotstar. Unlike ALTBalaji, Hotstar was born from a legacy broadcaster with deep-rooted access to sports broadcasting, national distribution networks, and a robust ad-sales infrastructure. Its trajectory reveals how broadcast television, far from being rendered obsolete, strategically inserted itself into the streaming space by leveraging marquee content (especially live sports) and a freemium business model to gain massive user traction.

Yet, as Chapter 3 demonstrates, even a platform as dominant as Disney+ Hotstar—bolstered by institutional scale, global capital, and exclusive sports rights—proved vulnerable to the structural realignments of India's digital media economy. While Hotstar initially capitalized on its legacy advantage to dominate live sports streaming, the ascent of telecom-integrated platforms like JioCinema revealed the limitations of a strategy rooted primarily in content control. Losing the IPL digital rights in 2023 showed this shift. It marked a point where infrastructure power overtook the advantage of legacy media. This was not the end, but a strategic move to reposition capital. At the end of chapter 3, the ultimate merger of Disney+ Hotstar with Jio (to become the merged company called JioStar) is suggestive of how even streamers are unlikely to hold their ground in an increasingly consolidated media landscape. This merger, discussed in more detail in chapter 4, shows how platformization in India focuses on consolidating power. It is more about controlling the ecosystem than digital technology itself.

Chapter 3

Star, Hotstar, and Live Sports Streaming

India has shifted from state broadcasting to digital media. This change came from liberalization, new technology, and shifting rules and has created space for new players. The presence of digital transformation along with the strengthening of legacy conglomerates has turned out to be an acute state of the modern media industry. In this chapter, Disney+ Hotstar is used as a paradigmatic case study of this phenomenon. The platform describes how traditional broadcasters may adapt the changing digital landscape both by continuity and adaptation. Hotstar started as an integrated broadcaster in the vertical sense and with the resources which it inherited through the same assets (infrastructure, exclusive content rights and a favourable regulatory environment) it brought the standard television format to the new realm of digital. Bolter and Grusin's (2000) concept of remediation is an apt description of the process: Hotstar is an example of hypermedia activity that requires the affordances of the internet to represent and hence reconstruct televisual culture. Moreover, it provides an important perspective to understand legacy advantages in India's streaming economy. Regulatory gaps and the rise of platforms help these advantages. They influence how content is distributed, who controls the market, and how audiences interact with media.

The selection of Disney+ Hotstar as a case stems, from its unique path, to a hybrid media formation—one that has evolved from the transformation, not disruption of television. The advantage of Star's dominance in sports broadcast—through dedicated rights to the Indian Premier League (IPL), Pro Kabaddi (PKL), and Indian Super League (ISL) are the building blocks for a digitally enhanced Hotstar. These rights became valuable assets, helping attract users, advertisers, and audience attention. The 2019 IPL final, which drew over 300 million viewers, marked a defining moment that established live sports streaming as a mass phenomenon in India (The Economic Times, 2021). In this

context, sports functioned as a critical throughline between television and streaming—preserving the event-based temporality of broadcast while adapting seamlessly to the affordances of the digital environment.
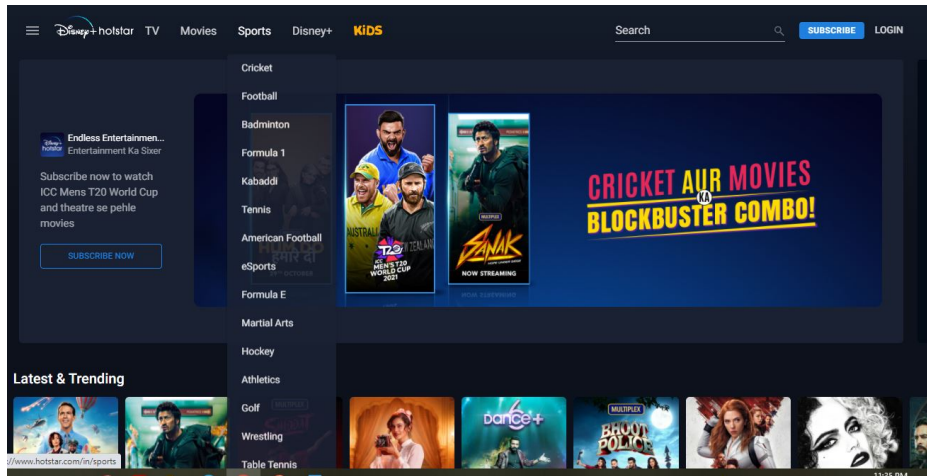
Figure 4.1: Homepage of Disney+ Hotstar highlighting its emphasis on live sports content, especially cricket, alongside mainstream entertainment offerings. The interface showcases multiple sports categories and promotes the ICC Men's T20 World Cup as part of its sports-media strategy. *Source*: Screenshot from Disney+ Hotstar website, captured by the author. URL: https://www.hotstar.com/in/sports

Live sports streaming was not simply a content category within Disney+ Hotstar's portfolio—it was a strategic engine of platform growth. The relationship between sports and media has long been symbiotic, as Jhally (1989) notes: sports offer high-value, time-sensitive spectacles, while media platforms provide the technological and economic infrastructure to amplify their reach and monetize their appeal. In the context of OTT, this relationship took on new dimensions. Live sports events became digitally optimized mega-media spectacles—anchored in broadcast traditions, but reformatted for mobile, on-demand, and algorithmically curated environments (Tamir & Lehman-Wilzig, 2022). Hotstar leveraged this shift with precision, transforming its platform into the country's default destination for cricket streaming. In doing so, it performed a critical mediating role between two competing logics: the collective, appointment-based temporalities of linear television, and the personalized, mobile-first culture of streaming. Thus,

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sports content evolved beyond mere audience attraction—it functioned as the structural hinge through which Hotstar bridged broadcast legacy with digital platformization.

Tables 3.1, 3.2 & 3.3 offer empirical evidence of this consolidation, showing how Star retained integrated television and digital rights for major cricket events between 2012 and 2023. For example, it had both sets of rights for Indian national team home matches and ICC tournaments. Having both rights enabled Star to integrate its linear and digital offerings, maximize revenue from advertising and subscriptions, and significantly squeeze competitors without the same scale. This strategy shows a common trend in Indian broadcasting. Large investments, gaps in regulation, and poor anti-trust enforcement have led to concentrated ownership (Dasgupta et al., 2021).

Table 4.1 The ownership of television rights for Indian cricket (national team home matches)

Years	Broadcast Rights	Value	Digital Rights	Value
2012-18	Star Network	$750 million	-	-
2018-23	Star Network	$944 million	Star Network	Inclusive

Table 4.2 The ownership of television rights for IPL

Years	Broadcast Rights	Value	Digital Rights	Value
2018-22	Star Network	$2.40 billion	Star Network	Inclusive
2023-27	Star Network	$3.05 billion	Viacom 18	$3.02 billion

Table 4.3 The ownership of television rights for ICC Matches

Years	Broadcast Rights	Value	Digital Rights	Value
2015-23	Star Network	$ 1.9 billion (appx)	-	-
2024-27	Star Network	$ 3 billion (appx)	Star Network	Inclusive

Hotstar's rise cannot be attributed to technological innovation alone—it was primarily driven by its embedded position within a broader media infrastructure. Strategic access to content rights, content distribution infrastructure and brand equity can be credited to the surge in the scale of Hotstar. Hotstar's parent company had upstream activities, including content creation, rights acquisition and multi-platform delivery: this allowed for synergies to be achieved that made it immune to competitive forces. This embeddedness did not reduce the service to the role of a content provider; instead, within India, this embeddedness placed Hotstar at a recognized point in the developing media-industrial structure of India. The strategic direction of the platform took another shift in 2020 with its absorption into the worldwide Disney system. This integration only intensified access to regional intellectual property and in the process providing the advantages of global analytic services along with global capital. As a result, Disney+ Hotstar started building a programme library including global franchise content, local production and popular sports.

Concurrent with the expansion of content and infrastructure, Hotstar confronted increasingly vulnerability in the broader Indian media economy, which had shifted from content ownership to infrastructure dominance. Telecommunication companies equipped with huge data banks and package service environments transformed the market. Also in 2023, IPL digital rights were purchased by JioCinema having replaced the Disney+ Hotstar content exclusivity and discovery approaches with data, access, and ecosystem power. The following year's merger of

Disney+ Hotstar into Jiostar was a strategic move rather than a step back from an integrated media infrastructure. Rather, it represented an intersection of the old media and telecommunications infrastructure, thereby establishing a new centre of influence within the Indian digital economy.

JioStar is not just a unifying of content libraries; in fact the presentation above hinted of convergence of distribution with data/cross sector capital; where all streams of distribution, user data – built to whatever form/channel of streaming – are powered by integrated service ecosystems (telecom, retail, and entertainment) as relative newcomers for the space are distanced from systemic constraints which are shifting infrastructures. Established leaders from fabrication and capital have chipped away valuable platforms with industry disruption, and now platforms based on legacy power of content original ownership and global financial sponsorship; are no longer out of touch with the important means of infrastructural-disruption. Competitive grounds of the marketplace redefined; no longer based upon content libraries. The loss of the IPL online rights in 2023 was not just a monetary loss; but it marked a paradigm shift in the system.

This was cemented in February 2024 with reliance industries and Disney signing a joint venture, pooling their Indian media holdings into a corporate entity with a valuation of US 8.5 billion dollars. Way beyond a traditional business-to-business deal, this partnership defined a *paradigital* space where converging methods of content, carriage, spectrum and software relate at significant scale. It began with the joint venture which is based on the complementary nature of JioCinema and Disney to create relevant competition with regard to their legacies and advance infrastructure deployment as the first task.

At the same time, the ability of the live sports streaming market to grow regularly (historically, a main source of growth for incumbent broadcasters) has proven highly volatile. Bilton (2019), Evans et al. (2013), Hardy (2014) and Strangelove (2015) note that the sports-media

nexus is being transformed by digitally native disrupters like FanCode, multiplying monetised intermediaries, widespread unauthorised streaming and a fragmented, volatile and increasingly expensive rights market. These dynamics have placed incumbent broadcasters under considerable strain, exposing the limits of traditional revenue models and the vulnerabilities of platforms that lack the infrastructural scale and bundling leverage of telecom operators.

By tracing these developments, the chapter positions Disney+ Hotstar as a case that reveals the adaptive strategies of legacy broadcasters within India's digital transition. But it also highlights the limits of strategic continuity in an environment increasingly structured by mergers, infrastructural asymmetry, and regulatory silence. The following chapter picks up this thread by analysing the Jio-Disney merger as a critical turning point—where broadcast legacy and telecom infrastructure do not just collide, but coalesce into a new configuration of digital power.

Therefore, this chapter takes Disney+ Hotstar as a lens to interrogate a broader research question central to the thesis: How do legacy television-based media conglomerates— and by extension, the medium of television itself—adapt to the structural pressures and strategic imperatives of India's digital media transition? To explore this, the chapter focuses on two interlinked dynamics: (1) the consolidation of ownership within post-liberalization Indian broadcasting, and (2) the instrumental role of live sports in facilitating (or failing to facilitate) legacy broadcasters' transition to digital-first, infrastructurally embedded platform models.

To unpack these questions, the chapter undertakes a political economy analysis of the strategies that have enabled certain media conglomerates in India to dominate content pipelines and distribution architectures. These include horizontal expansion across regional and genre-based television channels, alongside the acquisition of premium properties such as IPL through strategic partnerships (Mehta, 2015;

Doyle, 2002). From the vertically integration perspective, these players have vertically integrated operations such as content production, content broadcasting, and OTT content delivery via their infrastructural facilities (Evens & Donders, 2016). These systems combine information and capital in many industries which require bundled programming, cross services synergies, and multichannel delivery through the use of more conventional television, DTH, and online services. The simultaneous growth of international technology companies in the sector has added to the decline in media diversity and public access as noted by TRAI (2013) and McChesney (1999) respectively. These issues are compounded by regulatory loopholes and poor infrastructure governance.

To elucidate the mechanisms of this consolidation, the subsequent section analyses the political economy of Indian broadcasting. Although liberalisation is supposed to promote competition, the process in real-life scenarios empowers the few stronger competitors by consolidating power (Dasgupta et al., 2021; McChesney, 2013). The political-economy model cannot be denied the role of questioning the structural and systemic processes that sustain the uneven power processes and access in Indian media landscape, which is a process that could be communicated to the post-independence context.

4.1 Political Economy of the Indian Broadcasting Industry

The neo-liberated Indian market is argued to enhance competition, efficiency and choice for consumers. Nonetheless, the scholars of political-economy suggest that, in reality, capitalistic markets focus on accumulating power within a small group of elites (Dasgupta et al., 2021; McChesney, 2013). The theoretical framework looks at structures of power and access produced and reproduced unequally (Hardy, 2014). Regulatory regimes in the Indian context have experienced dynamism in the state-market relations and make political-economy an appropriate lens through which the victory of the entrenched interests and concentrated ownership in broadcasting and digital media industries can be theorised.

India had a centrally planned developmental model that came into place after independence. Key industries were under state control, while the private sector had limited participation. The broadcasting sector reflected this approach: AIR and later Doordarshan operated as state monopolies, with a mandate to serve developmental and nation-building goals. During this period, the growth of the broadcasting industry was sluggish and tightly regulated (Rajagopal, 1993). The landscape changed drastically with the liberalization reforms of 1991, spearheaded by Prime Minister Narasimha Rao's government under structural adjustment programs advocated by the IMF and World Bank. These reforms aimed to deregulate the economy, encourage private and foreign investment, and shift towards a market-oriented model. In broadcasting, this translated into the opening of the airwaves to private players and the arrival of foreign-backed satellite channels. Within a few years, India transitioned from a single-channel regime to a multichannel environment, offering viewers—particularly in urban areas—access to a growing variety of content (Manchanda, 1998).

While liberalization expanded consumer choice and improved content quality, it also accelerated the process of economic stratification. The benefits of reforms were disproportionately concentrated in the formal economy, while sectors like agriculture and the urban informal workforce remained marginalized. This uneven development extended into the media economy, where private broadcasters—particularly large conglomerates with political connections or foreign alliances—came to dominate both infrastructure and content. Over time, five or six major networks came to control a substantial share of advertising revenues, content libraries, and distribution pipelines. This concentration of media power was facilitated by weak regulatory oversight and a fragmented policy framework that failed to prevent cross-media holdings and horizontal integration.

The limitations of this regulatory environment became even more pronounced with the rise of digital capitalism. Initially, the digital turn in

India appeared to offer a more decentralized and open media economy. The early 2010s witnessed a boom in platform-based start-ups like Flipkart, Zomato, Ola, and OYO, which promised to democratize access to goods and services. However, as James Curran (2012) observes, capitalism soon began to shape the internet more forcefully than the internet reshaped capitalism. Large conglomerates—including those with roots in telecom, oil, and retail—started to exert growing influence over digital infrastructures. This created what some scholars call "platform monopolies." A few key players control access, algorithms, data, and infrastructure. Jio is a clear example of this process in India.

The coming of Jio in 2016, with a whopping investment of ₹2.5 lakh crore (roughly $30 billion) marked a turning point in the development of India's digital infrastructure (Mukherjee, 2019). Jio's entry into the telecom sector is not just an adventure of technological disruption or competitive market dynamics, it is situated within a more extensive state-corporate nexus. Jio was provided with massive loans from public sector banks, and received explicit government policy support, including relaxing regulatory controls and costs of spectrum. In exchange, Jio provided free voice calls and affordable data to aid the objectives of the government mandated Digital India mission. However, the reciprocal nature of the relationship between Jio and the state allowed for Jio to quickly consolidate its position, forcing many of its rivals out of the market and greatly restructuring the Indian telecom industry.

This model of state-supported consolidation is not limited to telecom. The broadcasting and OTT sector has also experienced these same trends. Incumbent companies like Star have long held a privileged status in the Indian media industry, aided by cross-ownership of other media and exclusive control over the most valuable media content such as sports rights. The latest entrants into the market, such as Jio, are now leveraging their telco infrastructure to vertically integrate into content production, distribution and streaming services. This is creating yet another chapter of convergence in the sector, where media companies,

data practices and content ownership are all owned by a select, few companies (Athique & Parthasarathi, 2020). The result of this change is concerning. Platformisation is not technologically efficient and requires a contextual understanding of its very emergence. It has become a tool for corporate dominance and avoiding regulation.

This discussion looks at the history and structure behind the monoculture. As Parthasarathi (2020) points out, the regulatory framework in India has always lagged behind technological advancement, giving rise to "considered silence", which as a form of strategic inaction on many fronts, enables corporate consolidation but continues to preserve some notion of liberal competition. The silence allowed giant companies to obtain exclusive rights to the content, charge more in distribution, and push aside smaller, independent production companies.

Analytical examinations of India's media political economy must therefore extend beyond consumption patterns to encompass the interplay of capital, regulation, and digital infrastructure. Sports streaming especially: streaming cricket rights: An illustrative example of how digital platforms, telecommunication monopolies and legacy broadcasters combine, compete and collaborate to influence media landscape. The rise of Hotstar and the Market ventures of Jio are indicative of more fundamental displacements in ownership, control, and access that are actively redefining the Indian media landscape.

Following the historical development of key stakeholders, specifically the entry of Star TV into the sphere of satellite television is the most significant, which would provide a complete picture of this reconfiguration and would be the background of the further evolution of the digital and streaming industry in India.

4.2 Star TV's Journey in India

4.2.1 The Advent of Star TV and its Slow Headway (1991-1998)

Star (Satellite Television Asian Region) TV's journey in India is a journey of many milestones. The company, based in Asia, brought satellite technology to India that transformed the India television industry in the early 1990s. Li Ka-Shing, a Hong Kong billionaire, attempted to create a trans-Asian TV market through Hutchison Whampoa in 1991 using satellite technology. He wanted to establish a market in order to bring premium television viewing entertainment with high quality that catered to the aesthetics of the wealthiest 5% of people in Asia. This was a lucrative segment that attracted regional advertisers, marking the beginning of a significant transformation in the region's broadcasting landscape. Star TV leased half of the transponders on AsiaSat 1, the first private, commercially available satellite covering the Asia-Pacific region. Although India was not initially the primary target market for Star TV, the network quickly found success there, largely due to its mix of English-language entertainment, movies, sports, and news, which resonated with India's English-speaking urban middle class (Chang, 2007). Within six months of its launch, India had become Star TV's largest market, a development that even surprised the network's managers.

Star TV's entry into India coincided with a period of economic liberalization and the Gulf War in 1991, which heightened the Indian public's interest in global news, particularly CNN's round-the-clock coverage. This demand for alternative news and entertainment content led to the emergence of private entrepreneurs in housing colonies across major cities who began setting up satellite dishes (Mehta, 2008). These entrepreneurs would buy a satellite dish, install it on their roofs, and connect it to neighbouring houses for a small monthly fee. Thus, the cable operator became a critical interface between the broadcaster and the Indian viewer, with broadcast signals being free-to-air and allowing the installed dish to be connected via video cables to thousands of

households. The cable operators, who only had to bear a one-time installation cost, were guaranteed a steady monthly subscription income from all their clients.

This grassroots-level expansion of satellite television services played a pivotal role in the growth of Star in India. Soon after acquiring Star TV in 1993, Rupert Murdoch, the media mogul behind News Corporation, recognized the importance of these cable operators. He famously referred to them as "pirates" but also praised them as "splendid entrepreneurs" who were pioneering the market (Murdoch, 1994). Although Murdoch's companies soon initiated efforts to reclaim control of distribution, his statement accurately reflected the dynamics of the time, with cable operators effectively establishing themselves as intermediaries between broadcasters and television viewers. By the mid-1990s, there were an estimated 70,000 cable operators in India, a testament to the rapid expansion of the satellite television market (Mehta, 2008). This widespread availability of satellite TV laid the groundwork for Star to introduce Indian audiences to a new world of foreign content.

Star TV was India's first exposure to foreign content. Reruns of American programs, music, and whatever Prime Sports was showing at the time dominated the broadcast. Before that, there was only one TV channel, a public service broadcasting channel, i.e., Doordarshan. Since the late 1980s, with the introduction of Hindi soap operas, television viewing in India has increased. However, the television landscape changed dramatically following the establishment of Star and subsequent foreign and local television networks. Indian television viewers could watch a variety of programs for a nominal monthly fee, including the US Open (live), Prime Sports (WWF wrestlers), MTV (music videos), American soap operas like *Santa Barbara* (1984) and *The Bold and the Beautiful* (1987), morning cartoon shows, and BBC's World News Service — all part of the Star TV network (Kohli-Khandekar, 2019).

Star launched India's first homegrown music channel, Channel [V], in 1994. Channel [V] was born because of an altercation between

Star and Viacom Network, which had teamed together to offer MTV. MTV preferred to concentrate on worldwide tunes, while Star sought to localize the programming. Channel [V] began generating unique Indian programming with a slew of new video jockeys. It started as a partnership between News Corp and four music companies: Sony Pictures Entertainment, Warner Music Group, EMI Music, and Bertelsmann AG's BMG Ariola Musik. Western music accounted for only about a fifth of Channel [V]'s programming; the majority was local, with film music accounting for about half of that. In 1994, the company won a coup in a media-hungry domestic environment, succeeding where all had failed – building a pioneering presence unparalleled in Asia. It was Star's first massive hit in India which was significant because it demonstrated that going local was the way to go. It provided Star with the positioning needed for international enterprises in a new market. The road of the Indianization of Star thus began with the triumph of Channel [V]. Building on the success of Channel [V] and the realization that local content was key to thriving in India, Star sought to strengthen its foothold by partnering with Zee TV[36].

News Corp was new to the Indian market, while Zee TV was new to the business in 1991 when it launched with the brand name Zee Telefilms Ltd. Murdoch discovered that staying local was vital to thriving in India. Therefore, Star acquired the Zee TV in 1993 and generated a profit within a year. However, the partnership had one condition: the joint venture would produce content in all Indian languages, while Star would only produce English programs. It was to ensure that the partners were not competing with one another. Zee TV's success was due to its all-Indian programming, which included Hindi-language shows with Indian themes and heavy reliance on Bollywood, the Indian Hindi-language film industry, and the world's largest motion picture producer. It was a win-

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[36] Zee TV is a Hindi-language general entertainment pay channel in India, operated by Zee Entertainment Enterprises.

win situation for Zee TV. It also fulfilled its aspiration of being a part of an international network and therefore extend its viewership in the South Asian diaspora. Star collaborated with Zee TV because it wanted to comprehend the market. In India, Star lacked a strong management structure, and putting one in place required time. The 'no-Hindi' condition, as it became known, delayed it back by roughly eight years, eventually leading to Star and Zee TV's separation in 1999. Though the partnership ended when Zee TV purchased its shares, it provided Murdoch with invaluable insight into Indian mainstream culture. By 2005, Zee TV had grown to be India's largest media corporation, a significant competitor to Rupert Murdoch, and the most well-known multinational Indian broadcaster (Thussu, 2005). Original Hindi shows were the way to go for Star, but the company needed some innovative programs. Despite these challenges, Star continued to evolve and adapt to the Indian market, eventually shifting its focus towards local content and news broadcasting, leading to significant developments in the years that followed.

4.2.2   Indianization and Growth of Star TV (1998-2015)

Before liberalization, Doordarshan was the only television news channel available in India. As the state-run broadcaster, Doordarshan held a monopoly on news dissemination, but it struggled to gain the trust and credibility of viewers. Singhal and Rogers (1989) note that many viewers were sceptical of Doordarshan's news coverage, perceiving it as biased and lacking in journalistic independence. According to the NAMEDIA report, Doordarshan must establish a separate, independent institution to produce television news:

> "It should have freedom of appraising news values and judgment, news selection and content, emphasis in presentation, and freedom of choice in summarising physical and human resources in making up a news programme. It should have a clear independent professional chain of command free from

bureaucratic, political or other outside intervention and interference." (NAMEDIA report 1986, p.25)

Despite these recommendations, significant changes in the Indian news landscape did not occur until the mid-1990s. In October 1996, Star introduced Star News, an English news bulletin on its Star Plus channel. The bulletin quickly gained popularity, resonating with an audience that was eager for an alternative to Doordarshan. Building on this success, Star launched a dedicated 24-hour news channel, Star News, in 1998. To bolster its news content, Star TV entered into a five-year contract with New Delhi Television Ltd (NDTV), a respected but relatively small media company at the time. It provided all the news material in Hindi and English and created presentations and packaging for Star. This was a win-win situation for both companies: NDTV could get access to rich Indians' homes and the diaspora via the Star network, while Star could profit from the inclusion of professional news production in its bouquet. Thereafter, television news industry found itself in a very competitive environment, both nationally and, even more so, regionally. Zee News[37] sought a broad audience and, as a result, debuted the first Hindi-language news channel. In 2000, *Aaj Tak*, a subsidiary of the India Today group, started a 24-hour Hindi news channel. The success of these channels indicated a growing appetite for diverse and localized news content, which Star initially captured but soon had to contend with.

Star News, however, continued to thrive, becoming a significant revenue generator for the Star network. The channel's strong performance encouraged Star to consider extending its partnership with NDTV in 2002. However, negotiations faltered when Star insisted that NDTV relinquish complete editorial control, a demand that NDTV's founders, the Roys, were unwilling to accept. As a result, the partnership ended, and Star News began operating independently in 2003,

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[37] Zee News, an Indian Hindi-language news channel owned by Subhash Chandra's Essel Group, began broadcasting on 27 August 1999 and serves as the flagship channel of Zee Media Corporation.

transitioning into a fully bilingual (English-Hindi) news channel. The end of the NDTV partnership also led to a strategic shift for Star News, which became a part of Star's collaboration with ABP (Ananda Bazar Patrika Group), an Indian media conglomerate. Under this partnership, Star News was transformed into an exclusively Hindi-language news channel, aligning more closely with the preferences of the broader Indian audience. This transition was not just a programming transition at all, but a tendency among such legacy broadcasters effecting leverage strategically in local language markets - supporting them as an initial area of reference in which television based conglomerates positioned themselves in the ecology of Indian media while preparing for digital convergence. Star News met with acclaimed critical reviews, though it was challenged on the competitive marketplace. Star, like countless media conglomerates, was throwing dollars after dollars and did not end up with a DTH business or transmission assets in India where television was skyrocketing. This would be sort of disappointment since Star was one of the original players at the table.

However, everything changed once again with the launch back in 2000 of the television quiz game, *Kaun Banega Crorepati* (KBC), hosted by one of the most popular actors, Amitabh Bachchan. Although KBC followed an international format, it became immensely popular in India. The show, which offered participants a chance to win a substantial amount of money by answering a series of questions, premiered on Star Plus on July 3, 2000. Initially, KBC received a lukewarm response, but within two weeks, it captured the nation's imagination. The audience was thrilled at the prospect of winning large sums of money, and the excitement reached such a fever pitch that on July 24, three million people attempted to join on the same day, overwhelming the show's telephone lines (Thomas, 2006). The tremendous success of KBC highlighted the growing appetite for innovative programming in Indian television, setting the stage for Star Plus's strategic move later that year.

In conjunction with the success of KBC, Star Plus made a strategic move by partnering with Balaji Telefilms in 2000. This collaboration brought to life two iconic family-oriented daily soaps, *Kyunki Saas Bhi Kabhi Bahu Thi* (Because a Mother-in-Law Was Also Once a Daughter-in-Law) and *Kahaani Ghar Ghar Kii* (The Story of Every Home). Indian audiences felt the programming and this gave birth to a new era of television productions in the country. *Kyunki* interwove kitchen politics, family drama and fashion; *Kahaani Ghar Ghar Kii* mirrored the daily ups and downs of Indian households. Many serials like *Kasautii Zindagii Kay* (2001), *Ssshhh . . . Koi Hai* (2001), *Kkusum* (2001), *Kabhii Sautan Kabhii Sahelii* (2001), *Kasamh Se* (2006) became a rage due to the flagship shows. This partnership was critical and allowed Star India to make more than 1130 crore in revenues in June 2001. The collaboration with Balaji supports the idea of how horizontal integration and culturally resonant content can control the market power, create dominance in the narrative, and precondition further incursions to the OTT platform where the logic of platforms will become a dominant features of televisions.

With the successful partnership with Balaji Telefilms, Star India expanded its market dominance through diversified approaches. In the years after 2006, Star Plus started to experience declines in viewership for its top shows and then subsequently cancelled those shows. As the partnership with Balaji faced setbacks in 2008 over declining ratings and the cancelled of jointly produced content targeting the southern market, it resulted in Balaji's departure from the partnership. In the following years they once again collaborated on the 2010 series of *Tere Liye*. A combination of Star shows, including *Yeh Rishta Kya Kehlata Hai* (2009), *Saath Nibhaana Saathiya* (2010), *Sapna Babul Ka...Bidaai* (2007), *Yeh Hai Mohabbatein* (2013), *Iss Pyaar Ko Kya Naam Doon?* (2011), *Diya Aur Baati Hum* (2011) and *Mann Kee Awaaz Pratigya* (2009) aided Star Plus to recover a position in the Top 10 (Olivera, 25 August 2013).

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The Star Group sought regionalisation as a strategic business move to enhance the brand value in local markets. In 2009, Star India strengthened its position in South India, growing its audience, and gaining greater market share of the region, by acquiring Asianet communications, a leading Kerala based media company. This acquisition was in the greater scheme of tapping into a variety of regionals markets by Star India. At the same time, the company reorganised its Asian business into three separate divisions: Star India, Star China Media and Fox International Channels Asia. That organisational rearrangement enabled the company to focus on the Indian market, and that is why it enabled the 2015 Hotstar OTT launch, the OTT platform of Star. Such developments explain the manner in which Star has been able to grow on both vertical and horizontal terms consolidation; retaining profitability in all its transformation into digital platforms-an evolution that remains true to the principles of broadcasting under a new digital backbone.

4.2.3   Hotstar: When Star went Over-the-Top

Recognizing As Star has entered into the OTT market, it has realised the strategic value of digital platforms within a rapidly growing media landscape. The company's early ventures, such as Indya.com and Star Player, did not find any success. The early arrival of the Hotstar app in mid-2016 after the introduction of Jio and the consequent increase in the bandwidth boom helped the platform to become a leading mobile and online entertainment OTT app. With the delivery of material in nine Indian languages and a monopoly on the ability to stream major sporting events, Hotstar was able to take advantage of growing online traffic. Jio's unprecedented drop in data tariffs- from Rs 269 per GB in 2014 to Rs 19 per GB as of August 2018- transformed how we use the internet in the country, in turn spurring the rapid growth of online TV consumption while creating the perfect conditions for Hotstar's aggressive expansion. Even before launching its own OTT platform, Star had established a strong digital presence through YouTube, consistently ranking among

the top ten Indian channels. This success laid the groundwork for Hotstar, which has since become a key player in India's digital media landscape. At the Asia-Pacific Video Operators Summit in Bali in April 2015, Shankar said,

> We realized that a large number of our viewers were consuming content away from TV screens. We were putting small amounts of our library content on YouTube and getting huge attraction. And then there were all kinds of sites where content was being put up and people were watching (Kohli-Khandekar, 2019).

However, being on YouTube was not the best choice for Star. Shankar added,

> we were not happy because our content was just sitting cheek by jowl with some jumping cat somewhere and some badly made video and here is the drama that your team has spent months and years developing . . . It's like putting a high-quality painting next to someone's dumb stuff (ibid.).

By this time, audiences have accepted that watching television programming on a TV box is not the only way. They could consume TV content on various devices like mobiles, laptops, etc. Thus, when Star started to think and plan about the launch of Hotstar, they decided to go with the mobile screen as described by Sanjay Gupta, chief operating officer (then), in an interview around the launch of Hotstar in 2015 (ibid.). Star spent money on the technology that powers its video app to support the discrepancies in bandwidth, operating systems, and viewing devices. The programming on Hotstar could run over 7000 different operating systems and screen sizes. By 2017, many OTT platforms had established themselves in India, including Netflix, Eros Now, HOOQ, Sony LIV, and Amazon Prime Video, among the thirty-five OTT apps available. These platforms were primarily owned by major technology, media, or telecommunications companies. To compete with these giants,

Hotstar focused on three primary sources of traffic: catch-up TV, sports, and movies.

A significant portion of Hotstar's audience tunes in to watch Star network shows like *Nimki Mukhiya* (2017) and *Yeh Rishta Kya Kehlata Hai* (2009). Additionally, Hotstar experiences a surge in viewership during major sporting events like the IPL and PKL. Beyond sports, many viewers are drawn to English TV series such as *Game of Thrones* (2011) or the popular talk show *Koffee with Karan* (2004). In terms of content, Hotstar offers a similar experience to other OTT platforms like Voot and Zee5, where catch-up TV dominates. However, what sets Hotstar apart is its innovative and localized programming strategies, which have led to numerous hits in local programming. Hotstar also offers a wide range of channels from Star TV, including Star Plus, Star Bharat, Star Utsav, Star Pravah, and Star Sports 1.

Despite its broad content library, sports is arguably the key driver of Hotstar's higher user figures compared to other OTT platforms. Star India's substantial investments in sports, particularly in the IPL, have enabled Hotstar to generate significant revenue through live sports streaming. Hotstar's dominance in the Indian market was further solidified in 2017 when it secured the global media rights to broadcast the IPL in a five-year deal valued at over 163 billion rupees (Gollapudi, 2017). This contract included both domestic broadcast rights for Star Sports and digital rights for Hotstar, giving Star a significant advantage in the sports broadcasting market.

Building on the empirical narrative of Hotstar's emergence and consolidation, it becomes imperative to situate this development within the broader historical and institutional context of Star India's media strategy. In retrospect, the evolution of Hotstar encapsulates the strategic foresight and institutional continuity that have characterized Star's approach to media transformation in the digital era. Instead of signalling the end of a break with its broadcast history, Hotstar became a logical extension of the historical progression of Star, which had a history of

content creation, a comprehensive distribution system, and integration throughout the media value chain. The success of the platform will have to be placed in a larger context of industrial adaptation, where the legacy media companies will update their strategies to be responsive to technological changes, changing consumer behaviour, and new types of competition. This was not the case that Star could afford to move its dominance of the linear television to OTT streaming due to the technological investment or content diversification, but the result of a more extended institutional history including vertical integration, the cross-platform synergies, and regulatory manoeuvring. This historic continuity needs to be taken into consideration when assuming that digital disruption inevitably results in the democratization or decentralization of media landscape. Rather, the case of Star depicts that the restructuring of mew media infrastructures by incumbent players can strengthen existing hierarchies to enforce asymmetries of power even supposedly open digital space. One of the central aspects of this consolidation has been the strategic investment and control that Star India has in sports broadcasting that has been a major force behind its OTT success and overall media dominance. The following section thus turns to examine the centrality of sports rights and live sports in shaping India's contemporary media economy and Star's sustained leadership within it.

4.3 India's Sports Broadcasting Through the Lens of Star

Television industry has been largely driven by sports, which are inseparably connected with the social and political processes as one of the most important forms of the popular culture. In the early days of television, sports were a primary reason for purchasing a TV and tuning in (Williams, 1989). Over the past fifty years, television has become the most influential medium in the sports industry, particularly through live broadcasts, driving massive audience growth and substantial capital investments through escalating broadcast rights (Boyle and Haynes, 2000; Rowe, 2004b). News Corporation has consistently prioritized sports in India, with Prime Sports (later renamed Star Sports) being a key

part of the Star Network from its inception. In October 1996, Star Sports announced plans to merge its operations with ESPN International in the region, resulting in the formation of the joint venture ESPN Star Sports.

Moreover, Cricket is undoubtedly the most revered sport in India, often compared to a religion due to the nation's deep-seated passion for the game (Singhania, 2007: 60). While sports like kabaddi and football enjoy their own popularity, the commercial significance of cricket rights far eclipses that of any other sport. This overwhelming popularity has naturally tied cricket broadcasting to the evolution of Indian broadcasting over the past few decades. Before the 1990s, Doordarshan not only refused to pay for the rights to broadcast international cricket but even charged the cricket authorities for providing this service (Evens et al., 2013). Given the widespread appeal of cricket, its close association with the development of Indian sports broadcasting comes as no surprise.

In the early days of sports broadcasting, the landscape was starkly different. During the 1980s, Doordarshan held a monopoly over sports broadcasting in India, leveraging its access to capital, infrastructure, and the capability to broadcast live events. This dominant position allowed Doordarshan to impose strict conditions on sports event organizers, often refusing to pay for broadcasting rights. In some cases, it even charged sports organizations like the BCCI for airing their events (Evens, 2014).

The liberalization of India's economy marked a dramatic shift in the television landscape. The emergence of the Star Network, along with other foreign and local television networks, significantly altered the status quo. The advent of satellite television and the Indian government's deregulatory policies empowered the BCCI to dismantle Doordarshan's monopoly on cricket broadcasting. Between October 1993 and February 1995, a major conflict arose when the Indian Ministry of Information and Broadcasting sought to enforce its legal monopoly on cricket telecast rights. The tension escalated after the Cricket Association of Bengal (CAB) sold the Hero Cup broadcasting rights to TWI, a multinational television company, following Doordarshan's refusal to match TWI's

bid. In trying to assert exclusive rights pursuant to the Telecom Act of 1885, Doordarshan attempted to stop TWI from broadcasting in India. In this case, we see the clash of global capital, state actors and colonial legacy working together to restrict India's regulatory reforms.

Even though the Ministry of Information and Broadcasting was opposed, the Ministry of Home Affairs authorized TWI's request and permitted TWI to broadcast its Signal for the Hero Cup. The Supreme Court finally ruled in favour of the request of TWI and permitted it to broadcast in support of Hero Cup. This was a very significant strike against the state's monopoly on broadcasting; however, it only applied to Hero Cup and arose anew in 1994 when ESPN acquired the rights to broadcast India's series against the West Indies. In 1995, the Supreme Court made a historic ruling. It ended the state monopoly on broadcasting. The court said airwaves belong to the public and free speech includes the right to share ideas through electronic media.

In response to subsequent legal challenges from private broadcasters, the government passed the 2007 Sports Broadcasting Signals (Mandatory Sharing with Prasar Bharati) Bill. This law required private sports channels to share feeds of major sports events with Doordarshan. The bill sparked significant debates about Prasar Bharati's autonomy and the state's authority to define events of "national importance," but it garnered widespread political support, fuelled by public enthusiasm for cricket. Once again, cricket served as a catalyst for significant changes in India's broadcast law, this time enabling the government to regain some control over sports broadcasting. Consequently, Doordarshan's monopoly was dismantled after liberalization, leading to a more diverse media market.

However, there is no evidence that the concentration level in Indian industries has decreased since neoliberal reforms. After liberalization, the new regulatory policies accompanied an easing of controls that restricted natural tendencies toward ownership concentration, as evident from the establishment of a more lenient system for mergers and acquisitions. By

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leveraging such a lenient regulatory regime, the conglomerates have used anti-competitive practices to dominate the market. Following liberalization, there was a sharp rise in mergers and acquisitions, especially of the horizontal variety across a wide range of sectors, including broadcasting. Star has a long history of horizontal concentration through acquisitions and mergers with competitors as discussed earlier in this chapter. It has produced several successful programs by integrating with other firms since its inception. For instance, Star and ESPN started a new sports channel, Prime Sports, in collaboration in 1996, which obtained the television rights to Indian cricket (home matches of the national team) from 1995 to 1999. Due to horizontal concentration, only a few media conglomerates have controlled the Indian sports broadcasting industry, leaving little space for new entries. Hence, Star established its supremacy in the television industry through anti-competitive practices such as horizontal integration and cross-media ownership, which enabled Star to purchase the broadcast rights to the IPL and other cricket tournaments for an exorbitant fee.

Star placed its first big bet to advance its sports objective in April 2012. It paid the BCCI Rs 3,851 crore for broadcasting rights to all international cricket conducted in India and domestic competitions like the Ranji Trophy (ESPNcricinfo, 2012). Between 2012 and 2018, these rights comprised 96 matches. The amount was 25% more than the previous bid. Around this time, News Corporation paid Rs 1,056 crore for ESPN's stake in the pan-Asian partnership ESPN-Star Sports. After the takeover, Star India would acquire the rights to nearly all Indian cricket tournaments, the English Premier League, Formula One, and the US Open. The IPL, an almost two-month-long cricket carnival and the most popular sport in India, was the only major tournament it lacked. (The IPL rights were held by Sony for ten years, expiring in 2017.) Star India also competed for and secured the internet rights to the IPL within the next six months. More than 90 percent of the Rs 4,000 crore spent on sports by broadcast went to cricket, mainly where India was competing. Star announced in November 2013 that it would invest Rs 20,000 crore

on sporting events as part of the launch of six new sports channels. Apart from cricket, Star has also invested in non-cricket sports like Pro Kabaddi League. These investments in sports business have assisted Hotstar to appeal more viewers through live sports streaming. However, as Star deepened its hold over cricket broadcasting, a new axis of competition was already taking shape. Jio's entry into the telecom sector in 2016, and its subsequent bundling of content with data services, introduced a formidable infrastructural challenger to traditional broadcasters. The groundwork was being laid for a new phase in Indian sports streaming—one in which data networks, not just content rights, would determine platform supremacy. Star's aggressive acquisition of sports rights exemplifies how media conglomerates used content-driven infrastructural control to dominate attention economies—anticipating how these same strategies would later shape the OTT streaming wars and highlight the limits of competitive diversity.

Star spent an enormous fee of $2.55 billion on the IPL's five-year television and digital rights in late 2017 (Reuters, 2017). The reason for buying IPL's rights for a vast amount is not because it is a cash-rich cricket league in India but because its significance is beyond cricket. The symbiotic relationship between IPL and Bollywood established India as the new "cricket capital", with its massive business capable of attracting viewers and increasing profitability (Gupta 2011; Rasul & Proffitt 2011). In four years since Hotstar began streaming the IPL live, the league's viewership has grown from 41 million (in 2015) to 110 million (in 2016) and from 130 million (in 2017) to 202 million (in 2018). That is a 55.3 percent rise in one year alone. These investments in the sports industry have helped Hotstar attract more viewers through live sports streaming. Yet this model—anchored in content exclusivity—was already facing disruption as telecom-platform convergence made infrastructural leverage a more decisive force than content ownership alone. However, the evolution of digital platforms and the increasing shift towards OTT services have introduced new challenges and opportunities for Star and

other players in the market. In the next section, the chapter will examine these emerging challenges in live sports streaming in India.

4.4 Live Sports Streaming

The term "live streaming" refers to the real-time transmission of video over the internet without being recorded or saved first. While it might seem like a recent innovation, live streaming has been around for the past two decades, emerging alongside the rise of the internet. However, its widespread adoption has accelerated in recent years, driven by advances in internet connectivity, increased bandwidth, and the proliferation of digital devices. Live streaming has become especially significant in the realm of sports, where the immediacy and excitement of real-time viewing are integral to the experience. Live streaming has been recognized as a vital method for television content to break free from the constraints of traditional broadcast media, while simultaneously extending the reach of television practices and coverage (Hutchins, Li, & Rowe, 2019). This dual role shows how live streaming supports and improves the television model. Castells mentions that the traditional broadcast television model has been gradually replaced and reframed by the decentralized and interactive capabilities of the internet (2002, 2004).

Live sporting events streaming has changed how audiences consume sports. Unlike the broadcast television model, which requires audiences to be in front of a television during a specific time and place, streamed live sporting events can be consumed on any device that includes smartphones, tablets, and computers at any time and place. This level of flexibility enhances the live sporting event audience. It continues to attract the traditional sports crowd, but also the younger audience demographic where streaming content is the norm versus the exception, and they value access and on-demand. Additionally live streaming of sporting events has also brought new markets in the sense that people can watch their teams and events across the world without the time-honoured barriers geographically of the broadcasting. Generally, speaking, the live broadcasting of sporting events has provided more interactivity and a

sense of customisations. The audiences have the option of various camera angles, watch those statistics in real-time, and even carry part in live chats and social media and consume a sports event. The interactive nature of the viewing in comparison with the traditional broadcasting. In a similar manner, the adoption of live streaming has posed a new range of issues regarding business models such as subscriptions and pay-per-views, such models also introduce new revenue streams to the content providers.

The switch to live sports streaming is not painless to the incumbents in the sports broadcasting arena, the switching between broadcasting and streaming consumes a lot of capital investments with regard to technology and infrastructure. Moreover, there is a growing competition between the incumbents and market entrants, and the battle to have exclusive streaming rights to major sports has further added to the competition in market share. All this is structurally altering an ecosystem whereby the traditional media had a huge stake in the innovation to be able to compete in the market, and as they are doing so. This development was happening at the same time that the data-rich telecom-broadcasters such as Jio were taking on the traditional broadcasters as a new source of content but now as a new type of distribution through outreach and bundling. These telecoms played using the model of the traditional broadcaster; offering a bundle of bundled data, device and content, which is to the detriment of the value of exclusive right and passageways of the old television. This segment finds possible new solutions how incumbent players in the sports broadcasting sector can be innovative in a new digital streaming environment where the innovation of new technologies, new consumer demands of the content, new business and media activity in live sports streaming are changing sport broadcasting. This distortion impacted on the demands on audience engagement needs and a working tension in the very heart of India's digital media change, to attempt to imitate their broadcast domination in a new, much-changing, platform-driven, mobile-first world.

4.4.1 New Players

New entrants into the sports broadcasting ecosystem should have to be compelling whether through revolutionizing sports broadcasting or threatening the monopoly of the media owners. Before the advent of streaming services, broadcast media owners enjoyed decades of stable influence in the sports industry due to high barriers to entry in the sports content market. These barriers included significant start-up costs, restrictive pre-existing contractual agreements, and economic policies that often fostered local monopolies or oligopolies, effectively limiting competition and protecting incumbent players (Hutchins et al., 2019). However, the landscape began to shift dramatically after 2015, driven by advancements in digital infrastructure and proactive government policies. Indian governments have raised substantial political capital on India's "global positioning" as a digital power (Thomas, 2012). The government has worked arduously to build the infrastructure needed with the help of the "Digital India" programme. Many entrepreneurs have been creating platform brands across various marketplaces and services, for example, Ola, Flipkart, and PayTM (Athique & Parthasarathi, 2020).

This holds true for sports streaming as well. Sports streaming is another area where there is 'digital plenitude'. According to Hutchins and Rowe, 'digital plenitude' refers to lower barriers to access and costs, which have increased the number of media organizations, clubs, and even individual athletes who can generate and distribute content for Internet consumption (2009). More significant users can now access and distribute live sports content (ibid.). It is argued that digital plenitude has enabled new sports broadcasting players, increasing the tension for traditional influential players. A prime example of this shift is the rise of multi-sport aggregators like FanCode, a homegrown Indian platform that has successfully acquired broadcasting rights for international cricket matches in countries such as the West Indies, Ireland, Zimbabwe, and Bangladesh. FanCode's success illustrates how digital innovation has

empowered new entrants to challenge established broadcasters by offering niche content and catering to specific audience segments.

This growing competition from digital-native companies has intensified the pressure on traditional broadcasters, forcing them to adapt to the rapidly changing dynamics of the sports media industry. As more players enter the market, the scarcity-driven business model that once underpinned the sports broadcasting industry is being replaced by one characterized by abundance and diversity of content, ultimately reshaping the future of sports media.

4.4.2 New Intermediaries

New intermediaries, particularly technology firms, have reshaped the media landscape by focusing on regulating consumption rather than controlling content (Bilton, 2019). Unlike traditional media companies, search engines, social media platforms, and internet service providers do not create or produce content themselves. Instead, they give access to content, usually free or for a small fee. Their main income comes from advertising and from using user data. This business model enables them to operate without putting that much money into the production of content, especially when they can source content from the users, or acquire at a low cost (Hesmondhalgh, 2010; Keen, 2007).

A prime example of this evolution is Amazon Prime Video, which began as a distribution platform but has since transformed into a significant content producer with proprietary programming. Amazon has even expanded into the sports broadcasting arena, securing broadcast rights for international cricket in New Zealand. Similarly, Jio's entry into the Indian market in 2016 with its 4G services marked a major shift. By offering unlimited internet data and free calls, Jio rapidly expanded its customer base, enabling it to launch a broad array of services including e-commerce, cloud computing, OTT platforms, and online payment systems, all underpinned by sophisticated data analytics (Mukherjee, 2019).

This shift from content production to consumption has introduced new challenges for established media giants (Bilton, 2019). The rise of these new intermediaries has also sparked a significant interest in on-demand content production. They have made free content more accessible, and as a result, many consumers seek to access it without paying, whether legally or illegally. Nevertheless, this free content can still generate substantial revenue through advertising, data collection, and the creation of highly profitable predictive customer profiles (ibid.). For instance, Facebook's failed bid for the IPL broadcast rights in 2017 indicates that even major technology companies are exploring live sports streaming to challenge the dominance of traditional broadcasters. This move signals a growing recognition among tech firms of the lucrative potential in live sports, further intensifying the competition in an already dynamic market.

4.4.3 Illegal Sports Streaming

With the advent of live sports streaming, a significant challenge that has emerged in sports broadcasting is the proliferation of illegal sports streaming. This issue has become increasingly prevalent, facilitated by the availability of free distribution software that enables almost anyone with an internet connection to record and stream content at little or no cost. For instance, a TV tuner card, which can be purchased for as little as $50, allows individuals to become web broadcasters from their own homes. The ease of access, minimal technical skills required, and the availability of free software have contributed to the widespread illegal streaming of sports and other broadcast content (Strangelove, 2015).

Despite the growing adoption of authentication services by legitimate broadcasters, they struggle to compete with piracy due to its extensive library, ease of use, and accessibility. As a result, much of the world's TV shows, films, and sports events are now freely accessible online through piracy. Research on illegal sports streaming suggests that viewers prioritize immediacy over video quality, preferring to watch their favourite sports in real-time, even if the quality is subpar (Sakthivel,

2011). Unauthorized sports streaming is on the rise globally. During the 2014 FIFA World Cup in Brazil, approximately 20 million people watched the event over 32 days on illegal streaming platforms (Mann, 2014). Major sporting events see thousands of unauthorized broadcasts from illegal websites, offering viewers free live retransmissions over the internet. Unfortunately, there are few effective legal remedies to combat the illicit streaming of sports. In India, for example, there are no clear laws regarding the liability of OTT platforms for copyright violations, posing a significant challenge for both incumbent broadcasters and new intermediaries.

4.4.4   Shifts in Broadcast Rights

Hotstar faces significant challenges due to the evolving landscape of broadcast rights. Traditionally, broadcasting and digital streaming rights were bundled together and often sold to a single entity. But, given that digital streaming rights have found themselves under increasing value, they are now being sold separately from linear broadcast rights. This is reflective of the growing realization of unique and valuable territories within OTT. In relation, BCCI has taken a prerogative position not to enter any long-term agreement for digital rights based on the belief that values will escalate for digital and OTT rights for years to come. This has opened the door for a number of large organizations, some that are not traditional broadcasters, to enter the market for the digital sport rights.

These scenarios are transforming the sport media landscape and allowing opportunities for new entrants to purchase rights to broadcast cricket and other sports. While many media companies are looking to acquire digital rights to various sporting events, Hotstar is the front-runner with the broadest and more valuable broadcast rights, with cricket being the jewel of their rights portfolio. Regardless of the challenges facing new entrants, new providers, illegal sports streaming, and unbundling broadcast and digital right, Hotstar has well positioned itself as the dominant provider for sports broadcast rights in India. Its predominance shows Hotstar is critical and have a capacity to adapt to

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system changes in a primary and secondary market. As the competition intensifies, it will be crucial to observe how Hotstar continues to adapt and maintain its leadership in this highly competitive market.

4.5 Hotstar: The Dominant Incumbent

In the mid-1990s, there was a widespread belief that the internet would dismantle the power and hegemony of media conglomerates, leading to a revitalized public sphere, the resolution of various issues, and the replacement of information control and broadcast scarcity with abundant communication (Hardy, 2014). However, this revolutionary potential of the internet was often based on "inferences derived from the internet's technology" (Curran, 2012, p. 3), overlooking the critical political economy where capitalism significantly shaped the internet rather than the reverse (Curran et al., 2012; McChesney, 2013). Today, established media conglomerates are striving to maintain their dominance over internet media, with Star's launch of Hotstar as a prime example of leveraging internet technologies to deliver programming directly to viewers.

At the core of arguments for a "new economy" was a "mystical core" suggesting that the internet would diminish the advantages of incumbents and large firms, fostering competition between corporate giants and entrepreneurial start-ups (Curran et al., 2012). While the dynamic and rapidly growing internet market has provided opportunities for new players to challenge incumbents—as seen with platforms like YouTube, which enables small producers and individuals to distribute content—media conglomerates have employed strategies to preserve their dominant market positions. These strategies include capital investments, branding, cross-media promotion, and advertising partnerships (McChesney, 2004, 2008).

Star invested heavily in the technology that powers Hotstar, addressing the complexities of varying bandwidths, operating systems, and viewing devices. Hotstar's ability to operate across more than 7,000 different operating systems and screen sizes is a feat that new entrants

would struggle to match. Additionally, Star launched Hotstar with an extensive ad campaign and benefited from its well-established brand, making it easier for consumers to trust the platform. Furthermore, Hotstar's vast content archive, built from its legacy television network, offers users a wide variety of content, further cementing its market position.

As OTT platforms have expanded, mergers and acquisitions have become a trend in the Indian television ecosystem. The significant costs of keeping up with emerging technologies have driven companies to form alliances or merge with competitors to share these risks. However, this increased concentration raises concerns about market competition and media diversity. The consolidation in media platforms, driven by a lack of regulation in the digital TV market, has impeded media pluralism and diversity (Iosifidis, 2014). While other players like Zee TV have launched their OTT platforms, such as Zee5, which benefits from content procured by numerous Zee channels, Hotstar has emerged victorious, particularly after its merger with Disney+, which made its content library the largest in India.

The Disney+ Hotstar merger is particularly noteworthy as it has positioned Disney India as the country's most prominent television broadcaster with an extensive content library. Disney+ Hotstar offers a unique combination of Hotstar's original content alongside Disney, Pixar, Marvel, and Lucasfilm productions, as well as other programs from Disney's archives. No other OTT platform in India offers such a comprehensive range of content. The merger has allowed Disney+ Hotstar to benefit from economies of scale, reducing costs and enabling more competitive pricing. It also allows the platform to engage in anti-competitive practices, such as temporarily lowering prices or leveraging marketing and other assets to weaken under-resourced competitors. Unlike Netflix and Amazon Prime Video, which operate on a subscription-only business model, Disney+ Hotstar uses a hybrid model that includes both ad-based and subscription-based revenue streams.

Additionally, Hotstar has maintained a low pricing strategy from the beginning, making it difficult for other OTT platforms to compete.

4.5.1 The Position of New Players

While the internet has lowered barriers to entry in many markets, the live sports streaming market remains dominated by a few large players. Despite the low-cost distribution enabled by the internet, Hotstar's stronghold in the live sports streaming market is reinforced by the lack of digital plurality. Star India controls most of the broadcast rights, including those for all International Cricket Council events, leaving little room for new players to make significant inroads.

Economies of scale further fortify the dominance of larger businesses over newcomers. Although technological advancements have eroded scarcity-based monopolies, the "natural monopoly of economies of scale" still prevails (Graham et al., 1999, p. 24). This advantage allows incumbents like Hotstar to continue controlling gateways to services, intellectual property rights, and critical market resources. As a result, it remains difficult for new players in the sports streaming business to gain a significant foothold. Incumbents also have an edge in combating illegal sports streaming, as a significant portion of viewers still prefer to watch sports on television, balancing losses from illegal streaming through their established cable channels.

Moreover, Star leads the sports media market, having secured television broadcast and streaming rights for all domestic cricket under the BCCI for $944 million for the next five years, outbidding competitors like Sony Pictures Networks India and Jio in 2018. However, Star's monopoly in the IPL ended when Disney+ Hotstar lost the IPL digital rights for the Indian subcontinent from 2023-27 to Viacom18, a subsidiary of Reliance Industries Limited. This shift in IPL digital rights from one conglomerate to another highlights the persistent concentration in the live-streaming market, even as new players attempt to break through.

4.5.2 Challenges from New Intermediaries

Despite Hotstar's dominance, the rise of new intermediaries is beginning to challenge the OTT market landscape, especially in the live sports streaming segment. Platforms like Amazon Prime Video and Facebook have transitioned from mere distributors to proprietary content producers—Amazon Prime Video, for example, has secured broadcasting rights for international cricket in New Zealand.

New intermediaries have started acquiring some broadcast rights for cricket series, indicating their growing interest in the sports streaming domain. However, these players face significant hurdles in challenging incumbents like Hotstar. The streaming industry's volatility and unpredictability make it difficult for new entrants to take substantial financial risks. Furthermore, incumbents like Hotstar, with their dual presence in both digital and cable distribution, can offset the cost-effectiveness of internet distribution, further solidifying their market positions.

However, Jio has succeeded in breaking Hotstar's effective monopoly. The possibility to get the economies of scale is not the only reason why Jio has succeeded in such a competitive environment but also because of its original business model, which is built upon the ecosystem and its reputation of state assistance. This model will enable Jio to connect its streaming service JioCinema with other services and products offered by Jio such as Jio Data, Jio Fibre and Jio Phones. Through product and services bundling, Jio will be able to encourage additional cross-selling of the products and services, create revenues in its product lines, and add to the user experience on its streaming platform, JioCinema. This is not merely the revenues made in telecom operation, but also acts as a locking mechanism of an ecosystem of customers in Jio. Its high level of distribution network and bundling strategy provides it with a competitive advantage to provide more favourable pricing and to recover the expenses of purchasing high-value digital rights. The future applications and effects of the ecosystem model of Jio will also be

discussed in the fourth chapter as I will explain how the dynamics are transforming the future of streaming in India.

4.6 Hotstar-Jio Merger- Jiostar

The union of Star and Jio is a milestone in the history of the Indian digital media, and its long-term impact on the OTT market is immense. Through this merger, Star, which has its large portfolio of media, and Jio, which has its large network of telecom and huge number of users, are likely to drastically transform competitive forces of the market. According to a report by Comscore, the merged entity is projected to reach approximately 160 million unique visitors, thereby amplifying its market dominance (Chacko, 2024). Visakh Vijayakumar, Sales Director - India at Comscore, highlights that

> "When examining the Indian OTT landscape from a macro perspective, two prominent platforms emerge: Disney+ Hotstar and JioCinema. Typically, exclusive digital or broadcasting partnerships accompany such events, leading to spikes in viewership for the platforms holding the rights, primarily Disney and JioCinema. Hotstar and JioCinema prioritize sports content, leveraging their substantial databases to attract audiences, with approximately 45 to 50 million viewers driven by non-sports content" (Chacko, 2024).
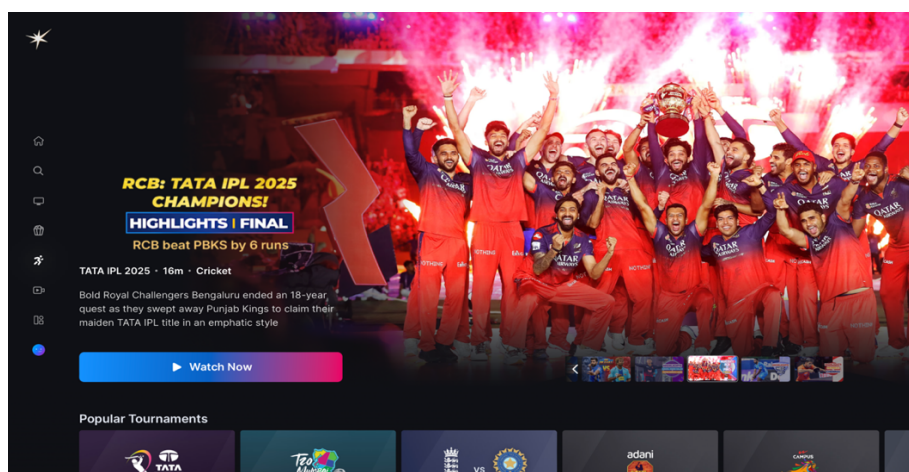
Figure 4.2: Screenshot of the JioStar (formerly JioCinema) sports homepage featuring Royal Challengers Bengaluru's victory in the 2025 IPL final. The image highlights JioStar's aggressive positioning in India's live sports streaming market following its acquisition of IPL digital rights. *Source*: Screenshot from https://www.hotstar.com, captured by the author.

The merger has the potential to drastically alter the competitive landscape of the OTT market in India. The integration of Star's vast content offerings with Jio's telecom services is likely to yield significant economies of scale, reducing operational costs and enabling more competitive pricing. This consolidation of resources may create substantial barriers to entry for smaller OTT platforms, thereby intensifying market concentration. Furthermore, Jio's telecom network and Star's content could combine to offer bundled services like curated shows or discounted subscription plans. This would keep users engaged and strengthen the merged company's position in the market. That it would allow the combined entity to "reimagine India's OTT landscape" indicates the sheer scale this merger could impact the sector (Chacko, 2024).

Nonetheless, the consolidation raise major implications with respect to market concentration and perhaps anti-competitive conduct. The combined entity's resources could lend themselves to engaging in predatory pricing or obtaining exclusive content arrangements which might marginalize the smaller players in the market and take away potential choice from consumers. The market could also settle on the concentration of a few major players that will diminish the possibility of any incentivization of innovations as the market competitive nature is eroded. The Star and Jio merger will likely intensify the consolidation trends that exist in the Indian digital media industry and may lead to an essentially homogenous entails and erosion media pluralism. The success of the merge may be a detriment to any niche or independent content.

This merger stands as strong evidence of James Curran's (2012) point that capitalism has a heavier influence on the internet than the reverse. Large conglomerates have effectively reduced market

competitiveness and established monopolistic power. This raises important questions about whether India is witnessing the emergence of a hegemonic nation that unequivocally supports the interests of large enterprises (Thomas, 2019). Moreover, the neoliberal Indian economy is being shaped by a close partnership between public and private capital, aimed at building critical digital infrastructure that only select players in privileged positions can harness. For example, the Indian government's Digital India project is structured as a public-private partnership (PPP), with private companies playing a central role in shaping the country's digital future (Thomas, 2019). This initiative sought substantial financial backing, which Jio's ₹250,000 crore ($300 billion) investment in next-generation wireless internet connectivity was poised to provide (Mukherjee, 2019). In return, Reliance received significant government support to establish Jio's 4G services, offering free voice calls and unlimited data. Reliance achieved this through unprecedented leverage of loans from public sector banks, with government assistance enabling Jio to bypass numerous regulations, thereby facilitating rapid market dominance. Jio's free services predictably disrupted the Indian telecom industry, causing other operators to lose both revenue and customers.

4.7 Conclusion

Indian capitalism appears to endorse the further prominence of already powerful corporations. The media economy is no exception, as incumbents maintain a tight grip on distribution rights. However, incumbent media players like Hotstar now face challenges from large conglomerates such as Jio, which are leveraging their powerful legacy businesses within the platform economy (Athique & Parthasarathi, 2020). Due to India's weak regulatory policies, large conglomerates like Star and Jio are making it increasingly difficult for new and smaller players to survive in the market, particularly within the media industry.

The landscape of the Indian digital media market is undergoing profound transformations, driven by the interplay between established media conglomerates and emerging digital platforms. The rise of

platforms like Hotstar exemplifies the ways in which incumbent players have strategically leveraged internet technologies to maintain and even expand their dominance, countering the early optimism that the internet would democratize media access and diminish corporate control. The relationship between Star and Jio embodies this trend and signifies additional consolidation of an already consolidated market.

In this chapter, I critically examined the transformation of India's media landscape using Disney+ Hotstar as a paradigmatic example of how legacy broadcasters transitioned to the digital streaming environment. Hotstar did not break away from television but continued it in a new form. It worked as a distribution channel that adapted TV culture to digital media while keeping its structural dominance. By being the exclusive distributor of cricket content, with the Indian Premier League (IPL) in particular, and vertical integration throughout the media value chain, Hotstar utilized its broadcast legacies to position itself as a dominant digital streaming provider. This development was not only the result of technological change. It was also born out of legacy benefits such as rights to the content and already developed infrastructure. The regulatory loopholes also defined the digital future of incumbents.

The chapter is founded on the notion of the concept of remediation suggests by Bolter and Grusin to show how the growth of Hotstar was to preserve the logics of the linear television premise based tracking and mass audience acquisition in a mobile, personalized, and algorithmic environment (2000). The shift by Hotstar to the digital localized model invested the live sports as the focal tie between the broadcast and the digital mode. Hotstar wanted, particularly through the IPL, not only to engage users but also to re-monopolize Star India in the field of television and OTT platform, in which line and digital rights could be synchronized to each other. Nevertheless, this continuity produced weak points, curtailing the power brokering advantage of the content-led digital strategies, projecting the embedded power to infrastructure, which telecoms were quickly moving to monopolize again.

The most significant turning point was the loss of IPL digital rights to JioCinema in 2023. It revealed the boundaries of a content-only business in a media economy whose framework is influenced by distribution, information, and bundled ecosystems. In 2024, Disney and Reliance joined together to create JioStar. This was not merely about content library combinations but it was a combination of carriage and content as well as spectrum and software. It also combined the television and telecom infrastructure heritage. This merger summarizes the current transformation of the media economy in India which is the shift to infrastructure-based platforms on which the competitive advantage is not only what one watches, but in what, when, and In what networks such watching happens.

By interrogating the strategic adaptations of Disney+ Hotstar, this chapter contributes to the thesis's broader argument: that the digital transformation of India's media industry has deepened existing power asymmetries, reshaped by media convergence, platformization, and regulatory silence. These dynamics have not only redefined the contours of competition but also reoriented the media economy around infrastructural ownership and data-driven consolidation.

The insights from Hotstar's evolution and eventual merger with Jio set the stage for Chapter 4, which delves into the emergence of Jio as a telecom-media behemoth. If this chapter explored how legacy broadcasters adapted to digital convergence, the next chapter shifts focus to how telecom-led platforms like JioCinema have redefined the terrain of media power through infrastructural asymmetry and state-enabled vertical integration. This transition reflects a broader reorganization of India's media system where regulatory inaction has enabled telecom companies to become central actors in the streaming economy. I will now trace Jio's rise and its strategic takeover of Hotstar. It can be used to investigate how telecom-media convergence changes the structure of the market, and policy.

Chapter 4

The Telecommunication Engine: Reliance Jio's Vertical Integration

The development of online markets has altered world media markets. They amalgamate technological infrastructure and content distribution. This has enabled the control of the digital networks by big companies, notably in the field of technology and telecommunication. In India, there is also the influence of increasing mobile internet, state-led initiatives on digital inclusion, and poor regulatory controls. These processes are discussed in this chapter with the Jio case study. It also analyses it based on the theories of media convergence and vertical integration, as well as the political economy of media. These political economy of media theories offer a distinct approach to the study of Jio as a telecommunications organization and media distributor, and how the lack of regulation and market monopoly allowed Jio to develop. This discussion examines the history of the Indian media policy. It demonstrates the transition towards commercialization of the public service that further increased the urban-rural gap and decreased equitable access. It also resulted in the market consolidation that gave the large corporations monopoly in the digital age and made the path to Jio. The chapter then compares the global dominance of YouTube to the failure of MX Player as a regionalized marketplace and validates its arguments to show that dissimilarities in scale and model of integration creates immobilizing structural injustices, which highlights the conflicts between global actors with high stakes and context players in India. These side-lined inequities narrate the story of the Jio ecosystem model, to show how a telecom giant can leverage on a monopolization to the extent that a business founded on the context would find hard to accomplish. Next, the paper focuses on the model of ecosystem of Jio and its tendency as the convergence of telecommunication infrastructure and media delivery. By bundling services, Jio has redefined access and competition in India's

digital economy. This shift has also deepened and complicated inequalities. These strategies thrive amid regulatory silences, where the lack of proactive oversight has facilitated unchecked market consolidation. This raises significant socio-political concerns about consumer choice, cultural diversity, and equitable access in an increasingly platform-dominated economy.

Jio, an Indian telecom company, secured the digital rights for the IPL, a men's Twenty20 cricket league, for the 2023–2027 cycle for $3.1 billion and streamed the tournament for free on JioCinema using an ad-based business model (Gollapudi, 2022). The IPL, a significant cultural and economic phenomenon in India, symbolizes the fusion of cricket with entertainment, consumerism, and global media, and has seen its broadcast rights rise from $1.03 billion in 2008 to $6.2 billion in 2023 (Sportsbrief, 2024). This growth reflects a shift in the centre of gravity of the cricketing world towards India, fuelled by a large population of passionate cricket fans. From its inception in 2008, the IPL revolutionized cricket with a fast-paced, franchise-based format appealing to modern audiences and attracting lucrative sponsorship deals, further solidified by its association with Bollywood.

Figure 5.1: Screenshot from the 2023 Indian Premier League streamed on JioCinema, with over 2.2 crore live viewers, illustrating Reliance Jio's use of free IPL streaming as a tactic for rapid audience acquisition and OTT market consolidation. Source: Screenshot by author from JioCinema during IPL 2023 broadcast.

Jio has streamed the IPL for free on JioCinema in 2023, during a period when other OTT platforms, both SVOD and AVOD, were struggling to generate revenues. In recent years, SVOD platforms faced reluctance from viewers to pay for content, while AVOD models struggled with viewers' aversion to advertisements. Jio's strategy of distributing content without fees raises questions about JioCinema's monetization plans and motivations.

Since its launch in 2016, Jio's aggressive pricing and expansive mobile internet coverage have had a profound impact on India's socio-economic landscape. By offering low-cost data and expansive network coverage, Jio facilitated digital inclusion across rural and economically marginalized areas, empowering millions through access to online education, digital banking, e-commerce, and telemedicine, thus boosting economic growth (Madhavan & Chirputkar, 2020). India's internet subscriber base grew from 317 million in 2015 to 560 million by 2019, largely due to Jio's disruptive market strategies and its role in expanding affordable internet access (ibid.).

Jio's rapid ascent in the Indian telecom market was supported by regulatory gaps and selective leniency, distinguishing it from competitors like Bharti Airtel and Vodafone. While deregulation generally benefited private players, Jio's ultra-low-cost data and free voice services, backed by substantial capital reserves, sparked antitrust concerns. In 2018, Airtel and Idea challenged TRAI's predatory pricing framework, arguing it disproportionately favoured Jio and destabilized the market (Medianama, 2018). This context underscores how Jio's strategy, including capitalizing on regulatory flexibility to gain a competitive advantage, expanded its user base while undermining rivals, reflecting similar tactics seen in its 2016 market entry (Bhatia & Palepu, 2016).

Moreover, this rapid expansion also led to significant market consolidation, reducing the telecom sector to a few dominant players, as smaller operators were forced out. This consolidation raises concerns about decreased consumer choice and the potential for monopolistic

practices, which could stifle future innovation in digital services. Additionally, Jio's growth was bolstered by government support, both through regulatory leniency and policies promoting digital inclusion, further solidifying its dominance in the telecom market.

Over the past two decades, successive Indian governments have made significant investments to establish the country as a digital power, acknowledging that digital technologies are crucial for economic growth and development. They recognized that improving connectivity could enhance productivity, create jobs, and drive innovation in the rapidly expanding global digital economy (Thomas, 2012). Therefore, since 2015, the government has supported the 'Digital India' program[38], which aims to ensure universal online access and develop a unified data infrastructure. This $17 billion initiative was supported by the mobile telecom boom of the 2000s, setting the stage for Reliance Industries Limited's entry into the mobile data sector in 2016 via Reliance Jio. Jio invested extensively in all aspects of cellular infrastructure, including spectrum acquisition for LTE data services, construction of new cell towers, and linking towers with fibre optic cables (Mukherjee, 2019: 2). In reciprocation, the government enacted favourable policies and demonstrated regulatory leniency, alongside what Parthasarathi termed 'considered silence,' which empowered Jio to disrupt the market through aggressive pricing strategies and substantial infrastructure investments[39] (2018). This included the acquisition of affordable spectrum and the expedited deployment of 4G technology driving consolidation in the

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[38] The Digital India Program, launched in 2015, aimed to transform India into a digitally empowered society and knowledge economy. Key initiatives included the BharatNet project, which sought to provide broadband connectivity to 250,000 village panchayats, and the Common Services Centers (CSCs), which offer digital access to government services across rural areas.

[39] In 2016, Jio's initial offering included six months of free 4G data and voice services, which was unprecedented in the industry. Additionally, Jio offered extremely low data rates following the promotional period, charging as little as ₹50 ($0.75) per GB, significantly undercutting competitors, who were offering data at rates up to five times higher.

telecom sector, resulting in the presence of only three major operators (Hill & Athique, 2018; Curwen, 2018).

As a result of the telecommunications market consolidation between 2010 and 2017, telcos in India have the unique advantage within media and communications industry towards bridging the analogue era with the 'age of convergence that has resulted in a blurring between infrastructures and platforms, resulting in the availability of access to voice and data over a plethora of devices and platforms' (Thomas 2019: 265). Beginning around 2016, with the launch of its mobile services, Jio leveraged these bundling strategies to rapidly grow its user base by offering free voice calls and low-cost data, setting the stage for its later media initiatives. By 2018, Jio expanded further into content distribution, forming partnerships with OTT platforms and compelling OTT services to bundle with telecom packages due to insufficient direct subscriptions. Reliance Jio benefited from a similar series of strategies before entering the media production industry largely with third-party production houses. These telecommunication firms are in a better position to be considered as providers of media content as this chapter will argue. The model has changed its production to the management of consumption of content. This transformation is one of the reasons why the media industry has changed.

The chapter examines whether Jio managing IPL is reflective of Jio controlling the Indian Internet- it is not just the Jio is an intermediary but it has become also the gateway and has created other monetization opportunities. In that case, what is the meaning of the bi-level control of Jio (as a media aggregator and as a telecommunications company) to the political and economic aspects of the India media industry? Jio has initially intervened in the telecommunications domain, and subsequently, taken strategic positions of dominant nodes of digital transaction in communication channel. It has now acquired former rivals in the OTT landscape and amassed even bigger amounts of content libraries, including the crown jewel of the Indian media production, namely the

IPL. This chapter tries to comprehend the changes that have occurred in the Indian media economy where Jio has significantly contributed, and how the Indian state has influenced the changing transformation of broadcasting media to Internet media. This transformation involves three steps: i) assertively shaping the media economy around public interest messaging; ii) retreating to let satellite television and OTT platforms prosper via collaborations with international conglomerates; iii) allowing Jio, via 'regulatory silence' (Parthasarathi, 2023), to rationalize the streaming and satellite television markets via mergers, acquisitions, and predatory pricing.

Given that Jio's primary strategy in the OTT market hinges on vertical integration and state support through regulatory silences, the first section of this chapter will address the theoretical framework, elaborating on the relationship between media policy, business models, and vertical integration in media. This section will also critically examine key concepts such as policy intervention and policy silences, OTT video platforms versus streaming platforms, and 'media convergence' (Jenkins, 2004) in contrast to 'media platformization' (Nieborg & Poell, 2019).

5.1 Media Policy, Regulatory Silence, and Vertical Integration

Streaming platforms such as Twitch, Instagram, Twitter, Facebook, and YouTube blend live streaming with on-demand content, emphasizing social interaction through features like chat, friend lists, and integrated e-commerce (Cunningham & Craig, 2019). These platforms are designed to foster real-time engagement and community-building, leveraging user-generated content alongside professional productions. In contrast, OTT video platforms like Netflix (founded in 1997, streaming since 2007) and Hulu (launched in 2008) primarily focus on professionally produced, on-demand content.

The strong appeal for binge viewing is satisfied by the appearance of an entire season at once, as well as a focus on curating content and episodic serials (Lotz, 2017; Herbert et al., 2018). If they offer live

streaming, it is mostly for events similar to sports; the function of an OTT streamer follows a similar path to traditional television in that it is a source of binge able, pre-recorded content (Lotz, 2017). OTT video streamers are more in line with traditional media formats, but crossing the boundary distributed across the internet, which implies it is media convergence of the concept of television to the digital streamer.

Additionally, convergence in the media mergers the old and the new media changes how content is created, distributed, and consumed. Convergence is linked to platformization. Tech giants like Google, Apple, Facebook, Amazon, and Microsoft dominate by controlling infrastructure and economic models. They merge different media into one digital space (Nieborg & Poell, 2019). Events speak to the maximally monopolization; Facebook buying Instagram in 2012 fundamentally changed the integration of social media across the platforms and Amazon's acquisition of Twitch in 2014 shaped the live streaming markets. As we have discussed, these platforms are content distributors but also dictate the process of production and monetization via their algorithms, analytics, and infrastructure information. Platformization also reshapes media industry dynamics by introducing new players and altering power relations. Traditional media companies, such as Disney, which launched its Disney+ streaming service in 2019, must compete with and adapt to platform-based business models, often forming strategic partnerships or altering content strategies to remain relevant (Lotz, 2017; Herbert et al., 2018). This shift impacts media policy as policymakers grapple with challenges unique to digital platforms, including data privacy, market dominance, and content moderation (Lobato, 2019).

As per Garnham, media policy refers to "the ways in which public authorities shape, or try to shape, the structures and practices of the media" (Garnham, 1998: 210). Key interventions, according to Freedman, include regulating media ownership to prevent monopolies and ensure diverse viewpoints (2008) and supporting public service

broadcasting to provide educational and cultural content despite commercial pressures (McQuail, 2000). For example, in response to media convergence, the Indian government recognized the need to reform and modernize its regulatory framework for the communication sector in early 2001. This led to the approval of the Communication Convergence Bill (CCB) by the Group of Ministers (GoM), chaired by Finance Minister Yashwant Sinha. The Bill was then introduced in the Lok Sabha in 2001. The CCB proposed the creation of a single regulatory authority called the Communications Commission of India (CCI). It was meant to oversee telecommunications, broadcasting, and information technology (CCI, 2001). Nevertheless, even with the CCB's forward-thinking perspective, the CCB has met multiple hurdles regarding implementation. One of the many issues, as policy analyst Menon highlights, is the Indian government's historically divided regulatory approach (2004). Looking at the deregulation of telecommunications and broadcast, each had very different purposes and outcomes in India. In order to highlight how telecommunications and broadcast deregulation differ in India, it is important to consider each policy's purpose and outcomes (or not). The main purpose for broadcast deregulation in the early 1990s was a reduction of state control. With the ability to launch private competition such as Zee TV (1992) and Star India, Doordarshan no longer had a monopoly. Even policy was governmental control without having to develop significant physical facilities, as existing cable and satellite networks used by those broadcasters. For example, in 1993, Sun TV was launched and increased regional content, while MTV was developed for urban youth audiences (Nanjundaiah, 1995).

Each telecommunications deregulation process began in the 1990s, but sped up in the 2000s, aimed at creating more competition by developing infrastructure to support it. The process shifted India from a state-controlled monopoly, with private and foreign investments to create more of India's telecom infrastructure (Chakravartty, 2004). The high price of running these networks, including cell towers and fibre optics, eventually led to market consolidation as only a few players could afford

it. By the mid-2010s, Reliance Jio and Bharti Airtel had built significant market power and started controlling competition in telecom and digital access.

The point of difference in this case is that under broadcast deregulation, they have provided a more diversified playing field to the content producers in determining equal, if not smaller, control of distribution. In telecommunication, where deregulation took place, the access was centralized among companies that constructed the infrastructure. The telecommunications regulation in India in many ways nurtured monopoly by creating the principle that telecom infrastructure monopoly could be held by companies such as Jio as would also dominate content distribution. This twin impact on distribution and content implies that although telecom deregulation in India enabled the growth of the market, it also made important actors such as Jio strong gatekeepers in the digital media industry. As an example, in 1991 the broadcast industry, especially the television, was deregulated to allow the participation of the private sector but the telecommunication industry focused on corporatizing and competition among companies including those owned by the state (ibid.). This divergence in policy approaches has created obstacles in achieving a seamless regulatory framework under the CCI.

Menon (2004) further notes that section (xiii) of the chapter grants the CCI the authority to establish appropriate mechanisms and to engage continuously with all industry sectors, including broadcasting and telecommunications, as well as with consumers. Although the chapter employs contemporary buzzwords such as "abuse of market is prevented," "non-discriminatory and transparent treatment," and "providing a level playing field for bidders for broadcasting rights," these terms are used in a fragmented and superficial manner (CCI, 2001:22, 38). The chapter lacks a thorough discussion on the practical implementation of the proposed policy, raising concerns about whether the powers granted to the commission will be sufficient to ensure

effectiveness and leaving convergence technology and service providers with significant uncertainties due to the absence of essential details on how these powers will address real-world challenges (Menon, 2004). However, despite the passage of over two decades, there have been no amendments to the law, even in the face of increasing power concentration, market consolidation, and anti-competitive practices within the media sector. This lack of amendment could possibly be attributed to the government's inclination to favour certain select entities that offer reciprocal support by remaining silent on regulatory loopholes.

This silence by government is an alternative approach in policy, rooted in social and political science debates from the 1960s (e.g., Bachrach & Baratz, 1962; Crenson, 1971; Lukes, 2005) that focuses on non-decision making and policy neglect. This perspective views power as most effective when least observable (Lukes, 1974/2005) and highlights "considered silence"—the deliberate choice to avoid addressing regulatory challenges (Parthasarathi, 2018). Freedman described it as "negative policy," highlighting the government's reluctance to develop new rules as a preference for minimal intervention, often justified as promoting a liberalized market environment (2010: 355). Policy silences can also stem from regulatory capture, where media firms influence policy-making to protect their interests, as seen in the U.S. with reduced transparency and increased business dominance (McChesney, 2004; Freedman, 2006). For example, early regulatory inaction on digital platforms allowed companies like Google and Facebook to dominate the market before significant policies were enacted. In India, notable instances of deliberate inaction include the handling of industry advocacy by trade bodies, which have influenced regulatory outcomes such as licensing norms, pricing, and service quality. Moreover, the government's focus on minimal regulatory attention and reliance on industry-provided information rather than independent studies results in regulatory gaps that protect specific business interests. Similarly, regulatory support for telecom companies entering TV distribution and the lack of measures to curb cross-media

ownership reveal how strategic silence can benefit dominant market players. The involvement of telecom giants in the DTH market and the expansion of media conglomerates across multiple platforms highlight how regulatory inaction can facilitate market dominance and concentration (Parthasarathi, 2018).

In addition, policy silence supports vertical integration, allowing large companies like Jio to leverage economies of scale and scope to reduce costs and increase efficiencies. Historical examples include major film studios like Paramount and Warner Bros., which in the 1920s and 1930s controlled production, distribution, and exhibition, dominating the value chain (Gomery, 1985). This model continued into the 1990s with the consolidation in the cable TV market (McChesney, 2004). Moreover, Hardy (2014) notes that the Internet facilitates scalability in media distribution, making vertical integration attractive for large incumbents, a trend that has been further transformed by the rise of OTT platforms beginning in the late 2000s. Platforms like Netflix and Amazon Prime use extensive intellectual property libraries to establish high entry barriers (Lotz, 2017). This shift blurs the lines between producers and distributors, prompting telecom companies to enter the online TV market. Evens and Donders (2016) highlight the convergence between fixed and mobile networks as a key factor in telecommunications consolidation. Telcos and cable operators, both in Europe and the US, have positioned themselves strategically to offer quadruple play services (broadband Internet, TV, telephony, and mobile services), reducing customer churn and acquisition costs (Chan-Olmsted & Guo, 2011). What makes telcos well-positioned is that they have 'the resources and wherewithal to dominate the Internet, primarily through ownership of most local and long haul transmission conduits and by owning the largest Tier-1 ISPs that control most of the broadband backbone facilities providing Internet data transport' (Frieden 2002: 428). In terms of the prolonged battle between telecommunication services and the Internet service providers – or between the Bellheads and Netheads, as it is known (Steinberg 1996)– the telcos 'may bank too much on their continuing ability to maintain toll

booths along the information superhighway' while ISPs must rely on telcos 'to exploit bottlenecks and superior expertise in working the regulatory process', 'unless and until they vertically integrate throughout the service chain' (Frieden 2002: 429).

Given that Jio's strategy in the OTT landscape is shaped by vertical integration and bolstered by regulatory silences, the first section of this chapter lays out the theoretical framework by examining the relationship between media policy, business models, and infrastructural consolidation. It critically explores concepts such as policy intervention and regulatory silence, and draws on the frameworks of 'media convergence' (Jenkins, 2006) and 'media platformization' (Nieborg & Poell, 2019) to understand how digital ecosystems restructure traditional media logics.

The next sections look at the uneven growth of major platforms. YouTube grew worldwide, but MX Player found it hard to expand in India's crowded streaming market. This shows that platform growth depends on infrastructure, data power, and regulatory support. The last section looks at Jio, which used internet access and bundling to put JioCinema at the heart of India's OTT market. These cases show that success today relies not just on content but also on infrastructure strength and regulatory gaps.

5.2 A Brief History of Policy and Strategic Silence in Indian Broadcasting

This section considers how the policy, and silences in Indian broadcasting have influenced the development of this sector in terms of creating urban-rural disparity, market concentration, and the trajectory from public service values to commercialization.

India's broadcasting sector shows how policy and regulatory silence shaped the market. It also influenced the urban-rural divide and concentration of the industry. The sector grew under specific policies and

gaps in regulation that shaped its direction. Throughout the 1950-1960's era the Indian government's policy was rooted heavily in Gandhian principles which placed a priority on public service interests over business interests. In 1959 when TV first started implementation, it was governed by the rules of the BBC of public service broadcasting which focused on national construction, education, and national integration at the expense of commercial gain (Singhal & Rogers, 2001). Jeffrey maintains that the model reflected a mindset that viewed television as a luxury, and thus marginalizing television in favor of radio for disseminating information to the public (2006). This period of intervention aimed to use television for social improvement. It followed the goals of post-independence India (Chatterji, 1991; Rajagopal, 1993). The Satellite Instructional Television Experiment (SITE) began in 1975. Its goal was to educate rural viewers in specific subject areas and shows evidence of policy gaps. The short timeframe and lack of follow-up support of SITE demonstrate the presence of policy that did not strategically address the urban-rural divide (Singhal & Rogers, 2001). The ending of SITE in 1976 shows a focus on short-term strategies. These strategies favored urban and commercial services over rural development goals.

Another example of policy silence is the Kheda Communication Project. This was a community-supported initiative that began in 1975. The Kheda project had effectively mobilized rural community members in the creation of educational content materials, that extended to significant areas of caste discrimination and gender inequality (Thomas, 2005). Upon completion, the Indian government did not pursue this approach in other districts; instead, they reallocated resources to the urban environment. The decision to move the high-power transmitter from Kheda to Chennai in 1985 created a commercial entertainment channel. This move reflected a policy silence that favored metropolitan commercial interests over rural development (Ghose, 2005). In the 1980s, there was a major policy shift in broadcasting. Public service broadcasting moved toward a commercial model, ending licensing fees

and allowing commercial services (Thomas, 2005). The intention of these shifts was to develop a market via advertising and entertainment, but also led to a policy silence with regards to the effects of commercialization on programming diversity and access to programming. The privatization agenda sought to attract financial resources to programming primarily targeted at an urban, middle-class consumer base without regard for rural audiences, developing audio-visual programming for villages (McDowell 1997).

The liberalization period of the 1990s created a competitive environment with the emergence of private broadcasters like Star TV and Zee TV as a result of the government's 'open sky' policy (Kohli, 2019). However, loopholes in the regulations resulted in a few private channels saturating the market and maintaining the urban-rural divide in broadcasting. On one side, while private channels target urban viewers, Doordarshan continued to reach out to rural viewers with its bland programming (Shitak, 2023). The digital switchover required by the Cable Television Networks (Regulation) Amendment Act of 2011 was designed to modernize and monopolise the cable television sector, migrating the cable television service from analogue to digital formats. Although the intention was improving efficiencies and service quality, the transition mandated favored larger Multi-System Operators (MSOs) over small local cable provider (Parthasarthi, 2018). The migration to large MSOs ensured control of the market reducing competition among smaller MSOs and thus changing the competitive landscape of the sector.

This short history illustrates the government chose not to intervene with the planned amalgamation of ownership and the urban-rural divide with all manner of broadcasting and telecommunications. This strategic silence has led to consequences for the development of these sectors in terms of inequities of access to media and diversity of content. Even though large tech companies are continuing to consolidate media through and beyond government oversight, the challenges of existing incumbents would suggest emergence into the same company failures and issues in

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terms of finances, resources, and content-inclusive production infrastructure.

The next section will explore the case of what are similar enterprises: YouTube is part of a technology conglomerate and MX Player is a media company – presently, YouTube continues to grow viewer share while MX Player is suffering to retaining audience share. I will compare the strategic distinctions between these platforms and the causes of their divergent paths. Additionally, I will investigate the role of government policy in shaping these disparities and the motivation behind it and its impact on the competitive dynamics within the OTT video market.

5.3 Strategic Divergences: YouTube's Expansion vs. MX Player's Struggles

Officially launched in 2005 but acquired by Google in 2006, YouTube became a global platform for users to upload, share, and view videos across various genres. As one of the earliest global platforms to enter the Indian market, YouTube capitalized on the burgeoning internet penetration and the growing consumption of online video content among Indian audiences (Lal et al., 2023). It was however after launch of Jio and free/ cheap internet that it became a generative or disruptive platform in India. The company's dominance was reinforced by favourable government policies and regulatory leniency, enabling it to disrupt the market with aggressive pricing and significant infrastructure investments, including affordable spectrum and rapid 4G deployment. Jio's rapid success was possible due to the regulatory support and exclusive spectrum assignment. Furthermore, the liberalization of the Indian telecommunication space and the policies of Foreign Direct Investment (FDI) also favoured Jio as it enabled the latter to enter the market in the first place. That capital investment is what then gave Jio the ability to list an outrageous amount of capital to finance an ambitions venture to be launched.

Simultaneously, the rise of Jio made significant impacts on the Indian digital content ecosystem and media. The consumption of digital content emerged due to the availability of inexpensive, clean, and ubiquitous high-speed internet by Jio. Emerging platforms liked YouTube saw exponential viewing growth with billions of new people online. Jio opened up the internet to the population creating new ways to create and consume. This shift challenged traditional media channels and reshaped the entertainment landscape. This surge in internet accessibility catalysed YouTube's growth, transforming it from a niche platform into a mainstream entertainment hub. The platform's localized approach, including the introduction of regional language content and collaborations with Indian creators, played a crucial role in its expansion. YouTube's ability to cater to diverse linguistic and cultural demographics across India helped it capture a broad audience base, extending beyond urban centres to rural regions, an area earlier marginalized by the private broadcasters (ibid.). In its early years, YouTube was embroiled in a legal battle over copyright infringement in the Delhi High Court with major music label T-Series, beginning in 2008, where its promises to remove copyrighted content upon reporting were squarely rejected by the publisher and the platform was characterized as 'defective technology'. However, these 'defects' seem to have been ironed out, with T-Series emerging as the top music channel on the platform globally in 2016 (Mumbai Mirror, 2017). Also, YouTube lined up a series of partnerships, including those with television companies like NDTV, Viacom18, Star India and Eros Now. It also streamed IPL live where YouTube's IPL channel had nearly 50 million views in 2010. Kumar, A. sees it as a 'codependent relationship with hegemonic cultural institutions by being both in competition with it but also gaining from the technical, cultural labour, as well its archive of readily available content to be used and reused' (2006: 5609). In this reciprocal relationship, broadcast channels harnessed online distribution to boost their exposure, eventually resulting in the creation of their own OTT platforms. While this collaboration expanded YouTube's viewer base in India but failed to strengthen the

OTT offerings of TV channels since viewers accustomed to watching TV programs on YouTube for free were reluctant to pay subscription fees.

YouTube's 'partnership agreements' with content creators entailed a revenue split from the initial advertising earnings. However, since 2015, a significant shift in video consumption patterns has been observed, with 96% of users favouring "long form video" (Punathambekar & Kumar, S., 2022: 335). This transition from short YouTube videos to full-length TV programs and films marked an inflection point, considering initial concerns about high data rates. It was also instrumental in YouTube's emergence as the key platform to bridge television with Internet, especially because mainstream channels could fetch further viewership from YouTube by posting their full episodes regularly. The emergence of YouTube as a free to access arm of subscription-oriented television, helped consolidate the cross-promotional synergy between cinema, television and the Internet (Kumar, A., 2018). This crossover trajectory was further strengthened by the popularity of stand-up comedy, for example, which graduated via reality television's popularity on YouTube, towards independent content creators posting on YouTube first and then graduating to web-native platforms such as Amazon Prime Video. Posting a portion of paywalled content, whether on television or the web, on free platforms as bait towards subscriptions became a regular promotional strategy which perhaps strengthened web-based access more than television, and facilitated the transition to the former, especially among younger demographics and especially mobile-only consumption. By 2018, the discourse had shifted from the slow digital transformation in India to optimistic discussions about the vast mobile phone user base, advertising opportunities, and the growth of payments/fintech services. Jio reshaped the streaming market with predatory pricing of data usage in particular, underwritten like its e-commerce venture by the conglomerate's traditional industrial operations; this led to explosive growth in internet usage all across India (Parthasarathi 2023; Mukherjee 2019).

However, the expansion of OTT user base does not apply uniformly across the sector; the market is now characterized by intense competition, with platforms from established media companies struggling to compete against 'megacorps' (Athique & Kumar, A., 2022). For instance, platforms like ALTBalaji, MX Player, and Disney+ Hotstar are facing considerable challenges in this competitive landscape. In this series, Times Internet, India's leading digital product company, recognized MX Player's success as a video player and acquired it for $140 million in 2018. MX Player, developed by South Korean developer J2 Interactive, was capable of playing various file formats stored locally on a phone. Its design prioritized smooth video playback, particularly on affordable Android smartphones, leading to its popularity in developing countries, with India emerging as its largest market. Consequently, when Times Internet rebranded and relaunched it as a video streaming platform in 2019, MX Player (OTT platform) effortlessly garnered 350 million users. It began targeting viewers in Tier 2&3 cities, employing a "bottom of the pyramid" (BoP) approach (Prahalad, 2005). Their approach involved aggregating content available at lower prices, including Korean/ Turkish web series, web shows and movies available at cheap prices from various national and international studios including FilmRise, Sonar Entertainment, Screen Media Films, Goldmine, Hungama, Shemaroo, Paramount Pictures, Sony Entertainment and Sun TV Network.

Additionally, it partnered with two other platforms similar to itself – *Ullu* in 2020 and DistroTV in 2023 – which also aggregate and produce content at low prices. Besides, aggregating, in producing original web series MX Player employed innovative strategies in programming to increase user base as well as increasing its subscriber base. Moreover, in addition to content aggregation, MX Player employed innovative programming strategies to produce original web series, aiming to expand its user base and engage existing users. They developed two types of web shows: tentpole shows and low-budget shows (Abhishek Vakil, Senior Creative Director, August 22, 2023, online personal communication). Tentpole shows, such as *Aashram* (2020) featuring Bobby Deol, a

renowned Bollywood actor, are characterized by high budgets, popular actors, diverse shooting locations, innovative scripts, and are targeted towards new users (Abhishek Vakil, Senior Creative Director, August 22, 2023, online personal communication). While low-budget shows such as *Campus Diaries* (2022) and *Shiksha Mandal* (2022) feature lesser-known or cost-effective actors, straightforward scripts limited to a few locations, and primarily serve to offer options for existing users (Abhishek Vakil, Senior Creative Director, August 22, 2023, online personal communication). MX Player also secured sponsorship from local brands for these shows, thereby generating revenue through the AVOD model (Abhishek Vakil, Senior Creative Director, August 22, 2023, online personal communication).

However, the success for MX Player was short lived in the face of issues related to balancing ad content, the challenge of piracy platforms, and competition from both traditional television and emerging intermediary platforms. When the volume of advertising surpasses a consumer's tolerance level within a media platform, it is labelled as advertising clutter (Ha, 1996). Excessive advertising clutter is likely to hinder purposeful consumption and contributes to users uninstalling the OTT app. This was the case with MX Player, since it provided free content but struggled to strike a balance, resulting in viewer dissatisfaction (Figure 5.2).
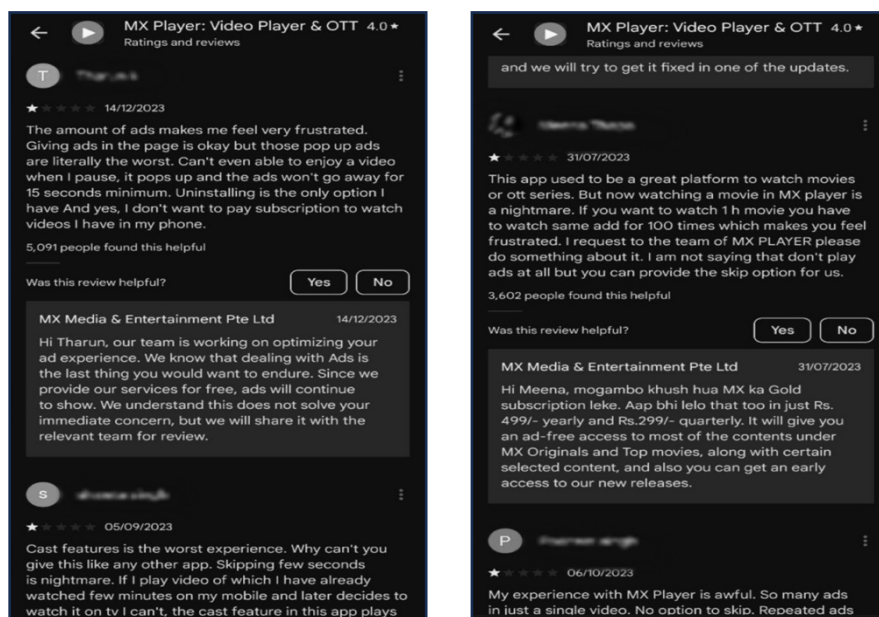
Figure 5.2: Screenshots from Google Play Store displaying user reviews criticizing MX Player for excessive advertising.

Piracy platforms, such as Telegram – an encrypted messaging application accessible on smartphones – also posed challenges for consumer retention since ad-free content is often readily available. Furthermore, MX Player faced a stiff challenge from the competition – new intermediaries either significantly discounted (Netflix and Amazon Prime), or at times, even offered content free of cost (JioCinema and Amazon Mini TV). This eventually led to the merger of MX Player with Amazon Prime Video in 2024.

In conclusion, the divergent trajectories of YouTube and MX Player underscore the challenges and opportunities within India's digital streaming market, where global platforms leverage robust ecosystems to sustain dominance, while localized players grapple with intense competition, monetization hurdles, and evolving consumer expectations. The next section will discuss how Jio consolidated the media market by first aggregating the users left out of the metropolitan ecosystem of streaming, and then acquiring key infrastructural nodes within the digital pipeline. Its case is instructive in not only understanding a key approach to Indian OTT market, but also the shape of the "Indian internet" at large and the extent to which it has been shaped by media policy.

5.4 Streaming on Jio's Internet

The opening weekend of IPL's 2023 edition, which streamed for free on Reliance Jio, resulted in 50 million new downloads; the tournament generated over 1.47 billion views and led to the addition of 100 million new viewers (Thathoo & Mitra, 2023). As a result of the IPL 2023 edition in particular, JioCinema has established a massive user base as well as a robust media ecosystem[40]. However, it is important to remember that even if Jio did not earn from paid subscriptions for the IPL, it gained enormously from the streaming traffic as a telecommunications operator providing mobile-phone Internet usage data to millions of Indians. Its streaming ecosystem – mounted atop an effective duopoly in telecommunication systems at its core – has been able to trigger a self-reinforcing cycle of benefits. For example, Jio sells its Jio Fibre Wi-Fi bundled with free access to JioCinema, which offers a wide range of traditional television content following the acquisition of Viacom 18 in 2022. Since the bundling offers Wi-Fi and TV subscription in a single plan, it helps users transition from Dish TV to Jio Fibre, towards an Internet-centric ecosystem with Jio at its core.

Evens et al. (2020) argue that platform power is found in four C's: connectivity, content, consumer, and capital, all of which work favourably for Jio Platforms. However, Chatterjee also identifies a fifth C, which includes policy and regulatory framework, emphasizing the importance of context (2023). He notes that it is challenging for any platform like Jio to operate within India's diverse socio-cultural landscape, which is characterized by unique complexities. The platform must navigate the heterogeneity of 1.4 billion people and various constitutional institutions while maintaining India's democratic and pluralistic fabric. This task is particularly difficult due to deep-rooted

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[40] an ecosystem model encompasses users within aggregated service markets and utilizes data collected from different businesses to enhance services.

diversities, where any imbalance could adversely affect systemic transformations (ibid.). However, partnerships between corporate entities and governments, aligned for mutual interests, can drive systemic transformations. He further argues that 'a mix of consistent decision-making and contextual decision-making can position Jio Platforms not only as an inclusive and humane dominant platform but also one that is consistent with the best global standards and frameworks' (ibid.: 14). The collaboration between Jio and the Indian state, focused on promoting the Digital India initiative, exemplifies this strategic alignment and highlights how such partnerships can effectively leverage shared goals to drive significant systemic change.

The relationship between Jio and the Indian state is characterized by a complex interplay of 'considered' silence and strategic cooperation, where the state's regulatory inaction has often facilitated Jio's rapid market expansion and dominance (Parthasarthi, 2018). For instance, Jio's entry into the telecom sector involved acquiring a company that won a broadband spectrum auction without competition, followed by retrospective regulatory changes that legitimized Jio's offerings. This approach enabled Jio to provide voice services and offer extremely low-cost data services, effectively undercutting competitors while avoiding regulatory penalties. Moreover, the government's failure to address procedural violations and predatory pricing practices further solidified Jio's position. Allegations of irregularities during spectrum auctions and subsequent acquisitions were not adequately investigated, allowing Jio to proceed with its aggressive strategies. The regulatory body's lack of action on Jio's anti-competitive pricing further reinforced its market dominance, as competitors struggled to match Jio's offerings without similar financial backing or regulatory leniency.

Large-scale investments in an ecosystem pose significant regulatory risks in an age when governments across the world are worried about national security, data sovereignty and tech monopolies. Reliance Jio, however, has the cushion of a very cosy relationship with the Indian

state. This is partly because governments across Asia, recognizing the central role of digital architecture in governance, economic growth, and developmental aspirations, have been prompted to endorse the rise of "national champions", capable of countering the global influence of the Tech giants of the Internet (Apple, Alphabet, Amazon, Meta and Microsoft) (Athique & Kumar, A., 2022). In numerous respects, the Indian government aided Jio in capturing India's mobile digital market with a free data service, explicitly preventing Facebook from doing so in 2016 with Basics (Block, 2019). Additionally, there is considerable pressure from both regulators and the government for the major tech companies, referred to as the Big Four, to form partnerships with Indian operators, particularly Jio. Simultaneously, as the Government of India transitioned from a supportive stance to a more critical one toward Silicon Valley leaders, Reliance effectively lobbied for its interests in influencing emerging digital and platform regulations (Block, 2019).

Capitalizing on its longstanding state relationship and the reliance of Digital India on its fibre network, Reliance attracted substantial investments from Silicon Valley giants. Facebook secured a 9.99% stake, and Google acquired a 7.73% stake in Jio, contributing to an influx of $20 billion into Jio Platforms in 2020, surpassing Reliance's initial investment. This strategic move not only solidified Jio's government support but also garnered backing from global players, facilitating horizontal and vertical expansion alongside Facebook, Google, Qualcomm, and Intel Capital. The endorsement from governmental authorities and global stakeholders empowers Jio with economic leverage, enabling the acquisition of additional enterprises and the marginalization of competitors through the adoption of predatory pricing. It is this cosy relationship with the government, which has allowed Jio to consolidate several segments of the media market with key acquisitions, such as Balaji Telefilms (TV library), Embibe (edtech material), *Saavn* (music library), Radsys (5G architecture), Eros (TV library), Hathway (broadband distribution), DEN (cable), and Haptik (customer engagement).

The most significant, however, has been its recent merger with Disney+ Hotstar, which held half of the entire OTT market share in India till April 2022 (Elad, 2023), and still retains the topmost spot with 24% (Media News4U, 2024)[41]. Jio has therefore not outperformed Hotstar by any metric; instead it remains a relatively insignificant player in the Indian OTT market. Except that it has been able to marshal its vast resources as a legacy megacorp – Reliance, which owns both Jio and Viacom18 – to triumph over the restructured media market (Athique & Kumar, A., 2022). The key battle in this case was played over the IPL, which split its streaming rights and television rights for the first time in 2022, before which they were bundled together. It is indeed due to the losing of IPL streaming rights to Viacom18 that Hotstar has seen a substantial decline in its subscribers, especially since JioCinema killed Hotstar's key offering on television by making IPL available for free. While it paid a fortune to buy the IPL streaming rights, Jio's clinching deal with Hotstar has confirmed that no commodity in Indian media offers higher and more consistently reliable value proposition than BCCI's cricket bundle, especially the IPL.

It is the effective monopoly over IPL that now gives Jio a robust upper hand in bargaining for lucrative advertising revenues. Indeed, this is only the latest chapter in a long list of moves made by Reliance to acquire subscribers via predatory pricing. In the early years, Jio expanded its market presence by offering affordable phones, such as the *JioPhone* (Android) and *JioBharat* (keypad), which come with built-in JioCinema apps and bundled data and calling plans. Handing these devices out to those with modest affordances was instrumental in shaping India's foray into digital transactions as fundamentally tethered to the mobile-phone.

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[41] One could argue that with this deal, Reliance is making an acquisition look like a merger. While the media undertaking of Viacom18 will be merged with Star India, Reliance actually has a controlling stake in the joint venture – it directly holds only 16.3%, but 46.82% held by Viacom18 is also indirectly controlled by Reliance. This means that Reliance Jio has effectively displaced Disney+ as the control unit commanding Hotstar's India operations.

But also, these devices are designed to provide cost-effective mobile solutions, particularly catering to users with budget constraints, and in exchange, integrating them within data transactions across advertisers, content producers and intermediaries. As opposed to developing or acquiring proprietary content, the scarcity value of which is distributed across sequential windows, Jio bundles a whole bunch of media catalogues, applications and extravaganzas together, making them available at throwaway prices; additionally, Jio's DTH television bouquet bundles them with Jio-fibre and Jio 4K Set Top Box. Such affordances inevitably point to a particular pattern of media power, best manifested in the pairing of megacorps and super-apps across digital Asia (Steinberg, Mukherjee and Punathambekar, 2022). Elaborating upon this cocktail in the case of Reliance, Athique and Kumar, A. (2022) argue that Reliance's turn towards expanding retail markets since the mid-2000s must be understood as a part of the global renaissance of *merchant capitalism*, which not only exercises a new power 'over and against both manufacturing enterprises and state regulators', but also plays 'an outsized role in making the market, setting the price, and influencing state tariff, trade and monetary policies' (Lichtenstein, 2012: 10). Athique and Kumar, A. (2022) argue that

> This dynamic is turbocharged in the digital domain, where it has long been apparent that the interoperability of manifold devices naturally predisposes monopoly positions in critical software infrastructure. When it comes to material infrastructure, the vast capital outlay required for mobile digital infrastructure at the national level determines that only the very largest companies can provide the industrial and financial competencies needed to operate as partners with government. The Faustian bargain of digital development in emerging markets is the institutionalization of hegemonic positions in digital markets in order to offset the cost of providing the backbone for public sector provision (2022, p. 1426).

In keeping with the spirit of merchant capitalism, Jio Studios outsources production to various third-party production units such as Gold Mountain Pictures, Ding Entertainment, and Jar Pictures to produce all of its original shows and movies. It focuses on producing relatively low-budget shows, probably because the primary goal is to keep the viewers engaged through content rather than using content to acquire new users.

Also, Parthasarathi et al. (2023) argue that the transition from capital expenditure-heavy data centres to cloud-based solutions is transforming competition in the VoD sector in three major ways. First, cloud services address deficiencies in India's public infrastructure, such as poor connectivity and low speeds, allowing content distribution to reach underserved areas. Second, they enhance quality of content delivery, which allows platforms to maintain quality standards of service with limited bandwidth. Thirdly, cloud services allow VoD platforms access advanced services like personalization recommendation engine, and interactive voices, which enhance the customization of their offerings and market competitiveness versus larger competitors in communications. However, both advantages is often dependant on sustained engagement with capable telecommunications companies, like Reliance Jio, who can provide significant investment stakes in media companies, like Alt Balaji, and Eros Now. Telecommunications companies have potential competitive advantages to dominate the market. For example, with significant investment in VoD platforms or considerable investment in a VoD platform, they can use that to have the advantage of dictating the terms of distribution and pricing for video titles and potentially provide preferential access for their brand and/or associated platforms. This clearly limits the competitive options for small by creating barriers or unlevel competitively. Telecom companies can leverage this even further, by entering in exclusive contracts and controlling bandwidth at scale for their own products and affiliates and loneliness the competition.

In summary, streaming development indicates that the market is complicated. India is looking at the future of digital due to state partnerships and regulations. This tension creates a gulf in the engaged dealings that will require significant overhaul of regulatory review. Ensuring fair competition and preventing the misuse of market power by telecom giants is essential to maintaining a diverse and competitive VoD ecosystem. Without proper regulation, the benefits of advanced content delivery could be overshadowed by monopolistic practices, limiting consumer choice and stifling innovation in the sector.

5.5 Conclusion

Along with Zee TV, STAR network was the iconic success of satellite television in India, once television as a medium shifted away from the relative monopoly of Doordarshan's public broadcasting, as I have recounted above. At the time of Star's peak consolidation across Indian television, Reliance Industries was pivoting from textile towards petrochemicals[42]. It was only in 2006 that Reliance entered organized retail and in 2010, it entered broadband services. Despite the disadvantages of being a late entrant into the media economy, Reliance Jio has made astronomical gains, first by capturing the largest share of the telecommunication market leading into a duopoly, and then leveraging its advantage as a powerful telco to build the Jio media ecosystem in the streaming space. As Parthasarathi, reminds us, Jio's penetration of the Indian media market is primarily owed to the dependency of 'legacy media and native-web actors on telcos to reach their audience, given the effective mobile-only character of India's digital economy' (2023: 223).

Mobile communication operators, or telcos, have therefore been the biggest beneficiaries of the broadcasters trying to circumvent their

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[42] Apart from a brief and unsuccessful foray into Telecommunications by Reliance Communications, which was launched in 2004.

traditional intermediaries in cable and satellite television. This dependence on telcos, which has to be reconciled with the telcos' own OTT offerings (as in the case of JioCinema), ruptures 'the neat demarcation between publishers and distributors familiar to legacy media businesses since telcos perform both roles in the VoD business' (Parthasarathi, 2023: 224). Reliance Jio has thus been the foremost beneficiary of the Indian state's regulatory silence and its weak norms for vertical integration. On top of that, Jio is leading the demand to extract more revenue from OTT players to compensate the telcos for the "burdening" of bandwidth (The Hindu Business Line, 2024). It is this convenient twin-role of Jio, as a leading distributor of streaming content while also acquiring content catalogues via mergers with and acquisition of broadcasters as well as web-native platforms, which has allowed it an outsized role and influence over the Indian media industry. But of course, the "inclusion" of millions of rural and provincial Indians in this reconfigured media market is a responsibility that was instrumental in the passing of proverbial baton from the public broadcaster to the "national champion" guarding India's "digital sovereignty".

While I agree about the telcos threatening the OTT environment in India, I just can't see how Jio could ever be duplicated or matched in this scenario by operating similarly. The Indian state's involvement in permitting a corporate giant to disrupt and shape the whole media industry in India should not be overstated, even if it is an exercise more about its antitrust non-appearance than anything else. To some extent, thus, Jio's victory only reinforces that valuations in media and communications are always in flux. By establishing position at an essential node of the streaming explosion in India – telecommunications – they were able to build not just undercut much of the content-centred valuation cultivated by VoD competitors, but also acquire it cheaply at the right time. This is largely due to the fact that platform economies in general are systems of connection and aggregation instead of systems of production; they fundamentally create value by addressing a whole set of

logistical problems, and matchmaking across orders of varying complexity.

As I have indicated, Reliance Jio's distinctive embrace of twenty-first century mercantilism has been constructed atop an ecosystem of cheap infrastructure and predatory pricing; but, certainly, there is something to be said about the Indian state as a silent observer of this process occurring with its skilful patronage. Certainly, one could even contend that this selective patronage[43] is the foundation of Indian media policy.

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[43] The symbolism of this patronage is manifested aplenty across multiple fora where the Indian Prime Minister hugs the Chairman of Reliance Industries Ltd. (First Post (2013). Most recently, it played out for months across the extravaganza of Anant Ambani's wedding (India Today, 2024).

Chapter 5

Conclusion

This thesis began with a deceptively simple question: How have OTT platforms, telecom integration, and regulatory dynamics transformed Indian broadcasting? Beneath that inquiry lies a more urgent concern— who holds the levers of power in India's contemporary media ecosystem, and how is that power exercised, concentrated, or obscured? While the shift from television to OTT is often framed as one of innovation, democratization, or user empowerment, this thesis argues, to the contrary, that India's digital transition has not disrupted existing hierarchies—it has reproduced and intensified them under the logic of infrastructural consolidation, platform capitalism, and regulatory silence.

At the heart of this argument is a rejection of technological determinism. The transformation of Indian broadcasting is not the inevitable result of innovation or consumer demand. It is a structural realignment—one shaped by corporate strategy, political inaction, and the affordances of digital infrastructure. What has emerged is not a plural, competitive marketplace, but a concentrated ecosystem where access to content is increasingly dictated by the ownership of bandwidth, data pipelines, and bundling capacities. Far from signalling a break from television, OTT represents its remediation and enclosure within platforms driven by extractive data logics and cross-sector conglomerates.

This critical perspective is grounded in four interlocking theoretical frameworks. First, media convergence theory (Jenkins, 2006; Dwyer, 2010) helps explain how television's aesthetics, formats, and logics persist in digital streaming, even as the interfaces and delivery mechanisms change. Convergence, in this context, is not a horizontal coming-together of equal media forms but a hierarchical reconfiguration where older formats are subsumed into newer infrastructures. Second, the

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thesis draws on platform capitalism (Srnicek, 2017) to analyse how platforms no longer just distribute content—they own key distribution infrastructure, harvest user data, and monetize attention. In this regime, value is created not through storytelling or cultural labour, but through bundling, surveillance, and algorithmic control. Third, the concept of regulatory silence (Parthasarathi, 2018; Freedman, 2010) is introduced as an original analytical lens for understanding India's governance landscape. The state's consistent refusal to regulate telecom-media convergence, platform monopolies, or bundling practices is not incidental—it is an active political choice that benefits incumbent infrastructure owners and weakens media pluralism. Lastly, this dissertation is situated within the political economy of media tradition (McChesney & Schiller, 2003; Golding & Murdock, 1997), which directs our focus away from content to ownership, and from technologies to power. It challenges us to think about not just what we watch, but who shapes how we watch, under what circumstances, and for whose benefit.

To clarify: this thesis does not glorify the emergence of platform monopolies or infrastructural supremacy. It challenges their legitimacy, critiques their market power, and exposes the policy failures that allowed them to flourish unchecked. If consolidation appears efficient, it is only because alternative futures have been foreclosed—through regulatory omission, infrastructural inequality, and the devaluation of independent cultural labour. It is not a digital revolution but a political rework disguised as progress.

6.1 Comparative Synthesis of Case Studies

The digitalization of the Indian broadcasting environment can be explained in the context of the comparison of three platforms: ALTBalaji, Disney+ Hotstar, and JioCinema. All these case studies constitute a distinctive institutional structure and strategy. They include content-based innovation to television-digital convergence and telecom platform supremacy. I put all these cases together to demonstrate the current transformation in the media power in India. They imply that

infrastructure, bundling, and regulatory advantage control has a greater impact on a platform success than storytelling, brand reputation, or market first-mover.

6.1.1. ALTBalaji – Content without Infrastructure

The ascendancy of ALTBalaji in the streaming business in India was also a planned move. It was a calculated action, as the traditional TV formats were on the way to decline, and the popularity of digital streaming to the audience was increasing. Being a child company of Balaji Telefilms, the platform was also more industry-heavy, their parent company has already had a strong grip on the Indian television with the familial melodramas, since the entertainment industry entered the post-liberalization era. Nevertheless, with the introduction of ALTBalaji, Ekta Kapoor tried to take a new stance of sorts through rebranding itself in the entirety, to move beyond the morality of *Kyunki Saas Bhi Kabhi Bahu Thi* (2000), just to re-position Balaji as an all-mobile, urbanising and vernacular digital viewer. It is clear that the movement aimed at being the "Netflix of Bharat" to create disruptive and culturally-specific content, which was subscription-based and broadcast safe.

It was not just the platform decline case, but a highly incendiary case study that in fact does reveal the effect of infrastructure exclusion and platform capitalism on the potential of content oriented innovation. ALTBalaji had a very basic content strategy which was to generate original high volume and low cost digital content in local languages and in Hindi. As an illustration, the flagship content *Gandii Baat* (2018), *Ragini MMS Returns* (2017), and *Dev DD* (2017) have successfully applied a fast-fashion concept of erotica and thriller based series-hyper local setting, sexually suggestive titles and episodic format that were intended to make the viewing experience appealing. The ideas of women-centric and real life based narratives were introduced in other shows like *The Test Case* (2017) and *Bose: Dead/ Alive* (2017), which indicated the openness of the channel toward altering the nature of the themes, which could have been ignored by the television and streamers in general.

Nevertheless, ALTBalaji was struggling with scaling as it showed the limits of a content-first approach in a telecom-driven digital ecosystem. Unlike JioCinema or Disney+ Hotstar, ALTBalaji emerged without any sort of data infrastructure. It was unable to package its subscription with its hardware or with mobile data, it was unable to subsidize streaming video on the application. Consequently, users were not only required to pay a subscription fee to ALTBalaji content, but also data fees as well-making its business model unviable in a market that is price-sensitive and now quite familiar with free and bundled access. Its micro-pricing (₹100 for three months) was also one of the lowest in the market, but it could not resist the rejection due to poor distribution, visibility of the app, and user exhaustion.

The workaround of the platform, which is to release the content through the aggregators such as Vodafone play, Amazon Fire Stick, and MX Player, provided the reach but at the cost of autonomy. These partnership, as my analysis shows, watered its brand identity, and dissolved user loyalty, and handed over power to intermediaries that could influence monetization and visibility. Instead of being a destination platform, ALTBalaji became a catalogue embedded inside others' ecosystems—often repackaged, renamed, or stripped of its original marketing appeal. This fragmentation made it impossible for the platform to build lasting engagement, and undercut its DTC strategy.

Beyond infrastructural exclusion, ALTBalaji's position was further destabilized by a complex creative-institutional identity crisis—what I refer to in Chapter 2 as its existence *"between film and television."* While the platform attempted to emulate cinema's aesthetics—sexual freedom, episodic thrillers, bold biopics—it retained television's production rhythms: short schedules, limited budgets, and serialized storytelling. In other words, ALTBalaji marketed itself with the effect of cinema but operated with the logic of television. This hybridity was neither accidental nor incoherent. It reflected an industry in transition, where

streaming was imagined as both an escape from broadcast censorship and a continuation of the habitual seriality that defined India's TV audiences.

Yet this "in-between-ness" became a creative and strategic trap. The erotic thriller became its default genre, not its innovation edge. Over time, the content catalogue narrowed into a formula—disproportionately reliant on softcore appeal to drive subscriptions. While this strategy captured attention, it lacked the prestige of Netflix-style originals or the algorithmic power of YouTube's user network. ALTBalaji could neither scale like a platform nor brand like a studio. It was, as I put it, "Balaji no more"—not because it had reinvented itself, but because it had abandoned its television legacy without securing a viable platform identity.

Furthermore, even ALTBalaji's experimentation lab was regulated by informal modes of control. Past discussions of regulatory silence, especially with OTT platforms, show an unfair advantage for some players. ALTBalaji was not bound by CBFC rules or television licensing laws. Yet, it still dealt with state agencies, troll groups, and complaint-driven censorship. "Crowd-source censoring" exemplifies how OTT models such as ALTBalaji needed to self-regulate due to the threat of backlash, such as removing scenes or recutting trailers, or virtue signalling, adding moral disclaimers—not due to the formal law, but ambient threat. Because ALTBalaji developed a reputation for provocative sexual content, ALTBalaji was a target with no legal protection or policy clarity, and ultimately gave into pressure. Even ALTBalaji's most daring content was bound to be regulated. The limits came not only from markets but also from the roots of a moral economy.

ALTBalaji's decline shows more than just a production house failing to become a platform. It demonstrate that content-first model will not operate in a media ecosystem where infrastructure is the king. Services such as Jiocinema may provide a high percentage of their content free of charge, including data access and driving scale up through ads. In contrast, ALTBalaji was not part of the bundled ecosystem, did

not have an algorithmic presence, lacked telecom advantage, and was progressively lacking viewer loyalty.

In short, ALTBalaji is not merely a case of a warning, though it is, in many ways, a prototype of how not to be when it comes to structure, but the history of ALTBalaji is a basis of my overall argument in this thesis when I state that it is merely not enough to produce content in the era of platform capitalism, and access to infrastructure, bundles and regulatory silence is what determine so much of who lives and who dies. This failure of the platform to turn the creative initial energy into sustainable digital sovereignty highlights the new forms of hierarchies influencing Indian broadcasting where the access rather than the authorship is the actual location of power.

6.1.2. Hotstar – From Television to OTT Hegemon

The shift and eventual decline of Hotstar suggests how old fashioned TV broadcasters shifted to digital streaming in India and the establishment of Hotstar is one of the most important instances of such shift. Hotstar, a continuation strategy (not a disruption strategy) was launched by Star in 2015. The service applied the industrial logic of television to the OTT by leveraging the legacy of assets of the parent company massive content holdings, exclusive sports rights, and established distribution strategies. Hotstar was, since its beginning, no content service, but a vertically integrated digital extension of the television empire of Star, designed to integrate the affordances of streaming, together with the cultural grammar of television.

Hotstar stamped its authority over live sports rights, most notably cricket, as one of the primary generators of online traffic and user base. As of 2019, the IPL is live streamed to over 300 million viewers on Hotstar, and the service is the main event-based digital consumption service in India and not just another video-on-demand service. It was a new type of streaming television and it combines the time-collectiveness of linear television with mobile-first viewers and also supports both

appointment viewing and on-demand behavioural patterns. Lastly, it also featured advertisement-supported free and paid subscription levels (VIP and premium), to ensure maximum reach and to monetize key, premium events in the Indian mobile internet boom that accompanied the data revolution created by Jio.

Nevertheless, the very strengths which catapulted Hotstar to the OTT arens, also exposed the flaws of OTT strategies as legacy-driven. As soon as Hotstar, which was only added to the Disney global streaming system after 2020, generated international IP and scale as it grew, it also exposed the dysfunctions of global subscription-based approaches, and the ad-supported and mobile first infrastructure of India. Hotstar had a hybrid strategy that was not compatible with the SVOD choices of Disney. Moreover, in a platform economy increasingly structured around infrastructural control—data pipelines, bundling, and telecom integration—Hotstar's content-first advantage began to erode.

The decisive blow came with the loss of IPL digital rights to Viacom18 (a Reliance-backed entity) in 2023. JioCinema's strategy to stream the IPL for free disrupted the market entirely. By removing the paywall, bundling cricket with data plans, and harnessing its telecom infrastructure, Jio neutralized Hotstar's most valuable differentiator. Even Hotstar's rich content catalogue, international franchises, and brand recall could not compete against the zero-cost, high-accessibility model enabled by Jio's ecosystem. Jio did not just undercut Hotstar on price; it redefined the basis of competition—from content supremacy to infrastructural domination.

By 2024, Disney+ Hotstar's Indian operations were absorbed into a joint venture with Jio, forming the consolidated entity now referred to as JioStar. This merger was not an anomaly but a structural inevitability—one that illustrates a broader transformation in India's media economy. As power shifts from ownership of content to control over access, distribution, and data, legacy broadcasters like Hotstar are compelled to align with telecom giants to remain relevant. The platform

once showed how broadcasters could lead digital change. In the end, it couldn't keep up with shifts in infrastructure and the power of big digital platforms.

Hotstar's journey shows both the strengths and limits of legacy flexibility in India's digital shift. It succeeded when broadcasting logic and streaming strategy could work together on its own terms. It struggled when facing a competitor focused on the broader ecosystem and operating on a different economic model. The trajectory of the platform supports the thesis statement of this thesis: in a market place that is more and more bundling-focused, infrastructure consolidated-oriented, and regulation-oriented, it is not having better content that can disrupt the players, but rather having a better command of the conditions of access.

6.1.3. JioCinema – Telecom-Led Platform Capitalism

The emergence of JioCinema demonstrates a huge transformation in the Indian media. Infrastructure and platforms now take centre stage as opposed to content and networks. JioCinema was initially launched as a content complementary service under Jio as part of Jio's bigger digital strategy but soon evolved into a streaming heavyweight of its own, after Jio had acquired at USD 3.1B the digital property of IPL. JioCinema features a strong line-up of content, but its unique approach lies in combining that content with data, devices, and user networks.

Jio's ability to offer free IPL streaming—bundled with cheap or prepaid data packs—transformed JioCinema into a mass entertainment platform with record-breaking reach. By integrating telecom access with media consumption, Jio positioned itself as both the distributor and gatekeeper of digital content. Its platform strategy aligns with Srnicek's (2017) notion of platform capitalism: value is extracted not primarily from content but from user acquisition, data harvesting, and cross-platform monetization. In this model, free content is not a loss leader but a strategic investment to lock users into the Jio ecosystem, spanning telecom, e-commerce, payments, and smart devices.

Crucially, Jio's dominance was enabled by the state's regulatory silence. The absence of policy oversight on cross-sector mergers, bundling practices, and content-platform convergence allowed Jio to vertically integrate telecom infrastructure with media distribution without significant antitrust scrutiny. Unlike television broadcasters who once needed government licenses, or OTT platforms like Netflix that rely on subscription revenue, JioCinema operates in a largely unregulated, data-rich environment where infrastructural control dictates content visibility and access.

The acquisition of Disney+ Hotstar's Indian operations further cements Jio's dominance, positioning JioCinema as not just a streaming platform but the infrastructural backbone of Indian digital media. In this configuration, content is important, but access is everything. By narrowing the gap between the supply of data and the consumption of content, JioCinema symbolizes the transition of media power away from broadcasters and production companies and to telecommunications conglomerates.

6.2 Thematic Synthesis of Broader Trends

According to the case studies and cross-case analysis, there are more general developments of the media system in India. These do not just involve competition at the platform or technology upgrades. They reflect the change in the country broadcasting set-up, which requires the new approaches to the conceptualization of the media power distribution. Here, we discuss five interrelated factors that are influencing the post-television media system in India. These aspects will have an impact on the future research and policy.

A major lesson of this paper is the fact that OTT platforms should not be imagined as opposing television, but as its further development. The time-space continuity of the two is not only the one when we count conveniently the storytelling conventions, such as seriality, melodrama, sport-as-spectacle, but also in their monetization regime. The digital

platforms use of SVOD and AVOD is not new, instead, they are just repeating old television strategies of revenue management. Nevertheless, the OTTs altered them to incorporate accuracy in advertisements, algorithms to delivery, and datafied users. More so, the Connected TVs re-integrate the social and physical centre of the TV back into the home and entrench it into the platforms with app-stores, voice interfaces and tracking systems. This redeemed television is not linear anymore, however, it is not rupture. Success of the OTT lies in its capacity to combine the prevailing patterns of television watching by using the platform infrastructure, maintaining the effective affordances, but eventually rearranging the economic and political base.

It is the telecom conglomerates that are actually leading this transformation and not the content producers or even the broadcasters. The best institutional creation to arise in the OTT ecosystem of the Indian market does not belong to the media firm but the telecom-media-tech hybrid, as the case of Jio. As the JioCinema case shows, the infrastructural control, rather than creative experimentation, is the key asset in the streaming economy in India. Telecom companies are now deciding what apps would run on the phone, what data plans would motivate what and what content would be distributed at what price. As a result, media power no longer resides in the newsroom or the studio—it resides in the data pipeline. This marks a significant realignment: from "content is king" to "infrastructure is empire." Jio's ownership of IPL rights, coupled with its ability to zero-rate content through its own network, creates a vertically integrated structure where production, distribution, and monetization are internalized within one corporate body.

This model is sustained through what this thesis identifies as multi-sided platform capitalism. A major lesson learned during this work is that OTT platforms should not be imagined as something that is not related to television, but on the contrary, something that develops out of it. The time and space continuity of the two is not merely in place when we take

a profitable inventory of narrative devices, such as seriality, melodrama, and sport-as-spectacle, but within their system of monetisation. The concept of using the SVOD and AVOD as tools implemented by the digital platforms is hardly new, in fact, it is merely replicating the previously established television revenue strategies. Yet, the OTT sites reconfigured them using technical advertising, algorithmic publishing, as well as datafied viewers. More crucially, the introduction of Connected TVs relocates the physical and social hub of the TV back into the home as it is embedded into platforms consisting of app-stores, voice assistants, and tracking technology. This fixed television is no longer linear but yet not rupture. OTT is successful because it has the capacity to amalgamate the existing tendencies of television watching via the platform infrastructure and to preserve the emotional affordances, but eventually to reconfigure the economic and political support.

JioCinema does not rely on its subscription revenues to make payments on what it provides. Rather, they provide high quality content based on the idea of offering free content in an attempt to capture user engagement, attention figures and behavioural statistics. This information in turn generates revenue on a number of Reliance verticals advertising, retail, fintech, telecom- etc. In this model, the platform is not simply a media platform (or a content aggregator) but instead a cross-subsidized node in a larger economic infrastructure. Content is used to attract users and bring them into bigger digital ecosystems. The merger with JioCinema and Disney+ Hotstar solidifies this thinking. As mega-platforms grow, they create closed ecosystems. Users choose based on infrastructure and bundled services, not content quality or creativity. Access is no longer neutral. It is shaped by the design of the ecosystem.

In the past, Indian state agencies directly handled spectrum, channel distribution, and carriage fees. Therefore, without appropriate regulation, telecom companies such as Jio nearly monopolize infrastructure and cultural production. Infrastructure and content rules are now often used as a way to censor. This happens through trolling,

complaints, and outrage campaigns against small creators and independent tech.

Underlying and facilitating this merger is a repeated pattern of regulatory silence that this thesis thinks of not as absence, but rather an active regime of governance. In the past, Indian state agencies directly handled spectrum, channel distribution, and carriage fees. In the OTT phase, when there is no coherent policy situation for telecom-media mergers, bundling practices, or platform accountability, this has functioned to foreground permissive conditions for vertical integration. Parthasarathi's "considered silence" is relevant in this case because it expresses strategic choice rather than bureaucratic inertia. Therefore, without appropriate regulation, telecom companies such as Jio nearly monopolize infrastructure and cultural production. Meanwhile, infrastructure and content regulations are increasingly used as tools of censorship. It does this by trolling, complaining, and moral outrage campaigns which typically focus on independent tech and smaller content creators. In that scenario, the state's lack of intervention becomes intervention: it shifts the field decidedly in favour of corporate incumbents.

To conclude, India's streaming is both globally and locally situated. India exemplifies all the characteristics of global platform capitalism such as algorithmic customization, user tracking and cross-platform monetization. Meanwhile, it is still influenced by local peculiarities. Mobile viewing, language diversity of content, state, state stimulated telecommunications development have given rise to digital spaces dissimilar to North America and Europe i.e. the preponderance of free and bundling strategies over paid subscription strategies indicate the economic backdrop and cultural historicity of incorporating the consumption of media through ad-supported broadcasting. International actors that enter India will need to fit into this space as discussed by the failures of Netflix and the adherence of Amazon to the local market. Moreover, Indian conglomerates, including Jio, are modulating global

capitalist models, to create decidedly domestic models of media capitalism, including a free access point in full range, data scraping, of Jio.

All these add up to the realization that the media transition in India is not merely a swap of platforms in place of television but has something deeper that is changing the landscape of distributing the media in terms of infrastructure, big data, and market power consolidation. The apparent increase in consumer numbers and technological developments is, in fact, a significant change. It moves toward governance controlled by those who own digital access. Without a strong policy framework and clear regulations, public accountability will be weak. This puts our cultural understanding and creative freedom at risk. Instead of focusing only on the platforms, we need to place media justice within the infrastructure itself. This means making sure production, distribution, and engagement are fair through democratic oversight, competition, and inclusive regulation.

6.3 Implications for Policy and Industry

This thesis shows key changes in India's media landscape, from OTT changing television to telecom-owned platforms with dominant control. These changes create real problems for how media is managed and regulated. Today's media system is dominated by consolidation of infrastructure, control by algorithms, and gaps in regulation. If not controlled, these trends can give big companies more control over who sees content, who can participate, and how culture is shared. These paths are not fixed. They are products of policy-making or non-making. In order to maintain media pluralism, healthy competitive and fair play and guard the interest of the people, India must make cation and transform the regulatory mode to the converged ecosystem of media and telecom.

Most importantly, however, the policymakers need to approach the question of telecom-media convergence head-on. The JioCinema case demonstrates that telecom companies receive benefits as they can manage production, distribution, and data. This verticalization interferes with competition and shrinks content diversity. Bundling of entertainment with internet infrastructure, as demonstrated by the complimentary IPL streaming via JioCinema, locks different or independent video platforms out—not on the basis of content quality, but because they are devoid of the infrastructure. This convergence creates regulatory barriers. A single company can limit viewer access through data prices, zero-rating, and content bundles. There are no clear rules on cross-industry mergers and bundling of services. This has allowed large telecom companies to gain unchecked power in cultural areas.

Policy that treats telecom and media as separate areas is outdated. India now needs a combined solution, possibly under a single communications regulator. In this system, content, infrastructure, and data would be treated as parts of the same ecosystem. Solutions must ensure no one organization can monopolize content and infrastructure markets at the same time, which is not only an anti-monopoly concern but also a prerequisite to media plurality and consumer options.

Net neutrality enforcement is another immediate priority. While India initially had strong net neutrality regulations, implementation has been sporadic and net neutrality has not been enforced with the introduction of bundled OTT offerings. When JioCinema offers premium content for free, zero-rated against the parent network's data plans in the case of bundled data plans, that is the very definition of unequal content access: consumers are selecting telco-based platforms over their own unique offerings as telco-based platforms receive an undue advantage tied to their own pricing plans. Lastly, true net neutrality would require eliminating the risk that telcos get to prioritize their own content over others, slow down competitors, or artificially engineer user traffic

carefully and precisely designated for reward with price incentives and tempos.

The industry needs to reckon with the loss of content diversity and decreasing public interest narrative. The industry needs to reckon with the loss of content diversity and decreasing public interest narrative. As platform logic becomes the new normal, content curation relies more on algorithmic engagement. It is not as concerned with the representation of cultures or its worth to the people. Format-type content that does not score well on performance indicators (e.g., long form political drama, minority-language film, documentary, children's content) are relegated down the priority list. Mandated quotas for regionally, independently, or educationally-oriented content need to be fiercely upheld by regulators on big platforms especially, if they have received a benefit from public infrastructure or spectrum access. The regular inputs into the regulations would bring the market incentives points realigned towards the valued public good.

Second, the industry bodies have little to offer regarding self-regulation considering the slacking of the OTT platforms in the face of political pressure or vigilantism. Indicatively, ALTBalaji that initially began with some soft forms of erotica found themselves creatively withdrawing owing to the complaints, harassment, and algorithmic throttling; all in a privily deregulated system. The balance is lost in the event that the industry does not protect a legal framework that guarantees transparency, due process, and protections of content. Self-regulation in that instance will be compliance and not resistance. A vigorous content policy would imagine how they can safeguard creative liberty and create avenues to redress grievances of creative work, particularly to those at those at the fringe of the dominant industry. In addition, the industry view of ramifications of vertical integration is bigger than competition and market share issues. They also relate to consumer data, platform neutrality, media violence and ethics issues. When the same entity dictates what you see, how you see and how the commercialization of

your actions is dictated- closed feedback loops grow; destroying the process of democratic participation, and cultural openness. The industry leaders must realize that sustainability should not be a process of monopolizing attention. It is established on faith, inclusion, and providing audiences with a feeling of agency.

Lastly, the issue of safeguarding democratic media access is not a technical or economic issue alone, but also a cultural issue. It is an expression of the right by the citizens to communicate and participate as envisaged by the Constitution. The advertising culture of the Indian media has gradually, provided room to many voices, regions and languages. Should the outcome of digital convergence be to confine media spaces to a few corporate domed silos the media mix will not merely retard the process of economic enclosure, it will also die.

Finally, I end with an imaginary picture of India on the threshold of choice; the post-TV digital system has enormous opportunities of creative development and access growth but only when the norm is established is based in good, fair, sustainable policies. Platform capitalism and a poor media infrastructure should be corrected by policy makers and industry to eliminate the power gaps. It would restore a diverse media system, which is democratic and serves the populace.

6.4 Contributions to Scholarship and Future Research Directions

This thesis has some critical contributions to the emerging research on digital media, political economy and cultural change in India. It examines the history of Indian broadcasting, both television and OTT. It demonstrates that digital convergence is a gradual process which depends on technology, infrastructure and policy. Instead of the fact that OTT platforms are a completely new media information, they are contextualized in this project as being rooted in the long history of Indian television – how the institutional logics of seriality, audience targeting and regulatory vagueness can be maintained digitally.

This thesis contributes to the conceptual understanding of the presence of digital media markets in a significant way that it forms the concept of the so-called regulatory silence- as a perspective on what the Indian state contributes to the development of digital media markets. Our contribution to the work by Parthasarathi (2018) and Freedman (2010) is that the inaction, particularly by authorities, could serve as a type of governance in its own right, either by delaying regulation or by insufficient authority or by purposefully not doing anything at all. In a convergence between the telecommunications and media interests in India, where OTT is a relatively new phenomenon, the absence of regulation has essentially paved way to the concentration of infrastructure and cultural power to a few. Such silence is not inert but it is dynamic. It forms the new conditions of access and competitive and creative expression in unaccountable and non-democratic ways.

A grounded critique of the digital transformation in India that has a political economy viewpoint that does not entail the valorisation of digital inclusion, or content plurality is also presented in this thesis. The study shows that with particular case of ALTBalaji, Disney+ Hotstar, and JioCinema that the direction of culture is being determined through the control of infrastructure, bundling, and algorithmic visibility. By doing so, it can be said to be in the lineage of McChesney, Schiller and Golding and Murdock, but is placing within context platform capitalism in the particular history of state-controlled broadcasting, media liberalisation and telecom growth within India.

The results of this thesis provide several opportunities for further research. A potential fruitful avenue is comparative research in OTT, especially in other BRICS or postcolonial settings, like China and Brazil, where the relationship between the state and its media, the nationalism of the platforms, and the infrastructural sovereignty assume other forms. Comparative study of this nature would help to illuminate the silhouettes of platform power in contrasting political economies through the regulatory regimes.

A second area of inquiry involves YouTube's role in vernacular streaming cultures in India. While this thesis focused on corporate OTT platforms, YouTube operates as both a distributor and a vernacular broadcaster—enabling hyper-localized content ecosystems that merit deeper analysis in relation to caste, class, and regional media politics.

Third, audience ethnographies—especially in small-town and rural India—could offer insight into how viewers negotiate bundled ecosystems, platform interfaces, and algorithmic content in everyday life. This would be useful to this thesis in the sense that it would help the institutional orientation of this thesis be accompanied by lived experiences.

Finally, a live case right now undergoing testing on the questions in this thesis is the regulatory response of India to the Jio-Disney consolidation. The response of the state, whether it will act or not, will be the next part of the history of the political economy of digital broadcasting.

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Sasura Bada Paisawala: Sinha, A. (Director). (2003). *Sasura Bada Paisawala* [Film]. Balaji Cinevision Pvt Ltd.

Shor in the City: Nidimoru, R., & Krishna, D. K. (Directors). (2011). *Shor in the City* [Film]. ALT Entertainment & Balaji Motion Pictures.

Shootout at Lokhandwala: Lakhia, A. (Director). (2007). *Shootout at Lokhandwala* [Film]. White Feather Films & Balaji Motion Pictures.

The Dirty Picture: Luthria, M. (Director). (2011). *The Dirty Picture* [Film]. Balaji Motion Pictures & ALT Entertainment.

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24 (U.S. TV series): Surnow, J., & Cochran, R. (Creators). (2001–2010). *24* [TV series]. Fox. 9 seasons, 204 episodes + *24: Redemption*. Aired 6 November 2001 – 24 May 2010.

Aahat: Singh, B. P. (Creator), & Singh, B. P., Varma, S., Mishra, S., Singh, I., Singh, N., & Raghavan, S. (Directors). (1995–2015). *Aahat* [TV series]. Fireworks Productions. 6 seasons, 554 episodes. Aired 5 October 1995 – April 2015 on Sony Entertainment Television.

Anupamaa: Vyas, B. (Writer), & Kalra, R. (Director). (2020–present). *Anupamaa* [TV series]. Director's Kut Productions. 1 season, 1,650 episodes. Aired 13 July 2020 – present on StarPlus.

Antakshari: Singh, G. (Creator & Director). (1993–2007). *Antakshari* [TV series]. Zee TV. 15 seasons. Aired 10 September 1993 – 6 July 2007 on Zee TV.

Bade Achhe Lagte Hain: Kapoor, E. (Creator), & Kapoor, E., & Kapoor, S. (Producers). (2011–2014). *Bade Acche Lagte Hain* [TV series]. Balaji Telefilms Limited. 1 season, 644 episodes. Aired 30 May 2011 – 10 July 2014 on Sony Entertainment Television.

Balika Vadhu: Sengupta, S., & Yadav, P. (Directors). (2008–2016). *Balika Vadhu* [TV series]. Sphere Origins. 2 seasons, 2,245 episodes. Aired 21 July 2008 – 31 July 2016 on Colors TV.

Baywatch: Berk, M., Schwartz, D., & Bonann, G. J. (Creators). (1989–2001). *Baywatch* [TV series]. NBC; Syndication. 11 seasons, 241 episodes. Aired 22 September 1989 – 6 April 1990 on NBC; 23 September 1991 – 14 May 2001 in syndication.

Bharat Ek Khoj: Benegal, S. (Creator & Writer), Zaidi, S., Shanbag, S., & Dev, V. (Writers). (1988–1989). *Bharat Ek Khoj* [TV series]. Shyam Benegal Productions; Doordarshan. 1 season, 53 episodes. Aired 13 November 1988 – 12 November 1989 on DD National.

Bigg Boss: Endemol India. (Producer). (2006–present). *Bigg Boss* [TV series]. Endemol India. 18 seasons, approx. 1,970 episodes. Season 1 aired 3 November 2006 – 26 January 2007 on Sony Entertainment Television; Seasons 2–present on Colors TV (from 17 August 2008).

Big Brother (U.S.): CBS. (Producer). (2000–present). *Big Brother* [TV series]. CBS. 26 seasons, 936 episodes. Aired 5 July 2000 – present on CBS.

Buniyaad: Joshi, M. S. (Writer), & Sippy, R., & Sarup, J. (Directors). (1986–1987). *Buniyaad* [TV series]. Doordarshan. 1 season, 105 episodes. Aired May 1986 – May 1987 on DD National.

Chanakya: Dwivedi, C. (Creator, Writer & Director). (1991–1992). *Chanakya* [TV series]. Shagun Films. 1 season, 47 episodes. Aired 8 September 1991 – 9 August 1992 on DD National.

Chitrahaar: Doordarshan. (Producer). (1982–present). *Chitrahaar* [TV series]. Doordarshan. Aired 15 August 1982 – present on DD National.

Circus: Mirza, A. (Creator & Director), & Sharma, V. K. (Writer). (1989–1990). *Circus* [TV series]. Doordarshan. 1 season, 19 episodes. Aired 1989 – 1990 on DD National.

Dekh Bhai Dekh: Mahendroo, A. (Creator), & Agarwal, R. B. (Writer). (1993–1994). *Dekh Bhai Dekh* [TV series]. Amitabh Bachchan Corporation. 1 season, 65 episodes. Aired 6 May 1993 – 11 August 1994 on Doordarshan Metro.

Diya Aur Baati Hum: Mittal, S. H., & Mittal, S. (Creators & Writers), & Shekhawat, R., & Mantri, S. (Writers). (2011–2016). *Diya Aur Baati Hum* [TV series]. Shashi Sumeet Productions. 1 season, 1,491 episodes. Aired 29 August 2011 – 10 September 2016 on StarPlus.

Game of Thrones: Benioff, D., & Weiss, D. B. (Creators). (2011–2019). Game of Thrones [TV series]. HBO Entertainment; Television 360; Grok! Television; Generator Entertainment; Startling Television; Bighead Littlehead. 8 seasons, 73 episodes. Aired 17 April 2011 – 19 May 2019 on HBO.

Hum Log: Joshi, M. S. (Writer), & Vasudev, P. K. (Director). (1984–1985). *Hum Log* [TV series]. Doordarshan. 1 season, 156 episodes. Aired 7 July 1984 – 17 December 1985 on DD National.

Indian Idol: Fuller, S. (Creator), Kurup, Y., Vaid, M. J., Thakur, P., Mull, V., Alva, N. J., Alva, N. T., Israni, B., Ray, I., Datt, S., & Anand, U. (Directors). (2004–present). *Indian Idol* [TV series]. Fremantle India. 14 seasons, 317 episodes. Premiered 30 October 2004 on Sony Entertainment Television.

Iss Pyaar Ko Kya Naam Doon?: Parvez, N., Singh, M., Khan, A., & Mohan, L. (Directors). (2011–2012). Iss Pyaar Ko Kya Naam Doon? [TV series]. 4 Lions Films. 3 seasons, 398 episodes. Aired 6 June 2011 – 30 November 2012 on Star Plus.

Junoon: Salam, A. (Director), & Krishan, P. (Producer). (1994–1998). *Junoon* [TV series]. Cinevistaas Limited. 1 season, 510 episodes. Aired 1994 – 1998 on DD National.

Kabhii Sautan Kabhii Saheli: Kapoor, E. (Creator), Gera, B., & Nagpal, A. (Writers), & Kuwajerwala, Q., Gonsul, H., & Gaddo, A. (Directors). (2001–2002). *Kabhii Sautan Kabhii Saheli* [TV series]. Metro Gold; StarPlus. 191 episodes. Aired 19 February 2001 – 14 November 2002.

Kahaani Ghar Ghar Kii: Kapoor, E. (Creator), & Mitra, P. (Director). (2000–2008). *Kahaani Ghar Ghar Kii* [TV series]. Balaji Telefilms. Aired 16 October 2000 – 9 October 2008 on StarPlus.

Kasamh Se: Kapoor, E., & Kapoor, S. (Producers). (2006–2009). *Kasamh Se* [TV series]. Balaji Telefilms. 4 seasons, 742 episodes. Aired 16 January 2006 – 12 March 2009 on Zee TV.

Kasautii Zindagii Kay: Kapoor, E., & Kapoor, S. (Producers). (2001–2008). *Kasautii Zindagii Kay* [TV series]. Balaji Telefilms. 1 season, 1,423 episodes. Aired 29 October 2001 – 28 February 2008 on Star Plus.

Kaun Banega Crorepati: Sheshkumar, A. (Director). (2000–2025). *Kaun Banega Crorepati* [TV series]. BIG Synergy (S1–S10); Studio NEXT & Digi TOK (S11–S16). 16 seasons, 1,382 episodes. Aired 3 July 2000 – 11 March 2025 on Star Plus (S1–S3), Sony Entertainment Television (S4–present).

Khatron Ke Khiladi: Sphere Origins (Producer, S1); Endemol Shine India (Producer, S2–S14). (2008–present). *Khatron Ke Khiladi* [TV series]. Colors TV. 14 seasons, 262 episodes. Aired 21 July 2008 – present.

Kkusum: Kapoor, E. (Creator), & Kumar, A. V., Bhatt, S., Ravasia, J., & Bhati, J. (Directors). (2001–2005). *Kkusum* [TV series]. Balaji Telefilms. 1,001 episodes. Aired 14 May 2001 – 30 November 2005 on Sony Entertainment Television.

Koffee with Karan: Kohli, R. (Director, Seasons 1–3), Rao, A. (Director, Season 4), Allana, F. (Director, Season 5), & Obhan, J. (Director, Seasons 6–7). (2004–present). Koffee with Karan [TV series]. SOL India (Seasons 1–6); Dharmatic Entertainment (Seasons 7–8). 8 seasons, 147 episodes + 6 specials. Aired 19 November 2004 – present on Star World (Seasons 1–6), Star One (Season 2), and Disney+ Hotstar (Seasons 7–8).

Krishi Darshan: Doordarshan. (Producer). (1967–present). *Krishi Darshan* [TV series]. Doordarshan (until 2015); DD Kisan (2015–present). 62 seasons, approx. 16,780 episodes. Aired 26 January 1967 – present.

Kyunki Saas Bhi Kabhi Bahu Thi: Kapoor, E. (Creator), & Nagpal, A., Joshi, R., Gandhi, A., & Mehta, V. (Writers), & Bhatt, S., Basu, N., Varma, S., Mazzumdar, A., & Sharma, D. (Directors). (2000–2008). *Kyunki Saas Bhi Kabhi Bahu Thi* [TV series]. Balaji Telefilms. 1,833 episodes. Aired 3 July 2000 – 6 November 2008 on Star Plus.

Mahabharat: Chopra, B. R., & Chopra, R. (Directors). (1988–1990). *Mahabharat* [TV series]. B.R. Films. 1 season, 94 episodes. Aired 2 October 1988 – 24 June 1990 on DD National.

Malgudi Days: Narayan, R. K. (Author), & Nag, S., & Lankesh, K. (Directors). (1986–2006). *Malgudi Days* [TV series]. Doordarshan. 4 seasons, 54 episodes. Aired 24 September 1986 – 2006.

Mann Kee Awaaz Pratigya: Gautam, R., Govandi, P., Bhatt, S., Ravasia, J., Rana, G., Gupta, A., & Vijay, S. (Directors). (2009–2012). Mann Kee Awaaz Pratigya [TV series]. Spellbound Productions & Walkwater Media Ltd. 2 seasons, 767 episodes. Aired 7 December 2009 – 27 October 2012 on Star Plus.

Mirza Ghalib: Gulzar. (Writer & Director). (1988). *Mirza Ghalib* [TV series]. Doordarshan. 1 season. Aired 1988 on DD National.

Nimki Mukhiya: Habib, Z. (Writer). (2017–2019). Nimki Mukhiya [TV series]. Qissago Telefilms LLP. 1 season, 598 episodes. Aired 28 August 2017 – 10 August 2019 on Star Bharat.

Pavitra Rishta: Kapoor, E., & Kapoor, S. (Producers). (2009–2014). *Pavitra Rishta* [TV series]. Balaji Telefilms. 4 seasons, 1,424 episodes. Aired 1 June 2009 – 25 October 2014 on Zee TV.

Philips Top Ten: Zee TV. (Creator), & Shamsi, S. (Director). (1994–1999). *Philips Top Ten* [TV series]. Zee TV. Aired 1994 – 1999.

Ramayan: Sagar, R. (Writer & Director). (1987–1988). *Ramayan* [TV series]. Sagar Arts; Doordarshan. 1 season, 78 episodes. Aired 25 January 1987 – 31 July 1988 on DD National.

Sa Re Ga Ma Pa: Zee TV (Creator), Singh, G., Karandikar, A., Babul, S., & Sharma, N. (Creative Directors). (1995–present). *Sa Re Ga Ma Pa* [TV series]. Zee TV; Zee5. 39 seasons. Aired 1 May 1995 – present.

Saath Nibhaana Saathiya: Maurut, P. K., Yadav, B., Raj, R., Gupta, M., Sahu, P., Kumar, D., & Kumar, P. (Directors). (2010–2017). Saath Nibhaana Saathiya [TV series]. Rashmi Sharma Telefilms. 2 seasons, 2181 episodes. Aired 3 May 2010 – 23 July 2017 on Star Plus.

Santa Barbara: Dobson, B., & Dobson, J. (Creators). (1984–1993). *Santa Barbara* [TV series]. Dobson Productions; New World Television. 9 seasons, 2,137 episodes. Aired 30 July 1984 – 15 January 1993 on NBC.

Sapna Babul Ka... Bidaai: Shahi, R., Kalra, R., Baranwal, S., Baliyan, N., Pandey, S., Gupta, M., & Khan, I. U. (Directors). (2007–2010). Sapna Babul Ka... Bidaai [TV series]. Director's Kut Productions.

1 season, 739 episodes. Aired 8 October 2007 – 13 November 2010 on Star Plus.

Shrikant: Chattopadhyay, S. C. (Author), & Nischol, P. (Director). (1987). *Shrikant* [TV series]. Doordarshan. Aired 1987 on DD National.

Swabhimaan: Khanna, A. (Creator), & De, S., Ranganathan, V., & Pandey, S. (Writers). (1995–1998). *Swabhimaan* [TV series]. Doordarshan. 1 season, 800 episodes. Aired 6 April 1995 – 1 May 1998 on DD National.

Survivor : Parsons, C. (Creator). (2000–present). Survivor [TV series]. CBS EYE Productions; Survivor Productions LLC; CBS Studios; Castaway Television Productions; Mark Burnett Productions (2000–2011); One Three Media (2012–2014); United Artists Media Group (2014–2015); MGM Television (2016–present). 48 seasons, 701 episodes. Aired 31 May 2000 – present on CBS.

Tara: Nanda, V., & Gautam, V. (Writers), & Kumar, R. (Director). (1993–1997). *Tara* [TV series]. Doordarshan. Aired 1993 – 1997 on Zee TV.

Tere Liye: Kapoor, E. (Creator), & Latkar, S. (Writer – Dialogues). (2010–2011). Tere Liye [TV series]. Balaji Telefilms. 1 season, 212 episodes. Aired 14 June 2010 – 2 April 2011 on Star Plus.

The Sword of Tipu Sultan: Gidwani, B. (Writer), & Khan, S., & Khan, A. (Directors). (1990–1991). *The Sword of Tipu Sultan* [TV series]. DD National. 60 episodes. Aired 25 February 1990 – 14 April 1991.

Yeh Jo Hai Zindagi: Joshi, S. (Writer), & Sinha, M., Shah, K., & Kumar, R. (Directors). (1984). *Yeh Jo Hai Zindagi* [TV series]. Doordarshan. 3 seasons, 67 episodes. Aired 1984 on DD National.

Yeh Rishta Kya Kehlata Hai: Kalra, R., Mandial, R., & Pandey, R. (Directors). (2009–present). Yeh Rishta Kya Kehlata Hai [TV

series]. Director's Kut Productions. Ongoing series, 4755+ episodes. Premiered 12 January 2009 on Star Plus.

Zee Horror Show: Salim, M. (Writer), & Ramsay, T., Ramsay, S., & Ramsay, D. (Directors). (1993–2001). *Zee Horror Show* [TV series]. Ramsay Cine Vision Production. 2 seasons, 364 episodes. Aired 9 August 1993 – 1 August 2001 on Zee TV.

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Bose: Dead or Alive*:* Pulkit. (Director). (2017). *Bose: Dead or Alive* [Streaming television series]. ALTBalaji.

Campus Diaries: Mistry, P., & Yadav, A. (Directors). (2022). Campus Diaries [Streaming television series, 1 season, 12 episodes]. MX Player.

Dev DD: Ghosh, K., Iqbal, S., & Dedhia, H. (Directors). (2017–2021). *Dev DD* [Streaming television series]. ALTBalaji & ZEE5.

Farzi*:* Krishna, D. K., & Raj, R. (Directors). (2023). *Farzi* [Streaming television series]. Amazon Prime Video.

Gandii Baat*:* Mohite, S. (Director). (2018–present). *Gandii Baat* [Streaming television series]. ALTBalaji.

Hai Taubba*:* Chaddha, B. S., Das Gupta, S., & Ghose, R. (Directors). (2021). *Hai Taubba* [Streaming television series]. ALTBalaji.

Helllo Jee: Khan, S. (Director). (2021). *Helllo Jee* [Streaming television series]. ALTBalaji.

Hero Vardiwala: Kumar, M. (Director). (2019). *Hero Vardiwala* [Streaming television series]. ALTBalaji.

Permanent Roommates: Saxena, S., & Mishra, D. K. (Directors). (2014–2023). *Permanent Roommates* [Streaming television series]. The Viral Fever.

Ragini MMS: Returns: Vadhavkar, S. (Director). (2017–2019). *Ragini MMS: Returns* [Streaming television series]. ALTBalaji.

Shiksha Mandal: Afzal, S. A. (Director). (2022). Shiksha Mandal [Streaming television series, 1 season, 9 episodes]. MX Player.

The Making of…: Sharma, R. (Director). (2014). *The Making of…* [Streaming television series]. The Viral Fever.

The Test Case: Waikul, V., & Kukunoor, N. (Directors). (2017–2018). *The Test Case* [Streaming television series]. ALTBalaji.

TVF Pitchers: Golani, A. (Director). (2015–present). *TVF Pitchers* [Streaming television series]. TVF Media Labs.

Virgin Bhasskar: Dalvi, S., & Rao, S. (Directors). (2019–2020). *Virgin Bhasskar* [Streaming television series]. ALTBalaji & ZEE5.

XXX: Uncensored: Srivastava, A., & Ghosh, K. (Directors). (2018–2020). *XXX: Uncensored* [Streaming television series]. ALTBalaji.