The Circuits of Piracy

In India, as elsewhere, most accounts of media piracy are built around the moral and economic claims of rights holders and are intended as justifications of those claims. These accounts tend to focus on the illegality and criminality of acts of piracy. They project a sense of loss and danger onto such acts, often by implicating piracy in a range of Indian social crises, from unemployment to organized crime. Such efforts to shape perceptions about piracy have been central to the organization of enforcement efforts but, in our view, are largely disconnected from the actual practices of media piracy. By raising the level of drama, they rarely capture the ordinariness and ubiquity of piracy in the contemporary Indian media landscape.

This ordinariness is rooted, first and foremost, in the central role the informal sector plays in cultural innovation in India, especially in the context of the digital revolution of the past decade. In India, as in other middle- and low-income countries, digital culture has become a mass experience primarily through the informal sector. Cheap Chinese hardware imports, grey-market recycled goods, and pirated content have been fundamental, for better and for worse, to this growth and to the resulting expansion of media access. They have also been central to the remarkable democratization of media production as the costs of production and distribution decline. In this context, pirate and grey-market practices have been vectors not only of “consumption” in a narrow sense but also of cultural participation, education, and innovation for a wide range of Indian publics.

Generally, these changes rise to the attention of the Indian media only in the context of the piracy debates, where they are usually stigmatized. There has been very little work on the nature of these new-media networks and what they mean for the social and economic development of India—or for our broader understanding of globalization. This chapter—and the longer trajectory of work of which this report is a part—is an attempt to document these transformations in the experience of media and urban life in India.

Most explorations of this subject in Indian journalism and scholarship circle around two poles of the Indian imagination: the interventions of the state, exemplified by the modernization plans of the 1960s and 1970s, and more recently, the dynamism of the market—a perspective that has become familiar with the emergence of India as a major player in information technology (IT) in the past two decades. In practice, however, India counts few simple transitions from rural society to fast-paced, market-driven modernity. The experience of modernity, for most Indians, comes not through the arrival of the new but through the recycled technologies and cheap copies that follow. It comes secondhand, as technologies circulate through communities, regions, and classes long after their original utility is past.

By locating piracy within histories of non-elite media practices, we have tried to avoid definitions of piracy as theft or crime and focus instead on how pirate practices weave into existing social relations while at the same time transforming them. Consistently, this has meant focusing on groups excluded from the technical education common in the Indian middle and upper classes, yet who have managed to climb the value chain in the information economy.
Nehru Place

Nehru Place, in Delhi, hosts Asia’s largest secondhand computer market, India’s largest garment-export center, and a large pirated software market. This is far from its original purpose. In the 1962 master plan for Delhi, Nehru Place was slated to be the largest of fifteen district centers that would redefine urban life in the city. It was the epitome of the modernizing imagination at work in Delhi in the 1960s, and in India more generally.

H. P. Singh was one of the earliest garment exporters to move to Nehru Place. He now owns one of the largest warehouse-and-retail stores in the complex, and he feels deeply betrayed by the failure of that modernizing vision: “When I saw the plans of Nehru Place, I was promised the boulevards of London and Paris, the district centers of Europe. Little did I know that this is the shape it would take.”

Today, Nehru Place is a prime example of the fluid boundary between formality and informality in the Indian economy. It is also a bustling example of commercial rejuvenation associated primarily with the establishment of the “secondhand hardware” market in the area, which sells refurbished computers, software, and a variety of support services. The computer hardware shops first made their presence felt in the early 1980s when local companies and government departments were beginning to adopt computers in large numbers. They continue today as part of the large Indian grey market for computers and software.

The majority of the goods in the secondhand hardware market are discarded computers shipped from Southeast Asia, which are disassembled and then reassembled for local reuse. Sachin, a hardware seller, described the basis of the practice: “In most countries abroad the life of a computer is considered to be anything between a year and a year and a half. Upgrading is the key to technology there. Over here, people do not sell their computers. They look at them like their TVs, passing them on to others when they are through with them.”

The market operates as a distributed network of shops that communicate with each other and trade parts and services. Most of the shops are connected through an intercom, referred to as the chhoti line (or small line), the existence of which is illegal since it bypasses the official telephone networks. When specific goods are needed, calls are made to the vendors who may have them. When this fails, the request is often passed to others, ensuring that most demands can eventually be met. One implication is that there are no centralized warehouses within the complex. Another is that most transactions are in cash, in order to facilitate the trade in parts and services across the network.

Pirated software is also widely sold at Nehru Place and often comes pre-installed on secondhand machines. Overlooking the software section of the market is Microsoft’s Delhi headquarters, which stands in the middle of the main courtyard at Nehru Place. Like all the other businesses at Nehru Place, the Microsoft site was originally intended for other purposes. On the original map, it is identified as a cinema hall.
Many of these social trajectories begin in call centers, photocopying centers, cyber cafes, or the computer service and repair industry. Many are marked by the aspiration to escape the constraints imposed by a lack of formal education. An understanding of these worlds of social mobility and aspiration has been key to our understanding of piracy and new-media networks (Sundaram 2001, 1996; Liang 2003).

Indian urban experience teaches us that the question of legality is often the least interesting place from which to begin such an inquiry. Strict lines between the legal and the illegal are often irrelevant to the construction of Indian media practices, especially in the context of the large informal sector. More often, it is better to ask how people navigate the urban media environment—how they access or make the media they want in relation to the range of available resources and constraints, including legal constraints.

Our interest in piracy is therefore not primarily about its illegality—indeed the construction of that boundary in the law and on the street has been enormously complicated in India. Instead, we are interested in its ordinariness—a question we have approached by analyzing the social worlds in which piracy emerges, the forms of circulation and consumption in which it is implicated, and the fears and forms of social control that it generates.

It is impossible to understand these practices without understanding the conditions of informality that shape access to goods, services, housing, political authority, and most other features of life in urban India and in other cities of the Global South. Most such cities are built on—and through—informal networks of housing and infrastructure, only partially imagined by municipal planning and only partially integrated into the networks of business, services, and governmental authority that face outward to the global economy.

These conditions of informality have been widely tolerated by the Indian state as an unavoidable aspect of urban growth. But attitudes have shifted in the past decade as the integration of the Indian economy into the global economy has increased pressures on land use in most cities. Assaults on zones of informality have become far more common, with the courts playing a central role in determining the survival of slums and squatter settlements in many Indian cities. Inevitably, this process results more in the displacement of informality than in its elimination. As old zones of informality are destroyed, the poor and marginal Indians who inhabited them move elsewhere. The resulting disruptions of the urban landscape also create new temporary zones, where informal trade and marginal livelihoods reemerge.

We make this digression through urban redevelopment because piracy cannot be divorced from the circuits in which it takes place. A nuanced account of piracy in India begins with the “many piracies” that cut across the daily lives of Indians. Three of these circuits have proved central to our inquiry: the traditional and still ubiquitous world of street vending, the production and distribution networks that organize the optical disc trade, and the more recent emergence of peer-to-peer (P2P) networks and other channels of digital distribution.
Piracy on the Streets

Arguably, the greatest threat to the informal street economy is not the long arm of the law but the unpredictable nature of the weather. It is a common sight in Bangalore to see hundreds of street vendors sent scattering for cover by sudden, heavy monsoon rain. Police raids, in general, produce much the same effect and often have the same outcome, with street vendors resuming their places once the raid is over.

As optical disc piracy became commonplace in the 1990s, markets and street spaces emerged as semi-permanent points of sale. Places like National Market and SP Road have achieved an almost iconic status as the pirate centers of Bangalore, home to wholesalers of an assortment of counterfeit and pirated products: DVDs and DVD players, Chinese-made mobile phones and PDAs, MP3 players and jukeboxes, fake Ray-Bans, and gaming consoles. Even VHS players can still be found, servicing the legacy collections of video cassettes built up in the 1990s and early 2000s.

Vendors know their customer base and vary their goods accordingly. On a cart outside the Ayyapan Temple on Millers Road (a destination spot for Tamil residents of Bangalore), Tamil films make up the bulk of vendor stock, followed by Hindi movies. English-language films sit in a single pile, mostly undisturbed by customers. On MG Road, a major office corridor, pirates cater to young professionals looking for after-work entertainment. Here, stock tends toward an even mix of Hindi, English-language, and regional Indian cinema. When construction work for the Bangalore Metro began in the posh neighborhood around 100 Feet Road, the road was transformed into a downmarket street bazaar. Vendors set up outside the big-brand shops and sold discs to corporate executives returning home from the high-tech corridors around the city. In this part of town, Hollywood rules the informal box office. While the mode of sale remains similar across locations, the sellers are mobile and quick to adapt to changes in the city and in their clientele.

Street pirates also offer different types of goods, reflecting the changing availability of higher- or lower-quality copies of new films and the perceived market for supplementary materials such as liner notes. At the high end of the market are the high-definition releases of new films, generally compressed from Blu-ray masters down to 720p MP4 files or similar formats capable of being burned onto a DVD. These are still a rarity in most street markets but are increasingly common in neighborhoods frequented by HDTV-owning corporate employees, such as those living around 100 Foot Road. At the low end are compilation discs of Hollywood and Bollywood films, usually with three to five films per disc, but sometimes with up to ten or more. The higher the number of films, the lower the quality of reproduction. Single vendors generally stock products across these categories. A copy of *The Untouchables* purchased during our visits, for example, was a duplicate of the official DVD release, while a DVD with three new Hindi films contained barely watchable “camcordered” prints. Over several weeks, successively better copies of the Hindi films will become available as improved
camcorder releases are paired with improved audio tracks. Within a couple months, vendors will be selling bit-perfect copies of the DVD release.

As in most of the countries documented in this report, enforcement campaigns against organized retail piracy have intensified over the last five to six years. In states like Tamil Nadu and Karnataka, local governments have extended the Goondas Act—traditionally used to curtail activities like bootlegging and extortion—to cover video piracy. The Goondas Act has been a lightning rod for criticism due to its high penalties, which include prison terms of up to two years, fines of up to US$2000, and the possibility of pre-trial detention without bail for a period of up to a year.

The extension of the Goondas Act to cover video piracy was passed at the behest of local film industry representatives and produced a typically parochial arrangement in which the measure was applied only to local film. In Burma Bazaar in Chennai—arguably the largest pirate market in India—most DVD retail kiosks post notices that they respect the copyrights of the Tamil film industry and do not stock Tamil films. Pirated copies of the latest films from Hollywood and Bollywood, in contrast, are available in large quantities, in plain sight. Such arrangements are common in India and reflect the intense localism of many aspects of cultural identity, trade, and governance. Pirates in the southern state of Karnataka do not stock Kanadda-language films. Enforcement in Andra Pradesh targets only local Telegu film. The local politics of enforcement are often the only politics of enforcement.

Major markets for pirated goods, such as National Market in Bangalore and Palika Bazaar in Delhi, have nonetheless come under growing pressure from police. Although local police presence in such markets is usually mediated by a variety of informal agreements with vendors and market operators designed to minimize the incidence of serious crime, the last five to six years have seen a significant rise in the frequency of anti-piracy raids to a level that has forced many pirate vendors out of the relatively exposed market settings. The most obvious result of this pressure has been the further decentralization and de-formalization of pirate sales. In Delhi, for instance, the concentration of pirate vendors in the major markets has given way to a much more local organization of pirate distribution, often intermingled with street vending of vegetables, fruit, and other goods.

In Bangalore, interviews with vendors, wholesalers, and police generally pointed to Chennai, a city on the southeast coast of India, as the main distribution hub for Hollywood, Bollywood, and Tamil films. Chennai has long been a center of smuggling and other informal market activity in India. When imported luxury goods such as perfumes and electronic goods were subject to high tariffs, before the liberalization of the Indian economy in the 1990s, Chennai was the electronics mecca of southern India. Chennai markets like Burma Bazaar were often the only places where popular imported consumer goods could be procured. When tariffs were removed, undercutting the profitability of many types of smuggled goods, vendors in Burma Bazaar shifted to selling pirated VCDs (video compact discs) and later DVDs. Burma Bazaar remains one of the most highly contested spaces in the Indian informal economy, with
Blue and Silver Maal

Pirated discs are commonly called maal in India—a colloquial term meaning “goods” but usually used in reference to illegitimate or pirated goods. There are two kinds of maal in circulation: blue and silver. The average blue maal is a low-quality VCD—generally a locally produced copy of a Bollywood film. These cost anywhere between Rs.40 and Rs.50 ($0.80–$1.00) in Mumbai. Imports are generally higher-quality silver maal—discs copied from DVD masters. Silver maal are available for both Bollywood and international films and can command a premium price of up to Rs.100 ($2), especially when they replicate the cover treatments of licensed discs.

Although the street prices for both categories of discs have dropped, the price used by police in estimating the values of seizures has risen, feeding skepticism about police reporting on the size of pirate markets. Prior to 2006, the cost of each VCD/DVD was pegged by police at Rs.100 ($2)—the high end of street prices. Today, when maal are seized by the police, the cost of each is estimated at Rs.300 ($6)—the high end of retail prices for most local film. This shift from street prices to retail prices in estimating the value of pirated goods is consistent with how rights-holder groups like to calculate damages in court but, as we have argued, no longer consistent with how they calculate broader losses [see chapter 1]. In practice, the shift inflates the scale of both piracy and enforcement operations, which, in a system that rewards the public display of enforcement, is almost certainly the point.

regular raids disrupting the flow of pirated goods but with little evidence of lasting effects or a diminution in the overall trade.

Despite industry attempts to link such markets to larger networks of organized crime, examination at the local level reveals the small-scale nature of much of the business. Pirated goods are brought into Bangalore from other cities, such as Mysore and Hosur, in small cartons carried in personal vehicles or on tourist buses. These are delivered to the wholesale markets, which in turn distribute to the retailers. There are many intermediaries, and at every step, the margins in the trade have become very thin. Prices for pirate media have fallen dramatically in the past four to five years, putting significant pressure on all players in the commodity chain.

As recently as 2004, DVDs typically sold for over $2. Today, distributors generally buy films at wholesale for around $0.70 and sell to street vendors at $0.80 per copy. The vendors, in turn, sell the disc for around $1 on the street or in the pirate bazaars. There is still a great deal of variation in price as well, reflecting factors such as the proximity to upscale neighborhoods or the distance from highly competitive wholesale markets like Burma Bazaar. At Burma Bazaar, DVD prices at retail can be as low as $0.40.

With such thin margins, volume sales are critical. According to our interviews, a wholesaler in National Market in Bangalore sells on average a thousand discs per day. Outside National Market, there are other small shops and street-side vendors spread across the city that purchase
from wholesalers and sell with a markup of Rs.10 to Rs.15 ($0.20 to $0.30). The average price of a copy of an English-language or Bollywood film at Brigade Road or Indira Nagar, both hot spots for Bangalore’s commercial activity, is roughly $1 per disc. Here, the vendors sell between fifty and a hundred discs per day, generally making a profit of $10–$20.

Nearly all informants agreed that the pirated disc market had become much less lucrative in recent years. Most blamed a confluence of factors, from the recession to the changing release practices of the studios, which have narrowed the window between theatrical and DVD release and thereby diminished the period in which the pirates have a monopoly on distribution. All, however, saw the Internet as the primary threat, as improvements in bandwidth undercut the two traditional advantages of the street vendor: faster availability and lower prices.

**Piracy and Time**

The notion of access to media, developed throughout this report, usually centers on questions of cost and availability. But another crucial factor is the relationship to time. Global licensing regimes for film, especially, attempt to maintain well-ordered flows of commodities across time and space. “Windowing” is the industry term for the control of circulation over time. A modern Hollywood or Bollywood production has many release windows, beginning with the long, anticipatory advertising campaign, which primes the public for the initial theatrical release. The theatrical release window is the critical period for revenues. In India, with local products in intense competition for screens, this period can be very brief.

Recurrently in our work, we find that timing is as important as price in shaping both licit and illicit media markets. The temporal nature of distribution is tied not just to an economic logic but also to what we call an economy of anticipation. The buildup to the latest film; the release of trailers, posters, and soundtracks; the premiere—all are part of this economy of anticipation. Within it, however, the share of waiting is very unevenly distributed. The wait grows longer as you move from the northern hemisphere toward the Global South, and from metropolises to small towns and villages. The trend toward simultaneous global release—now common for many large Hollywood productions—is an effort to minimize the pirates’ opportunities to exploit these gaps. But even this trend is operative only in major cities. In the provinces, people wait.

In these contexts, the newness of the films, the quality of their reproduction, and the quality of the cinematic experience come to stand for temporal and cultural differences—differences between the North and the South, between the town and the city, and between global modernity and those who are “not quite modern.” In films such as *Main Madhuri Dixit Banna Chahti Hoon!* (2003) and *Haasil* (2003) or Pankaj Kumar’s documentary *Kumar Talkies* (1999), we get a glimpse of this waiting-room world of cinema. In a delightful scene in *Main Madhuri Dixit*, the protagonist goes to watch the Hindi film *Devdas*, but after a few reels the film stops and the audience has to wait for the arrival of the other reels from the neighboring village. Members of the audience complain that the last time, they had to wait for over two hours after the delivery bike carrying the other reels broke down.
The big city is the place where these fractures can be repaired, where films are shown in their entirety, and where audiences do not have to confront their geographical and cultural marginality every time they attend the cinema. The social life of piracy occurs at this intersection of anticipation—now often measured in days or weeks—and aspiration to belong to the modern, to inhabit the space of global time represented by and through the movies, where things are not perpetually breaking down or delayed (Vasudevan 2003; M. Prasad 1993; Bagchi 2006).

Waiting for the latest Hollywood or Bollywood release, in this context, becomes an apt metaphor for the experience of those placed differently within the circuit of space and time. Brian Larkin and Ravi Sundaram, both students of the “pirate modern,” argue that in contrast to the dizzying, real-time global integration of the information era, the great majority of people in the Global South experience time not through the trope of speed but through the experience of interruptions and breakdowns. Breakdowns create a temporal experience that has less to do with speed and more to do with the process of waiting.

From waiting for e-mail messages to open, machines to be fixed, or electricity to be restored, the experience of technology outside the high-tech centers is subject to a constant cycle of breakdown and repair. In most countries, the promise of technological prosthesis—of enhanced memory, enhanced perception, enhanced communication—is thwarted by the everyday experience of technological failure. Each repair enforces another waiting period. The experience of slowness, moreover, comes as a consequence of speed-producing technologies, so that speed and acceleration, deceleration and stasis are relative, continually shifting states.

In most countries, consequently, technological modernity is predicated not on the smooth functioning of new technology but on its imperfect adaptation or indigenization. Digital piracy in developing countries is an example of this wider process, built on the cheap, repurposed infrastructures of the information economy (Sundaram 2001; Larkin 2004).

An interesting instance of this adaptation in film technology is the history of the video compact disc. Sony and Philips introduced the VCD in 1993 as a format for recording video on compact discs. It was cheap, convenient, and initially seemed to signal an emerging standard. At the time of the introduction of the new format, however, development of the technologically superior DVD was already underway. From the beginning, Philips was aware of the impending arrival of the DVD and its threat to the VCD. Anticipating a bleak future for the new format, Philips and Sony abandoned plans to launch the VCD in Western markets and opted instead to launch it in China, where its technological inferiority would not be as rapidly challenged (Wang 2003; Hu 2008). Because Philips and Sony had a tight grip on the production of discs and players, the film industry believed that VCDs would help fight widespread video cassette piracy. Instead, the introduction of the VCD triggered a boom in the Chinese production of cheap disc technologies.

Asian markets enthusiastically adopted the VCD and—shortly thereafter—VCD piracy as a means of bypassing global distribution networks for Hollywood and Bollywood film. Sharp Chinese quotas on the number of Hollywood films that could be released domestically in a
given year gave a huge boost to the practice. Pirated VCDs became the only means of watching many of the latest Hollywood titles, few of which ever saw theatrical release.

Within a short period of time, the VCD became the primary movie format in large parts of the developing world. It was also a short-lived format that inaugurated a process of rapid diffusion and turnover of new, cheap, digital consumer goods. By 1998, VCD adoption was already widespread in China, with roughly sixteen VCD players per hundred households. By 2000, the number had more than doubled, significantly outpacing cell-phone adoption. But the shift to VCD-compatible DVD players was already underway. In 1999, VCD player sales in China peaked at twenty-two million. By 2000, annual DVD player sales had jumped from one million to three million, on their way to a 2006 peak of nineteen million (Linden 2004; Digital TV News 2008).

VCD technology spread rapidly from East Asia to other parts of Asia. Within a few years of their introduction, VCDs had replaced video cassettes as the standard video format in the region and had become vastly more prolific than the VHS format ever was. In India, the price of VCRs never fell below $200. VCD players, in contrast, had plummeted to as little as $20 by the middle of the decade. As with other obsolete technologies, the VCD infrastructure remains important outside the major Indian cities; the total number of DVD players surpassed VCD players only in 2008 (Kohi-Khandekar 2010).

The VCD also spread rapidly to other world regions. In Nigeria, home to the second-largest film industry in the world in terms of numbers of films produced (more than 1,200 in 2008), most films are available only on VCD and DVD. The Andean countries were also flooded with cheap players in the early 2000s, and VCDs remain prolific in Andean pirate markets—a topic explored in our Bolivia chapter. But most Western markets never saw the VCD, and the format remains a marker of the technological periphery.

The Transnational Trade

Well-developed networks trafficking in pirated Indian films emerged in the 1980s, in the early days of the video cassette era. In a pattern that would be repeated over the next three decades, illicit networks took advantage of market opportunities created by the major producers. In this case, the Bombay studios decided to ban video releases of new films for fear of cannibalizing theatrical exhibition. This did little to stop video retail and exhibition in India, but it did ensure that the growing sector remained entirely illicit (Sundaram 2009). Additionally, because Bollywood’s international distribution networks were poor, the pirate networks provided the primary means of circulating new Bollywood films to international audiences. The United Kingdom, Pakistan, and Dubai—the last of these the offshore hub of much legal and illegal Indian business in the period—became the main nodes in this international distribution network.

Other Indian media and IT businesses grew out of similar transnational networks in the 1980s. Indian grey-market suppliers for computers and electronic components traveled back
The T-Series Story

In the late 1970s, Gulshan and Gopal Arora owned a fruit-juice shop in Delhi, but their real interests were in music and electronics. In 1979, the two brothers opened a small studio where they began to record Gharwali, Punjabi, Bhopjpuri, and other Indian regional music. Borrowing money, they visited Japan, Hong Kong, and Korea to learn more about the recording industry and cassette production technologies. On their return to India, they set up a factory to produce magnetic tape and audio cassettes and eventually built a large manufacturing plant where they offered duplication services to smaller regional-cassette producers. By the late 1980s, their company, T-Series, was the market leader in cassette production in India and had begun to diversify into manufacturing videotapes, televisions, washing machines, and detergents, and later VCD and MP3 players.

T-Series was a profoundly disruptive force in the Indian music market, in large part because it was a tremendously successful pirate. The company built its catalog through a variety of quasi-legal and illegal practices, notably by abusing a provision in the fair-use clause of the Indian Copyright Act, which allowed for version recording. On this basis, T-Series released thousands of cover versions of classic film songs. It also engaged in more straightforward copyright infringement in the form of pirate releases of popular hits, and it often illegally obtained film scores before the release of the film to ensure that its recordings were the first to hit the market. Many other accusations were leveled against T-Series, including the wholesaling of inferior magnetic tape to competitors in an effort to discredit their brands.

On the plus side, T-Series changed the rules of distribution in ways that permanently transformed the music industry and music-buying public in India. Breaking with the narrow existing channel of retail outlets, T-Series moved aggressively to distribute cassettes in neighborhood shops, grocery stores, paan waalahs (wrapped betel-nut stands), and tea shops—making the cassette a ubiquitous product in Indian commercial life.

It also expanded the music-consuming public by focusing on genres and languages that had been ignored by the dominant Indian record labels and distributors, notably HMV. HMV had viewed recording in languages other than Hindi as unprofitable due to the small scale of the respective markets. T-Series proved that it was possible to expand these markets with stronger distribution and lower price points. By providing duplication services to smaller labels, it also assisted in the revival of other, small-market music traditions.

These innovations were inseparable from the company’s assault on the price structure of recorded music in India. In a market dominated by two government-licensed companies—HMV and EMI—audio cassettes were priced between $3.60 and $4.60. T-Series reduced the price of cassettes to $2.50, fueling the first mass market in recorded Indian music.

Branding T-Series a pirate doesn’t quite do justice to the larger revolution in the music business of which they were a part or to its close relationship with the informal market. In an interview with the media scholar Peter Manuel, a T-Series employee commented on the forces that the company both capitalized on and unleashed:
"What the people say about our activities in the early years—it is mostly true. But I tell you that back then, the big Ghazal singers would come to us and ask us to market pirate versions of their own cassettes, for their own publicity, since HMV wasn’t really able to keep up with the demand.” Even major players like HMV dealt with pirates. When HMV found that it could not meet the demand for one of its biggest hits, *Maine Pyar Kiya*, it reportedly entered into an agreement with pirate cassette producers to raise their price on the album from Rs.11 to Rs.13 and pay HMV half a rupee for every unit sold. HMV, in return, promised not to sue them or raid their businesses. Other producers also colluded with pirates in order to minimize their costs, taxes, and royalty payments to artists (Manuel 1993).

and forth to Taiwan and Southeast Asia to source components and raw materials for emerging domestic producers. Financing for these trips was often provided through local bazaar networks or through the diasporic networks of the merchant castes. Major Indian media companies like T-Series had their origins in such trips.

These networks also provided key support for the rapid adoption of subsequent technologies, such as compact discs, especially as low-cost Chinese hardware and Malaysian discs began to flow into India in the late 1990s. By then, economic liberalization and growth in India and China had greatly increased the volume and sophistication of transnational trade in the region. The relatively simple informal sector of the 1980s had become a complex ecology of organizations that ran from local street vendors to factories throughout Asia. Because profit margins depended on efforts to accelerate the production and delivery of goods, these networks grew and innovated very rapidly.

Street-level pirate vendors and wholesale markets were strongly embedded in these wider metropolitan, regional, and transnational networks. In our interviews, large facilities in Pakistan, Malaysia, China, and Hong Kong were still identified by vendors and intermediaries as primary sites of production, with DVDs entering India through a variety of regional supply routes. Malaysian imports, for example, were said to follow two regional distribution circuits on their way to wholesale and retail markets in Mumbai—one passing through the cities of Dhaka (Bangladesh) and Kolkata (India), and the other passing through the city of Chennai (India).

Many of these routes are anchored in long-standing, transnational ethnic and kinship networks. The link between Chennai and Kuala Lumpur, for example, is marked by the presence of a large (Indian) Tamil population living in Malaysia. Pakistani pirates, in turn, build on and service the large South Asian diaspora in the Anglophone world, hungry for Indian music and film. Often, traffic within such networks goes both ways. Diasporic Tamilians in Malaysia eagerly await the latest Tamil films, while Tamilians living in Chennai await the latest Hollywood releases, copied in Malaysian factories.

The entertainment industry is aware of these regional circuits but has tended to view them primarily through the lens of global hits. According to the IIPA, for example, the May 19,
1999, release of *The Phantom Menace* set in motion a sort of regional domino effect in which pirated VCD copies of the film were available on May 24th in Singapore; on the 25th in Hong Kong, Taiwan, and Macao; on the 26th in Thailand; on the 27th in Indonesia and Australia; on the 28th in Korea; and on the 31st in Pakistan. After Pakistan, the VCD was available on June 2nd in India.

This complex itinerary is emblematic of the highly structured pirate media flows of the late 1990s and early 2000s, in which the diffusion of physical discs from a central source—here, Malaysian factories—shaped the pace and geography of the pirate release. India’s appearance at the end of the chain very likely signals a different production path, passing through masters delivered to Pakistani factories and copies smuggled across the border into India. Today, such an account would look very different. The geographical trajectory for any current blockbuster film is now radically compressed, with camcordered or better copies globally available via the Internet on or before the initial release date and street distribution following shortly after. Factory-produced copies do continue to appear in this context, but inevitably later and typically as premium products.

Our interviews in 2009 found evidence that these networks still play a role in the South Asian arena, but it is also clear that the pirate ecosystem is changing rapidly, driven by cheap copying technologies that diminish the advantages of industrial-scale production and further decentralize distribution. The Internet is a crucial factor in this context but not the only one: local factories and cheap consumer burners, storage, and other consumer infrastructure play major roles. When Ernst & Young investigated the origins of pirate discs in India in 2008, it estimated that 40% came from local disc manufacturers, 50% from informal cottage production, and only 10% from transnational networks (USIBC/Ernst & Young 2008). By all accounts, these shifts have vastly expanded the flow of pirated goods within India and Asia more generally, even as they displace the complex organizational networks that, until very recently, structured them.

Inevitably, this displacement is less of a factor in the hard-goods trades—especially electronics—where the Asian geography of the grey market remains highly visible and unchallenged. This geography is signaled to consumers in a variety of ways, most directly in the packaging and other signs marking the origin of the goods. In India, it also announces itself in the names of the street markets. Visitors stepping out of National Market in Bangalore can look across to Bangkok Plaza and, a few meters away, to Bangalore’s own Burma Bazaar. Across from Burma Bazaar is New Hong Kong Bazaar. All specialize in non-legal media commodities, from counterfeit phones to DVDs and software. All are part of the grey-market-media world of modern India.