

AN EMPIRICAL STUDY ON THE REGULATORY FRAMEWORK OF OTT VIDEO STREAMING PLATFORMS IN INDIA

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Abstract

Once considered a luxury service of a luxury nowadays Over The Top (OTT) services are common among people. The number of consumers getting used to it is growing increasingly in India. Although Indian players can hold their ground, like Jio cinema and Hotstar, the market share of global services like Amazon Prime and Netflix has been growing steadily. This research explores the future of streaming services, their emergence, and their advantages via analytical research. We also showcase various OTT services and their technological background, content characteristics, and developments theorized in the future of the industry and the censorship.

1. Introduction

Originally, television and theatre were the media used to enjoy video and audio content and movies. With technology advancing, using Blu-rays, VHS, disk rental services, and DVDs, all of the content can be accessed from the comfort of the home. Furthermore, By utilizing fiber optic cables and Co-axial cables, the cable television also brought content to many homes. In addition, a new service based on Dish connectivity and Satellite was introduced called DTH, which provided on-demand content to the viewer and broadcasts in high quality. In recent times, viewing TV and movies has been made even more convenient with developments in technology via Video on Demand (VoD) or online streaming services. Streaming video content through OTT applications over the internet is called VoD. Using any device like Laptop, Smartphone, Desktop computer, Smart TV, and tablet, Video content through OTT apps can be accessed by the viewers.

In contrast to traditional media, varied stories are told by streaming services which are not under restriction by Demographic, censors, and box office. A viewing experience consisting of amazing visual quality and sound is provided by it, given that the viewer uses a stable internet connection.

Although it was a luxury once, online streaming or cord-cutting has been utilized by Indians, growing at an increasing rate. At the same time, it is indicated that the VoD industry is currently in its nascent by the figures. The industry's high potential is shown by the emergence of nearly 40 VoD companies in three years; at minimum, four smartphone users use an OTT app to watch OTT video content out of 5 smartphone users (New18.com, 2019). The most downloaded category of apps is OTT, which surpassed social media apps like twitter and facebook and e-commerce apps like flipkart, amazon, and messenger apps like

WhatsApp.

The streaming market is responsible for jointly accounting for 46 percent of the entire increase in India's media and entertainment business from 2017 to 2022. This growth is expected to occur between the years of 2017 and 2022. (PwC India,2018). This article demonstrates the features of the audience, including the material that is frequently consumed in OTT, growth, emergence, major streaming services in India, problems, and the future of OTT. The reasons behind the unexpected expansion of the video on demand market in India are discussed in the next section.

2. Reasons for Increase of Streaming Services

As the OTT market in America has almost reached maturity, other international markets link India has been the focus of many global players to drive their next cycle in the growth of subscribers. Rajib Basu of media and entertainment, it was reported by PWC India that “India is the fastest-growing entertainment and media market globally and is expected to keep that momentum.” The increasing number of people who have access to the internet via their mobile phones is one of the primary factors behind the expansion of the video-on-demand (VoD) business in India, falling costs associated with internet and broadband access, personalization of content and pricing, and increased Internet penetration overall.

More than half of the people living in the world are now using the internet in some populations. Although China has more people online than India does, India has more internet users. At the end of 2019, 451 million monthly internet users will be active in India, which will be increased to 666.3 million by 2023. The vast majority of internet users access the phone via their mobile phones, taking advantage of less costly alternatives to landline connections (IAMIA, 2019). However, a major part is devoid of internet access in rural India. Hence, there is a big opportunity to grow, contributing to increasing the internet's overall population. There is no way that a service intended for the public can ignore the reality that India is a nation in which rural areas are home to roughly 70 percent of the population.

These days, the internet is regarded as a technology that may uniquely influence how business is done in certain industries. In spite of this, it is also considered a marketplace, as the tremendous success of OTT service providers demonstrates. OTT stands for over-the-top. This perception change came about as a direct result of the widespread proliferation of mobile devices and the growing popularity of cloud computing. (Li,2015).

Jio has been the most important driver of internet and OTT platform adoption. Jio is an acronym for “over-the-top.” Jio telecom network supported over 65% of OTT consumption on smartphones and 55% of overall OTT traffic in India (Keshavdev, 2019). 15 to 30 minutes per day is the typical amount of time spent by someone in rural India, and it is anticipated that this time would grow as a result of improvements in bandwidth and a drop in data prices that is around 98 percent lower. As a comeback to jio, dropping of Traffic rates and introduction of cheap data plans was don't by other telecommunication services. OTT also threatens telecom industries and Internet Service providers (ISPs) because they have high data traffic along with a high cost of maintenance which is a basic requirement for quality of

experience (QoE) for the customers (Jirakasem and Mitomo, 2019).

Consumption of online video is contingent on the availability of devices capable of playing online video content. For online video streaming, the device of choice in India is the mobile phone or smartphone. In February 2019, 362 million hours were spent by 144 million on an OTT platform, where 13% was spent in a desktop environment and 87% was in a smartphone environment (Gevers, 2019). As a result of more stringent environmental and labor standards, China is struggling to maintain its order as a global manufacturing powerhouse. As a result, India has made significant progress in this area. Original Equipment Manufacturers (OEMs) see India as one of their most important markets. As a result, it is predicted that the number of people using smartphones will reach 859 million by 2022.

To simplify taxation and encourage infrastructure development and labor regulation, the government of India introduced the “make in India” strategy, which helped foreign investors to invest in India.

In addition to this, it prompted the market for smartphones to become more competitive, which led to an increase in the ease with which smartphones could be obtained at lower prices.

According to the findings of several studies, the cost is one of the primary motivating reasons that drives customers away from cable television providers and toward online streaming service providers. Services such as Prime Videos and Netflix are examples of subscription Video on Demand (SVoD) services. These are the types of services in which the customer must make a recurring payment, most commonly every month, and is granted permission to view the service’s library of video contents. Only a few are willing to pay for subscriptions, and most viewers prefer free services. According to the study of the market done by Brightcove and YouGov, 23% of consumers said they would prefer a lower fee along with one to three ads, and 29 percent of customers expressed an interest in using free online streaming services to watch movies. As a result, advertising is the sort of revenue strategy utilized in OTT platforms the most often and the most successful, as shown by overwhelming subscribers and revenue (Jiral Asem and Mitomo, 2019). Services like Hotstar and Viu based on Ad-Based Video on Demand (AVoD) allow the consumers access to their library for free and gain money from ad revenue. AVoD services are the main focus of the market. Except for Netflix and Amazon Prime Videos, the top eight video streaming services are based on AVoD content. Along with some platforms, which are Transaction-Based Video on Demand (TVoD) services like iTunes and youtube, viewers play according to what they want to watch.

The availability of personalized content is the second most critical factor for Indians to consider when selecting whether or not to use streaming services. According to the findings of research conducted by HIS Markit, 74% of viewers picked for reasons related to the quality of the dubbing and foreign content, and 76% of viewers believe that the availability of locally produced content is the factor that plays the most important role in making a key choice (Begum, 2018).

In the context of marketing in the modern day, it is not enough to merely adapt the company's goals to satisfy the needs and preferences of the objective market; also, acquiring new clients alone via marketing activities is not sufficient. With the development of data analytics, companies are now able to put into action strategies that will enable them to provide a personalized experience for each user demography by collecting the relevant information from those users, which allows businesses to attract and retain a greater number of customers. Furthermore, future technological developments like artificial intelligence and machine learning will let streaming servers offer insights by doing data analysis to understand about the viewing habits of users. The choice to utilise online streaming services rather of cable television is also influenced by social trends and the convenience of using the internet (Lee Atal. 2018).

3. Major Streaming Services in India

In the same way, competition is fierce between global and local payers in the smartphone market segment, so it is in this nation's over-the-top (OTT) market space. There are roughly 40 video-on-demand (VoD) providers in India, and given the rate at which new services are being launched, it is anticipated that the number will reach 100 by 2023. In the domestic market, local players like JioCinema and Hotstar gained a stronger footing, but global platforms also show steady growth in market share.

The following is a list of the major streaming services that are currently accessible in India:

3.1 Prime Video

It is a VoD service owned by Amazon. Over 2000 movies and prime videos host 400 television shows. The subscription cost is around Rs.999 per year and Rs.129 per month. It has over 10 million subscribers for Prime Videos India is the biggest market globally. In an annual letter to shareholders, Jeff Bezos, the CEO and founder of Amazon stated that for the company, India is the second most valuable market outside America (Bezos,2019). Amazon made an announcement saying they would spend almost Rs. Two thousand crores for creating original content in 2018 (Das, 2019).

3.2 Hotstar

For watching live daily soaps, sports, news channels, and movies, Hotstar is an ideal service. An account can be created, and the content can be viewed free with advertisements in between by a user compared to the premium subscription that offers exclusive access to international TV shows and movies and an ad-free experience for 999 per year or Rs-199 per month. In 2019 downloads for Hotstar crossed 400 million and live streaming of cricket matches is one of the main pulling factors. During the Indian Premier League (IPL) of 2019 total of 300 million active viewers were recorded by the platform. At ICC World 2019, During India vs. Pakistan match Hotstar registered 100 million active viewers and 25.3 million concurrent viewers during India vs. New Zealand.

3.3 Netflix

In January of 2016, Netflix was introduced to India. Its main selling point is having many original television shows and movies. Because at first, they lacked content which is India oriented or localized. Three different subscription plans are offered by Netflix, which have various benefits. At Rs. 500, the basic subscription starts, and it does not support HD streaming. At Rs. 650 per month along with HD streaming support. At Rs.800, the premium subscription starts with all of the previous benefits and allows up to four devices to stream simultaneously. The cost of a subscription is higher than others. To counter that, they launched an exclusive mobile version of the service, which is low cost and only available in India. Their plan starts at Rs. 199, and the aim is to bring Netflix to smartphone users in India.

3.4 Jio TV and Cinema

Mobile data services from Reliance Jio provide its customers with a selection of over-the-top (OTT) applications, such as Jiosaavan, JioTV, and JioCinema, to meet their varied entertainment requirements. The majority of this service's content is geared specifically toward viewers located in India. JioTV provides users with 647 LiveTV channels, which is roughly twice the channel count made available by their rivals. Meanwhile, 10,000 TV shows and movies are hosted by Jio Cinema. a long-term content deal was signed Between Jiocinema and Disney India, where Jio Cinema must host a dedicated section branded by disnet on their homepage consisting of content that includes Disney animation series and movies. Jio Fibre's "first-day first show" was announced by Jio, which was set to launch in 2020. Users were able to watch brand new movies on the day of their release without leaving the convenience of their own homes to do so, thanks to this service.

3.5 Sonyliv

SONY Pictures Networks is the company that is in charge of running this video-on-demand (VoD) streaming service. It hosts access to over 40,000 hours' worth of content across various genres. SonyLiv showed a high growth rate in cities that are not metropolitan like Jaipur, Patna, Lucknow, and Indore, compared to other cities (KPMG, 2019). Like Hotstar, at Rs.199 per month, the premium service starts and offers access to TV shows and English movies. Sony recorded over 70 million viewers during the FIFA world cup in 2018, and during India's cricket tour to England and Australia in 2019, around 50 million viewers were recorded (Mitter,2019).

3.6 Other OTT Players

At the beginning of Eros International, compared to the other over-the-top (OTT) services available in India, ErosNow offered the most content options. One hundred television episodes, 11,000 film movies, and 100 thousand records. Eros Nows was recognized as "the Best OTT platform of the Year 2019" by the British Asian Media Awards. A rival is known as hooq, which is not as well known. Even though it was introduced in India much earlier than other services, 10,000 titles were offered by hooq, which included movies and television

shows like DC superheroes. Viacom 18 introduced Voot, which is a streaming service. Programs already aired on TV channels are hosted in it like Nicklodeon, Colors, MTV, etc. Original series was also started being produced by Voot under the name of Voot Originals. Balaji Telefilms Ltd introduced ALTBalaji, a VoD platform at Rs.300 per year or Rs.25 Per month. The cheapest of all platforms in India is ALTBalaji. This platform has housed more than 250 hours of original content, and a new episode of a program is made available on it every month. Their collection has more than one hundred hours of content specifically geared toward children and a large number of television shows presented in a variety of languages.

Times Internet (TIL) group acquired MX Player, a mobile video playing app, for 1000 crores in 2018. TIL built a digital-first streaming service on MX Player to influence its user base of 350 million in India. The CEO of MXPlayer, Karan Bedi, said that “their OTT service would revolutionize digital entertainment in India” (BW Online Bureau,2019). As of now, 14 original shows have been hosted by MX Player.

4. Content Typically Consumed in OTT

Hooking the viewers through addictive, unique, and binge-worthy content and having higher engagement is the goal of every VoD service. Recently younger generation has started binge-watching content during their weekends. Regarding this medium, teenagers are mostly skeptical; however, when it comes to the quality of programming quality, they are very selective. They are very articulate and active in their binge-viewing practices and their favorite shows on social media. Bingeing isn't just about customization and convenience; it stands for community, unification, and connection, and the shared experience bounds the people together (Matrix, 2014).

In recent years, it was harder for the film industry to fill the theatres with viewers, as seen in big production movies of 2019 like Kalank and Thugs of Hindustan ending up failing, which let to traditional media's high-risk investment culture often dissuade risks being taken by the producers in storytelling. However, regional and indie filmmakers are willingly getting opportunities from OTT platforms; the production of edgy, alternative and original content has seen massive growth. Due to the increased demographic diversity of the audience, storytellers now have the opportunity to investigate those stories with which native and global audiences may identify and connect to all of this.

On OTT platforms, more shows like “Mirzapur, Edge, Sacred Games, and Breathe” show that they are relying on this trend to get the audience's attention. The argument that their ability to express their creativity has been limited by overreliance on soap operations has been made by various technicians, actors, and writers who have experience working on TV (Mehta, 2019). Amazon has collaborated with digital content producers and Indian production companies, including filmmakers such as Anurag Kashyap and Farhan Akhtar, using a quarter of their budget of Rs. 2,000 crore.

Original content is watched more by 85% of the audience surveyed, according to Vidooly's survey (Vidooly,2019). Audiences prefer the romance genre between the age group of 24-34; meanwhile, genres like reality shows, drama, and crime thriller is liked by every age group.

Interest in romance content begins to decline as the viewer grows older than 34; they begin to develop an interest in action-adventure movies. Between the age of 24-45 years, documentaries start to get the audience's attention. The difference in content consumed between different age groups was revealed by the survey where younger audiences prefer TV shows, and Older audiences prefer Movies.

5. Characteristics of Audience

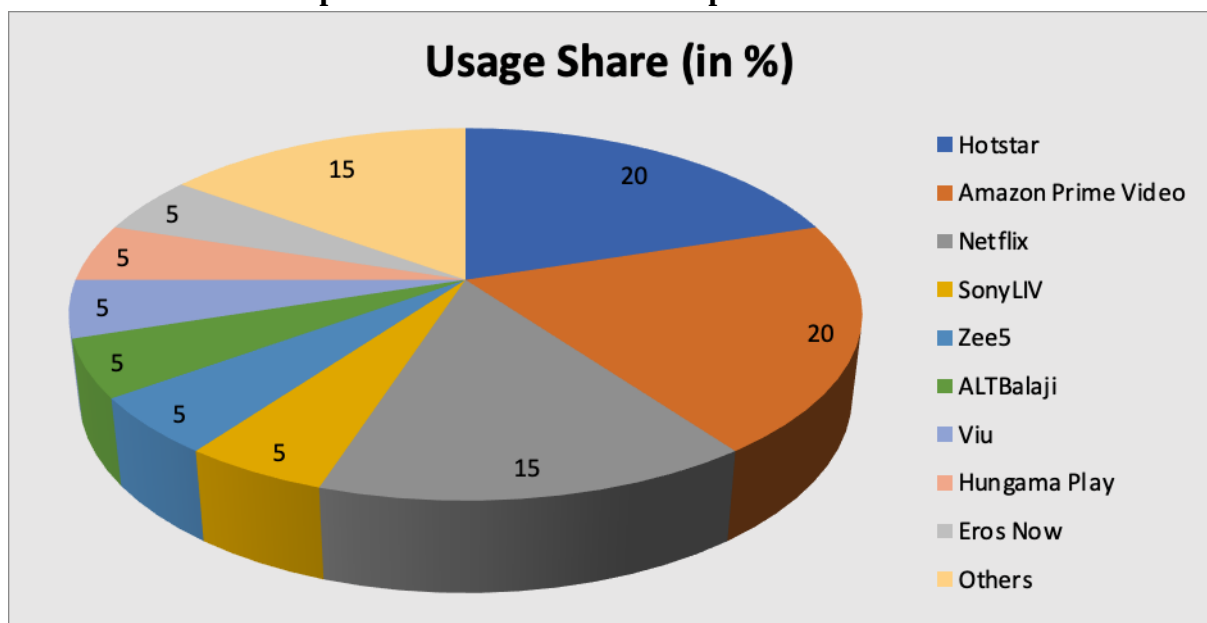
Despite the global majors like Netflix and Amazon Prime entering the market, In terms of users, Hotstar is on the top of Counterpoint Technology Market Research (Table 01).

Table 01. Market share of OTT platforms in India

OTT Platforms	Usage Share (in %)
Hotstar	20
Amazon Prime Video	20
Netflix	15
SonyLIV	5
Zee5	5
ALTBalaji	5
Viu	5
Hungama Play	5
Eros Now	5
Others	15

Source: Counterpoint Technology Market Research”.

Graph 01. Market share of OTT platforms in India



Even though in terms of userbase Prime Videos and Hotstar are the leading services, among the OTT platforms, the most user engagement is generated by ErosNow. From the survey, we

can see that content on ErosNow has been watched daily by 68% of the users, with 21 hours per week being spent by 9% of the users viewing the contents. 70% of the total users are made up of young Indians who are below the age of 34 as mentioned in a survey done by Statista Global Consumer.

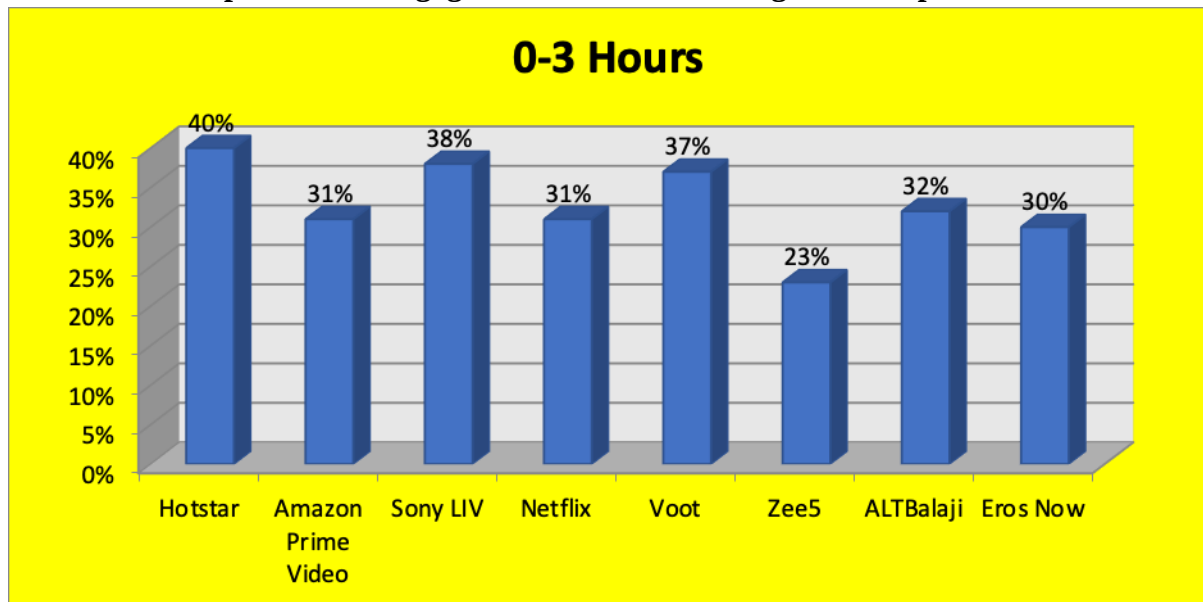
21.7% is contributed by consumers between the age of 35-44, and the age group of 46-to 54 contributes 1.8% to the viewership of OTT platforms in India. Along with the users between 25-35, ALTBalaji ranked the highest, and ErosNow for the users of the age group between 25-35 has the largest share. 48.4% of the users belonged to the low-income group in 2019. 31.5% of the users had medium income; 30.1% had a high income.

Table 02. “User engagement among the OTT platforms

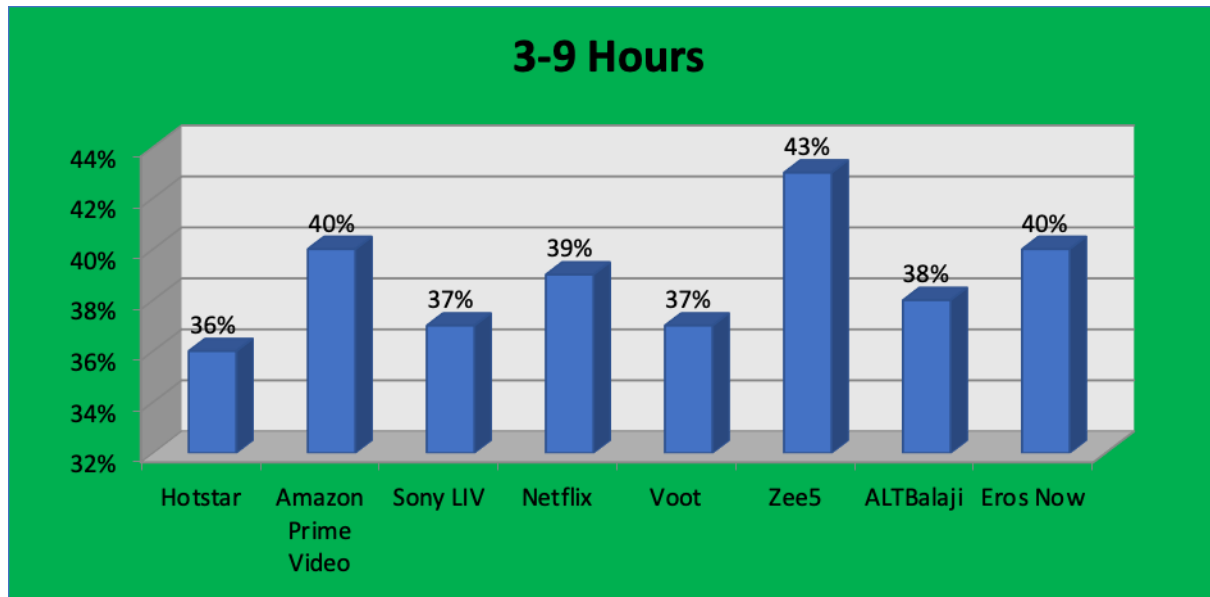
OTT	0-3 Hours	3-9 Hours	9-21 Hours	More than 21 Hours
Hotstar	40%	36%	17%	7%
Amazon Prime Video	31%	40%	20%	8%
Sony LIV	38%	37%	19%	7%
Netflix	31%	39%	22%	7%
Voot	37%	37%	18%	7%
Zee5	23%	43%	26%	8%
ALTBalaji	32%	38%	21%	8%
Eros Now	30%	40%	21%	9%

Source: Counterpoint Technology Market Research”.

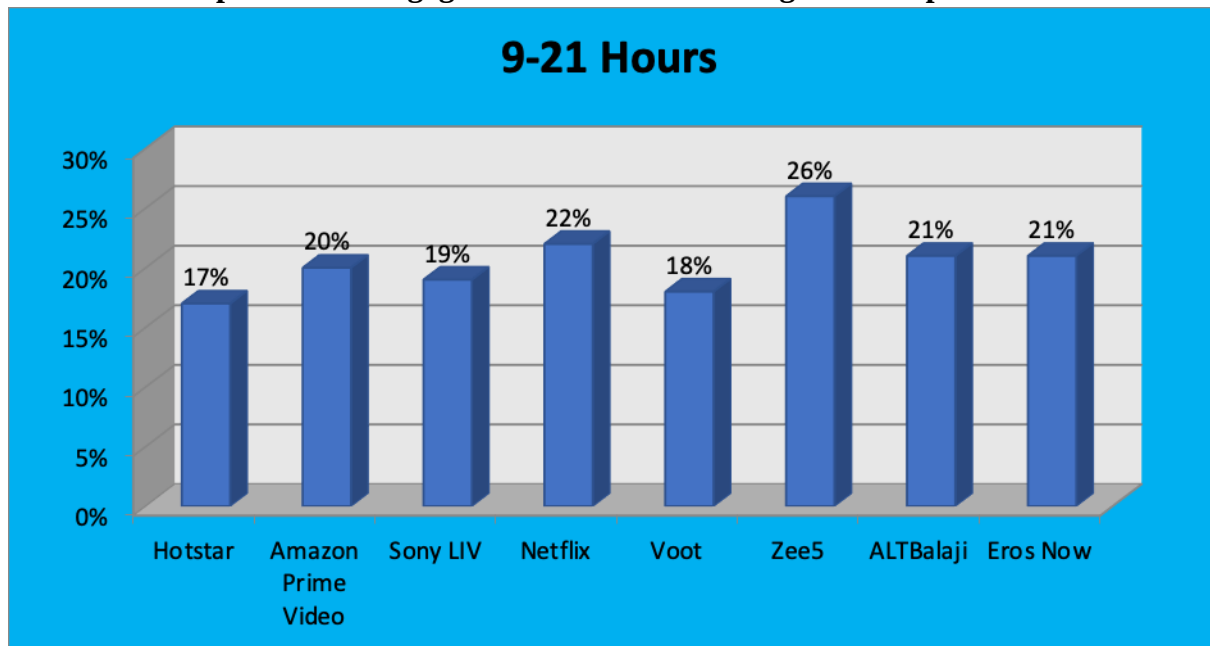
Graph 02. User engagement 0-3 Hours among the OTT platforms



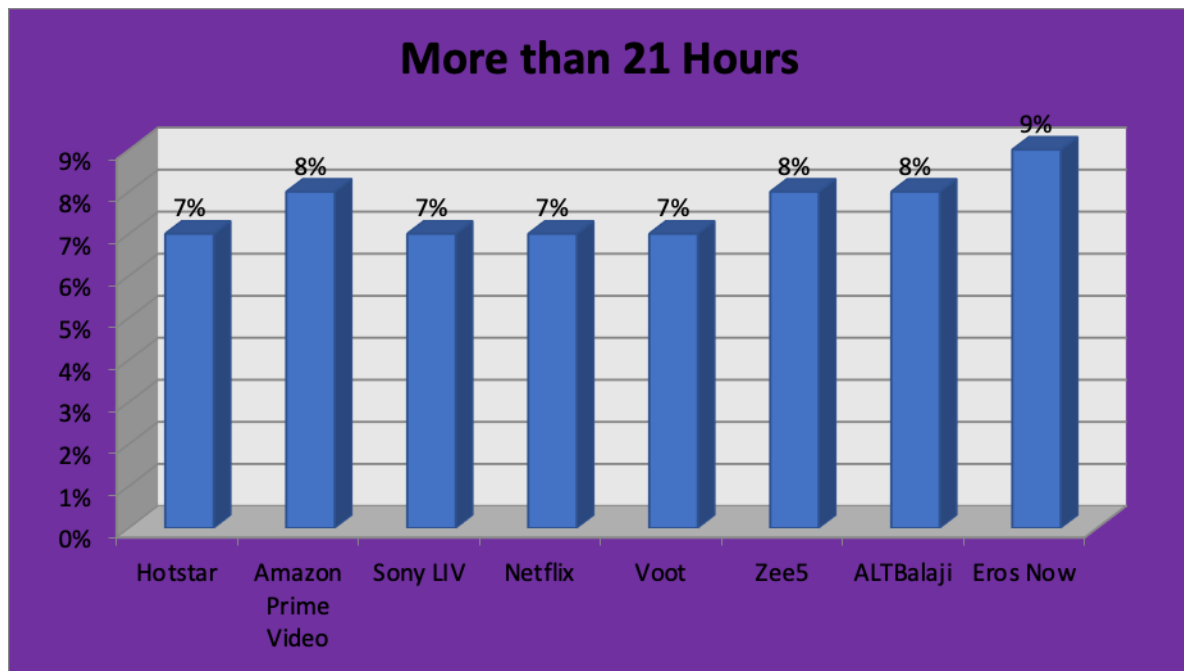
Graph 03. User engagement 3-9 Hours among the OTT platforms



Graph 04. User engagement 9-21 Hours among the OTT platforms



Graph 05. User engagement 21 Hours among the OTT platforms



6. Issues

After the market and culture were impacted massively by OTT, in various aspects, it became the center of attention, like regulatory framework, how traditional services were impacted by it, and is it an opportunity or a threat to the industry's investors, the owners of the Copyright contents are afraid that chances of piracy are increased by OTT (Crandall, 2014). Ever since movies and TV shows can be stored in digital formats, illegally downloading them has impacted the market significantly. It is theorized that 51.6 billion USD globally will be lost.

Unlike the telecommunication and legacy media, the OTT services were under very light regulation regarding anti-monopolistic behavior and public interest responsibilities. The digital media services gained even more market power. OTT platforms are the home to strong language, extreme violence, and nudity due to less regulation in OTT sectors than in TV and Movies (Zboralska and Davis, 2017).

Democratic practice and cultural expression consider local and domestic broadcasting industries. Due to this, they receive regulation according to the public interest and government support. Despite OTT services being portrayed like it and traditional media being complementary, the principles and value of legacy broadcasting are disrupted by their consumer approach (Sbroalska and Davis, 2017). Not to mention their scheme for distribution of content is connected to the capability of collecting and selling the user data. Hence in the interest of the immediate public regulation is needed for OTT services.

Inconsistency in OTT legislation may be traced back to the inherent imbalance that exists between one-sided and two-sided content marketplaces. The telecom sector often adheres to the one-sided business model when it comes to the provision of internet services. In contrast, the providers of numerous OTT services, such as YouTube, support the paradigm for two-sided business, thereby developing into a distinct technological business faction.

7. OTT's Future

Using VoD services to consume video content is not even close to becoming slow. With entry barriers becoming low for content creators, this is a golden era. How different factors will impact the future of OTT platforms in India will be discussed.

8. New Business Models

Nowadays, many OTT services are very aggressive in promoting themselves using a method where initial free usage is allowed for the client to get an experience of the platform, and at a later stage, after the client is in favor, demand an incremental premium. B2C is the model which is implemented by OTT services around the globe. Although, it is believed by stakeholders prominent in the streaming industry that Pure B2C models wouldn't work in India and believe that the right course of action is B2B2C (KPMG,2019).

Recently, the norm is apps like Airtel Wynak and Jio Apps offering syndicated content to boost the income between OTT services and telecoms in India, and globally there has been a massive rise of partnerships to offer video content exclusive for free to particular telecom subscriber users. As an example, package deals have been offered by Vodafone, where access to its entertainment services called Vodafone Play is included, along with a free subscription to Amazon Prime.

A strategic partnership was formed by Netflix and Airtel, where three months of free subscription would be given to selected subscribers for broadband. Tata Sky Binge was created by Amazon and DTH operator Tata Sky forming a partnership. It showcases a collection of digital content from many apps. Thus the space for OTT will see customers being acquired by newer or smaller platforms via a large customer base that already exists for telecom or any other service.

9. Better Means for Consumption of Content

Aside from mobile phones, another good device for online video consumption is tablets. Although as of 2017, India has only seen a 5.3% penetration of them, and its theorized by 2022, it will only reach 10% (ET Bureau, 2019) as tablets have a bigger screen which is more suitable for consumption of High Definition media as compared to smartphones the low penetration is considered an opportunity which was missed. It was argued by Pixalate (2018) that the bases of the device used for accessing the contents should define OTT.

It was predicted by Tim Cook, the CEO of Apple, that apps are the future of TV (Zakrzewski, 2015). Much like tablets and smartphones, connectivity to the internet and supporting various apps along with OTT applications is possible in smart TVs, "People sample content on their smartphones and migrate quickly to larger screens if the content is long-form and compelling," was said by COO of ALT Balaji Sunil Nair (Chatterjee, 2017). The company Xiaomi said that they have sold over two million smart TVs in India over the course of the previous 14 months (Mukherjee,2019). A dumb or traditional TV may be converted into a smart TV using a set-top box provider such as Apple TV, Roku, or Amazon Fire TV. This is

possible because of recent technological advancements.

10. Conclusion

In India's content consumption space, video streaming is among the most successful avenues. Even the smallest over-the-top (OTT) services can attract capital from international investors while simultaneously having a substantial effect on the market. At this time, the Indian over-the-top (OTT) player Hotstar has the lead in the market. When it comes to non-paying users of over-the-top (OTT) terms, Hotstar has the most penetration. Users are the most popular choice for accessing online smartphone streaming services (OTT), and among those who use smartphones to watch OTT content, Xiaomi is the most well-known smartphone. JIO now holds the number one spot for the most popular networking services among OTT users, followed by Airtel and Vodafone-idea in that order. JIO is being followed by Vodafone-idea. English and Hindi are the two languages that are used the most in daily communication. It is expected that the increasing proliferation of over-the-top (OTT) television services would reduce the need for cable television in India. As a result, conventional television stations need to be ready for the paradigm change that will be caused by over-the-top (OTT) services. More notably, making content with high-quality should be the focus, so they have a chance of competing against OTT's content (Shin et al, 2016). The budget in marketers' tune has been changed due to the preference of viewers being changing towards digital media.

There is a big opportunity nowadays where consumers in rural and urban India can be reached by the use of digital services in addition to streaming. In India, the online gaming market 2020 is theorized to become a billion-dollar industry. Youths of India are more interested in gaming on their phone than video streaming. Despite using digital services to consume videos is on the rise. The television sector of the media and entertainment industry will continue to hold the top spot as the sector that generates the most revenue overall. The Indian television industry had business of 13,314 million USD in 2017, and it is anticipated that this number would almost double by 2022, reaching 22,003 million USD, at a compound annual growth rate of 10.6 percent.

In the meanwhile, the average global growth rate for television watchers throughout the world is 1.4 percent. According to research conducted by Deloitte India (2019), scheduled TV and watching appointments would persist for another 10 years. Nowadays, it's really easy to afford a TV, and at Rs. one hundred twenty per month, one can get a basic cable connection. Over 90% TV penetration in Andhra Pradesh, Tamil Nadu, Kerala, and Karnataka. From now onwards, digital media consumption will be driven by youths of India. Until they reach the correct model of business the VoD services will experience many advancements and changes that will end up with success over cable TV and cable satellite.

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