

**Consultation Paper No. 18/2023**



**TELECOM REGULATORY AUTHORITY OF INDIA**

**Pre-Consultation Paper**  
**on**  
**Inputs for Formulation of**  
**“National Broadcasting Policy”**

**New Delhi, India**

**21<sup>st</sup> September 2023**

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**Written comments on the Pre-consultation paper are invited from the stakeholders by 10<sup>th</sup> October 2023, which will be posted on TRAI's website [www.trai.gov.in](http://www.trai.gov.in) .**

**The comments may be sent, preferably in electronic form, to Shri Anil Kumar Bhardwaj, Advisor (B&CS), Telecom Regulatory Authority of India, on [advbcs-2@traigov.in](mailto:advbcs-2@traigov.in) and [jtadvbcs-1@traigov.in](mailto:jtadvbcs-1@traigov.in).**

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## Contents

<b>Chapter</b>	<b>Topic</b>	<b>Page No.</b>
	List of Acronyms	1
Chapter 1	Introduction	2
Chapter 2	Structure of policy framework	7
Chapter 3	Issues for Pre-consultation	12

## List of Acronyms

<b>Acronyms</b>	<b>Description</b>
AM	Amplitude Modulation
DTH	Direct-to-Home
FM	Frequency Modulation
FTA	Free-to-Air
HITS	Headend in the Sky
IPTV	Internet Protocol Television
M&E	Media and Entertainment
MIB	Ministry of Information and Broadcasting
MSO	Multi-System Operator
TRAI	Telecom Regulatory Authority of India

# CHAPTER 1

## INTRODUCTION

### **Background**

1. Ministry of Information and Broadcasting (MIB) vide its letter dated 13<sup>th</sup> July 2023, inter-alia, informed that they are in the process of formulating a National Broadcasting Policy. They have mentioned that the consultations with stakeholder Ministries have been carried out. The Broadcast Policy needs to identify the Vision of a functional, vibrant, and resilient broadcasting sector which can project India's diverse culture and rich heritage and help India's transition to a digital and empowered economy. National Broadcasting Policy stipulating the vision, mission, strategies, and the action points could set the tone for a planned development and growth of the Broadcasting sector in the country in the era of new and emerging technologies. Through the said letter dated 13<sup>th</sup> July 2023, MIB has requested TRAI to give its considered inputs under Section 11 of the TRAI Act, 1997 for formulation of the National Broadcasting Policy.

### **Indian Broadcasting Sector**

2. As per the industry report<sup>1</sup>, Indian Media and Entertainment (M&E) sector grew 19.9% in 2022 to reach Rs. 2.1 trillion from Rs. 1.75 trillion in 2021 and is expected to reach Rs. 2.83 trillion in 2025 with a CAGR of 10%. Television is one of the largest and fastest growing segments of M&E sector. It represents around 35% of the total M&E revenue. Even though television remains the largest segment, digital media has seen

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<sup>1</sup> FICCI EY Report (April 2023) titled "Windows of opportunity -India's media & entertainment sector – maximizing across segments"

phenomenal growth with a 27% growth in digital subscriptions in 2022. The potential of the new technologies in the sector can be inferred from the fact that in 2022, animation and VFX was the fastest growing sector with a staggering 29% growth.

3. The broadcasting sector consists of television and radio services. The television services are delivered through cable TV, Direct-To-Home (DTH), Headend In The Sky (HITS) and Internet Protocol Television (IPTV) services. As per the industry report<sup>2</sup>, the TV universe consists of approximately 64 million cable TV households, 2 million HITS subscribers. In addition, as reported by the pay DTH operators to TRAI, there were 65.25 million pay DTH total active subscribers as on 31.03.2023. Further, reported subscriber base by the IPTV Operators was 6,47,596 as on 31.03.2023.
4. The TV broadcasting sector encompasses approximately 332 broadcasters providing 903 private satellite TV channels as on 31.03.2023<sup>3</sup>. These television channels include 254 SD pay TV channels and 104 HD Pay TV channels provided by 43 Pay television broadcasters. Currently, there are 1748 (Multi System Operators (MSOs)<sup>4</sup> registered with MIB, 1 HITS operator<sup>5</sup>, 4 pay DTH operators and 25 IPTV operators<sup>5</sup>. Further, as per the information provided by MIB, there are 81,706 cable operators registered in the country.
5. Prasar Bharati is the Public Service Broadcaster in India which operates radio network- All India Radio (Akashvani) & Television Network (Doordarshan). At present, Doordarshan broadcasts 36

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<sup>2</sup> FICCI EY Report (April 2023) titled “Windows of opportunity -India’s media & entertainment sector – maximizing across segments”

<sup>3</sup> <https://new.broadcastseva.gov.in/digigov-portal-web-app/>

<sup>4</sup> [https://www.mib.gov.in/all\\_broadcasting\\_documents](https://www.mib.gov.in/all_broadcasting_documents)

<sup>5</sup> As reported to TRAI

satellite TV channels<sup>6</sup> which includes 7 national channels, 28 regional channels and 1 international channel (DD India). Prasar Bharati also operates DD Free Dish, the only Free-to-Air (FTA) DTH Service which is the largest distributed DTH platform in India. DD Free Dish reaches to millions (~45 million as per industry<sup>1</sup> estimates) of people especially in rural, remote, inaccessible and border areas having low income and is used as a tool not only for entertainment but also for promoting education, health, and agriculture.

6. India's television industry stands at Rs 70,900 crores in the year 2022 as compared to Rs 72,000 crore in the year 2021, thereby registering a decline of around 1.5%. Subscription revenues account for a major share of the overall industry revenue.
7. Radio is a popular means for mass communication, owing largely, to its wide coverage, portability, low set-up cost and affordability. In India, Radio coverage is available in the Short-wave (SW) and Medium-wave (MW) bands in the Amplitude Modulation (AM) mode and also Frequency Modulation (FM) mode. Today, FM Radio broadcasting is the most popular and pervasive medium to provide entertainment, information and education to the masses. As reported by the private FM Radio broadcasters to TRAI, there were 388 private FM radio stations operational as on 31<sup>st</sup> March 2023, besides the public service broadcaster- All India Radio (AIR).
8. All India Radio - India's Public Service Broadcaster, the Radio vertical of Prasar Bharati, has been serving to inform, educate and entertain its audiences since its inception. One of the largest broadcasting

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<sup>6</sup> <https://prasarbharati.gov.in/dd-channels-2/>

organisations in the world in terms of the number of languages of broadcast, the spectrum of socio-economic and cultural diversity it serves, AIR's service comprises 479 stations located across the country, reaching nearly 92% of the country's area and 99.19% of the total population. AIR originates programming in 23 languages and 179 dialects<sup>7</sup>.

9. Regarding Community Radio Stations, as per the information provided by the MIB, out of the 571 licenses issued as on 31<sup>st</sup> March 2023 for the setup of such stations, 427 community radio stations were become operational.

### **Telecom Policies in India**

10. Recognizing that provision of world class telecommunications infrastructure is the key to rapid socio-economic growth of the country, the Government has been announcing its telecom policy statements on a regular interval since the onset of market liberalization in the country in the early 1990s. In effect, post-liberalization, the Indian telecom sector has been shaped by the following policy statements viz. –
  - (a) National Telecom Policy, 1994,
  - (b) New Telecom Policy, 1999
  - (c) Broadband Policy, 2004
  - (d) National Telecom Policy, 2012
  - (e) National Digital Communications Policy - 2018
11. Telecom Sector has seen an unprecedented growth since the announcement of first Telecom Policy in 1994. It is widely believed that the Telecom policies have acted as a catalyst for enabling such growth.

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<sup>7</sup> <https://prasarbharati.gov.in/homepage-air/>



TRAI has provided important inputs for Telecom Policies from time-to-time, especially for the 'Digital Communication Policy 2018'. Similarly, on reference from MIB, TRAI is undertaking this pre-consultation for National Broadcasting Policy. The pre-consultation will be followed by stakeholder interactions with various associations, industry groups and policy research organizations.

12. Similar to Telecom Sector, Broadcasting sector is also undergoing unprecedented changes due to evolving technologies. Moreover, there are social or behavioral changes in viewing patterns and viewers way of consuming entertainment. A policy can provide a channelized approach for sector and provide appropriate impetus for development. A comprehensive National Broadcasting Policy will enable planned development and enable further growth of the Broadcasting sector in India.

#### **National Broadcasting Policy**

13. MIB has accordingly sought inputs of TRAI. The broadcasting sector is governed by service specific Act, Rules and Guidelines for various licence/ registration/ permission issued from time to time. The policy may provide a common approach for licenses, oversight, and compliances. This pre-consultation is proposed to elicit the comments on issues required to be considered while formulating the "National Broadcasting Policy". Chapter 2 discusses structure of policy framework and broad issues for consideration for comments. Issues for pre-consultation have been provided in Chapter 3.

## **CHAPTER 2**

### **STRUCTURE OF POLICY FRAMEWORK**

2.1 In line with the existing National Digital Communications Policy – 2018<sup>8</sup>, the possible structure of “National Broadcasting Policy” may be as follows:

- Preamble
- Vision
- Mission
- Objectives
  - Goals
  - Strategies

Against each objective, possible goals and the probable strategies for achieving those goals needs to be identified.

2.2 Broadcasting: The policy requires to address the Broadcasting sector in a comprehensive manner. It should deal with all the aspects related to content certation, content delivery/ distribution, assimilation, introduction of new technologies and role of different institutions for the growth of sector. It has to appropriately look into aspects of capacity building, skilling, future institutional framework etc. An analysis of global best practices may also help in defining various aspects of the policy.

2.3 It is noted that at this stage it is important to identify the broad issues for consideration/ comments. While a comprehensive list of issues will be worked out after receipt of comments and stakeholder

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<sup>8</sup> <https://dot.gov.in/sites/default/files/EnglishPolicy-NDCP.pdf>

interactions, following broad contours may require to be inter-alia included/ addressed in the proposed policy:

## **A. Objectives**

- i. Ensuring affordable and universal reach of Broadcasting
- ii. Establishing India as a global Content Hub:
  - a. Creation of global content in India
  - b. Promoting Indian content globally
  - c. Establishing/ enhancing institutional capacity for content creation or processing.
- iii. Developing state-of-the-art R&D infrastructure for broadcasting sector in India. Enabling Next Generation Technologies and Services through Investments, Innovation, Indigenous Manufacturing. Leveraging Artificial Intelligence, Big Data and cloud services technologies. Separate fund for R&D and establishment of Centre for Excellence for Broadcasting sector.
- iv. Capacity Building and Promoting Skill Development for broadcasting Sector in India. Training/ Re-skilling human resources for building New Age Skill. Promoting Industry-Academia-Government partnerships to develop capacity and skills in line with future technological needs.

## **B. Broad Issues for Consideration:**

### **I. Public Service Broadcasting in India**

- a. Requirement, Relevance and Review
- b. Support and Validation
- c. Content Priority

- d. Mandatory Sharing of television programmes
- e. Enhance global reach

## **II. Policy and Regulation**

Simplifying policy & regulatory framework and adopt coherent and modernized approach for different types of Broadcasting services:

- Satellite Broadcasting
- Terrestrial television Broadcasting
- Radio Broadcasting
- Print media
- Digital Media
  - An intermediary
  - Publisher of online curated content

## **III. Other Specific Issues for comments / suggestions:**

- i. **Promotion of Local Content:** Enhancing and incentivizing demonstration of India's rich and diverse cultural heritage through television programmes including festivals, music, dance, art, literature, food, education, sports and more for cultural preservation and expansion.
- ii. **Piracy and Content Security:** Putting in place framework for systematic and legal redressal for piracy and copyright. To devise a multi-layer framework of security to address cyber attacks, hacking by vested interests and other security issues. To enable measures for location-free access and transmission of programmes for broadcasting sector using cloud storage.

- iii. **Technology Innovation & Standardization:** To promote conducive environment for experimentation and innovations in the space of broadcasting technology. Establishing a broadcasting Standard Development Organization as an autonomous body with effective participation of the government, industry, R&D centres, service providers, and academia to drive consensus regarding standards to meet national requirements including security needs and interoperability to avoid e-waste.
- iv. **Convergence:** Enabling convergence of IT, telecom and broadcasting. Establishing a unified policy framework and spectrum management regime for broadcast and broadband technologies. Restructuring of legal, licensing and regulatory frameworks for reaping the benefits of convergence.
- v. **Separate Regulatory Authority for Broadcasting:** Currently Telecom Regulatory Authority of India (TRAI) regulates the Television Broadcasting Sector. TRAI regulates both the Telecommunications and the Broadcasting sector. It is understood that stakeholders have made submissions for having a specific regulator for Broadcasting sector. Accordingly, it is to explore the need for a separate regulator for broadcasting services and if yes, the suggested statutory and organisational structure of such regulator.
- vi. **Robust grievance redressal mechanism:** Ensuring adherence to Program Code and Advertisement Code.

Establishing effective institutional mechanisms to protect consumers' interests including Ombudsman and centralized web-based complaint redressal system.

- vii. **Role of Broadcasting during Disaster:** Framing and enforcing standard operating procedures to be followed during disasters and natural calamities, including sectoral guidelines for disaster response and recovery. Broadcasting to be used as rapid dissemination of early warning disaster notifications.
  
- viii. **Audience Measurement System:** Essential to ensure transparent and credible audience measurement system. Framing of guiding principles for viewership rating framework in India.
  
- ix. **Social Goals**
  - Assuring gender diversity in workplace
  - Access to Broadcast Content by Persons with Disabilities
  - Content for Children; educational content
  - Content for tribals and other marginalized sections of society
  - Need for promoting content through formation of specialized Societies (eg., Children's Film Society of India).
  
- x. **Environmental Responsibility**
  - Public health and Safety Standards
  - Improve energy consumption efficiencies

- Promoting research and development of green sources of energy
  - Sustainable development goals
- xi. **Animation, Visual Effects, Gaming and Comics (AVGC) segment:** Develop, support and unleash the scope and reach of AVGC sector in India to become a torch bearer of “Create in India” and “Brand India”.

**CHAPTER 3**  
**ISSUES FOR PRE-CONSULTATION**

**Q1. Stakeholders are requested to provide their comments on the possible structure and content for National Broadcasting Policy, clearly outlining the specifics along with the justification. The comments may explicitly include the following titles/heads:**

- **Preamble**
- **Vision**
- **Mission**
- **Objectives:**
  - **Goals**
  - **Strategies**

**The stakeholders are requested that against each suggested objective, possible goals and the strategies may be explicitly provided.**

**Q2. Stakeholders may provide specific comments and suggestions for identifying objectives, goals and strategies for National Broadcasting Policy including the following aspects:**

- i. Public Service Broadcasting**
  - a) Requirement, Relevance and Review**
  - b) Support and Validation**
  - c) Content Priority**
  - d) Mandatory Sharing of television programmes**
  - e) Enhance global reach**
- ii. Policy and Regulation**
  - a) Satellite Broadcasting**
  - b) Terrestrial television Broadcasting**
  - c) Radio Broadcasting**
  - d) Print media**



**e) Digital Media**

- iii. Promotion of Local Content**
- iv. Piracy and Content Security**
- v. Technology innovation & Standardization**
- vi. Convergence**
- vii. Specific Regulatory Authority for Broadcasting**
- viii. Robust grievance redressal mechanism**
- ix. Role of Broadcasting during Disaster**
- x. Audience Measurement System:**
- xi. Social Goals**
- xii. Environmental Responsibility**
- xiii. Animation, Visual Effects, Gaming and Comics (AVGC) segment**

**Detailed comments may please be provided.**

**Any other issue**

- Q3. Stakeholders may also suggest any other issues which should be considered for formulation of National Broadcasting Policy, along with detailed justification.**