

INTERNATIONAL JOURNAL FOR LEGAL RESEARCH AND ANALYSIS



Open Access, Refereed Journal Multi-Disciplinary
Peer Reviewed

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THE INDIAN FILM DISTRIBUTION CHAIN: A COMPETITION LAW PERSPECTIVE

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ABSTRACT

This article provides an in-depth analysis of the Indian film distribution chain within the context of competition law, emphasizing the sector's evolving dynamics, legal challenges, and reform needs. Rapid digitization and the emergence of streaming platforms have significantly reshaped content dissemination, introducing new competition concerns around vertical integration, market concentration, and the exclusion of independent voices. The study examines regulatory responses under the Competition Act, 2002, scrutinizing issues such as cartelization, exclusive distribution agreements, and price discrimination, and evaluates the Competition Commission of India's enforcement strategy through landmark cases and sector-wide investigations. Despite the sector's vibrancy, high entry barriers and lack of transparency persist, thereby limiting consumer choice and stifling innovation. Drawing comparative insights from international practice, the article further explores unique Indian challenges: linguistic diversity, regional monopolies, and technological disparities in data sharing and exhibition. The recommendations outlined include stricter audits of vertical relationships, enhanced public access to box office data, regulation of exclusive agreements, proactive competition advocacy, and specific guidelines for digital platforms to promote fairness and diversity. The article concludes that a robust, adaptive, and transparent regulatory approach supported by industry cooperation and periodic policy review is essential to realizing a more competitive, innovative, and inclusive film marketplace in India.

Keywords: Competition law, Film distribution, Vertical integration, Market concentration.

I. INTRODUCTION

The Indian film industry, one of the largest and most vibrant in the world, is characterized by immense diversity, creativity, and commercial dynamism. Central to this creative economy is the film distribution chain a complex and multifaceted system bridging the gap between producers and audiences through a network of distributors, exhibitors, and, increasingly, digital

platforms¹. The process by which films reach viewers is not only commercially vital but also shapes cultural dissemination and consumer choice.

The competitive landscape of film distribution in India has undergone a paradigm shift with the advent of multiplexes, corporatization of studios, and an explosion in the popularity of digital streaming services. As new business models proliferate and the contours of market power shift, ensuring fair competition through regulatory enforcement has become both urgent and complex². This article provides an exhaustive analysis of the Indian film distribution chain from a competition law perspective.

II. HISTORICAL OVERVIEW AND EVOLUTION

India's film sector, a century-old institution, has transformed from single-screen exhibition to a robust system of multiplexes, home video, satellite television, and most recently, OTT (Over-The-Top) platforms.

The distribution system, once reliant on informal networks and deeply entrenched regional monopolies with rigid territorial divisions, has undergone a major transformation. Traditionally, territories were controlled by powerful regional distributors who operated with minimal transparency, often limiting competition and consumer access³. Today, however, distribution has shifted toward professionalized, data-driven, and contractually structured business practices. The adoption of digital technology, better reporting mechanisms, and standardized agreements has enabled streamlined release strategies, greater efficiency in revenue-sharing, and wider audience reach, both domestically and internationally.

This modernization has also fostered greater investment and innovation, attracting not just traditional producers and exhibitors but also corporate players, private equity, and global streaming giants. The entry of OTT platforms has redefined film distribution by offering content on-demand, breaking geographical barriers, and enabling regional films to find global audiences⁴. It has empowered independent filmmakers who were previously unable to penetrate the rigid theatrical distribution system, while also giving established studios a new

¹ Kapoor, Saumya, and Shivam Dwivedi. "IPR AND COMPETITION LAW: THE GREY AREA." (2016): 146.

² Jain, Neha. "Defining Dominance: An Analysis of the Competition Act, 2002." NUALS LJ 8 (2014): 175.

³ Makam, Ganesh. "An Overview of Competition Law in India: A Comprehensive Analysis." SSRN 4488634 (2023).

⁴ Scott, Andrew. "The evolution of competition law and policy in the United Kingdom." (2009).

revenue stream.

III. LEGAL AND REGULATORY FRAMEWORK

(A) The Competition Act, 2002

The Competition Act, 2002 is the cornerstone of India's legal response to market failures, including cartels, abuse of dominance, and anticompetitive combinations. The Competition Commission of India (CCI) is entrusted with enforcement, advocacy, and education on fair market practices.

- **Prohibition of Anticompetitive Agreements (Section 3):** Disallows agreements that limit competition by way of price-fixing, market allocation, or bid-rigging, a critical provision in film distribution where cartel behavior can significantly harm consumers.
- **Abuse of Dominant Position (Section 4):** Targets dominant enterprises that use their market status to exclude or exploit competitors, relevant for major distributors and multiplexes⁵.
- **Regulation of Combinations (Sections 5 and 6):** Mergers and acquisitions above certain thresholds must be notified to CCI and are subject to scrutiny for their impact on competition.

(B) CCI's Powers and Industry Engagement

The CCI uses investigation, adjudication, and imposition of penalties as enforcement tools. It has criminalized serious infringements and can order modifications to contracts, cease-and-desist orders, and penalties up to 10% of offending parties' average turnover⁶. Additionally, CCI conducts market studies and consults with industry stakeholders for nuanced policymaking.

IV. STRUCTURE AND DYNAMICS OF THE INDIAN FILM DISTRIBUTION CHAIN

(A) Key Participants

- **Producers:** Responsible for content creation and, frequently, the first point of licensing rights.
- **Distributors:** Acquire rights on regional, national, or digital bases; responsible for commercial negotiations, physical and virtual delivery, and marketing.

⁵ Slot, Piet Jan, and Martin Farley. *An introduction to competition law*. Bloomsbury Publishing, 2017.

⁶ Day, Suzanne, et al. "Rightsizing Regulation: The Competition Act, 1975–2005." *Canadian Journal of Law and Society/La Revue Canadienne Droit et Société* 24.1 (2009): 47-67.

- **Exhibitors:** Owners/operators of cinema halls, multiplexes, and digital platforms.
- **Ancillaries:** Entities facilitating marketing, publicity, post-production, and international sales.

(B) Market Concentration and Entry Barriers

Market concentration manifests in a few pan-India distributors and multiplex majors controlling access to premium audience segments⁷. High capital requirements, exclusive networks, established industry relationships, and technological capabilities present formidable barriers for new entrants, especially in digital distribution where subscription-model giants have displaced traditional intermediaries.

V. ANTICOMPETITIVE PRACTICES: ISSUES AND EVIDENCE

(A) Vertical Integration

With production houses, distributors, and exhibitors increasingly operating under the same corporate umbrella—or through exclusive contracts—the risk of market foreclosure and self-preferencing grows. This can effectively shut out independent films from mainstream exhibition circuits, reinforcing winner-take-all dynamics in both traditional and digital domains.

(B) Exclusivity and Tie-In Arrangements

Long-term exclusive contracts between distributors and multiplex chains, and tie-in conditions (where access to popular releases is bundled with less attractive titles), lead to disadvantages for new competitors and independent exhibitors. These suppress consumer choice and drive ticket prices upward.

(C) Collusion and Cartelization

Investigations by the CCI have uncovered instances of multiplex chains collaborating to fix base ticket prices or screen allocation, stifling price competition and undermining consumer welfare. Such cartel behavior is often hard to detect due to industry opacity and the informal nature of many negotiations up and down the value chain.

(D) Digital Platforms and Data-Driven Discrimination

Digital streaming platforms introduce both opportunities (democratized release for independent content) and new risks, including algorithmic discrimination, preferential search rankings, and the threat of global studios leveraging their scale to lock in rights through upfront payments. Data privacy concerns and opaque revenue-sharing agreements further complicate fair

⁷ Cini, Michelle. "Competition policy." *The Europeanization of British Politics* (2006): 216-230.

competition.

(E) In the Indian film distribution chain, the dominance of one particular family or person in the entire industry can significantly affect competition from a legal perspective under the Competition Act, 2002. Such dominance often translates into vertical integration, where the dominant player controls film production, distribution, and exhibition, leading to market concentration. This creates high entry barriers for independent filmmakers and smaller producers, restricting their access to multiplexes and other distribution channels. The dominant player can engage in exclusionary practices, such as preferential treatment to affiliated films, refusal to deal with competitors, and price discrimination, which limits consumer choice and stifles innovation. From a competition law viewpoint, this dominance may amount to an abuse of dominance prohibited under Section 4 of the Competition Act. The Competition Commission of India (CCI) scrutinizes such conduct, especially when it results in cartelization or exclusive agreements that restrict fair competition. The regulatory concern is that such market control threatens the plurality and diversity crucial for a vibrant film industry, leading to unfair market conditions and harming independent voices. Thus, addressing dominance through stricter audits, transparency mandates, and enforcement of competition laws is essential to ensure a level playing field in Indian film distribution.

VI. COMPETITION LAW ENFORCEMENT: CASE STUDIES AND EFFECTIVENESS

Landmark CCI Interventions

The CCI's intervention in cases like *Telangana Film Distributors Association v. Competition Commission of India* and complaints involving major multiplex groups has led to directives for contract modification, penalties, and broader awareness of the need for compliance. These actions, however, remain piecemeal, with many anticompetitive effects evading full correction.

Enforcement Challenges

Notable hurdles include:

- Lack of transparency in revenue splits and box office data, impeding market assessment.
- Jurisdictional complications in regulating global digital platforms.
- Reluctance among smaller competitors to lodge complaints due to commercial retaliation fears.
- Rapid industry evolution outpacing existing regulatory guidelines.

VII. COMPARATIVE INSIGHTS: INTERNATIONAL PRACTICE

Here is a comparison of the film distribution chain in the US, EU, and UK from a competition law perspective:

(A) United States:

- The US film industry was historically regulated under the landmark *United States v. Paramount Pictures Inc.* case (Paramount Decrees), which dismantled the vertical integration of studios owning production, distribution, and exhibition⁸.
- Key antitrust principles prohibit practices like block booking, exclusive geographic licensing, minimum ticket pricing, and blind bidding⁹.
- The Department of Justice actively enforces these rules to prevent monopolistic practices and protect independent theaters and producers¹⁰.
- Emerging challenges involve the rise of streaming platforms, raising concerns that dissolving the Paramount Decrees could allow new monopolistic structures limiting theatrical competition¹¹.

(B) European Union:

- Competition law focuses on preventing abuse of dominance and anti-competitive agreements under the Treaty on the Functioning of the European Union (TFEU).
- Vertical agreements between film producers, distributors, and exhibitors are scrutinized for restrictive clauses, such as exclusivity or territorial limitations.
- The EU emphasizes market access, consumer choice, and fairness in digital transition, including regulating streaming platforms and protecting smaller cinema operators.
- Merger control rules prevent excessive market concentration in production and distribution segments¹².

(C) United Kingdom:

- The UK's Competition Act 1998 and Enterprise Act 2002 govern anti-competitive conduct in the film sector.
- The Competition and Markets Authority (CMA) oversees enforcement against cartelization, abuse of dominance, and restrictive trade practices.

⁸ Williamson, Oliver E. "Williamson on Predatory Pricing II." *Yale LJ* 88 (1978): 1183.

⁹ Brady, Robert A. "The Role of Cartels in the Current Cultural Crisis." *The American Economic Review* 35.2 (1945): 312-320.

¹⁰ Picker, Randal C. "Copyright as entry policy: the case of digital distribution." *The Antitrust Bulletin* 47.2-3 (2002): 423-463.

¹¹ Cass, Ronald A. "Price discrimination and predation analysis in antitrust and international trade: A comment." *U. Cin. L. Rev.* 61 (1992): 877.

¹² Marburger, Daniel. *Innovative pricing strategies to increase profits*. Business Expert Press, 2015.

- UK competition law addresses exclusive distribution agreements, price discrimination, and vertical integration risks, with a focus on preserving plurality and innovation.
- Post-Brexit regulations align closely with EU principles but allow more flexibility in intervention¹³.

Overall, all three jurisdictions share a common concern about vertical integration and market concentration in film distribution, while adapting their regulatory frameworks to address streaming and digital platform challenges.

(D) Analysis:

The legislative gap in India's film distribution sector, compared to jurisdictions like the US, EU, and UK, lies primarily in the incomplete and evolving nature of regulatory mechanisms addressing digital transformation, market dominance, and vertical integration. While India's Competition Act, 2002, provides broad principles for curbing anti-competitive agreements and abuse of dominance, the enforcement faces challenges due to the cultural and structural uniqueness of the industry. Unlike the US with its Paramount Decrees that explicitly dismantled vertical integration of film studios, India lacks targeted laws explicitly regulating such integration or forbidding exclusive distribution practices with clear thresholds.

Additionally, India grapples with linguistic diversity, regional monopolies, and a fragmented market, complicating blanket competition law enforcement. The industry's self-regulatory bodies often reinforce informal exclusive agreements, limiting transparency and market entry for smaller players. Also, regulatory oversight over emerging digital platforms and streaming services remains underdeveloped compared to the EU and UK, where competition authorities have clearer frameworks and jurisdictional experience in scrutinizing streaming giants and digital exclusivity.

Moreover, India currently lacks legal provisions recognizing collective dominance and faces a dearth of specific guidelines to regulate digital content distribution and access to reliable exhibition data, which are critical to ensuring market fairness. Addressing these gaps by adopting precise, adaptable regulations and enhancing CCI's technical expertise would promote a more competitive and inclusive film distribution ecosystem in India.

VIII. SUGGESTIONS AND WAY FORWARD

1. Strengthening Regulatory Vigilance on Vertical Integration

- Mandate compulsory disclosure of all vertical relationships between producers,

¹³ Scherer, Frederic M. "Retail distribution channel barriers to international trade." *Antitrust LJ* 67 (1999): 77.

distributors, and exhibitors, including beneficial ownership on digital platforms.

- Periodically audit contracts and revenue flows to detect patterns of market foreclosure and self-preferencing.
- Introduce guidelines for reviewing mergers and acquisitions in both the physical and digital exhibition space, using not only turnover thresholds but also market power indicators relevant to digital economies.

2. Regulation of Exclusive Agreements

- Prescribe maximum tenures for exclusive licensing and limit the scope of tie-in obligations.
- Mandate public notification of exclusive deals above a market-share threshold and require independent review.
- Engage in continuous dialogue with industry associations to develop a code of conduct that prioritizes open access and diversity, especially for independent and regional content.

3. Enhance Transparency and Data Disclosure

- Require real-time, audited box office and digital revenue data to be available to regulators and, wherever feasible, the public.
- Standardize revenue-sharing arrangements to reduce deal-by-deal secrecy, especially for small producers, and provide for transparent dispute-resolution mechanisms.

4. Addressing Digital Platform Challenges

- Develop sector-specific guidelines for OTT platforms, addressing preferential showcasing, algorithmic fairness, content discoverability, and minimum standards for contract disclosure.
- Collaborate with sector regulators in technology and consumer protection to address overlaps in data privacy, content moderation, and platform fairness.

5. Competition Advocacy and Education

- Expand the CCI's competition advocacy efforts by launching sector-focused education initiatives for producers, distributors, exhibitors, and creators—especially those from marginalized or regional markets—on their legal rights and obligations.
- Develop resources, including template agreements and compliance checklists, to aid SMEs and new entrants.

6. Incentivizing Innovation and Diversity

- Establish government-backed or CSR-funded distribution pools for independent cinema and regional films, with transparent criteria for access and promotional support.

- Offer preferential access to state or national promotional platforms for content that demonstrates innovative distribution strategies or diversity in subject matter and language.

7. Periodic Regulatory Review

- Set up a joint working group comprising the CCI, Ministry of Information & Broadcasting, and industry bodies to review and update regulations at least every two years, addressing new technological and market developments.
- Encourage systematic collection of feedback from consumers and industry participants on regulatory effectiveness.

8. Strengthening International Collaboration

- Foster international cooperation with competition authorities in other film-producing countries to develop harmonized responses to global platform challenges, especially concerning digital rights management, cross-border mergers, and content discoverability.

IX. CONCLUSION

Competition law, primarily through the Competition Act, 2002, and the active role of the Competition Commission of India (CCI), has made notable strides in identifying and addressing these challenges¹⁴. Case studies and enforcement actions have highlighted both the capabilities and limitations of existing regulatory mechanisms. Despite the interventions, entrenched power structures and the evolving nature of digital platforms continue to complicate enforcement.

A competitive and transparent film distribution ecosystem requires continuous regulatory vigilance, stronger enforcement mechanisms, and policy frameworks that account for digital disruption and market innovation. Moving forward, a collaborative effort involving industry stakeholders, legal experts, and regulators is necessary to promote a fair, inclusive, and innovative marketplace that benefits both content creators and consumers¹⁵.

Overall, the analysis underscores the importance of competition law enforcement in promoting fair competition, protecting consumer welfare, and fostering innovation within the film distribution sector in India. By addressing anticompetitive practices, promoting compliance, and

¹⁴ Kanda, Arun, and S. G. Deshmukh. "Supply chain coordination: perspectives, empirical studies and research directions." *International journal of production Economics* 115.2 (2008): 316-335.

¹⁵ Suh, Dong Won. "Enforcement Direction of Competition Law." *J. Korean L.* 4 (2004): 29.

fostering greater transparency and accountability, competition authorities can help create a competitive marketplace that benefits industry stakeholders and consumers alike. Continued vigilance and proactive enforcement of competition law will be essential to ensure a vibrant and dynamic film distribution ecosystem that drives growth, innovation, and consumer choice in India's cinema industry.

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