CHAPTER 5

Amazon Prime Video: A Platform Ecosphere

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In the summer of 2018, I found myself hooked to the weekly Amazon Prime Video stand-up comedy competition show *Comicstaan*. I noticed how the interface design influenced my viewing of the show. On the left-hand side, there was a tab titled X-ray, which contained the names of all the contestants and judges appearing on screen before me. In the autumn of 2018, I am renewing my postpaid mobile plan with the telecom giant Vodafone. I am informed that it comes with a free subscription to Amazon Prime Video for a year and I receive text alerts from Vodafone to remind me of my free one-year subscription to Prime Video. Fast forward to the winter of 2018, I am watching a promotional music video on YouTube for the upcoming Bollywood movie *Zero*, the bottom-centre portion of the screen flashes the logo of Amazon Prime, informing me of the availability of the song on Amazon Prime music service.

I begin with this experiential anecdote as it is evocative of Amazon's efforts to establish a platform ecosphere in the Indian media economy. In this chapter, my working definition of ecosphere attempts to address the

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ways in which a platform brand integrates its customers within a portfolio of digital goods and services. I will argue that this is where Amazon Prime Video differs from dedicated subscription-video-on-demand (SVOD) platforms, due to the embedding of its video platform within the larger umbrella of services that it offers (specifically its music platform, Alexa assistant and its wider e-commerce operations). This is the strategic approach with which Amazon Prime enters the audiovisual market, not as a television provider per se, but as a seller of video products densely interlinked to multi-sided markets in retail, advertising, music, data and finance. It is the situation of Amazon Prime Video within this platform ecosphere that I will begin to deconstruct in this chapter. To begin with, I will attempt to establish a working definition between various overlapping usages of the terms platform and ecosystem. Firstly, the widespread adoption of the term 'platform' over the past decade has been consciously fashioned from the available cultural vocabulary by apex stakeholders with specific aims. It is carefully massaged in both industry literature and popular discourse in order to affect a particular resonance for particular audiences (Gillespie 2010). Propositions for platform economies 'are efforts not only to sell, convince, persuade, protect, triumph or condemn, but to make claims about what these technologies are and are not, and what should and should not be expected of them' (Berland 2010).

I posit the term ecosphere in recognition of the explicit integration of content streams across a broader multi-product platform that is enabled, but not justified, by the technical ecosystem of digital technologies and mobile phones in particular. Amazon is itself taken as a particular example, since it has been a pioneer of horizontal expansion across products and has, in the process, developed an underlying ecosystem of data centres and services that has itself become a very large component of the digital economy. In this sense, unlike many of the other platforms active in the over-the-top (OTT) video market, Amazon plays a larger strategic role in both ecosystem (infrastructure) and ecosphere (retail market). This makes Amazon a far bigger player than its headline share of the media production sector suggests, a dynamic which not only provides numerous advantages for its component businesses and ventures, but also shapes a set of market strategies in OTT video that are distinct from the traditional logics of media producers, and even from other OTT platform variants such as Netflix. Taking a single-sector approach to the OTT video boom thus far, most studies of SVOD platforms have focused upon the impact of Netflix in the markets of the Global North. This has included detailed discussions around internet-distributed television (IPTV), geo-blocking and content acquirement (see Lobato 2016, 2019; Lotz 2017; Lotz et al. 2018; Wayne 2017). In the case of Amazon Prime Video, however, the provision of media content is only one part of a larger commercial proposition.

In this chapter, I want to think through the emerging Amazon ecosphere in India in terms of its negotiations with the distinctive market conditions in play in India's OTT video market. My opening anecdote predicates this inquiry by demonstrating how the integrative experience of platform ecospheres has already become ubiquitous in everyday life. One therefore gets an everyday and immediate sense of the expansive horizontal integration of a platform such as Amazon Prime Video, through its tie-ins with telecom operators and advertising clients, inter-promotional strategies for content and cross-promotion strategies for their larger suite of platform services. The extent of this inter-linked ecosphere consequently raises immediate and critical questions about where an analysis of Amazon's SVOD service should begin and end. In this chapter, I will sketch the contours of the SVOD market in India, in order to identify the future provocations likely to emerge through the study of SVOD platforms in the global south. I will go on to consider the promotional strategies utilized by Amazon Prime Video in order to enter the Indian market, before proceeding to a brief discussion of the mobile ecosystem upon which SVOD services in India overwhelmingly depend. I will then go on to address Amazon Prime Video's formulation of content acquirement and creation strategies. Finally, I will seek to explicate how Amazon, as a 'global' SVOD platform attempts to 'localize' its ecosphere model as a customer experience in the Indian market.

Integrated Brand Strategies

Amazon Prime Video was launched in the Indian market in December 2016 (Television Post 2018). According to the Financial Express, a mix of direct-to-home (DTH) service providers, international content aggregators and distributors, broadcasters and telecom operators are currently active in the market for online streaming in India (Nath 2017). As of 2018, there are approximately 30 online video streaming platforms that comprise of 90 million active viewers (ibid.). Drawing on their existing advantages in content archive and links to broadcaster and telecoms providers, India-based platforms are the market leaders, with HotStar at 69.4% of market share. Of the global platforms operating in the market, Netflix has 1.4% of the market share as opposed to Amazon Prime's 5%. It is estimated that, the Indian arms of Amazon Prime Video and other key video streaming platforms spent Rs. 300 crores in 2018 ($41.5 million) on advertising designed to encourage individual viewing as a habit in a market where collective viewing has always been the norm. Ritika Pant's research also notes that the Indian market is governed by acute price sensitivity, which has seen a freemium (free + premium content) model being adopted as the primary strategy for attracting subscribers for online video services (Pant 2019). This is currently the market norm, since local SVOD platforms such as HotStar operate on this model. A recent chapter in the *Hollywood Reporter* has also noted that the most successful platforms in India are those that largely depend on advertisement revenues and hence YouTube (advertiser driven) and HotStar (freemium model) lead the market (Bhushan and Brzeski 2018). For Amazon Prime Video, it raises the question of how to best monetize itself in market primarily driven by the advertisement-funded model.

Thus far, pricing has been a key factor driving SVOD subscription growth in India. Amongst the three major video streaming platforms in India (Amazon Prime Video, HotStar, Netflix), Amazon Prime Video is the cheapest platform to subscribe to amongst the three as is costs Rs. 499 ($7) a year, which works to Rs. 42 ($0.58) a month. In India, non-Prime subscribers will be able to use Amazon Prime at a price of Rs. 129 ($1.79) per month. Amazon offers a number of benefits to its Prime members in India. Prime members get free scheduled delivery, discounted same-day delivery, exclusive deals, unlimited access to video streaming via Prime Video and an ad-free access to playlists via Prime Music. Over time, analysts expect Amazon's local content investments, product integration and tie-ups with local telecom companies to be the key drivers for Amazon Prime Video. At the global level, Michael Wayne observes that Amazon's ability to forge symbiotic relationships and craft their service around well-established TV brand identities must be understood in relation to the company's broader commercial interests. He notes, that Amazon is an e-retailer that uses its SVOD platform to drive customers to its Prime membership program (whose members make more purchases more often than non-members). In that respect, it is significant to note that Amazon Prime's key competitor in the Indian market is not Netflix, but the e-retailer Flipkart (recently acquired by Walmart). We see traces of this larger strategic objective through the pricing strategy described above, but it becomes more evident when one charts the way Amazon has integrated its video service with its other offerings in India (see Wayne 2017). This horizontal integration is pursued though the synchronization of Amazon Prime Video with Amazon's overarching Prime services, with its music platform in particular, and through commercial partnerships with India's telecom giants.

Amazon launched its music streaming service, Amazon Prime Music, February 2018 as a companion to Prime Video. The ad-free music streaming service came with no additional cost to Prime subscribers. Amazon Prime Music inked deals with top-five music labels in the country, including T-Series, Tips Music and Sony Music. Amazon is also actively seeking to integrate its shopping and viewing services and has already added its voice assistant, Alexa, to Prime Video as a tool for users to search and watch content by using voice control. The obvious goal is to integrate Amazon Prime Video and Music and e-retail within the large Amazon ecosphere, where, if you are watching a movie on Prime Video, retail ads for what the character is wearing will automatically appear along with the video. According to Amazon, this new overlay screen will be called 'X-ray' and will appear over whatever you are watching. Vijay Subramanian, head of content for Prime Video India, has stated in an interview:

> Amazon's goal is to make it as easy for the customer to get what she wants. We are always looking to innovate. For example, the new show *Comicstaan* has a skill built into Alexa, where you can ask for a joke from a comedian. We are completely focused on x-ray. We want to populate as that as much as we can to give customers a good customer experience to make their engagement deeper. We will constantly keep adding to the x-ray feature. It is as much a content focus for us as creating content. (Suvarna 2018)

This seamless vertical integration of its shopping, music, voice assistant and video platforms, makes Amazon a unique player in the market, where all the component Amazon platforms are linked in a feedback loop to each other. This synchronization, is intended to foster customers who will subscribe to the entire umbrellas of services. However, this platform ecosphere also has to be tailored locally, taking into account the media infrastructures, taste cultures and regulatory norms that structure Indian media markets. In a context characterized by the rapid and uneven development of digital markets, surveying the state of telecommunication infrastructures in India becomes crucial to understanding the milieu in which the Amazon ecosphere is being designed.

Expanding Infrastructures

Ramon Lobato has noted that SVOD platforms are heavily reliant on telecommunications infrastructure (Lobato 2016). Various internet geographers have also pointed out that infrastructure is vital as to how to experience the internet (Zook 2006; Warf 2013). For streaming video applications that require high download speeds, location is especially important. Lobato cites the example of Netflix which requires 0.5 mbps (megabits per second) and recommends a level of 3.0 mbps. However, in India, the average speed is well below 3.0, effectively putting Netflix out of bounds for most users. Moreover, SVOD streaming services require a credit card account, which constitutes a financial infrastructure requirement that remains out of reach for the majority. Consequently, both access rates and purchasing power are highly stratified in India's digital economy. Despite having half a billion users, only 50 million are enabled to carry out transactions online, a prerequisite for becoming regular customers of big e-players such as Amazon (Sachitanant 2018). Given the socio-economic factors involved, it is also pertinent that the language of the current Amazon user base is predominantly English, since this signifies an elite socio-economic profile. Nonetheless, those left behind in the onset of Web 2.0 due to lack of infrastructure are now entering the internet economy due to the massive growth of mobile-phone ownership (Rashmi 2018). Emerging as a 'mobile-first' market, India is now home to 460 million internet users, second only to China.

According to KPMG, the Indian internet user base is expected to reach 730 million by 2020. Growth will be driven by increasing mobile penetration, faster internet speeds, 4G mobile connectivity and cheaper data charges (KPMG 2018a, b). As per the latest Federation of Indian Chambers of Commerce and Industry (FICCI) Frames Study on the media and entertainment sectors, there are around two million paid digital subscribers across application providers, including video platforms, and 1–1.5 million customers who have moved entirely to digital media (mobile telephony, internet) (FICCI 2018). FICCI expects the number of people using digital platforms is expected to burgeon to four million by 2020 (ibid.). Furthermore, entertainment services are the most accessed services via internet. Almost all telecom service providers now offer mobile data packages for subscribers starting from a minimal price of Rs. 10 or even less. Mobile phones with multimedia capabilities have thus given people from all social strata an unprecedented access to all kinds of media content. Mobile phones have become the preferred viewing device for many Indians mainly due to reasonably priced smart phones, better internet penetration and low mobile data charges. Even basic mobile-phone models come with camera, radio, music player with recording and Bluetooth options. Cost-effective data storage technologies such as micro and mini SD cards have augmented the media capacities of these phones. The availability of mobile packet-data technology has further connected users to the internet at a low cost compared to broadband. This had led to an explosion of content online and the market is steadily opening up to local content production.

According to consultants Media Partners Asia, video content budgets in India topped $4.2 billion. OTT video revenue in India was pegged at Rs. 2019 crore (around $290 million) in 2017 and is expected to reach Rs. 5595 crore (around $776 million) by 2022, helped by the rising adoption of smartphones, smart TVs and other devices (KPMG 2018b) Bandwidth nonetheless remains a major issue as India has one of the lowest broadband speeds in the world, an average of 2 mbps compared to the US average of 11.5 mbps. Data charges have recently fallen due to the launch of Indian telecom major Reliance Jio, backed by India's richest industrialist Mukesh Ambani with an initial $22.5 billion investment. The service had accumulated around 240 million wireless phone users as of August 2018 (TRAI 2018). This expansion of the broadband and DTH infrastructure is linked to the Digital India drive. Digital India is a US $17 billion infrastructure programme intended to usher India into the knowledge-economy era. The vision is to usher in a flow of multilevel transactions that will become the base for commercial, social and citizen engagement. The project entails major public and private investments in national connectivity, infrastructure, smart cities, e-commerce and e-governance. It is an aspirational project that aims to mainstream the transactional economy and for India to become a recognized global power in the digital economy. The Digital India drive is reliant on contribution of private sector firms that are involved in telecommunications, data and internet infrastructure, and a variety of digital platforms. These developments in infrastructure are absolutely crucial to the fortunes of SVOD platforms in India.

A number of scholars have noted that studies of information infrastructures typically point to their similarity and their centrality in shaping the global distribution, production and consumption of goods and services (Dourish and Bell 2011; Gillespie 2010; Parks and Starosielski 2015).

Addressing the Indian case, Pradip Thomas has also observed that over the past decade, the apparent 'privatization' of the internet has run in parallel with the rise platforms whose growth rates are reliant on 'network effects' and 'exemplified by the enormous reach and shaping powers of the big three—Amazon, Google and Facebook—enhanced by their algorithmic dominion over cultures, the idea of the social, political practices, economic futures and their investments in and control over cloud computing practices' (Thomas 2019). Network effects are predicated upon audience capture, which can be clearly seen in India through the sweeping integration of the Amazon platform ecosphere. It is equally obvious that the SVOD scenario in India remains largely dependent on mobile-phone infrastructure, which requires effective working relationships with the dominant telecoms providers. To date, Amazon Prime Video has partnered with telecom service providers BSNL (Bharat Sanchar Nigam Limited) and Vodafone. Vodafone offers its consumers a free Amazon Prime subscription with Vodafone SuperNet 4G plans. In the case of BSNL, customers get free subscription to Amazon Prime Video if they buy BSNL's Rs. 399 ($5.53) postpaid mobile plan or a plan package of Rs. 749 ($10.39) and above. In the *Hindustan Times*, Gaurav Sandhi, Director and Head of Business, Amazon Prime Video, India, stated:

> Prime Video has received an overwhelming response from customers across the length and breadth of the country. We are thrilled that our association with BSNL will expand the reach of Prime Video to an even larger base of customers who can now enjoy premium content on a screen of their choice—be it their mobile device or the television in their living room. (Hindustan Times 2018)

Anupam Srivastava, Chairman and Managing Director, BSNL, chimed in, stating:

> We understand the customer shift towards a highly networked digital ecosystem. Customers today demand freedom and flexibility in shopping and streaming content online. Our collaboration with Amazon India is our commitment to stay ahead of times providing the best to our customers. It provides them access to thousands of Indian and international movies, videos, TV Shows and music on the go. We are confident that our customers can enjoy uninterrupted on-the-go shopping and entertainment benefits with their Amazon Prime membership. (Hindustan Times 2018)

The partnerships with Vodafone and BSNL make it clear that the Amazon ecosphere depends heavily on mobile-phone users for shoring up its subscriber bases, with telecoms providers using the suite of Amazon services as a lure to expand their own subscriptions. Within the Amazon ecosphere itself, SVOD plays a similar role in developing a user base that can be drawn into the broader suite of services. It seems evident, then, that Amazon Prime Video cannot be properly considered as a standalone player in the market for video on demand. Rather, it has to be understood as part of a larger platform ecosphere, where one service cross-subsidizes and create values for other sites of audience commodification.

Populating the Inventory

Having delineated the Amazon ecosphere in a material sense through its hardware infrastructure, I now shift my attention to the domain content creation and its regulation in order to demonstrate how the Amazon ecosphere becomes malleable to market demands. In December, 2016, when Amazon Prime Video entered the Indian market, it brought original shows such as *The Man in the High Castle*, *Mr. Robot*, *Transparent*, *Mozart in the Jungle* and *The Grand Tour*. It also offered an assortment of licensed TV shows in addition to Hollywood and foreign films (Bhushan 2016a). Despite these offerings, it recognized that the Indian market is ruled by local content. According to a KPMG report, Western programming commands a miniscule 0.5% viewership compared to 60% for domestic entertainment on Indian television (FICCI 2017). We have been here before. Jean Chalaby in a classic study of MTV's transition to European markets in the 1980s and 1990s, noticed that 'international' channels were initially oblivious to local market condition and culture (Chalaby 2005). They vastly overestimated the appeal of US-based programming for European audiences and subsequently underwent a process of localization, by hiring multilingual presenters, translations and producing original content for these markets. A similar story played out in India during the television boom of the 1990s and is playing out again through SVOD platform content-creation strategies (see Thussu 2007; Mukherjee 2018).

The consistently strong preference for local content has encouraged international VOD platforms in India to aggressively procure and commission content. Amazon Prime Video has reportedly invested $300 million in producing Indian content, much more than the budgets of most entertainment channels in the country. It has struck content licensing deals with local players such as Dharma Productions and T-Series, garnering exclusive rights to Bollywood and regional movies (see Bhushan 2016a, b; Jarvey and Szalai 2016). It has partnered with most of the top Bollywood production houses in the country to expand its catalogue and commission original series. Notably, Amazon's Prime Video's USP in India is its stand-up comedy specials (Financial Express 2017). In November 2018, a Hindi-language interface was added to Prime Video, allowing Hindi speakers to easily navigate the video platform via desktop and mobile apps, including Android and iOS (Ghosh 2018). It is also producing Telugu-language and Tamil-language originals for South Indian audiences. Amazon brought along what they described as the 'best practices from the US' to support creative partners by providing script consultants, writer's rooms and technical expertise (Bhushan 2018). They see the SVOD local content market in India as a 'fledgling system' (ibid.). One of India's biggest production houses, Eros Entertainment (which has its own SVOD platform), noted that with these moves, Amazon had made itself a tough competitor in the SVOD market (Szalai 2016).

Amazon debuted its first Indian series, the cricket drama *Inside Edge*, in July 2017. Since then, the company has expanded its portfolio with originals like *Breathe*, *Mirzapur*, *Made in Heaven* and other formats, such as the comedy talent hunt *Comicstaan*, the dating show *Hear Me, Love Me*, the Telugu mafia drama *GangStars* and the musical reality show *Harmony*. They also recently announced a new original series *The End* starring Bollywood Megastar Akshay Kumar (Ramachandaran 2019). *Inside Edge* was nominated in the Best Drama Series category of the 2018 International Emmy Awards (Raman 2018). Commenting on *Inside Edge*, Vijay Subramaniam stated:

> *Inside Edge*, at the guts of it, is the drama of politics. The veneer was cricket … These are things that are relatable. We are not creating this to get somebody in London. We are creating this to make sure that every customer in India loves it. And in that authenticity, comes the global appeal … [it] all starts with a story and one thing we learnt with our originals is that authenticity counts. The more authentic you are to your stories and the setting, the more likely it is going to be of interest to people who are way outside your radar. Prime Video enables customers to sample content that is of interest to them and give them a customer experience to make it easy to follow content … adding regional languages to our library is a part of our localisation plan … In the next six months, you can expect more regional languages. Apart from this, we have started work on originals from Telugu and Tamil.

> It is always a challenge when you are a fan of a particular regional content and are living in another region. Sometimes the films just does not travel. An important part of our quest is to bring the popular, latest films to the customers as quickly as we can. (Ibid.)

With words such as 'authenticity' and 'stand out', Subramaniam is clearly stressing local appeal and foregrounding Amazon's generous investment in creating local content. How should we think of the idea of the local in this context? The idea of the local typically signifies local exhibition, local screenings of national or international cinema and the dialectic of the local versus the global (Toulmin and Loipendinger 2005). Neves and Sarkar, locate the local within ad hoc practices of digital video-making. According to them, with the advent of the digital, the video medium expanded to include 'networked publics and platforms for rapid duplication and sharing (Neves and Sarkar 2017, p. 17). For them, the evolving global video space is now markedly different from the gradual dialectical incorporation of various locals within a homogeneous and universal structure. Penumbral globality would, of necessity, remain partial and contingent, as an emergence that nonetheless 'gestures toward the irrepressibility of local media practices in the face of dominant global norms' (ibid.). Amazon prime video's localization strategy does precisely this, and I seek to illustrate this pandering to the creation of local content and local audiences through a case study of the hit Amazon Prime show *Comicstaan*.

Establishing Product Niches

One of the ways in which Amazon has strategized content production in India is targeting what they deem to be 'special interest areas' for 'young people' (Raman 2018). I will illustrate this by taking the example of Amazon's most successful series, the reality competition *Comicstaan*. The show is about the hunt for the next big stand-up comedian in India. The stand-up comedy scene became popular on Indian television with shows such *The Great Laughter Indian Challenge* and *The Kapil Sharma show*. The emergence of YouTube subsequently led to an explosion of comic content, providing a platform for many budding comics experimenting with political, observational, improv and other forms of comedy. Comedy collectives such as *AIB* (*All India Bakchod*) and *East India Comedy Company* and comedians such as Malika Dua, Aditi Mittal, Biswa Kalyan Rath and Zakir Khan became household names. This encouraged the practice of open mic in urban cities, often hosted by food and beverage venues to attract customers. Many comedians have their own dedicated YouTube channel, Facebook pages and Instagram presence. Comedians such as Vir Das were invited to the American talk show *The Conan O'Brien Show*, and Kenny Sebastien and Abish Matthews performed at the New York Comedy Club (Bose 2017).

This exposure led Amazon and Netflix to offer a platform (to turn a phrase literally) to these comedians to host their specials, since they already had an inbuilt audience in the online sphere. Amazon did it most effectively with *Comicstaan*, which featured seven of India's most prominent comedians—Tanmay Bhat, Kaneez Surka, Kenny Sebastian, Biswa Kalyan Rath, Kanan Gill, Sapan Verma and Naveen Richard as judges/mentors for handpicked contestants from all across India. The format was that every week the contestants would come on stage and perform a different sub-genre of comedy such as topical, sketch and observational comedy amongst others. The would be marked every week based on a four-minute open mic. The marking was distributed 50–50 between the judges and the audience present at the taping. The top five of the ten contestants advanced to the finale. Prior to the unveiling of the trailer, promotions for the show had begun through the judge's social media pages. The marketing campaign also included TV and outdoor campaigns. On digital platforms, it took over the masthead of YouTube. Closer to the launch of the show, viewers noticed that the masthead of India's leading English daily the *Times of India* changed to the *Times of Comicstaan* for a few seconds when visiting the website. Prime Video also integrated its Alexa service, where some of *Comicstaan*'s judges mentored Alexa to be funny. Speaking about *Comicstaan*, Vijay Subramanian, said:

> Comedy is already one of the most watched genres on Amazon Prime Video and customers, across age groups and geographies want to see more. *Comicstaan* will take customers on a hilarious journey alongside some of today's most recognizable comedians, to search for India's next big comedian. Unique, fresh and packed with jokes, the series will make you crack up. The future looks funny indeed! (exchange4media 2018)

Ajay Nair, Chief Operating Officer, of the production company Only Much Louder (OML), stated:

> *Comicstaan* is the exciting next step in our long and fruitful relationship with Amazon. It ties all the best parts of Indian stand-up together into something fresh. Getting the country's top comedians to nurture and mentor new talent is an idea that excited us, and it's been extremely rewarding to see it all come together. (Ibid.)

In its first week, *Comicstaan* became the most watched series on the platform (Farzeen 2018). It is important to note here that all episodes of the series were not available to 'binge watch'. Rather, it followed the conventional television programming model where a new episode was released every Friday. Thus, although Jeanette Steemers has predicted the demise of linear television and scheduled viewing patterns with the internet providing online video streaming platforms like Netflix and Amazon Prime, the case of *Comicstaan* disrupts this narrative (Steemers 2014). *Comicstaan* followed the broadcast model, precisely, in order to get a sense of the audience, monitoring how many people were coming back every week to check out the show on its platform. Like a movie release, the shows were not released on fixed time but on a fixed day. The buzz around *Comicstaan* was discernible: from think pieces of women comedians in India, to the viral circulation of contestants on social media. Since then, the contestants of *Comicstaan* can be seen headlining open mics across the country, and a second season has just concluded on the platform. The show's success has hinged on 'local' conventions of audience-building and capitalizing on the successful stand-up comedy scene in India, rather than the 'global' factor of SVOD disrupting norms of distribution. The case of *Comicstaan* therefore demonstrates that content platforms need to have a grasp of the local market and its demands. This required is further illustrated in the way the Amazon ecosphere has responded to the demands of censorship regulations in the Indian market.

Negotiating Regulation

Complaints levelled at SVOD services in Western countries have tended to revolve around anxieties around media concentration and tax jurisdictions. In Asia, policymakers appear to be far more concerned with asserting content censorship and sovereign jurisdiction over moral standards. As of now, internet-distributed services remain free of government regulation in India and are thus attractive for some audiences because they can offer uncensored English-language programmes. Nonetheless, Pradip Thomas has notes that platform and infrastructure anxieties are being felt by the Government of India, although primarily in areas where state privilege are concerned as opposed to due to the potential consequences for domestic content industries (2019). Thus, SVOD is seen primarily to pose a challenge to the government role in censorship. Consequently, a critical aspect of building a content archive within the Amazon ecosphere is an evolving negotiation of regulatory regimes and programming norms in India. In India, the censorship of films comes under the ambit of the Indian Cinematograph Act. The Indian Cinematograph Act was passed and came into effect in 1920 in British-ruled India. Regional censor boards were constituted in the cities of Madras, Bombay, Lahore and Rangoon and Calcutta. After Independence in 1947, the board was unified under the 1952 Cinematograph Act and reconstituted as the Central Board of Film Censors (Central Board of Film Censors India 2018). The ordinance was updated in the 1980s to cover the regulation of analogue video. Television content, however, is regulated in accordance to guidelines laid down by the Broadcasting Content Complaints Council (BCCC), a self-regulatory body set up by the Indian Broadcasting Foundation in consultation with the Ministry of Information and Broadcasting as recently as 2011.

Under this regime, Indian broadcasters and cable carriers self-regulate by pre-censoring content at the production stage. By contrast, an arbitrary practice of censorship is imposed on imported English-language programming in order to meet 'Indian' moral standards. Thus, for example, HBO's globally popular *Game of Thrones* had major story plots edited out, visual details blurred and profane words/dialogues bleeped in the audio track and left blank in the subtitles. However, in the absence of government regulation, it is becoming apparent that some online streaming services have already begun to self-censor global content. While both Netflix and HotStar largely provide their subscription-based content uncensored, Amazon Prime Video has adopted a more stringent approach to censoring content in line with 'Indian cultural sensitivities'. Thus, although web content currently does not have formal censorship codes to adhere to, Amazon Prime Video was sued in 2018 for airing 'vulgar' and 'sexually explicit content' on their platforms (News Minute 2018). The case is currently being heard in the Delhi High Court which is awaiting the response of the Central Government. For their part, Netflix and HotStar are pushing for an industry censorship code akin to one that exists in Southeast Asian nations for Netflix, Fox and Disney. This move has been prompted by VOD companies' anticipation of the Government of India passing legislation that they fear will be onerous for the industry.

On 15 November, 2018, Netflix and HotStar came to an agreement with the Ministry of Information and broadcasting to adhere to a regime of 'self-regulation' by adopting the 'best practices internationally' and to come up with a set of sectoral guidelines (Pathak 2018). Amazon is opposing this move, as it fears that such a move could alienate its paying subscribers who have indicated a preference for uncensored imports (Srivastav 2018). Despite its formal opposition, however, it is equally clear that Amazon unilaterally adopted its own self-censorship route when it entered the Indian market. For example, an episode of the motoring show *The Grand Tour* is only 30 minutes long on Amazon Prime, while the original is actually one hour. The half-an-hour difference is the sum of cuts made to remove all references to a car made of beef (Bose 2016) Nude scenes in TV shows such as *Californication* are pixelated (Dhingra 2018). Mindful of cultural norms in India, Amazon Prime released two versions of the TV series *American Gods*: censored and uncensored. The censored version removed female frontal nudity, blurred out male genitalia and removed references to a 'holy cow' due to the animal's religious significance amongst Hindus (Arora 2017). Responding to the *Huffington Post*, Amazon has stated:

> Amazon Prime Video offers the largest selection of movies and TV shows of any OTT video service in India and give customers the choice on what to watch. We respect our customers' preferences and will comply with the regulations applicable to our service. Amazon is a responsible company and we are here to entertain the Indian customer with award-winning content from the US along with blockbusters from Indian and regional makers. We will keep Indian cultural sensitivities in mind while offering this content to customers. (Bose 2016)

Thus, as Wagman and Urquhart observe, the fact remains that *where* you access the internet says a lot about *what kind* of internet you experience (2014). Similarly, as Graeme Turner and Jinna Tay observe: 'Notwithstanding the internationalization of the media industries, these days the answer to the question "What is television?" very much depends on where you are' (2009, p. 8). Lobato points out that approaching the internet as a localized and unevenly available set of cultural experiences reminds us that internet, just like television, is always locally configured as well as globally networked (2019). This diversity of institutional forms, production cultures, advertising systems and regulatory frameworks still vary significantly between countries. In the example above, the likelihood of audience objections and/or a response from the Indian regulation system led to the adoption of self-censorship practices, proving that location determines experience.

Indigenizing the Ecosphere

In their book *Locating Television: Zones of Consumption*, Anna Pertierra and Graeme Turner argue that one can understand the localization of television by placing it within the context of the diversity that exists internationally. They situate the consumption of television within the range of structures, patterns of everyday life and industrial norms that determine the importance of location to the audience experience of television (2013). Their argument thereby provides a useful provocation for thinking about SVOD platforms in Indian households and, from a material perspective, for the framing of scholarship underway on SVOD platforms across the world. Taking into account the distinctive local infrastructural conditions, and how SVOD platforms create their ecosphere in response, emphasizes the need for socially and culturally nuanced insights into the question of 'what it means to experience SVOD platforms'. Given the materialization of its audience in the Indian market, Amazon Prime Video's platform ecosphere is evidently marked by highly segmented audience taste and profile, low-bandwidth infrastructure, heavy reliance on mobile phones, regulatory inconsistencies, prudishness and a persistent reliance on celebrity to sell content. The future intentions of regulators, the uneven purchasing power and propensity of the audience and the competing presence of major local and global players are all contingencies in the evolving strategies of Amazon Prime Video.

Amazon Prime Video, fully recognizing this distinctive configuration of content, audience, infrastructure and business norms, 'Indianizes' both its 'skin' and its internal structures to suit these market conditions. At the same time, it consistently pursues its central aim of disrupting the local media economy in order to entrench its own platform ecosystem at the technical level. In terms of product offering, the process of content adaptation to local conditions is undertaken primarily as part of the broader programme of developing the Amazon India ecosphere as a customer experience. As a business model, the underlying imperative remains to build a user base that can be locked in across a wider ecology of mutually supporting services. This ideal ecosphere, with its multiple products, business partnerships and value transfers is entirely in keeping with the model that Amazon has developed internationally. At the same time, the process of developing an actualized ecosphere in the Indian market has consistently required Amazon Prime Video to develop new strategies for negotiating distinctive and changing conditions of consumer taste, regulations and norms. Accordingly, this chapter has begun to explore the strategic evolution of Amazon Prime Video to date not only in terms of the Indian SVOD market, but also in light of the larger platform ecosphere that Amazon is seeking to develop. The evolution of the Amazon ecosphere can thus be a useful model to understand the likely pathways for other proponents of platform ecospheres, such as Apple and Jio. This is where the primary field of competition for Amazon Prime Video will emerge, alongside but nonetheless distinct from the wider proliferation of India's online video market.

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