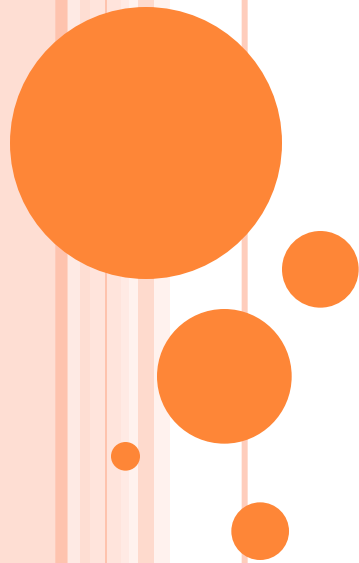


**TDSAT SEMINAR ON “DISPUTE
RESOLUTION IN BROADCASTING & CYBER
SECTOR”**

**DEVELOPMENT IN
BROADCASTING SECTOR**

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BROADCASTING SECTOR IN INDIA

- Broadcasting sector is a sunrise sector of the economy.
- Broadcasting a segment of the media & entertainment sector is making rapid strides due to rising consumer demand, increase in nuclear families, digitization which has led to increase in advertising revenues.



BROADCASTING SCENARIO IN INDIA

- Broadcasting sector in India
 - 877 registered satellite television channels
 - 475 AIR FM radio channels and Pvt FM radio channels
 - 214 operational community radio stations
- Distribution platforms-
 - 1469 registered MSOs
 - 6 DTH private operators plus DD Free Dish
 - 1 Headend in the Sky (HITS)
 - 2 IPTV service providers like MTNL/BSNL, Bharati Airtel
 - 60000 local cable operators.
- Cable TV Services-regulated under Cable Television Networks (Regulation) Act, 1995 and Regulations, Orders and Directions of TRAI.
- DTH services bound by the policy guidelines on DTH services
- Internet Protocol Television regulated by Guidelines for provisioning of IPTV services.
- Uplinking/downlinking of satellite TV channels permitted under policy guidelines of 2002 & 2005 which was amended in 2011



GROWTH OF THE SECTOR

Gross Value Added by Economic Activity at 2011-12 prices in Rs.crs.

Commu nication & Services related to Broadca sting	2011-12	2012-13	2013-14	2014-15	2015-16
	125930	134505	156031	176738	205069
% increase		6.8	16.0	13.3	16.0

Source: National Accounts Statistics



TELEVISION REACH IN INDIA

- TV viewing households – (183 million) 64% of total households of 286 million
- No. of Cable households 98.5 million
 - DTH households 52 million
 - HITS households 1.5 million
 - DD Free Dish around 24 million
- Internet users -40% of total population by 2018
- Increase use of smart phones-traditional TV viewing decreasing- non-linear modes of viewing increasing-among the younger generation.
- Digital mode of television viewing has increased but average revenue per user has not increased.



FDI POLICY IN BROADCASTING SECTOR

- 100% automatic entry route for teleports, DTH, MSOs, HITS, mobile TV, local cable operators, Up-linking of non-news and current affairs TV channels.
- Terrestrial broadcasting (FM Radio), Up-linking of news and current affairs TV channels- 49% govt route.
- FIPB approval for change of ownership

FDI Equity Inflows in US \$ million

Information & Broadcasting (including print media)	2013	2014	2015	2016	2017	Cumulative 2000-17
	576	221	666	1709	809	7072



RADIO PENETRATION IN INDIA

- Radio industry-market size of around 25.8 billion rupees in 2017
- Public broadcaster- AIR one of the largest networks in the world.
 - 469 broadcasting centres
 - 662 transmitters inclusive of MW, SW and FM.
- Broadcast coverage-
 - FM signal -39% by area and 52% by population
 - MW signal- 90.65% by area and 98.40% by population.
- AIR broadcasts
 - 23 languages and 146 dialects.
 - 609 news bulletins daily in 92 languages/dialects
- AIR FM
 - 18 FM stereo channels called FM Rainbow, 5 AIR FM Gold stations broadcast from the metros.
- AIR external broadcast
 - 16 foreign and 11 Indian languages covering more than 100 countries
- To improve transmission quality AIR is switching from analog to digital by adopting DRM technology (Digital Radio Mondiale)



RADIO PENETRATION IN INDIA- *ENTRY OF PRIVATE PLAYERS*

- In 1993 AIR sold airtime blocs on its FM channels to private operators who developed their own programme content.
- In July 1999 the first auction of 108 FM frequencies across India was announced, of which only 21 private FM radio channels became operational mainly in State capitals.
- In 2005 phase II of FM auction covered cities with a population of 3 lac & above and 243 pvt FM channels became operational in 86 cities including 21 channels of phase I.
- To further expand the reach of FM, in July 2011 phase III auction covering all cities with population of one lakh & above and 11 border cities having population less than one lac was announced. The auction was conducted in batches- 96 in 2015, 66 in 2016 were successfully auctioned.
- In December, 2017 e-auction of 683 channels in 236 cities has been cleared
- As of 31st Oct, 2017 320 private FM channels were operational across 26 States and 3 UTs.
- Completion of phase III auction will make private FM radio accessible to areas such as J&K, NER, LWE areas etc.



PUBLIC BROADCASTING - DOORDARSHAN

- **Present Network**

 - 67 Studio Centres- 39 Studio Centres digitized

 - 1108 terrestrial transmitters

 - Free to air DTH DD Free Dish

 - 34 satellite channels using DVB-S & DVB-S2 standards

- **Terrestrial mode coverage**

 - DD National channel-92% of population & 81% area

 - DD News- 49% of population & 26% area

- **34 satellite digital channels**

 - All India Channels 6

 - International Channel (DD India) 1

 - Regional Channels 16

 - State networks 11

- **DD Free Dish(FTA DTH) carrying capacity**104 TV Channels and 40 Radio Channels- presently 80 TV & 39 radio channels



PUBLIC BROADCASTING - DOORDARSHAN

Digital Terrestrial Television

- DD introduced DTT in 2003 using DVB-T2 standard for digitization which is in operation in 166 countries.
- DTT facilitates transmission of high quality multiple channels which can be received on a variety of devices like fixed TV, mobiles, laptop, tablets etc.
- 63 DTTs installed, digital transmission expected to cover about 44% population and 31% area
- DD is planning DTT transmitters at 630 locations to reach the present level of coverage and replace analog



MODERNIZATION ACTIVITIES IN DOORDARSHAN

- Setting up of New Earth Stations & modernization & up gradation of existing Earth Station
- New Digital Satellite News Gathering terminals at 9 locations
- Augmentation of technical facilities for 24x7 DD-ArunPrabha satellite channel from DDK Itanagar
- Procurement of 30000 DTH Sets for distribution in remote, tribal and border areas for reception of Doordarshan DTH signals. (2896 DTH Sets for NER)



MEASURES TO STRENGTHEN PUBLIC BROADCASTER-DOORDARSHAN

- Strengthening of sales and marketing teams of AIR & Doordarshan
- Offering turn-key solutions on media planning to Ministries/depts. for information dissemination of their social development schemes
- Sharing of infrastructure such as towers, studios, auditoria etc.
- Business Model for DTT network is being framed to rope in private players to make commercial use of DTT network
- Tie-ups with e-commerce sites for better monetization of AIR/DD archive products



MEASURES TO STRENGTHEN PUBLIC BROADCASTER- DOORDARSHAN CONTD/-

- Explore collaborating with corporates having CSR Funding
- Content improvement based on best practices followed by Public Broadcasters globally
- Restructuring of Doordarshan to separate its Creative, Sourcing, & Marketing/Sales functions from Operational/Administrative functions.
- Developing a new business model for DD Free Dish based on a revenue sharing basis with interested partners.



MEASURES TO STRENGTHEN PUBLIC BROADCASTER-ALL INDIA RADIO

- AIR mobile app- All India Radio Live available on Amazon's cloud based voice service Alexa
- AIR Video on Demand Service available through Echo device on Amazon platform



MANN KI BAAT-AIR

- Prime Minister's 'Mann Ki Baat' broadcast on All India Radio
- The programme is also repeat broadcast in 18 languages and 33 dialects including in English and Sanskrit.
- Viewership of this programme has increased and the govt has earned ad revenue of around Rs.10 crores 2015-2017.
- The programme through SW transmitters and internet is available to global listeners also.



MISSION DIGITIZATION OF CABLE TV NETWORK

- Cable TV Digitization was implemented in four phases. Sun-set of the Cable TV Digitization expired on 01.4.2017.
- Only 87% Set Top Boxes have been seeded so far because Phase IV covers small town, rural areas, remote and hilly inaccessible areas where laying of optical fibre is not feasible.
- To achieve full implementation of Cable TV Digitization “Mission Digitization” would continue till 2020.



FUTURE OF BROADCASTING

- Proportion of Linear (Traditional) TV viewing may undergo a change
- More of live streaming through
OTT (Over the Top)- Hotstar, Netflix, Voot
IPTV (investment in bandwidth and infrastructure)
- Linear Television viewing to continue in rural areas, poor broadband connectivity, border areas
- Live sports and News continue to be popular on linear mode
- Providing broadband connectivity to all Gram Panchayats would increase the demand for television viewing over smartphones even in rural areas.
- Family viewing may change to spilt viewing of different programs by different members of the family
- Advertisements would be targeted to audiences on one-to-one basis.



Thank You

