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Amazon as a Digital Empire? Reflecting on Expansion and Collaborative Processes in India

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Abstract

This article studies the localization and expansion process of the American e-commerce company Amazon in India analyzing how it has been acquiring a dominant position in different markets and contributing to reminiscent of earlier communication 'empires'. Emphasizing also necessary alliances, collaboration and interdependencies with other local players, this case study aims to contribute to a more complex understanding of contemporary digital empires.

Keywords Big Tech · Global South · Power relations · Interdependency

The 'digital transition' of contemporary societies has become an increasing priority at national and global scales, often associated with the promise of leveraging territorial development, economic growth and reducing inequalities. In parallel to this discourse widely promoted by industries but also by public authorities and international organizations, a body of critical literature from various disciplines, especially from Political Economy of Communication, sociology and Science and Technology Studies has highlighted that, along with the deployment of digital technologies, tools and services, large private actors from the communication and technology sector have been awarded increasing influence in the organization of contemporary societies (Garnham 1990; Gillespie 2010; Srnicek 2016). Research has emphasized that far from being neutral intermediaries (Nieborg and Poell 2018), they contribute to processes that reshape local dynamics, including markets and industries (reintermediation, collaborations, financialization), labour and the gig economy (Casilli 2017; Woodcock and Graham 2020), as well as public policy debate both in the Global North and Global South.

Thus, the deployment of powerful digital corporate players, coming from different core industrial activities (e-commerce, web services or telecommunication companies) and which can be gathered under the umbrella of 'Big tech' companies, has been increasingly under scrutiny in social sciences. Digital development policies in many countries of the Global South have been supported by digital economy players or by the philanthropic branch of large digital companies such as the Bill & Melinda Gates Foundation (McGoey et al. 2018). While Big tech tend to present themselves as facilitator, intermediaries or accelerator of development, especially in the Global South, they revive debates on mechanisms of dependence on technology firms from the West that were observed since the 1970s (Mattelart 1973) and bring 'new layers of complexity to social problems instead of solving them as they promised' (Al Dahdah and Quet 2020: 219). Others explain that the foray of these firms into public action through the new public private partnerships contribute to a form of 'usurpation of the very space of governance' by digital corporations (Gurumurthy and Chami 2020: 30) and to the acceleration of privatization of government services and technocratization (Courmont and Le Gales 2019).

This article is taking cue from recent international research addressing in a critical perspective the expansion of large communication and technology actors in the Global South as well as their consequences for socio-economic transformations (Taylor and Broeders 2015; Al Dahdah 2019; Oyedemi 2021). More precisely, it proposes to study the rise of the American e-commerce company Amazon to contribute to the discussion on the shaping, the expansion strategies and the limits of contemporary technological or digital 'empire' in the Global South. Since its launch in India in 2013, the company has been acquiring a dominant

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position in different markets contributing to the emergence of monopolies or 'empire' in its own ways. While exploring on the one hand its sectoral, spatial, financial dominance, on the other hand, the article aims at highlighting the network of necessary alliances, forms of interconnections and interdependencies between those powerful players and a diversity of other players. Hence, the analysis of localization strategies, collaborations and partnerships in the case of India will enable to bring a more complex understanding of contemporary digital empires.

From Early Communication Companies to Big Tech in Global South

While most studies on the deployment of major digital players remain constructed from the perspective of Global North countries and players, the academic literature on the deployment of digital technology in South countries has been well expanding in the last few years. Recent works on the strategy of Big tech *in* the Global South (Nothias 2020; Oyedemi 2021) but also *from* the Global South, such as Tencent (Tang 2019) or Naspers (Teer-Tomaselli et al. 2019), have been renewing the global narrative on old and new forms of imperialism in the digital era.

Asia has become a center of attention not only because of its massive user population but also due to the emergence of national powerful information and communication companies transforming not only local and regional markets but aiming at monopoly position and transnational expansion. The Special Issue by M. Steinberg, R. Mukherjee and A. Punathambekar (2022) interrogates the institutional conditions for the emergence of corporate giants and their associated 'super apps'. The authors explain that they serve to shore up new forms of digital media power and contribute to reshape social, cultural, and political dynamics:

> Tencent, Alibaba, Reliance, or Kakao are not simply rent-seekers or surveillance capitalists [in a context of Digital capitalism]. Rather, they are particular, concrete corporate forms that occupy real estate, organize labor, deliver infrastructures, negotiate with states and other corporations, regulate the public sphere, and shape the cultural and political environment (Steinberg et al. 2022: 1410).

For technology corporations whose capital generation relies on a large user base, India represents a particularly attractive market with about 35% of its population connected to the internet and the second country with the highest number of internet users after China. Its successive political and economic reforms and its fast-growing digital economy made it an important laboratory of experiments for technology companies.

This analysis of Big Tech in Global South is also drawing from key research based on the political economy of communication of media or communication empires (Schiller 1969; Mattelart 1994; Winseck and Pike 2008) to examine several continuities that appear between Global communication and information companies today and their predecessors of the earlier century. As Winseck and Pike describe, Global communications systems were largely privately owned before the 1930s and were 'organized by cable monopolies and cartels […] cutting deeply across national lines' (Winseck and Pike 2008: 17). More specifically, the authors have been exploring the crucial role played by collaborative models implemented by private companies to create this global system. First, they point out a situation of collaboration between several countries, especially from Europe allying together to get access to national markets, especially in Africa, and where they used the 'language of developmental humanitarianism' (Winseck and Pike 2008: 16). Such collaborative models have of course evolved, but the system of foreign stakes and ownership presents forms of continuity in the collaboration of foreign financial players. In India, the presence of American players is significant, but not exclusive, there are also Asian and Middle East foreign interests present in some of the most important Indian Digital players such as Jio Reliance (Bouquillion and Ithurbide 2022).[1]

Second, Winseck and Pike observe strategic alliances often being tied between the largest private companies and state-owned telecommunications operators (Winseck and Pike 2008: 30). They also notice the ambiguous relation developed between monopolistic private companies with the State national interest. Indeed, governments are aware of the influence of such communication means and hence of the power of such communication players on market, foreign policy and public opinion. As they explain, multinational cartels are consequently contributing to the pursuit of national interests:

> The companies and the high-tech gloss associated with the new media technologies of the time also intersected with discourses of modernization that were already taking place among indigenous elites. The view of imperialism as a process of one-way exploitation by imperial states and corporation is unduly simplistic (Winseck and Pike 2008: 29).

Recent works have been highlighting how these partnerships between Google or Facebook with local Internet providers and telecommunications companies, as in the case for instance of Google Station or Facebook free basics, turn

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[1] In 2020, significant shares (around 30%) of Jio's capital have been sold to diverse industrial or financial players, including Facebook and American and Arab investors.

into win–win surveillance capitalism partnership (Oyedemi 2021).

Third, foreign companies also relied on multiple subsidiaries operating under their corporate umbrellas and local directors. As Oyedemi comments for Facebook or Google, just as in the old colonial structure, there is always a local person to head local operations in various outposts (Oyedemi 2021: 4). Country heads are instrumental in driving the spatial expansion strategies of the firm, but also handling public policy relations especially with local political powers.

Hence, historical work highlights important characteristics of communication empires, especially the complex collaborative dimension and systems of interdependencies associated with their expansion process, raising the question of way they continue to shape a global digital communication empire today.

Rise of Amazon in India and Building of Markets Domination

This section proposes to come back on the rise of Amazon to question how and to what extent the company has reached a hegemonic position in India, being attentive to the logic of scale, sectoral and financial expansion. From its early core activity to its diversification in multiple verticals, I propose to discuss both the logics of territorial and capitalist expansion.

Amazon is one of the largest market capitalizations in the world. From an industrial perspective, Amazon stands as a leading player in the electronic commerce of cultural products and consumer electronic materials. Starting from selling books online in 1994, the company has both expanded its activity into the selling of more products (computer games, music etc.) and had also started to deploy its services all over the world. Amazon quickly strengthen its international activities backed up by important investments, in particular in the construction of logistics centers outside the United States (Bouquillion et al. 2012). But one of its most significant shifts was its foray into technology activities with the creation of Amazon Web Service (AWS). The company started to develop its activities in cloud computing, data storage and related digital services market for big business but also for government agencies and academic institutions, helping them with the storage, processing and analysis of large quantity of data in its cloud services. In 2021, AWS was reponsible of 74% of the company operating profit (Forbes 2023). Thus, Amazon moved from e-commerce and trade services to a powerful and autonomous sector of activity which now in return makes it possible to finance its activity of e-commerce and adopt a dumping strategy to reduce products prices. It is also important to note that within AWS vertical-scaling, a Public Sector department was created in 2010. AWS Public Sector department caters to customers in governments and public institutions and aim to 'support administrations, local authorities, and state operators in the implementation of infrastructures enabling them to successfully complete their digital transformation' (AWS). The company declared that the outbreak of COVID-19 had prompted government agencies to migrate operations to the cloud (Alberston 2020). Jeff Bezos was not only the founder of a powerful e-commerce company but also an investor in some of the new biggest ventures to 'wire the world', to take after Winseck and Pike's expression (2008: 10), although not anymore with cables systems and telegrams but with data centers and cloud technology. In 2018, Amazon was owning nearly half of the global public-cloud infrastructure market (47.8%), followed by Microsoft (15.5%), Alibaba (7.7%), Google (4%), and IBM (1.8%) (Su 2019), highlighting its stranglehold on cloud-based digital services. States and federal agencies have become an important client segment for AWS and depend on its digital services with often a 'lock-in' strategy that makes it difficult to change providers due to high migration costs or inconvenience. This situation opens up possibility for Amazon to have increasing influence on public policies. As pointed out by MacGillis (2021), the issue is not that Amazon, along with other Big Tech companies, would be dominating one sector of activity, but that 'they end up dominating so many markets that they have the power to twist the economy with that control' (MacGillis 2021). Indeed, research in the political economy of communication has long studied the question of concentration in the communications sector, and especifically to way modalities of concentration reconfigure market systems. While companies operating as monopolies see industrial concentration as one of the keys to acquiring strong market power, they also exercise their intrinsic power to shape politics and policy-making (Bouquillion 2012; Brevini and Swiatek 2021).

Amazon deployed its e-commerce activity in India in 2013. Representing one of the most financially powerful foreign players in the country with a market valuation of approx. US$1.182 trillion (April 2020), Amazon had the capacity to expand fast in multiple sectoral and territorial directions (from big cities to last-miles areas). Its main activity was soon followed by an expansion into many other verticals, including in cultural industries with Amazon Prime Video and Amazon Prime Music services in 2016. AWS Indian subsidiary was launched in December 2017 and two years later it had its first Amazon Public Sector Summit in New Delhi. Amazon's arrival cames at a time when India was seeking to attract significant investments in the digital space, particularly foreign ones, as part of its Digital India Mission. Launched in 2015, this government initiative aimed at 'transforming India into a digital society and a knowledge-based economy' by facilitating the development of broadband infrastructure to provide internet access all over

India and the deployment of government e-services. Hence, Amazon has been taking advantage of the strong demand for data storage and services from businesses and public bodies to develop its cloud-base service offer (Venkat 2023).[2] India is also the first country where a pilot seller lending programme was launched in 2016 (revamped into 'Seller Lending Network' in 2018), making a strategic entry into financial services. This was followed in 2021 by its digital payment service, Amazon Pay, entering in competition with already well installed local and international e-payment platforms such as PayTm, GPay (from Google) or RuPay (Abrar 2021). In the perspective of market expansion and domination, the aggregation of users is an essential element. In that sense, Amazon perfectly illustrates digital capitalism at work with an economic model of revenues based on the production, collection and analyzing of users' data to further the corporation's own commercial interests.

Little critical research has been done on the company deployment in India considering its dominant position in multiple industrial sectors. In the book by Alimahomed-Wilson and Reese (2020) analyzing Amazon's global expansion, monopoly power and its exploitative labour practices, Sprague and Sathi focus on the Indian case, the corporate strategy of business expansion and labour exploitation but also vendors resistance. A few works have focused on e-commerce activities from its branding strategy to reach the masses of small and medium cities (Yadav and Sargar 2018) to its competition with other local players. Other works have analyzed its entry and localization strategy in the audiovisual market with SvoD platform Amazon Prime Video (Tiwary 2020; Bouquillion and Ithurbide 2022). The budget invested both for the acquisition of Indian content as well as the production of originals was one the highest ones among SvoD platforms in India, directly competing with its main American rival, Netflix. India was also the only market outside the United States where about 20 original content were launched the first year of activity, highlighting the position of India as a strategic digital economy to invest in (Bouquillion and Ithurbide 2022). The company's high level of specialization in digital technologies (especially with algorithms and recommendation systems) and vast database of subscribers acquired through its e-commerce platform have presented considerable advantages for Amazon Prime video vis-à-vis its competitors and enabled it to position among top three leaders on the SVoD market. Thus, the strength of the firm comes from its capacity to interlink activities (retail, data and finance) and its ability to lower prices and benefits from its first-mover position. This is also illustrated when

Amazon stepped into food delivery sector in India in 2020, a market so far dominated by the duopoly of local companies Swiggy and Zomato. Amazon significant financial resources and its capabilities to use organizational advancements acquired from its experience in other delivery sectors allows the company to lower its costs[3] (Sprague and Sathi 2020: 83). Amazon not only massively invested in India over the decade, about $6.5 billion in the country in nine years according to economic press (Economic Times 2022a), but declared in 2020 investing $1 billion more in digitizing Small and Medium Businesses (SMBs), through its Digital Kendras programme, 'physical resource centers, designed to help local stores and small businesses become digital entrepreneurs' (AWS Press 2022). Sprague and Sathi (2020: 85) highlight how while claiming to provide additional employment opportunities, Amazon is built on exploiting low-wage and contingent workers, leading to further consolidation of the country's capital and exploitation of its cheap workforce.

In parallel to this diversification process, the company reached a duopoly in two key markets in India, e-commerce and cloud services. Amazon has been controlling the highest share of the e-commerce market with its main competitor Walmart-owned Flipkart.[4] It has the highest number of sellers (700,000) before Flipkart (450,000) as well as the widest selection of products (170 million when Flipkart has around 150 million) (Economic Times 2022a) and consequently owns the largest database in India of online stores. Its position of aggregators has enabled it to offer discounts and exclusive arrangements to its sellers. However, since 2019, several actions have been undertaken by the government to limit this situation of duopoly. The modification in FDI policy for e-commerce aimed at targeting the two dominant foreign players in the market Amazon and Flipkart at a time when Indian company Reliance and other local startups were entering the e-commerce business. Moreover, in March 2022, the government announced the preparation of a Draft Ecommerce Policy to 'reduce prevalent market distortions', and prevent creation of 'digital monopolies' (Bloomberg 2021).

Regarding the second sector, Amazon Web Services (AWS) occupies also a dominant position in Cloud market in India, like globally.[5] In December 2017, AWS joined a list of approved providers by the Indian Government becoming the first global cloud service provider to earn this status in India.

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[2] According to market intelligence provider IDC, the Indian public cloud services market is expected to reach $13 billion by 2026, with an annual growth rate of 23.1% for 2021–26 (Venkat 2023).

[3] Amazon is charging restaurant 10–15% again 20 to 30% for its main competitor (Variyar 2022).

[4] In 2018, the US retail company Walmart acquired India's largest online retailer Flipkart for US$16 billion to dominate the highly lucrative e-commerce sector in India (*Economic Times* 2018).

[5] In 2019, AWS controlled about 42% of Global cloud market, followed by Microsoft's Azure (17%), Google Cloud (9.5%) and Alibaba (9.5%) (Chapel 2019).

Recently, it has been challenged in this position by another american Big Tech, the Microsoft-Cloud service Azure, who has been recently partnering with Reliance Jio, the telecom giant owned by India's largest industrial conglomerate. As such, India's cloud market remains concentrated in the hands of two transnational players with its overall engineering system largely built around these two companies (Khatri 2018).

This case study highlights how Amazon was able to reach hegemonic position through the progressive control of critical technical infrastructures on the one hand (through increasing investments into back-end infrastructure, data centers, cloud system[6]) and of its associated data resources, on the other hand. This situation has been described by Kwet (2019) as a form of imperial control where multinationals exercise a centralized control over the architecture of the digital system. Nevertheless, certain limits also tend to appear Amercian Big Tech companies in India are facing the rise of a new generation of Internet infrastructure operators, especially with Reliance Jio. The attempts also to further regulate E-commerce in favor of national companies announces also potential changes in current the game of powers.

Beyond the Empire: Collaborative Logics

Lastly it is important to examine the logics of collaboration and alliances with different categories of players that appear necessary in the localization and expansion of Digital 'empires'. More specifically, I will analyze forms of partnerships, enrollment and interdependencies with a diversity of local industrial players as well as public partnership.

In continuity with earlier Global communication and information companies, alliances mechanisms and collaborative logics have played an important role in Big Tech transnational or national expansion. In the case of Amazon, we can observe an evolution from a traditional local recruitment strategy (that imply employment contract and fixed salaries), still crucial in the functioning of the Amazon's Warehouses for instance, to an integration process through the enrolment of local players and especially independent stores and entrepreneurs.

Amazon has aggressively engaged with physical stores in India in recent years, using their vast presence in the nation to expand its delivery network and warehouses and even just relying on their inventory to drive sales (Singh 2021).

To expand its activity, the company has been working on several types of enrollment and integration processes.

The case of e-commerce activities is particularly relevant with many initiatives since 2018 to have more stores and entrepreneurs signing up on the platform. According to Amazon, the Digital Kendras programme was started to help business developing their online activities (through its platforms). In the race to provide more digital service, the company started providing physical stores with software to handle a digital inventory of the goods from their shop, and supplied them with a QR code. Amazon also announced the acquisition of the Indian retail startup Perpule specialized in automate inventory, purchase orders from distributors and billings (Singh 2021). Training and enrolment programmes were also specifically developed for small business and self-entrepreneurs with digital literacy difficulties, with for instance specific 'On-boarding' workshop organized in partnership with local NGO and State organizations. In the case of artisans and women entrepreneurs, often living in rural areas, such programmes have been conducted by Amazon's representative in local languages across different States in order to accelerate the number of enrollments, providing the creation of saler ID, catalog of product and uploading on the platform. To reach and enroll more artisans, partnerships through Memorandum of Understanding, have been signed by the company with over thirty State Government Emporiums and five Government bodies including most recently the Council of Handicrafts Development Corporations (*Economic Times* 2022b). While basic help to become an Amazon seller is provided for free to artisans and small entrepreneurs, the other services to expand business through online sales have a cost (packing, storage, delivery) and they become almost indispensable to exist in a highly competitive market.

In order to reach beyond its usual delivery network, the company has also started a last mile initiative called 'I Have Space'.[7] Under the promise to reach territories little connected to e-commerce, hundreds of local neighborhood shops and kiranas turned into micro-warehouses for Amazon where customers can come to withdraw their online order or with the possibility for the shopkeeper himself to ensure the delivery to close-by customers. This programme is promoted as the opportunity to provide additional income for kirana shop owners, earning also commission on the sales. This has been a particularly clever move as it enables the company not to appear as a direct competitor of local shops, but rather as a possibility to complement their revenues. It also enabled the e-commerce giant to capitalize on the well rooted geographical and social position of the shop, with their own clientele. Such initiatives were often welcomed by state officials who came to buy into the promise for

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[6] In May 2023, Amazon cloud computing unit has announced to invest $13 billion (1.06 trillion rupees) in India by the end of this decade (Venkat 2023).

[7] See official programme website https://sell.amazon.in/seller-blog/i-have-space-by-amazon.

economic progress and regional development through digital platforms, especially for rural areas. This situation highlights how regional state interests and modernity discourse end up meeting Big Tech ambitions and how the former contributes to the localization and expansion of the latter. However, at the same time, there have been also waves of resistance from owners of small businesses and independent traders, particularly in New Delhi, where they felt particularly under threat both by Amazon and Flipkart (Sprague and Sathi 2020).

Alliances with other Indian technology firms is also an important aspect in the company organization. AWS strategy relies on the aggregation of local 'solution providers' who come under the AWS Marketplace (a digital catalog of partners). Amazon has established a Competency Program to train and select its partners who will market and sell their software to AWS customers. Its marketplace gathers around 600 partners including major companies such as Wipro, HCL, Tech Mahindra or Tata Consultancy Services. Examples of their missions including migrating applications from its main competitor, Microsoft, to AWS. Alliance has been also signed with Indian telecom company Airtel (the direct competitor of Jio Reliance) to tap small-and-medium businesses, also in Internet of Things segment (Khan 2020). What emerges from these alliances between industrial players is a relationship of 'coopetition' with the establishment of agreements and partnership on specific projects but also a competition that remain strong (Bouquillion and Ithurbide 2022).

Finally, Big Tech expansion is also made possible through partnerships at multiple levels with public institutions from Central and Regional States to a diversity of departments and local organizations as we have been highlighting. Nevertheless, tension has been rising between foreign Big Tech and the Indian State. As the recent decisions from the government indicated on e-commerce draft regulation, a certain move has been operated from a context where industrial policy was designed to attract transnational players in order to invest into infrastructures and technologicals development, especially during the first years of the Digital India Mission, to the preparation of new regulation that aimed at limiting the dominant power of foreign players. This is also taking place against a backdrop of growing debate about the control and localization of Indian data in India (Sinha 2019). In 2020, the decision by the Indian government to ban a series of Chinese platforms due to suspicions over China's handling of personal data through apps, put in difficulties the Chinese Big Tech who has made important progress in Indian digital market, especially with popular media apps (TikTok, PubG) or cloud business (with Alibaba Cloud (Aliyun), Tencent and China Telecom offering cloud services since 2018). It showed that the balance of power between Indian and foreign players (in this case Chinese) can quickly evolve, especially as the debates on 'data sovereignty' and 'data localization' are raising. As Sinha (2019) explains 'these developments coincide with a growing national ambition to leverage the data of the country's citizens for national economic gain'. In this context of increasing data flow regulation, alliances between the US Big Tech and Indian industrial actors close to the government, such as Jio-Reliance[8] have been also encouraged by the political authorities (Bouquillion and Ithurbide 2023).

Conclusion

In line with recent research on Big Tech expansion in Global South countries, this article aimed at better understanding through the case of Amazon the logics of territorial (through Cloud and other digital infrastructure investments), geographical (toward last-miles areas) and capitalist expansions (through sectoral diversification) as distinctive but intertwined logics of power (Harvey 2003). Amazon well illustrates forms of monopoly or duopoly control through both the integration of multi-sector vertical markets and data-based horizontal markets (Gurumurthy and Chami 2020: 33). Its capacity to capture and use big data from flows of goods, services and social interactions put such digital corporations 'at the top of the pecking order to control emerging global value chains' as Gurumurthy and Chami explain. Such power has come under scrutiny as the preparation of a Draft Ecommerce Policy by the Indian Government demonstrates. Drawing from historical perspectives on Communication Empire enabled to highlight continuities in the 'collaborative' character on which companies rely on to establish their monopolistic position, with however new forms of partnerships, enrolment and interdependencies with a wide range of national industrial and public players. Finally, the recent decision from the Indian government to limit the power large e-commerce companies such as Amazon recall the importance of negotiation and adjustment of Big Tech with national regulations from which they will seek to take advantage at some level to deserve their own purpose of power relation.

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[8] For example, the acquisition by Facebook of a 10% equity stake in Reliance Jio subsidiary in April 2020 illustrates this tendency.

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