



Telecom Regulatory Authority of India



Consultation Paper
on
Tariff related issues
for
Broadcasting and Cable services

16th August, 2019

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Written comments on the Consultation Paper are invited from the stakeholders by 16th September 2019. Counter comments, if any, may be submitted by 30th September 2019. Comments and counter comments will be posted on TRAI's website www.trai.gov.in. The comments and counter comments may be sent, preferably in electronic form to, Shri Arvind Kumar, Advisor (B&CS), Telecom Regulatory Authority of India, on the e-mail: arvind@traigov.in or vk.agarwal@traigov.in.

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Chapter I

Introduction

- 1.1 Telecom Regulatory Authority of India (TRAI), over the years, has been regulating Telecom & Broadcasting Services, mainly driven by the objective of protecting the interests of service providers and consumers. TRAI has played an important role in shaping the regulatory and policy framework governing the sector by making timely interventions through regulations, tariff orders, directions and recommendations to the Government.
- 1.2 In the light of complete digitization in the cable sector, TRAI on 3rd March, 2017 notified the new regulatory framework to ensure orderly growth of the sector after due consultative process that lasted more than one and a half year. The framework comprises of:
- i. The Telecommunication (Broadcasting and Cable) Services (Eighth)(Addressable Systems) Tariff Order, 2017 (Tariff Order 2017)
 - ii. The Telecommunication (Broadcasting and Cable) Services Interconnection (Addressable Systems) Regulations, 2017 (Interconnection Regulations, 2017)
 - iii. The Telecommunication (Broadcasting and Cable) Services Standards of Quality of Service and Consumer Protection (Addressable Systems) Regulations, 2017 (QoS Regulations, 2017)
- 1.3 The following diagram depicts value chain in provisioning of channels under the new regulatory framework for the Broadcasting Service:

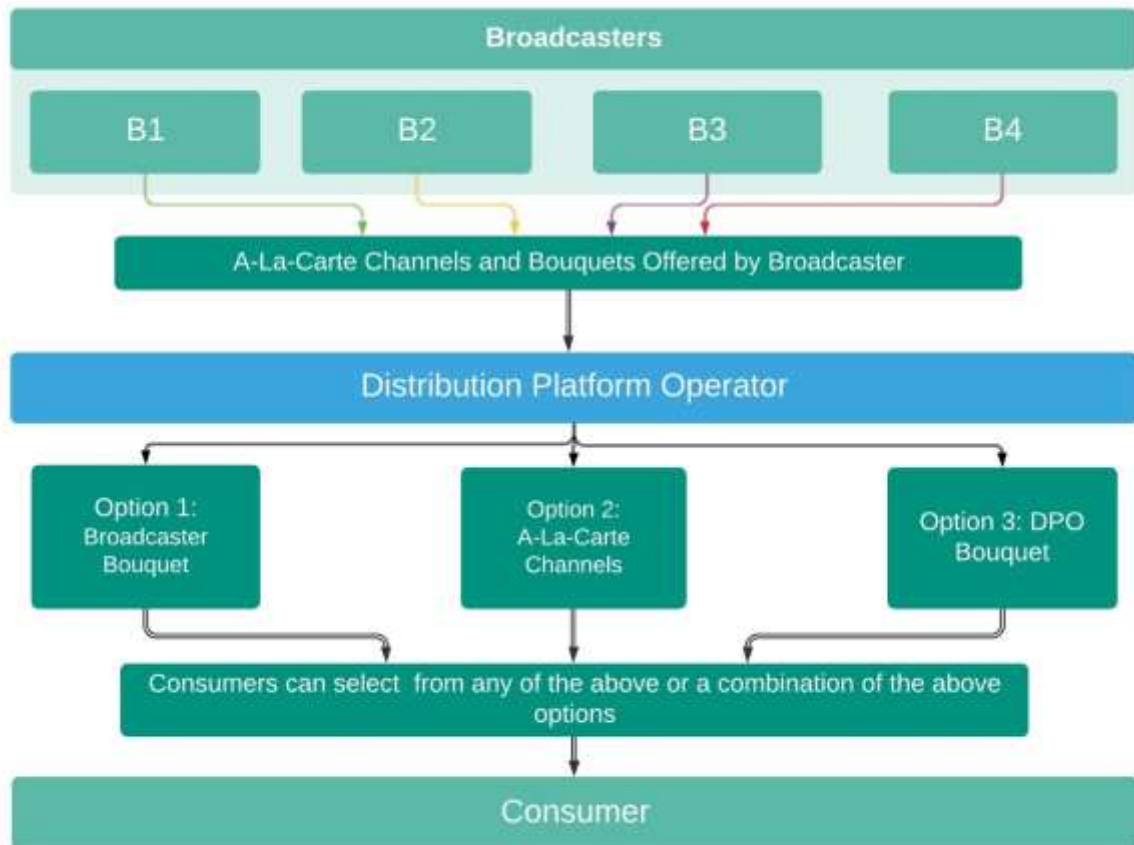


Figure 1.1: Broadcasting value chain for provisioning of channels

- 1.4 In the new framework broadcasters are required to declare maximum retail price (MRP) of their a-la-carte pay channels for subscribers. Broadcasters also form bouquets of their pay channels and declare the MRP of such bouquets payable by a subscriber. Broadcasters offer their channels on a-la-carte basis and bouquets of channels formed by them to Distribution Platform Operators (DPOs). DPOs in turn offer a-la-carte channels and bouquets formed by broadcasters without any alteration to their subscribers. DPOs are also permitted to form bouquets of pay channels of one or more broadcasters and offer them to their subscribers. DPOs are also free to declare DRP of the channels and bouquet of channels formed by broadcasters. A subscriber is free to choose any channel on a-la-carte basis or bouquet of channels formed by the broadcasters, or bouquet of channels formed by DPOs or a combination thereof as per his/her choice.

- 1.5 The Authority in third proviso to clause 3 (3) of the Tariff Order 2017, prescribed that MRP of a bouquet formed by a broadcaster should not be less than 85% of the sum of MRPs of the a-la-carte pay channels forming part of that bouquet. As pricing of TV channels have been left to the broadcasters, there must be some inherent checks to ensure that broadcasters do not price their a-la-carte channels very high and push channels through bouquets by offering huge discount reducing a-la-carte choice. The primary reason for prescribing the maximum permissible discount in formation of the bouquet was to enable customer choice through a-la-carte offering and prevent skewed a-la-carte and bouquet pricing. This was also intended to check pushing of those channels that are not the original choice of the subscribers and the available capacity of distribution platforms should not get choked with intention to reduce competition at broadcasters' level.
- 1.6 Writ Petitions were filed by some Service Providers in the Hon'ble Madras High Court challenging inter-alia the TRAI's power to regulate tariffs and also the quantum of discount that can be that can be offered on sum of prices of a-la-carte channels forming part of the bouquets. Hon'ble Court in judgement dated 02.03.2108 upheld TRAI's powers to regulate tariffs for broadcasting services; but held that the capping of maximum discount on sum of prices of a-la-carte channels forming part of bouquets at 85% as provided for in the third proviso to clause 3(3) of the Tariff Order 2017, is arbitrary and un-enforceable.
- 1.7 The High Court judgment was taken to Supreme Court in appeal by the service providers. Hon'ble Supreme Court on 30th October 2018 dismissed the appeals, upholding the power of TRAI to regulate tariffs for broadcasting services. The Hon'ble Supreme Court's gave no specific decision on the issue of capping on discount on sum of prices of a-la-carte channels forming part of the bouquets as provided for in

third proviso to clause 3 (3) of the Tariff Order, as the issue was not before the Hon'ble Supreme Court for adjudication, Therefore, the Authority felt it appropriate not to enforce the capping on discount on sum of prices of a-la-carte channels forming part of the bouquets at 85%, as provided for in the third proviso to clause 3(3) of the Tariff Order 2017.

1.8 Subsequently TRAI had filed SLP before the Hon'ble Supreme court for clarification on the third proviso to Clause 3(3) of the Tariff Order, 2017 related to capping of prices of bouquets at 85% of the sum of a-la-carte prices of TV channels which was declared arbitrary and unenforceable by the Hon'ble High Court of Madras. The Hon'ble Supreme Court vide its order dated 03.01.2019 dismissed the SLP as withdrawn by the TRAI.

1.9 As mentioned in para 1.7 above, no specific decision on the issue of capping on discount as provided for in third proviso to clause 3 (3) of the Tariff Order, was given by the Hon'ble Supreme Court, since it was not an issue for adjudication in the appeals under consideration. However, it is quite relevant to note that the judgment of the Hon'ble Supreme Court, had touched upon the issue of capping of discounts on bouquets by broadcasters in detail. The Hon'ble Court considered the rationale behind the price cap and the need for it in order to prevent perverse pricing of bouquets vis a vis individual pay channel. Attention is invited to Para 37 of the judgment, which is reproduced below:

37. It can thus be seen that both the Regulation as well as the Tariff Order have been the subject matter of extensive discussions between TRAI, all stake holders and consumers, pursuant to which most of the suggestions given by the broadcasters themselves have been accepted and incorporated into the Regulation and the Tariff Order. The Explanatory Memorandum shows that the focus of the Authority has always been the provision of a level playing field to both broadcaster and subscriber. For example, when high discounts are offered for bouquets that are offered by the broadcasters, the effect is that

subscribers are forced to take bouquets only, as the a-la-carte rates of the pay channels that are found in these bouquets are much higher. This results in perverse pricing of bouquets vis-à-vis individual pay channels. In the process, the public ends up paying for unwanted channels, thereby blocking newer and better TV channels and restricting subscribers' choice. It is for this reason that discounts are capped. While doing so, however, full flexibility has been given to broadcasters to declare the prices of their pay channels on an a-la-carte basis. The Authority has shown that it does not encroach upon the freedom of broadcasters to arrange their business as they choose. Also, when such discounts are limited, a subscriber can then be free to choose a-la-carte channels of his choice. Thus, the flexibility of formation of a bouquet, i.e., the choice of channels to be included in the bouquet together with the content of such channels, is not touched by the Authority. It is only efforts aimed at thwarting competition and reducing a-la-carte choice that are, therefore, being interfered with.....”

Need to Review:

- 1.10 In all fairness, it was expected of the broadcasters to take a holistic view of the matter and give due consideration to the observations of while pricing their bouquets and channels. Reasonable expectations were cast upon the Broadcasters that they should exercise the flexibility granted to them in a fair and responsible manner with due consideration to the rights and aspirations of the consumers. However, this appears to be not the case. The Authority has observed from the tariff declared by the broadcasters under new regulatory framework that broadcasters are offering bouquets at a discount of upto 70% of the sum of a-la-carte rates of pay channels constituting those bouquets. It indicates that in absence of any restriction on the discount on the offering of bouquets, broadcasters are making prices of a-la-carte channels illusory thereby impacting the a-la-carte choice of channels by consumers and giving huge discounts on bouquets to push even those channels which are not the choice of subscribers.

- 1.11 Further, no restriction on number of channels has created another problem wherein broadcasters and DPOs are offering too many bouquets. TRAI has observed that too many bouquets are formed by the broadcasters/Distributors and many of them contain the same set of channels, with very few changes. This too many bouquets are not only creating confusion among consumers but also becoming a hurdle in choosing the channels by consumers.
- 1.12 TRAI had extensive interactions with the stakeholders including consumers and consumer organizations, at various forums, wherein stakeholders have also raised certain issues such as variable NCF for different regions, discount on long term subscription, DD channels as part of one hundred channels etc. These issues are also significant in terms of consumer welfare and considered it appropriate to obtain the views of the stakeholders on it.
- 1.13 In order to deliberate upon above issues that have surfaced post implementation of the new regime, this consultation paper has been floated seeking stakeholders' views. This paper primarily discusses the relationship between prices declared by broadcasters for a-la-carte channels and bouquet of channels and capping the number of bouquets etc. Besides, the paper also discusses certain other issues raised by the consumers during the extensive interactions, TRAI had with the stakeholders in the process of implementation of the new regime.
- 1.14 The Interconnection Regulation 2017, the QoS Regulation 2017 and the Tariff Order 2017 have been separately under challenge before Hon'ble Delhi High Court by some other stakeholders through writ petitions WP (C) Nos. 4091/ 2017, 4135/ 2017, 6915/2017 and 7017/ 2017. The Hon'ble High Court of Delhi in its common order dated 29th August 2017, directed as under:

“upon pronouncement of the judgement by the High Court of Madras, the respondents shall inform the petitioners of the outcome

in the judgement and shall inform this court as well before effectuating the orders.”

- 1.15 In compliance to the direction of the Hon'ble High Court of Delhi, in its order dated 29th August 2017, the Authority has filed an affidavit to this effect on 3rd July 2018 before the Hon'ble Court. The matter is still pending before the court.
- 1.16 Chapter II provides a brief history of evolution of tariff framework of broadcasting and cable services for better appreciation of the events leading to the notification of the new regulatory framework in March 2017. Chapter III discusses issues related to pricing, formation of bouquet and discounts. Chapter IV deliberates on certain issues raised by consumers in their interactions with Authority during and post implementation of the new regime and chapter V summarizes the issues for consultation.

Chapter II

Evolution of Tariff Orders for Broadcasting and cable services

- 2.1 Regulation of broadcasting and cable TV services was entrusted to the Telecom Regulatory Authority of India (TRAI) in 2004. Since then, TRAI has taken several initiatives for regulating the sector in exercise of both its recommendatory and regulatory powers vested with it as per the TRAI Act, 1997. In order to regulate the tariff for the broadcasting and cable TV services sector, TRAI has been issuing tariff orders for the TV sector consisting of the broadcasters, Distribution Platform Operators (DPOs) and TV subscribers.
- 2.2 Initially, each broadcaster had limited number of channels. Subsequently, broadcasters increased number of their channels. Some of these channels became very popular, often called driver channels, with the consumers. Some broadcasters launched new channels which usually broadcast programs already available on driver channels. The analog system prevailing at that point of time have limited capacity to carry maximum 50-60 channels. These broadcasters occupied major portion of the limited bandwidth of the analog cable networks and thus killed the competition artificially for new entrants. As a result, majority of pay channels including driver channels belonged to a limited number of broadcasters.
- 2.3 A lot of problems were being faced in cable TV sector which were hampering the growth and also not meeting the consumer expectations. In order to examine these issues, a committee of stakeholders was constituted under the chairmanship of Joint Secretary MIB. The committee identified the following issues:
- a) Under-declaration of subscriber base and addressability;
 - b) Provide consumer choice;
 - c) Improve Quality of service;

- d) Appropriately addressing affordability issues;
- e) Ensuring Tax compliances;

2.4 Subsequently, TRAI was entrusted the responsibility to regulate the broadcasting services and cable services sector in 2004. TRAI issued the first tariff order for cable TV services on 15th January 2004. A ceiling for charges payable by a cable subscriber to the cable operator, a cable operator to a Multi System Operator (MSO)/broadcaster and MSO to a broadcaster was specified as the charges prevalent as on 26thDecember 2003. In the case of retail tariff charged by MSOs/LCOs from subscribers, ceilings were based on the number of channels received, as well as the types of habitations (i.e., cities, towns, semi-urban areas, etc.).

2.5 Broadcasters with powerful driver channels succeeded to piggyback their not so popular TV channels with the driver channels in form of bouquets to MSOs/LCOs by offering deep discounts on bouquets as compared to a-la-carte channels, thus resorting to perverse pricing of bouquets vis-à-vis individual a-la-carte channels. Additional discounts were offered if MSOs/LCOs agreed to package all channels into their basic package and provide it to their maximum number of subscribers. The consumer pull for few driver channels made MSOs/LCOs apprehensive about the viability of their businesses in absence of such channels not being available on their platform. This resulted in large number of bundled channels being pushed to the subscribers as a bouquet, irrespective of their choice. The cost of unwanted channels was also passed on by the MSOs/LCOs to the consumers. Broadcasters also kept the prices of bouquets high as they suspected that there was under reporting of number of subscribers by MSOs/LCOs.

2.6 In order to consider issues regarding Cable TV regulation, TRAI in

2004 constituted a Committee consisting of representatives from the State Governments of Delhi, Tamil Nadu, West Bengal and Maharashtra and was chaired by Secretary, TRAI. The Committee considered various issues including Pricing of Pay channels, Bundling of channels, STBs, Advertisements and Gradual and voluntary introduction of STBs. The Committee in its report observed the following:

- At present pay channels offer a package deal to the MSOs and in turn the MSOs transfer the same to subscriber. Even in CAS areas compared to a bouquet of channels offered by the broadcaster, an individual channel is priced in such a manner that the subscribers do not have a real option to choose channels on a-la-carte basis. The committee decided that the issue needs to be regulated.
- The Committee also felt that in order to give effective choice to the consumer there should be a cap on the bulk discount (i.e. the discount if the entire bouquet is bought as against the sum of prices of the individual channels) being offered on the bouquet. Similarly a cap should also be considered for the ratio of individual channel price to the overall bouquet price.

2.7 On introduction of Conditional Access System (CAS) in four metro cities, the Authority notified The Telecommunication (Broadcasting and Cable) Services (Third) (CAS Areas) Tariff Order, 2006 on 31.08.2006 wherein the maximum a-la-cart prices of the pay channels were to be declared by the broadcasters and a ceiling of Rs. 5/- per channel was prescribed.

2.8 TRAI in its tariff amendment order dated 4th October 2007, mandated the broadcasters to provide their channels on a-la-carte basis to the MSOs/LCOs as per their request. In addition, broadcasters were also permitted to provide channels on bouquet basis. However, in order to

ensure that an effective a-la-carte choice was available to MSOs/LCOs without being handicapped by perverse pricing of bouquets, the Authority also mandated a relationship, in the form of following 'Twin Conditions', between a-la-carte rates of TV channels forming part of bouquet and bouquet rates provided by the broadcasters at the wholesale level:

- a) the sum of the a-la-carte rates of the pay channels forming part of such a bouquet shall in no case exceed one and half times of the rate of that bouquet of which such pay channels are a part; and
- b) the a-la-carte rates of each pay channel, forming part of such a bouquet, shall in no case exceed three times the average rate of a pay channel of that bouquet of which such pay channel is a part.

2.9 Though the broadcasters were mandated to offer their channels on a-la-carte basis to MSOs/LCOs by the tariff amendment order dated 4th October 2007, they continued to provide channels on bouquet basis to MSOs/LCOs with skewed commercial conditions in favor of bouquets. As a result, MSOs/LCOs were denied the desired flexibility of providing channels on a-la-carte basis to subscribers.

2.10 In order to provide benefits of the Digital Addressable Systems (DAS) to the consumers, TRAI in its Tariff Order dated 21st July 2010 mandated Distribution Platform Operators (DPOs) to offer all the pay TV channels available on their platform on a-la-carte basis. In addition, DPOs were also permitted to offer bouquets or a combination thereof. The Tariff Order 2010 was not applicable to cable TV networks as these networks were analog at that time.

2.11 In view of limitations of analog TV distribution platforms and the advantages of digital addressable platforms, TRAI initiated efforts

towards digitalization of cable TV distribution networks. TRAI, in August 2010, recommended to the government that the process of digitisation may be executed in four phases for smooth implementation. It was expected that digitization will bring addressability enhance the capacity of platforms to carry sufficient TV channels, provide choice to the consumers while better compliance to tax collection.

- 2.12 During discussions in the Parliament on the motion for consideration of the Cable Television Networks (Regulation) Amendment Bill, 2011, the then Minister of Information and Broadcasting, inter-alia stated:

*“Digitalization will carry with it a large number of benefits for every stakeholder. The most important benefit flows to the common man, who is the most important stakeholder of course. **Digitalization will enable the consumer to exercise a la carte selection of channels, get better picture quality, access to Value Added Services like Triple Play, Video on Demand, etc.** For the Broadcasters and Cable Operators, who are both Service Providers, the system will ensure transparency, fairness and allow complete addressability, resulting in increase in subscription revenue and reducing their dependence on TRPs as also advertising revenue.”(emphasis provided)*

- 2.13 The Government amended the Cable TV Act on 25thOctober 2011 and the rules made thereunder on 28th April 2012 which led to the implementation of the Digital Addressable Cable TV System in India. The digitalization process has already been completed in entire country.

- 2.14 While prescribing a mandatory a-la-carte offering of pay TV channels, the Authority had initially decided to adopt a light touch approach. It therefore did not mandate any conditions on the retail pricing of the a-la-carte channels vis-à-vis the pricing of bouquets of which these channels formed a part.

- 2.15 Subsequently, on examining the prevalent market conditions, it was observed that though the DPOs were allowed to package and price the offerings as bouquets in addition to offering them on a-la-carte basis, the uptake of channels on a-la-carte basis remained negligible as compared to the bouquet subscriptions. Analysis yielded that the prime reason for such poor uptake of a-la-carte channels was that the a-la-carte rates of channels were disproportionately high as compared to the bouquet rates and further, there was no dynamic relationship between these two rates.
- 2.16 TRAI amended the Tariff Order 2010 in April 2012 to include cable TV networks. In order to enable consumer choice through a-la-carte offering and prevent skewed a-la-carte and bouquet pricing, TRAI, in the Tariff (Amendment) Order 2012, extended the 'Twin Conditions' to the retail level pricing also. The intent while prescribing the 'Twin Conditions' was basically to link the a-la-carte rates of channels to the bouquet rates, so that whenever the bouquet rates are reduced, the a-la-carte rates of channels are also proportionately reduced in order to ensure effective choice to the consumer in the form of a-la-carte rates of channels. The Authority was conscious that while doing so, ingenuity and flexibility should be allowed to the DPOs for pricing and packaging their offerings at the retail level.
- 2.17 TRAI issued the draft Telecommunication (Broadcasting and Cable) Services (Fourth) (Addressable Systems) Tariff (Amendment) Order, 2015 on 30th September 2015 for seeking comments of stakeholders. After analyzing stakeholders' comment and its own analysis, on 28th December 2015, the Authority notified the Telecommunication (Broadcasting and Cable) Services (Fourth) (Addressable Systems) Tariff (Sixth Amendment) Order, 2015, wherein following 'Twin Condition' were prescribed:

- (a) the a-la-carte rate of a pay channel forming part of a bouquet shall not exceed two times its RIO rate offered by the broadcaster for addressable systems; and
- (b) sum of a-la-carte rates of all the channels in the bouquet shall not exceed three times the bouquet rate.

2.18 It was expected that implementation of these 'Twin Conditions' at retail level, would provide consumers better choice and freedom to exercise their option of channels but not implemented on ground as most of the wholesale deals between broadcasters and DPOs continued on bouquet basis.

2.19 Even after the above-mentioned tariff amendment order, a-la-carte choice of TV channels for subscriber remained illusory either because a-la-carte rates of TV channels were disproportionately high in comparison to bouquets which forces subscribers to opt for bouquets or they were simply denied the a-la-carte choice by distributors of television channels. The main reason for this cited by the DPOs was the economic un-viability as the wholesale a-la-carte rates of channels were too high and the bouquets were heavily discounted even to the extent of 90% of the sum of a-la-carte rates of channels. Even cursory glance at the data submitted to TRAI under Register of Interconnection Agreement Regulations and RIOs by broadcasters revealed that there was a huge difference between the rates declared in RIO and the rates at which actual deals were taking place in the market. This was even acknowledged by Hon'ble TDSAT in NSTPL judgment that actual deals were happening at much lower prices than that of RIO prices, rendering the RIO as a meaningless exercise. Even after the NSTPL judgment, the RIOs submitted by broadcasters continued to have unrealistically high a-la-carte rates and heavily subsidized bouquet rates. This forced DPOs to opt for bouquets for their economic survival and thus they were not offering a-la-carte choice of channels to the subscribers. Therefore, it was evident that

fruits of addressability had not been passed on to the subscribers and subscribers were not able to exercise their choice in subscribing to channels.

2.20 In 2016, TRAI initiated a comprehensive review of the prevailing regulatory framework, covering tariff, interconnection and quality of service, with the objective to create an enabling environment for orderly growth of the television broadcasting sector in the light of various developments related to technology, emergence of different distribution platforms, evolving business models and enhanced addressability across the platforms. Accordingly, TRAI issued consultation paper on “Tariff Issues related to TV services” on 29th January 2016. TRAI also issued consultation paper on “Interconnection framework for Broadcasting TV Services distributed through Addressable Systems” on 4th May 2016, and consultation paper on “Issues related to Quality of Services in Digital Addressable Systems and Consumer Protection” on 18th May 2016.

2.21 In order to maintain complete transparency while bringing change in existing regulatory framework, TRAI issued the draft Telecommunication (Broadcasting and Cable Services) (Eighth) (Addressable Systems) Tariff Order, 2016 (draft TTO) and the draft Telecommunication (Broadcasting and Cable) Services Standards of Quality of Service and Consumer Protection (Addressable Systems) Regulations, 2016 on 10th October 2016 seeking comments of the stakeholders. TRAI also issued the draft Telecommunication (Broadcasting and Cable Services) Interconnection (Addressable Systems) Regulations, 2016 on 14th October 2016.

2.22 M/s Vijay Television Private Limited & M/s Star India Private (Nos 44126 of 2016 and 44127 of 2016) challenged the draft Interconnection Regulations and the draft tariff order before the High Court of Judicature at Madras as ultra vires of TRAI Act.

- 2.23 TRAI notified the Telecommunication (Broadcasting and Cable Services) (Eighth) (Addressable Systems) Tariff Order, 2017, the Telecommunication (Broadcasting and Cable Services) Interconnection (Addressable Systems) Regulations, 2017 and the Telecommunication (Broadcasting and Cable) Services Standards of Quality of Service and Consumer Protection (Addressable Systems) Regulations, 2017 on 3rd March 2017.
- 2.24 On 02.03.2018, the two-member Division Bench of Hon'ble Madras High Court delivered a split judgment on the Writ petitions filed by Ms Vijay and M/s Star. One Judge allowed the writ petitions and struck down many provisions of the Interconnection Regulations 2017 and Tariff Order 2017, including the third proviso to clause 3(3) of the Tariff Order 2017, on the ground that these provisions regulate the content of the programmes of TV channels of the broadcasters and therefore, ultra vires the TRAI Act.
- 2.25 The Hon'ble Chief Justice of the High Court, the other judge in the Division Bench dismissed the writ petitions and upheld the powers of TRAI to issue the Interconnect Regulations, 2017 and Tariff Order, 2017. However, that order contained a finding that the capping of price of bouquets at 85% of the sum of a-la-carte price of the channels, as provided for in the third proviso to clause 3(3) of the Tariff Order 2017, is arbitrary and un-enforceable.
- 2.26 This split verdict, was referred to a third judge of the High Court of Madras to adjudicate on issues of difference. The Hon'ble Judge in his judgement dated 23.05.2018, while concurring with the decision dated 02.03.2018 of the Hon'ble Chief Justice of the High Court of Madras, dismissed the writ petitions and upheld the powers of TRAI to frame the Interconnection Regulations and the Tariff Order under the TRAI Act. However, the Hon'ble Judge declined to consider the

validity of capping on discount as provided for in the third proviso to clause 3(3) of the Tariff Order 2017 observing that the reference court was concerned with the views expressed by the Hon'ble Judges on the points of difference only.

- 2.27 The judgements dated 02.03.2018 and 23.05.2018 of the Hon'ble High Court of Madras were challenged by M/s Star India Pvt. Ltd and M/s Vijaya TV by way of filing SLPs before the Hon'ble Supreme Court. The Hon'ble Supreme Court vide its judgement dated 30.10.2018 dismissed the SLPs and held that the Interconnection Regulations, 2017 and Tariff Order, 2017 are intra vires the TRAI Act.
- 2.28 The Hon'ble Supreme Court, at para 36 and 37 of its judgement dated 30.10.2018, which are reproduced below, had extensively dealt with the issue of capping of discounts on the price of bouquet vis-a-vis the sum of a-la carte price of channels.

“36. Pursuant to these and other inputs, TRAI has in its explanatory memorandum given reasons for the Tariff Order as follows:-

“64. The Authority has noted that at present the uptake of channels on a-la-carte basis is negligible as compared to the bouquet subscriptions. Analysis yields that the prime reason for such poor uptake of a-la-carte channels is that the a-la-carte rates of channels are disproportionately high as compared to the bouquet rates and further, there is no well defined relationship between these two rates. As per data available with TRAI, some bouquets are being offered by the distributors of television channels at a discount of upto 80%-90% of the sum of a-la-carte rates of pay channels constituting those bouquets. These discounts are based on certain eligibility criteria/conditions to be fulfilled by the distributor of television channels in order to avail those discounts from broadcasters. Such high discounts force the subscribers to take bouquets only and thus reduce subscriber choice. As a result, while technically, a-la-carte rates of channels are declared, these are illusive and subscribers are left with no choice but to opt for bouquets. Bouquets formed by the broadcasters contain only few popular channels. The distributors of television channels are often asked to take the entire bouquet as otherwise they are denied the popular channels altogether or

given such popular channels at RIO rates. To make the matters worse, the distributors of television channels have to pay as if all the channels in the bouquet are being watched by the entire subscriber base, when in fact only the popular channels will have high viewership. In such a scenario, at the retail end, the distributors of television channels somehow push these channels to maximum number of subscribers so as to recover costs. This marketing strategy based on bouquets essentially results in 'perverse pricing' of bouquets vis-à-vis the individual channels. As a result, the customers are forced to subscribe to bouquets rather than subscribing to a-la-carte channels of their choice. Thus, in the process, the public, in general, end up paying for "unwanted" channels and this, in effect, restricts subscriber choice. Bundling of large number of unwanted channels in bouquets also result in artificial occupation of distributors' network capacity. This acts as an entry barrier for newer TV channels.

65. In order to facilitate subscribers to exercise their options in line with intention of lawmakers to choose individual channels, in the new framework the broadcasters will declare to customers/subscribers the MRP of their a-la-carte channels and bouquets of pay channels. In order to ensure that prices of the a-la-carte channels are kept reasonable, the maximum discount permissible in formation of a bouquet has been linked with the sum of the a-la-carte prices of the of pay channels forming that bouquet. A broadcaster can offer a maximum discount of 15% while offering its bouquet of channels over the sum of MRP of all the pay channels in that bouquet so as to enable customer choice through a-la-carte offering and also prevent skewed a-la-carte and bouquet pricing (refer example 1). The bouquet(s) offered by the broadcasters to subscribers shall be provided by the distributors of television channels to the subscribers without any alteration in composition of the bouquet(s). In case a broadcaster feels that more discount can be provided in formation of the bouquet, it indirectly means that a-la-carte prices at the first stage has been kept high and there is a need to revise such a-la-carte prices downwardly. Full flexibility has been given to broadcasters to declare price of their pay channels on a-la-carte basis to correct such situations, if it may come.

66. Some stakeholders are of the opinion that limiting the discount to subscribers while forming bouquets is anti subscriber. In this regard, while the Authority wants to facilitate the availability of a-la-carte choice to customers/subscribers, it does not intend to encroach upon the freedom of broadcasters and distributors to do business. During the discussions in the Parliament on the motion for consideration of the Cable Television Networks (Regulation) Amendment Bill, 2011, the then Minister of Information and Broadcasting emphasised the need to establish a system for subscribers to choose a-la-carte channels of choice. The Authority has also made several attempts in this regard, but for one or the

other reason could not succeed. Here it is important to understand that the Authority has not been able to do pricing of channels in the absence of pricing of content. Present trends indicate that majority of channels are priced much below the prevailing ceiling, but higher ceilings were prescribed to give flexibility to broadcasters to monetise their channels and freedom to do business. Further, different channels even in the same genre may have varying cost of production and potential to monetise, but within the framework. A broadcaster may price even non-driver channels at a much higher value that they can command. Non-discovery of reasonable price of a channel in a market is one of the constraints that can be manipulated and misused to price a channel in a-la-carte from which is illusionary. Such high a-la-carte prices permits broadcasters/distributors to provide high discounts to push non-drivers channels in form of bouquets to the subscribers while reducing the probability of choosing the a-la-carte channels of choice as required by the lawmakers in the Parliament. The possibility to forcing bouquets over a-la-carte choice by using higher discounts can be further understood by following example, where a broadcaster has a total of 35 pay channels out of which only 5 are driver channels:

Channel	Discount 75%	Discount 60%	Discount 45%	Discount 30%	Discount 15%
Channel 1 a-la-carte price	19	19	19	19	19
Channel 2 a-la-carte price	10	10	10	10	10
Channel 3 a-la-carte price	12	12	12	12	12
Channel 4 a-la-carte price	5	5	5	5	5
Channel 5 a-la-carte price	4	4	4	4	4
Sum of a-la-carte prices of 5 driver pay channels	50	50	50	50	50
Sum of a-la-carte prices of 30 non-driver pay channels (@ Re 1)	30	30	30	30	30
Total price of 35 a-la-carte pay channels	80	80	80	80	80
Price of bouquet of 35 pay channels (with discount on sum of a-la-carte prices)	20	32	44	56	68

The above table clearly indicates that in case the amount of discount offered by the broadcaster, over the sum of a-la-carte prices of pay channels, while forming the bouquet of those pay channels is very high (75%), the price of bouquet becomes much lower than the sum of a-la-carte prices to the extent that it is almost equal to a-la-carte price of one driver channel. Such amount of discount is anti customer/subscriber as it discourages a-la-carte selection of channels. As the amount of discount on formation of bouquet decreases, the difference between the prices of bouquet and the sum of a-la-carte prices also decreases. In case the amount of discount is fixed at 15%, the price of bouquet becomes higher than the sum of a-la-carte prices of driver channels; thereby encouraging a subscriber to choose a-la-carte channels of his choice.

67. In the present regulatory framework incidences have come to the knowledge where discount upto 90% on the declared RIO prices has been given by broadcasters. Obviously such efforts kill competition and reduce a-la-carte choice which is anti-subscriber. Accordingly, the Authority has prescribed a discount of 15% to be provided by broadcasters at wholesale level and further 15% to be provided by distributors at retail level. The net effect to subscribers at retail level will be a discount of approximately 30% on the bouquets of channels. Therefore flexibility of formation of bouquet has been given to broadcasters and MSOs both to such an extent that total permissible discount does not kill the a-la-carte choice. The Authority has been careful in prescribing a framework which does not encourage non-driver channel to be pushed to subscribers against their choice. Non-driver channels which are provided as part of bouquets not only kill choice of the ala-carte channels but also eat away the channel carrying capacity available with distributors which may result in artificial capacity constraints at distribution platforms for launch of new/competitive channels. Such restrictions are anti-subscriber and have to be carefully handled. Accordingly, the Authority has consciously decided the present framework of prescribing relationship between a-la-carte and bouquet prices to protect interest of customers/viewers and as well as those of service providers. However, the Authority will keep a watch on the developments in the market and may review the maximum permissible discount while offering a bouquet, in a time period of about two years.

68. A broadcaster is free to offer its pay channels in the form of bouquet(s) to customers. While subscribing to bouquet, a customer may not be aware of the price of each channel forming the bouquet. Abnormal high price of a pay channel may result in higher price of a bouquet leading to adverse impact on

subscribers' interests. It is an established fact that bundling of channels complicates and obscures their pricing. Prices are obscured because subscribers do not always understand the relationship between the bundle price and a price for each component. However, the bundling of channels offers convenience to the subscribers as well as services providers in subscription management. Keeping in view these realities and to protect the interests of subscribers, the Authority has prescribed a ceiling of Rs. 19/- on the MRP of pay channels which can be provided as part of a bouquet. Therefore, any pay channel having MRP of more than Rs. 19/- cannot become part of any bouquet. The amount of Rs. 19/- has been prescribed keeping in view the prevailing highest genre wise ceilings of Rs. 15.12 for all addressable systems between broadcaster & DPOs at wholesale level and further enhancing it 1.25 times to account for DPOs distribution fee. Broadcasters also have complete freedom to price their pay channels which do not form part of any bouquet and offered only on a-la-carte basis. Similar conditions will also be applicable to DPOs for formation of the bouquets. However, the Authority will keep a watch on the developments in the market and may review the manner in which a channel can be provided as part of a bouquet, in a time period of about two years.”

37. It can thus be seen that both the Regulation as well as the Tariff Order have been the subject matter of extensive discussions between TRAI, all stake holders and consumers, pursuant to which most of the suggestions given by the broadcasters themselves have been accepted and incorporated into the Regulation and the Tariff Order. The Explanatory Memorandum shows that the focus of the Authority has always been the provision of a level playing field to both broadcaster and subscriber. For example, when high discounts are offered for bouquets that are offered by the broadcasters, the effect is that subscribers are forced to take bouquets only, as the a-la-carte rates of the pay channels that are found in these bouquets are much higher. This results in perverse pricing of bouquets vis-à-vis individual pay channels. In the process, the public ends up paying for unwanted channels, thereby blocking newer and better TV channels and restricting subscribers' choice. It is for this reason that discounts are capped. While doing so, however, full flexibility has been given to broadcasters to declare the prices of their pay channels on an a-la-carte basis. The Authority has

shown that it does not encroach upon the freedom of broadcasters to arrange their business as they choose. Also, when such discounts are limited, a subscriber can then be free to choose a-la-carte channels of his choice. Thus, the flexibility of formation of a bouquet, i.e., the choice of channels to be included in the bouquet together with the content of such channels, is not touched by the Authority. It is only efforts aimed at thwarting competition and reducing a-la-carte choice that are, therefore, being interfered with.....”

2.29 Subsequent to the judgement dated 30.10.2018, TRAI received several representations from various stakeholders pointing out that in light of the findings of the Hon’ble Supreme Court in its judgment dated 30.10.2018, the findings of the Hon’ble Chief Justice of the Madras High Court holding the capping of discounts as per the third proviso to clause 3(3) of the Tariff Order 2017 as arbitrary and not enforceable, are not sustainable and cannot be given effect to.

2.30 In the meanwhile, M/s Fastway Transmission Pvt. Ltd., a MSO, filed an appeal (No. 1/2018) before the Hon’ble TDSAT raising the issue of non-compliance of the third proviso to clause 3(3) of the Tariff Order by the broadcasters. It was contended that the said provision is enforceable in light of the findings of the Hon’ble Supreme Court in its judgement dated 30.10.2018, and therefore, TRAI may be directed to enforce the said provision by the defaulting broadcasters. The Hon’ble TDSAT by its order dated 29.11.2018, disposed of the matter in view of assurance given by the Authority that it is seized of the issues arising from representations including that of the M/s Fastway Transmission Pvt. Ltd. and is likely to take a decision within a week.

2.31 Therefore, TRAI filed an SLP before the Hon’ble Supreme court for clarification on the third proviso to Clause 3(3) of the Tariff Order, 2017 related to capping of prices of bouquets at 85% of the sum of a-la-carte prices of TV channels which was declared arbitrary and unenforceable by the Hon’ble High Court of Madras. The Hon’ble

Supreme Court vide its order dated 03.01.2019 dismissed the SLP as withdrawn by the TRAI.

2.32 In view of the above, the present Regulatory framework has been implemented without any cap on permissible discount on sum of the A-la-carte channels forming part of the Bouquet. Through Tariff Order 2017 was implemented without cap on maximum permissible discount, it was expected that broadcaster would behave rationally and implement the main spirit of the framework which envisage “Choose what you want to watch”.

2.33 This sequence of events leading to the origin of the new tariff framework and conclusion of the related litigation, will help in analyzing conduct of the service providers, their pricing of channels thereby providing an insight into the extent to which the objectives of the new tariff regulatory framework, primely the consumer welfare, has been met.

Chapter III

Issues related to pricing, formation of bouquets and discounts

- 3.1 TRAI's new regulations/orders for the television and broadcasting sector gave freedom to consumers to select television channels they want to watch. To ensure proper implementation of the new framework, TRAI has made number of efforts such as series of meetings with Broadcasters, DPOs, publicity in electronic and news media, interactions with customer groups etc.
- 3.2 In the new framework of 2017, Broadcasters have been given complete freedom to price their TV channels while imposing certain conditions when bouquet is formed. The Authority wanted that broadcasters must concentrate to improve the quality of the TV channels and therefore no cap on pricing of individual TV channels was prescribed. The Authority while finalizing the new regulatory framework also noted that flexibility to broadcasters to decide retail price directly to the customers/ subscriber in the form of maximum retail price will provide flexibility to broadcasters to optimize the retail price of their pay channels in such a way that they can maximize their sum of revenue from subscription and advertisements. Relevant para from Explanatory Memorandum to Tariff Order 2017 is reproduced below:

“36. In order to understand the concerns of the broadcasters, it is important to understand the prevailing business model. Broadcasters get revenue from two streams viz advertisements from advertisers and subscription revenue from the subscribers. The advertisement revenue directly depends on the eye balls linked with a given program. Broadcasters during discussions on tariff issue pointed out that they lack control on pricing of channels to customers. They argued that since retail level pricing remains with the distributors of television channels and they offer their channels at wholesale level to distributors of television channels, any reduction in price at wholesale level does not get passed on to subscriber impacting their power to maximize advertisement

revenue. They requested the Authority to give them freedom so that broadcasters can maximize the revenue by optimizing their advertisement revenue and subscription revenue. Accordingly, the Authority, in the Tariff Order, has given flexibility to broadcasters to decide retail price directly to the customers/ subscriber in the form of maximum retail price of their channels, which is at present decided by the distributors of television channels. It will provide flexibility to broadcasters to optimize the retail price of their pay channels in such a way that they can maximize their sum of revenue from subscription and advertisements. This will also empower broadcasters to provide good quality channel or reduce the price of the channel if they so desire to enhance its viewership and get better advertisements revenues.”

3.3 In the new framework the broadcasters have to declare to customers the MRP of their a-la-carte channels and bouquets of channels. The Authority has given full freedom and business flexibility to the broadcasters to monetize their channels. In this regard, relevant para of Explanatory Memorandum of the Tariff order 2017 is reproduced below:

“52. The Authority has considered the views of stakeholders in this regard and is of the view that full freedom and business flexibility should be given to the broadcasters to monetize their channels. Accordingly, the Authority has decided not to prescribe genre wise ceiling on the MRP of pay channels. However, the Authority expects that the broadcasters will ensure complete transparency, non-discriminatory behavior and protection of subscriber interests while pricing their channels. It is also expected that broadcasters will price their channels reasonably and benefits of higher revenue realization due to digitisation and addressability shall be shared with subscribers also.”

3.4 The foremost issue, the Authority wanted to settle through the new tariff order, has been the sacrosanct right of consumers to choose and pay for only those channels they want to watch, as informed consumers. While finalizing the new regulatory framework the Authority noted that even after introduction of addressability the uptake of channels on a-la-carte basis was negligible as compared to the bouquet subscriptions. Analysis yielded that the prime reason for such poor uptake of a-la-carte channels was that the a-la-carte rates

of channels were disproportionately high as compared to the bouquet rates and further, there was no well-defined relationship between these two rates.

- 3.5 In fact, in the earlier framework, due to heavy discount in bouquet, consumers were confused and misled to find more illusory value for money in the bouquet. Further, some bouquets were being offered by broadcasters at a discount of upto 80% -90% of the sum of a-la-carte rates of pay channels constituting those bouquets. These discounts were based on certain eligibility criteria/conditions to be fulfilled by the DPOs. This indicated that a-la-carte rates of pay channels constituting the bouquet were kept exorbitantly high with a purpose to force the consumers to take bouquets only and reduce consumer choice.
- 3.6 Bouquets formed by the broadcasters contained only a few popular channels. The DPOs were often forced to take all channels of a broadcaster as otherwise they were denied the popular channels altogether. To make the matters worse, the DPOs had to pay as if all the channels were being watched by the entire subscriber base, when in fact only the popular channels might have high viewership. In such a scenario, at the retail end, the DPOs had no option but to somehow push all channels to maximum number of customers so as to recover costs. This marketing strategy based on forcing all the channels upon the subscribers through bouquets essentially resulted in 'perverse pricing' vis-à-vis the individual channels. Thus, in the process, the subscribers, in general, ended up paying for "unwanted" channels and this, in effect, restricted consumer choice. Bundling of large number of unwanted channels in bouquets also resulted in artificial occupation of distributors' network capacity.
- 3.7 The Authority in the new regulatory framework while giving flexibility to broadcasters to declare price of their channels on a-la-carte basis to consumers prescribed conditions that only those channels having

MRP less than or equal to Rs. 19/- can be put in a bouquet. It was expected that broadcasters will consider requirements of consumers and make bouquets of those channels which are demanded by the subscribers. However, post implementation analysis of new regulatory framework indicates that freedom given to broadcasters has been misused. The prices of the channels have been either increased or decreased in new regulatory framework when compared with their prices declared in old framework just to make these channels to be a part of the bouquets (refer Annexure I). This clearly indicates that focus of broadcasters have been to push as many channels as possible in the form of bouquets rather than giving choice to consumers on a-la-carte basis.

- 3.8 The Authority observed that a-la-carte rates of pay channels constituting the bouquet are kept high by the broadcasters with the intent to force the customers to subscribe bouquets only and kill consumer choice. One can say that while technically a-la-carte rates of channels are declared to comply with the regulatory provisions, these are illusive, and customers are left with no choice but to opt for bouquets. Bouquets formed by the broadcasters are generally a combination of a few popular channels and several not so popular channels. Huge discounts are offered on bouquet make them commercially appealing to consumers and making the a-la-carte choice of the popular channels a less attractive option.

Discount structure on Bouquet pricing:

- 3.9 Authority, in the Tariff Order 2017, prescribed a maximum discount of 15% that a broadcaster could offer while offering its bouquet of channels over the sum of MRP of all the channels in that bouquet. The prime reason for prescribing the maximum permissible discount in formation of the bouquet was to enable customer choice through a-la-carte offering and prevent skewed a-la-carte and bouquet pricing.

3.10 The relevant clause (Clause 3(3)) of the Telecommunication (Broadcasting and Cable) Services (Eighth) (Addressable Systems) Tariff Order, 2017 is reproduced below:

“(3) It shall be permissible for a broadcaster to offer its pay channels in the form of bouquet(s) and declare the maximum retail price(s), per month, of such bouquet(s) payable by a subscriber:

...

Provided further that the maximum retail price per month of such bouquet of pay channels shall not be less than eighty five percent of the sum of maximum retail prices per month of the a-la-carte pay channels forming part of that bouquet:

.....

3.11 However, as mentioned in chapter II, the Madras High Court had declared that the capping of price of bouquets at 85% of the sum of a-la-carte price of the channels, as provided for in the third proviso to clause 3(3) of the Tariff Order 2017, is arbitrary and un-enforceable. An appeal was filed in Hon’ble Supreme Court against the judgment of Hon’ble High Court of Madras in this matter.

3.12 Hon’ble Supreme Court in its judgment dated 30.10.2018 while considering the limited question of TRAI’s powers to regulate, inter-alia observed that subscribers are forced to take bouquets if the a-la-carte rates of the pay channels are much higher. Relevant para of the Judgement is reproduced below:

“37. It can thus be seen that both the Regulation as well as the Tariff Order have been the subject matter of extensive discussions between TRAI, all stake holders and consumers, pursuant to which most of the suggestions given by the broadcasters themselves have been accepted and incorporated into the Regulation and the Tariff Order. The Explanatory Memorandum shows that the focus of the Authority has always been the provision of a level playing field to both broadcaster and subscriber. For example, when high discounts are offered for bouquets that are offered by the broadcasters, the effect is that

subscribers are forced to take bouquets only, as the a-la-carte rates of the pay channels that are found in these bouquets are much higher. **This results in perverse pricing of bouquets vis-à-vis individual pay channels. In the process, the public ends up paying for unwanted channels, thereby blocking newer and better TV channels and restricting subscribers' choice. It is for this reason that discounts are capped. While doing so, however, full flexibility has been given to broadcasters to declare the prices of their pay channels on an a-la-carte basis.** The Authority has shown that it does not encroach upon the freedom of broadcasters to arrange their business as they choose. Also, when such discounts are limited, a subscriber can then be free to choose a-la-carte channels of his choice. Thus, the flexibility of formation of a bouquet, i.e., the choice of channels to be included in the bouquet together with the content of such channels, is not touched by the Authority. It is only efforts aimed at thwarting competition and reducing a-la-carte choice that are, therefore, being interfered with. Equally, when a ceiling of INR 19 on the maximum retail price of pay channels which can be provided as a part of a bouquet is fixed by the Authority, the Authority's focus is to be fair to both the subscribers as well as the broadcasters. INR 19 is an improvement over the erstwhile ceiling of INR 15.12 fixed by the earlier regulation which nobody has challenged. To maintain the balance between the subscribers' interests and broadcasters' interests, again the Authority makes it clear that broadcasters have complete freedom to price channels which do not form part of any bouquet and are offered only on an a-la-carte basis. As market regulator, the Authority states that the impugned Regulation and Tariff Order are not written in stone but will be reviewed keeping a watch on the developments in the market. We are, therefore, clearly of the view that the Regulation and the Tariff Order have been made keeping the interests of the stakeholders and the consumers in mind and are intra vires the regulation power contained in Section 36 of the TRAI Act. Consequently, we agree with the conclusion of the learned Chief Justice and the third learned Judge of the Madras High Court that these writ petitions deserve to be dismissed.”

3.13 While recognizing the need of prescribing the cap on the sum of the a-la-carte price of the channels forming part of the bouquet, Hon'ble Supreme Court did not pass any order in this regard and as such the decision of Hon'ble High court of Madras continue to prevail.

3.14 In view of the above, the present Regulatory framework has been

implemented without any cap on permissible discount on sum of the a-la-carte channels forming part of the Bouquet. Though Tariff Order 2017 was implemented without cap on maximum permissible discount, it was expected that broadcasting industry would own more responsibility and consider the concerns of the subscribers while declaring the prices of their channels, in a-la-carte and bouquet basis.

- 3.15 The Authority has analyzed the data submitted by the service providers post implementation of the new regime and has observed that the uptake of channels on a-la-carte basis still continue to be very less as compared to the bouquet subscriptions (**refer Annexure II**). Analysis yields that such poor uptake of a-la-carte channels could be attributed to the highly disproportionate a-la-carte rates of channels in comparison to bouquet rates. No well-defined relationship between these two rates exists in the new framework. As per data available with TRAI, some bouquets are being offered at a discount of upto 70% of the sum of a-la-carte rates of pay channels constituting these bouquets.
- 3.16 TRAI also analyzed the viewership of the channels forming part of most popular bouquets subscribed by subscribers to find out whether subscribers are viewing all the channels in such bouquets. The viewership data obtained from Broadcast Audience Research Council (BARC) shows that only few popular channels in such bouquets are viewed by subscribers and other channels have very insignificant viewer-ship in comparison, establishing the fact that not all channels in popular bouquets are equally wanted or watched by subscribers. Evidently, the formation of bouquets by broadcasters is not based on consumer demands. It is purely driven by the motive of earning higher revenues at the cost of consumers. Such bouquet formation has least consideration of consumer choice.

3.17 Figure 3.1 shows that on an average discount offered on various bouquets of major broadcasters are in the range of 40-54 percent.

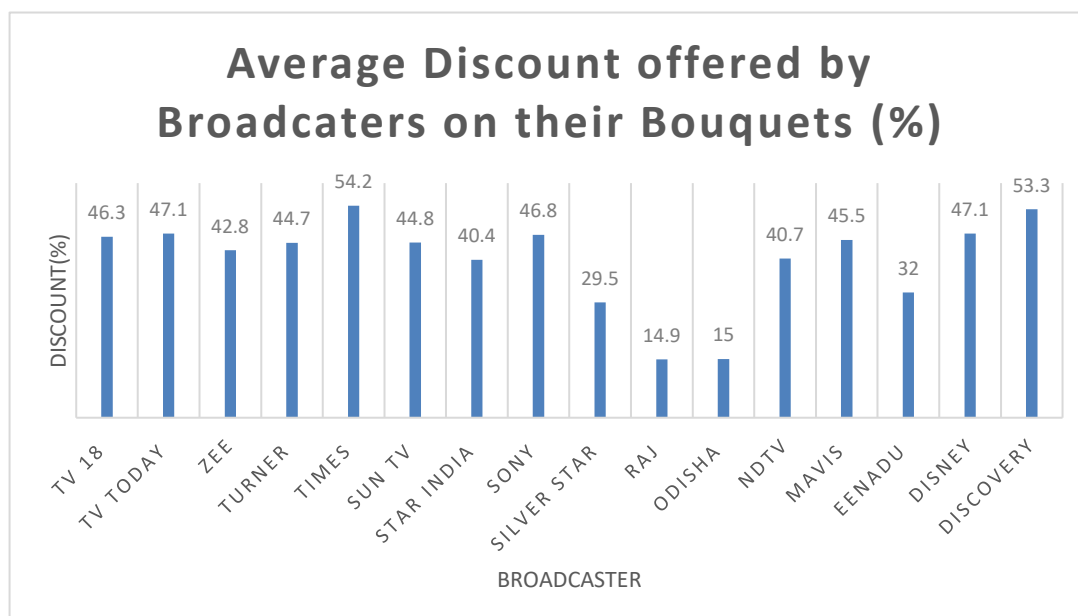


Figure 3.1: Average discount offered on bouquets by broadcasters

3.18 Interestingly, it has also been observed that in some case broadcasters have declared MRP of their bouquet such that their bouquet price is equal to or less than the MRP of a single channel present in that bouquet. (**Refer Annexure III**)

3.19 TRAI has also obtained information about some of the most selling bouquets of some of the major broadcasters to understand pattern of formation and pricing of the bouquets. A summary of the information is given in table 3.1 below:

Table 3.1: Most selling bouquets of some of the major broadcasters

S. No	Name of Broadcaster	Name of the Bouquet	Channels in Bouquet	A-la-carte MRP of Channel (in Rs) (excluding taxes)	Sum of a-la-carte prices	MRP of Bouquet (in Rs.) (excluding taxes)	Discount Offered to Subscriber
1	Star India Private Limited	SVP Hindi	Star Plus	19.00	75.10	49	34.8
			Star Bharat	10.00			
			Star Utsav	1.00			
			Star Gold	8.00			
			Movies OK	1.00			
			Star Utsav Movies	1.00			
			Star Sports 1 Hindi	19.00			
			Star Sports 2	6.00			
			Star Sports 3	2.00			
			Star Sports First	1.00			
			National Geographic Channel (NGC)	2.00			
			Nat Geo Wild	1.00			
			UTV Movies	2.00			
			UTV Action	2.00			
		UTV Bindass	0.10				
		SVP TELUGU	MAA TV	19.00	63	39	38.10
			MAA Movies	10.00			
			MAA Gold	2.00			
			MAA Music	1.00			
			Star Sport 1 Telugu	19.00			
			Star Sports 2	6.00			
			Star Sports 3	2.00			
			Star Sports First	1.00			
			National Geographic Channel (NGC) / National Geographic Telugu	2.00			
Nat Geo Wild	1.00						

2	SONY Pictures Networks India Pvt Limited	Happy India 31	SONY ENTERTAINMENT CHANNEL (SET)	19.00	63.00	31.00	50.80
			SAB	19.00			
			SET MAX	15.00			
			MAX 2	1.00			
			Sony YAY!	2.00			
			PAL	1.00			
			SONY Wah	1.00			
			MIX	1.00			
			SONY Marathi	4.00			
		Happy India 31 (A)	SONY ENTERTAINMENT CHANNEL (SET)	19.00	59.00	31.00	47.50
			SAB	19.00			
			SET MAX	15.00			
			MAX 2	1.00			
			Sony YAY!	2.00			
			PAL	1.00			
			SONY Wah	1.00			
			MIX	1.00			
3	ZEE Entertainment Enterprises Limited	Zee Family Pack Hindi SD	Zee TV	19.00	58.50	39.00	33.30
			&TV	12.00			
			Zee Anmol	0.10			
			Big Magic	0.10			
			Zee Cinema	15.00			
			&pictures	6.00			
			Zee Bollywood	2.00			
			Zee Action	1.00			
			Zee Anmol Cinema	0.10			
			Zee News	0.10			
			Zee Hindustan	0.10			
			Zee Business	0.10			
			Living Foodz	1.00			
			Zee ETC	0.10			
			Zing	0.10			
			Zee Salaam	0.10			
			Big Ganga	0.50			
Zee Bihar Jharkhand	0.10						

			Zee Punjab Haryana Himachal	0.10			
			Zee Madhya Pradesh Chattisgarh	0.10			
			Zee Rajasthan News	0.10			
			Zee Uttar Pradesh Uttarakhand	0.10			
			Zee 24 Kalak	0.10			
			Zee Classic	0.50			
		Zee Prime Pack Telugu SD	Zee Action	1.00	32.50	20.00	38.50
			Zee News	0.10			
			Zee Hindustan	0.10			
			Living Foodz	1.00			
			Zee ETC	0.10			
			WION	1.00			
			Zee Telugu	19.00			
			Zee Cinemalu	10.00			
			Zee Keralam	0.10			
			Zee Salaam	0.10			
4	TV 18 Broadcast Limited	Colors Wala Hindi Value	CNBC Awaaz	1.00	41.15	25.00	39.20
			Colors	19.00			
			FYI TV18	0.25			
			The History Channel	3.00			
			MTV	3.00			
			MTV Beats	0.10			
			News 18 Assam / North East	0.10			
			News 18 Bihar Jharkhand	0.10			
			News 18 India	0.10			
			News 18 Madhya Pradesh / Chattisgarh	0.10			
			News 18 Punjab / Haryana / Himanchal Pradesh	0.10			
			News 18 Rajasthan	0.10			

			News 18 Uttar Pradesh/ Uttarakhand	0.10						
			News 18 Urdu	0.10						
			NICK	6.00						
			NICK JR	1.00						
			Colors Rishtey	1.00						
			Colors Cineplex	3.00						
			SONIC	2.00						
			Vh1	1.00						
		Colors Wala Tamil Budget Plus	CNBC TV 18	4.00				20.95	8.00	61.8
			CNN News 18	0.50						
			Colors Tamil	3.00						
			FYI TV18	0.25						
			The History Channel	3.00						
			News 18 Tamil Nadu	0.10						
			News 18 Urdu	0.10						
			NICK	6.00						
			NICK JR	1.00						
			SONIC	2.00						
			Vh1	1.00						
			5 SUN TV Network Limited	Telugu Basic						
Gemini Movies	17.00									
Gemini Comedy	5.00									
Gemini Music	4.00									
Kushi TV	4.00									
Gemini Life	5.00									
Gemini News	0.10									
Tamil Basic	SUN TV	19.00		69.00	40.00	42.0				
	KTV	19.00								
	Adithya TV	9.00								
	Sun Music	6.00								
	Chutti TV	6.00								
	Sun News	1.00								
	SUN Life	9.00								

3.20 The general trend is visible. Heavy discounts are applied to bouquets making the a-la-carte prices of channels irrelevant in comparison. MRP of the popular channels are declared at the maximum permissible

limit of Rs19/- so as to qualify to be the part of a bouquet and then these are bundled along with number of other channels, mostly marginally priced non-popular channels. By following this business model, the broadcasters gain in maximizing their reach even for not so popular channels, increasing subscription revenues. On the flipside, this perverse pricing strategy renders the a-la-carte subscription of the channels meaningless for the consumers and reduces option of choice. They end up subscribing to channels not of their original choice and even paying for those channels which they are not inclined to watch without even taking notice of.

- 3.21 The misuse of flexibility given in new regulatory framework is apparent. The conclusion from the analysis of information is definite. The marketing and business strategies of the broadcasters in general, have failed to give due consideration to the overall objective of the new tariff regime, the spirit of the judicial decision upholding the regime, and the consumer interests that they are bound to respect.
- 3.22 The very purpose of addressability was to bring transparency in reporting of number of the subscribers while ensuring effective choice of channels to the consumers. The implementation of digitalization in the country has ensured the transparency in number of subscribers. However, the right of the consumers to select and pay for only what they want to view still remains elusive. Heavy discounts in the form of bouquets to manipulate selection behavior of the consumers and pricing of a-la-carte channels on illusionary basis continue unabated. This clearly demonstrates the intention on the part of broadcasters offering large number of channels to somehow push maximum number of channels to the consumers, disregarding consumers' legitimate right to choose channels of their choice. This in a sense defeats the very purpose of digitization and demonstrates misuse of flexibility which has been given to broadcasters in forming and pricing their channels.

3.23 Some broadcasters during discussions have also shown their concerns about heavy discounts given on the sum of a-la-carte channels while forming the bouquet by broadcasters offering large number of channels. They stated that broadcasters offering large number of channels use the power of their popular channels and resort to heavy discounts to push their own not so popular channels as part of bouquets to subscribers, resulting in non-level playing field. The ability of broadcasters offering large number of channels to form bouquets and to hugely discount the bouquets is forcing small broadcasters either to exit from the market or convert their pay channel to FTA channel for survival. This fact has been substantiated to some extent by the data available with TRAI. While broadcasters offering large number of channels have converted their FTA channels to pay channels at token prices, less than a rupee per month in many cases, (Refer table 3.2), some broadcasters have converted pay channels to FTA during same period for survival. Such non-level paying fields, if they exist, need to be addressed so that all players in the sector are able to conduct business on fair terms.

3.24 As mentioned above, in some cases, the price of the bouquet is less than the price of one single channel in that bouquet. This is clear case of illusory price of a-la-carte channel aimed to push the maximum channels by the broadcasters to the consumers. No subscriber will like to purchase a channel on a-la-carte basis when bouquet of multiple channel including that one available at a cheaper price than that of one single channel. In this process, subscriber end up taking even those TV channels which are not their natural choice. Such incidences clearly demonstrate the strategy of broadcasters to push maximum number of channels to the subscribers at the cost of the customers' right to choose what they want to watch and pay for that only. Further, such channels that are not so popular; but pushed to the subscribers misusing the flexibility in pricing by the broadcasters, are reducing the competition in broadcasting space by reducing the

available capacity with DPOs and creating entry barrier for new TV channels.

3.25 In view of the above, stakeholders are requested to give their comments on the following issues with justifications:

Q1. Do you agree that flexibility available to broadcasters to give discount on sum of a-la-carte channels forming part of bouquets has been misused to push their channels to consumers? Please suggest remedial measures.

Q2. Do you feel that some broadcasters by indulging in heavy discounting of bouquets by taking advantage of non-implementation of 15% cap on discount, have created a non-level field vis-a-vis other broadcasters?

Q3. Is there a need to reintroduce a cap on discount on sum of a-la-carte channels forming part of bouquets while forming bouquets by broadcasters? If so, what should be appropriate methodology to work out the permissible discount? What should be value of such discount?

Q4. Is there a need to review the cap on discount permissible to DPOs while forming the bouquet? If so, what should be appropriate methodology to work out the permissible discount? What should be value of such discount?

Q5. What other measures may be taken to ensure that unwanted channels are not pushed to the consumers?

Number of Bouquet offered by Distributors/Broadcasters

3.26 In the new regulatory framework, broadcasters/distributors have been given freedom to offer their channels in form of bouquet in addition to a-la-carte offering. It was expected that broadcasters/distributors will offer reasonable number of bouquets based on the analysis of the consumers' need so that it becomes convenient for them to select

channels of their choice while exercising the option.

3.27 In the new regulatory framework, there is no restriction on number of bouquets to be formed by broadcasters/DPOs. Post implementation of the regime, TRAI has received feedback that too many bouquets are formed by the broadcasters, many of them contain more or less the same set of channels with very few changes. DPOs have highlighted that they have to configure all the bouquets offered by the broadcasters in their system irrespective of the value these bouquets offer to the subscribers. DPOs have further informed that it becomes very difficult for the consumer as well to choose from a large number of bouquets offered by broadcasters and frequent changes in composition of bouquet further complicate the choice of the consumers. In this manner, the very purpose of giving choice to consumers and extending a helping hand to facilitate selection of channels through use of bouquets has been completely defeated.

3.28 The Authority analyzed present offering by the broadcasters, it has been observed that broadcasters are offering large number of bouquets of their channels. Figure 3.2 indicates the number of a-la-carte pay channels and bouquets of channels offered by major broadcasters including their group companies.

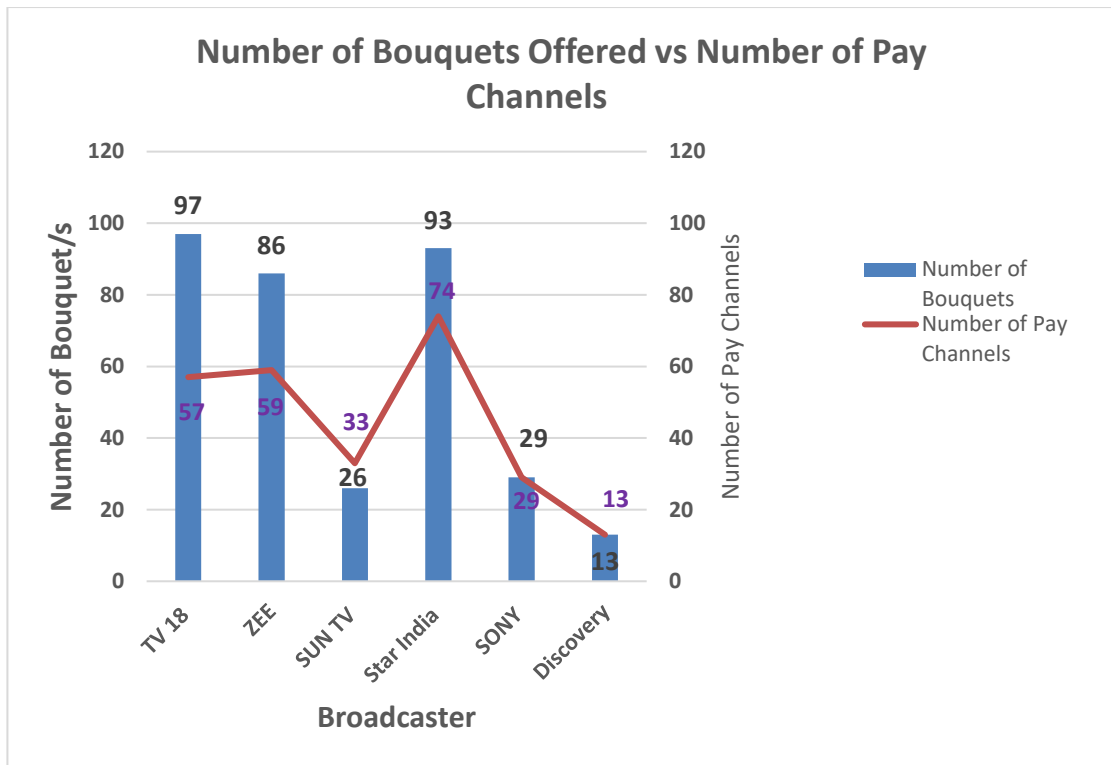


Figure 3.2: Number of Bouquets offered vs. number of Pay channels

3.29 Some broadcasters have formed large number of bouquets in comparison to a-la-carte channels offered by them. It is noted that some major broadcasters have declared 97, 86, 26, 93 and 29 bouquets while number of channels uplinked by them are 57, 59, 33, 74 & 29 respectively.

3.30 It is evident from above that the number of bouquets offered by broadcasters is quite large and it creates confusion in the minds of consumers. There are already around 900 a-la-carte channels and no restriction on number of bouquets could encourage broadcasters to continue with formation of new bouquets. Some stakeholders have pointed out that apart from making the consumer choice difficult, this would also cause unnecessary burden on IT and billing systems of the DPOs. Suggestions have been received by the Authority that restrictions must be imposed on number of the bouquets that can be formed by broadcasters for these reasons.

3.31 In nutshell, there are concerns raised on the manner in which the flexibility to offer bouquets have been used by some broadcasters and its fall out on consumer welfare and small broadcasters. If this is to be controlled, one way could be to put restriction on number of the bouquets that can be offered based on number of channels offered by the broadcaster. Other way could be to put a flat ceiling on the number of bouquets that can be offered by broadcasters. There could be a case of combination of both also.

3.32 The problem of large number of bouquets get further complicated as DPOs are also offering a large number of bouquets. As a result, many offerings in the form of large number of bouquets are killing the basic spirit of 'choose what you want to watch'. In all the offering, if a consumer once chooses a bouquet, he cannot remove unwanted channel. If he wants to remove unwanted channel which is part of the bouquet, he is required to remove the bouquet as a whole and then individually select each desired channel which makes process more complicated for the consumers and in this manner they are able to push more and more channels. As a result, consumers are not able to optimize their plan and are forced to pay more. Interestingly, one DPO has informed that they have more than 4000 bouquets in their offering. Views of the stakeholders are invited with detailed justifications:

Q6. Do you think the number of bouquets being offered by broadcasters and DPOs to subscribers is too large? If so, should the limit on number of bouquets be prescribed on the basis of state, region, target market?

Q7. What should be the methodology to limit number of bouquets which can be offered by broadcasters and DPOs?

Ceiling on MRP of channels provided as part of Bouquet:

3.33 The new regulatory framework of broadcasting and cable services notified in March 2017 gave flexibility to broadcasters and DPOs to carry channels having MRP not more than Rs.19 in a bouquet. The purpose of restricting channels having higher MRP than Rs.19 was that operators should seek explicit and considered choice of consumers for such channels as the price of individual channels in a bouquet is generally hedged and consumers generally tend to overlook prices of individual channel while opting for bouquets. Rs.19 has been prescribed as ceiling considering that even highest priced channel of sports genre in 2017 was approximately Rs.15 so that all channels being provided by the broadcasters in SD format can be carried in a bouquet and choice of consumers for selecting the channels is fulfilled through bouquet as well.

3.34 However, during the discussion with various stakeholders and consumers, it has been pointed out that allowing Rs 19 as ceiling on MRP to be part of a bouquet is not justifiable as Rs 19.00 (15.12×1.25) was the maximum price of any SD channel in the previous regime. Rs 19 should be considered as a price for niche/premium channel and such niche/premium channels should not at all be allowed to be the part of any bouquet. They expressed the view that bouquet should be allowed to be formed of channel which are affordable and are in similar price brackets. They also pointed out that if such a high value channels are continued to form a part of the bouquet, the basic objective of the framework that the niche channel should only be given on the consumer choice will be defeated. As all top 4-5 broadcaster have priced their niche channels @ Rs 19, consumers are bound to subscribe to either the bouquet or the niche channels, both ways resulting in more payout from consumers.

3.35 It has also been observed that many channels that were FTA in the

earlier framework have been converted into pay channels and priced at token amounts for the simple reason that under the new regulatory framework FTA channels cannot be part of a bouquet. Few examples of such channels are given in table 3.2

Table 3.2: Channels converted from FTA to PAY

S.No	Name of the Channel	MRP (Rs.)
1	Living Travelz	0.1
2	NDTV India	1.0
3	Big Magic	0.1
4	Big Ganga	0.5
5	SONY Wah	1.0
6	Star Utsav	1.0
7	Star Utsav Movies	1.0
8	News 18 Tamil Nadu	0.1
9	News 18 Kerala	0.1
10	News 18 Assam / North East	0.1
11	News 18 India	0.1
12	Rishtey	1.0
13	Zee Anmol Cinema	0.1
14	Zee Anmol	0.1
15	Zee Hindustan	0.1
16	Zee Bihar Jharkhand	0.1
17	Zee News	0.1

3.36 It has also been observed that prices of some channels both SD and HD format, priced more than Rs. 19/- in earlier framework, have been reduced to Rs 19/- which is upper ceiling for any channel to be carried as part of the bouquet (**refer Annexure IV**). This also demonstrates that intent of the broadcasters is to push the channels in the form of the bouquet rather than permitting consumers to take channels of their choice on a-la-carte basis. Data of subscription of individual pay channels on a-la-carte basis vis-a-vis bouquets (**refer Annexure II**) obtained from DPOs indicates that almost all the pay channels have been made available to subscribers as a part of bouquets using skewed pricing mechanism. This marketing strategy focused purely on

promoting bouquets completely negates the key objective of the new frames work, viz enabling consumer's choice.

3.37 The Authority also noted that small broadcasters, who are not able to make bouquet of their channels and handicapped to face the competition from the big broadcasters, have converted their pay channels to FTA as survival strategy.

Table 3.3: Channels converted from Pay to FTA

S.No	Name of the Broadcaster	Name of the Channel
1	E 24 Glamour	E 24
2	Sahara India Commercial Corporation Limited	Sahara One
3	Sahara India Commercial Corporation Limited	Filmy
4	9X Media	9XM
5	Paul Entertainment	9X Tashan
6	Business Broadcast	BTVi
7	ABP News Networks Limited	ABP Majha
8	ABP News Networks Limited	ABP Ananda
9	Zee Media Network Limited	Ezmall.com
10	Turmeric Vision Private Limited	Food Food TV

3.38 As mentioned above that quite a few of the FTA channels in previous regime have been converted into pay channels in the new regime and priced at less than Re.1 so that they can be included in the bouquet along with premium channels. Table given at **Annexure-I** provides the price of channels under old regulatory framework and new regulatory framework and percentage increase therein. Wholesale prices declared by broadcasters in the old framework have been multiplied by a factor of 1.25 in order to account for the 20% mandatory discount on MRP to be given by broadcasters to DPOs in the new framework. It may not be

out of place to mention here that in the old regime broadcasters used to give 80-90 percent discount over RIO price while offering their bouquets to DPOs. This clearly indicates that prices of most of the SD channels have increased significantly. The flexibility given to broadcasters has been grossly misused and consumer interest has been seriously hurt. In fact, many SD channels which were much below Rs.19 in the previous regime have been increased to the threshold price of Rs.19 so that they can be part of a bouquet to maximize their revenue and at the same making it a choice on a-la-carte prices difficult. The detailed analysis of the price of channels of different broadcasters including HD channels clearly indicates that channel price of many of the HD channels has been reduced to be accommodated within the bracket of Rs.19 (**refer Annexure III**) so that they can be pushed in the form of bouquet. The flexibility to the broadcasters to price their channels was given on the premise that quality of the TV channels will be improved and consumers will be provided a high value channel only on their choice. However, the re-adjustment of the channel prices by the broadcasters clearly indicates that flexibility of the framework has not only been misused to increase the channel prices but also denied choice of the channels to the consumers.

3.39 Further analysis of channel prices in new regulatory framework indicates prevailing prices in 2017 of many SD channels have been increased multiple times while prices of HD channels have generally been reduced.

3.40 A bouquet is normally expected to have same or similarly priced channels. However, at present bouquets offered by broadcasters follows a pattern in which channels of very less price are clubbed with one or two high price channels.

3.41 The density plot of prices for all pay channels shows the distribution of the MRP values of channels (when sold a-la-carte) in 2017 as well as in 2019. The peaks of this plot help demonstrate the most frequently occurring MRP values for the set of channels in that year. The peaks thus highlight the prices at which bunching is happening and the extent of the bunching.

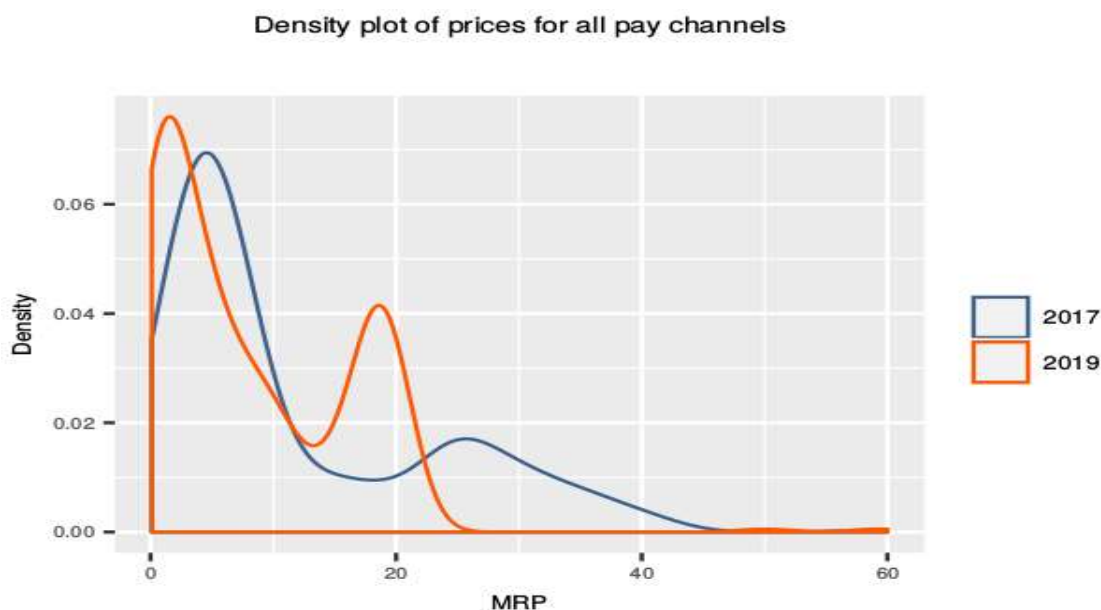


Figure 3.3: Density plot for all pay channels

3.42 New tariff order stipulated that a channel can be a part of a bouquet only if it's MRP (when sold a-la-carte) is greater than zero and less than or equal to Rs 19. The plot shows that while bunching up of channels around certain MRP values was a practice even in 2017, the bunching is now closer to zero and Rs 19/-, in response to the caps set by the new Tariff Order. It may be noted that while prices of the most the channels in 2017 was much below Rs. 10 and only a few channels had high price, the pricing pattern in 2019 clearly demonstrates bunching of most channel around Rs 19. Here it may be observed that channels priced around Rs 1 in new framework were mostly FTA in 2017 regime.

Thus, the channels are bunched up much more closely to the extremes in 2019 than in 2017.

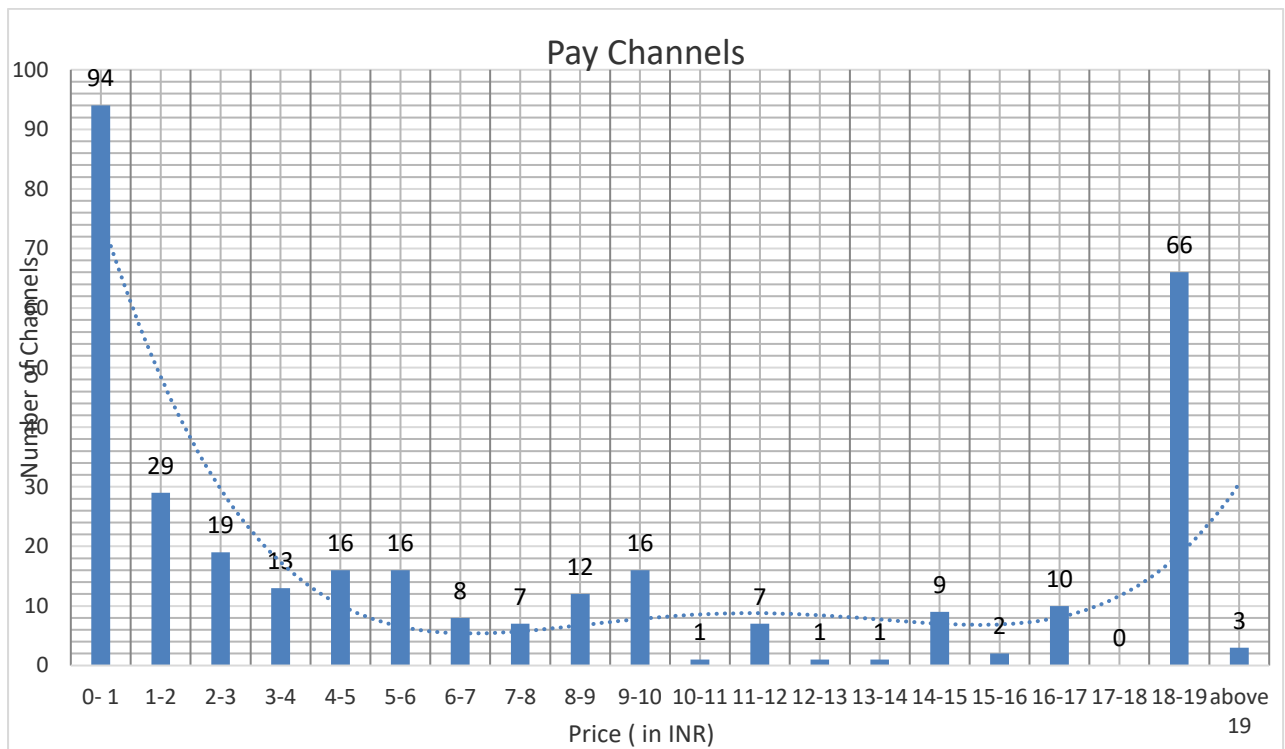


Figure 3.4: Range of prices of Pay channels

3.43 As may be observed from the figure 3.4, out of the existing 330 pay channels, 94 pay channels have been priced lower than or equal to INR 1.00. These channels are generally less popular channels and many of them are recent converts from FTA to pay, so that it could be included in a bouquet. As the price range of MRP increases, it can be observed that there is a decrease in the number of channels as we move towards higher price range. Further, 66 channels which are generally popular (mainly GEC and sports) have the MRP declared at the threshold price of Rs. 19 by the broadcasters.

3.44 An analysis of the distribution of prices of all pay channels offered by Broadcasters based on the following data has also been attempted:

(i) A-la-carte rates of pay channels offered by broadcasters to distribution platform operators (DPOs) pre NTO regime.

(ii) Maximum retail price (MRP) of pay channels offered by broadcasters to subscribers under the Tariff Order, 2017.

3.45 It may be noted that pre NTO data set only contains the rates offered to DPOs by Broadcasters under the earlier regime and does not reflect the actual price paid by the final consumer. However, for understanding the response of broadcasters to the new tariff regime and their pricing strategy, it will serve as indicative prices for the purpose of comparison. Besides, several new channels may have been introduced by the broadcasters in the period between 2017 & 19 or some of the pre-existing channels may have been discontinued.

3.46 Comparing the distribution of all pay channels over MRP (price) intervals before and after the new regulations demonstrates the fact that channels are now concentrated in the Rs 0-2 price range (some converted from FTA to pay) and at the Rs 19 price point. The figure below shows that the spread of the distribution has noticeably reduced compared to the distribution of the 2017 rates. However, the bunching of channels at the start and end of the bouquet range is not a uniform trend. There are wide variations in the practices that have been adopted by different broadcasters as well as across different genres of channels.

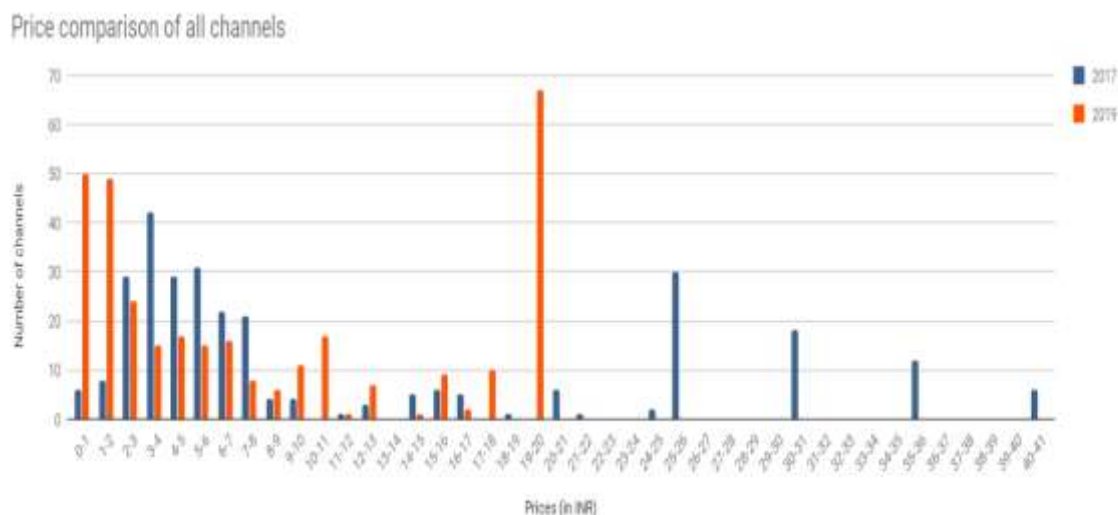


Figure 3.5: Distribution of all Pay Channels

3.47 It is apparent that the tendency of Broadcasters to price their driver channels at the threshold price of Rs.19 or close to it is purely based on commercial considerations. No visible change in consumer demand or preference could be attributed to this sudden change in pricing at large level.

3.48 In view of the above, stakeholders are requested to give their comments on the following with justifications:

Q.8 Do you agree that price of individual channels in a bouquet get hedged while opting for a bouquet by subscribers? If so, what corrective measures do you suggest?

Q.9 Does the ceiling of Rs. 19/- on MRP of a a-la-carte channel to be part of a bouquet need to be reviewed? If so, what should be the ceiling for the same and why?

Need to form Bouquets by Broadcasters/Distributors

3.49 The new framework provides that all the broadcasters shall declare the price of their channels in the form of MRP to subscribers. Broadcasters are also permitted to give a maximum discount upto 35% on declared

MRP in transparent and uniform terms to all DPOs. DPOs are also permitted to give discounts on MRP of a-la-carte channels declared by broadcasters and declare their distributor retail price (DRP).

3.50 The primary aim of the new framework was to facilitate consumer choice and provide them freedom as to what they want to select for their viewing and pay only for those channels. As the number of channels are very large, it was envisaged that consumers may not be very comfortable initially in selecting the channels of their choice, due to large scale disparity in consumer awareness, their ability to use IT Systems, understanding of new framework etc. Therefore, the Authority permitted formation of bouquets of channels both by broadcasters and DPOs so that considering the normal requirement of the consumers these bouquets can be formed which will facilitate choice of the consumers, reduce the burden of subscribers in selecting individual channels and in some cases can also give reasonable discount over the sum of prices of a-la-carte channels while they are selecting bouquets.

3.51 In fact, the earlier market was operating in the analog manner, where channels were priced in such a manner that all the channels of the broadcasters were taken by the DPOs and all the channels were pushed to consumers. This unfair treatment of the consumers continues despite the digitization of the sector.

3.52 In the new framework, Authority has given flexibility of formation of bouquet to both broadcasters and DPOs. The objective to give this flexibility to broadcaster was so that they can make small bouquet of same genre or some popular channels so that it makes life ease for the subscribers in selecting the channel. However. During meeting with DPOs, they pointed that broadcasters are using this flexibility to push their non-driver channels along with some driver channels. DPOs further informed that large number bouquet not only created

confusion among consumers but also choked IT system of DPOs.

- 3.53 Some stakeholders have pointed out that subscribers get their subscription either directly from DPO or through LCOs. They are aware about their choices and interests. DPOs are having market-based data of subscribers' habit, viewership pattern, language priorities, and genre mix. DPOs are also offering bouquets of channels by bundling a-la-carte and bouquet of channels offered by different broadcasters. DPOs have also stated that the very purpose of formation of bouquet is to help the consumers to easily select channels of their choice with minimal efforts. Therefore, the flexibility to form such bouquet should lie only with the DPOs as they are facing subscribers and they may create better mix of channel across the broadcasters for its subscribers. DPOs can offer bouquets of homogenous channels as per the taste and choice of the consumers by picking channels of same genre across the broadcasters or mix of different genre as per prevailing choice of consumers.
- 3.54 It is important to note that formation of bouquet is only a commercial concept and it does not save any resource whatsoever either in up linking the channels by broadcasters or in downlinking by the DPOs. From technological angle each TV channel is uplinked individually. Through commercial agreements between broadcasters and DPOs, the pricing of channels between broadcasters and DPOs are settled considering the mode of offering channels to subscribers i.e. whether channels are given to subscribers as a-la-carte or as a bouquet.
- 3.55 The new regulatory framework provides adequate freedom to the broadcasters to encourage adoption of their channels by consumers. The manner in which broadcasters are misusing the flexibility granted to them in the new regime to form bouquets by way of skewed pricing, pushing non-popular channels to subscribers etc. have already been discussed in detail in previous sections of this paper while deliberating on some of the related issues. As all the channels are available on a-

la-carte basis, there appears to be no pressing requirement for broadcasters to form a bouquet. Therefore, stakeholders may give their comments regarding need of formation of bouquets by broadcasters.

3.56 DPOs are also given flexibility to form bouquets with an understanding that they understand requirement of consumers much better than others. However, after implementation of new regulatory framework, several instances have come to light where many bouquets have been pushed to consumers without their specific choice. Some broadcasters also informed that the flexibility of formation a bouquet is grossly being misused by DPO by having their preferred channels in most of the bouquets. This problem further accentuated for FTA channel. Many of the bouquets formed by DPOs are not in line with the market demand. It has also been noticed that mobile Apps are becoming popular are being used efficiently by large number of subscribers. In view of these developments the need to continue the flexibility of formation of bouquets by DPOs also needs to be reviewed.

3.57 Keeping the overall circumstances, stakeholders may like to comment on the following issues with detailed justifications:

Q.10 How well the consumer interests have been served by the provisions in the new regime which allows the Broadcasters/Distributors to offer bouquets to the subscribers?

Q.11 How this provision has affected the ability and freedom of the subscribers to choose TV channels of their choice?

Q.12 Do you feel the provision permitting the broadcasters/Distributors to offer bouquets to subscribers be reviewed and how will that impact subscriber choice?

Q.13 How whole process of selection of channels by consumers can be simplified to facilitate easy, informed choice?

Chapter IV

Other related issues raised by Stakeholders

4.1 TRAI had extensive interactions with the stakeholders with the consumers and consumer organizations, at various forums, both during and post implementation of the new regime. Authority felt that couples of suggestions/comments so received on the new regime are significant in terms of consumer welfare and considered it appropriate to obtain the views of the stakeholders on it. This chapter deliberates on such issues.

NCF for multi TV home

4.2 TRAI has been receiving several representations from the subscribers of Cable TV and DTH services seeking clarifications regarding tariff for multiple TV connections in a home. They have alleged that DPOs are charging equal amount of network capacity fee for each TV connection in a home. Some subscribers have also mentioned that DPOs are providing same set of channels on all the TV connections and not allowing to choose different set of channels for different TV connections in a home.

4.3 In this regard, the Authority vide its press release No. 10/2019 dated 8th February 2019 has provided the following clarification:

“.....the Regulation provides a capping of Rs. 130/- as Network Capacity Fee (NCF) for 100 SD channels and Rs. 20/- for the slab of next 25 SD channels. Further, the regulation does not prohibit the service providers to offer discount or lower Network Capacity Fee for second/additional connections in same location/ home. However, it may be noted that such discount shall be uniform in the target market area of respective TV channel distributor and duly declared by the DPO (Distribution Platform Operator) on their website. Pursuant to the same

now few service providers have started offering the discount/complete wave off Network Capacity Fee (NCF) on second/additional TV connections in home.”

- 4.4 Subsequently, TRAI sought information from some major DPOs regarding their policy for multiple TV connections in a home. Some DTH operators are charging lower NCF for second TV connection onwards in a home. However, MSOs do not have differential pricing for multiple TV connections in a home and charge same NCF separately for all the TV connections in a home.
- 4.5 Another issue related to with multiple TV connections is that same package of channels is usually provided for all connections. Some subscribers mentioned that connections in a home are viewed by all age groups e.g. Grand Parents, Parents, Kids. Each age group has different viewing preferences. Same package, with large number of channels, may not be required for all the TV connections in a home. Different packages, with a smaller number of channels, can be subscribed for each connection according to viewing preference of Grand Parents, Parents, Kids etc. This may reduce overall TV viewing budget of the household.
- 4.6 At present there are no separate provisions regarding tariff for multiple TV connections in a home in the Tariff Order 2017. The Tariff Order 2017 defines network capacity fee (NCF) as follows:

“(y) “network capacity fee” means the amount, excluding taxes, payable by a subscriber to the distributor of television channels for distribution network capacity subscribed by that subscriber to receive the signals of subscribed television channels and it does not include subscription fee for pay channel or bouquet of pay channels, as the case may be;”

4.7 The Tariff Order 2017 defines the subscriber as follows:

“(zg) “subscriber” for the purpose of this Order, means a person who receives broadcasting services relating to television from a distributor of television channels, at a place indicated by such person without further transmitting it to any other person and who does not cause the signals of television channels to be heard or seen by any person for a specific sum of money to be paid by such person, and each set top box located at such place, for receiving the subscribed broadcasting services relating to television, shall constitute one subscriber;”

4.8 The above indicates that each set top box is considered as one subscriber. However, it may be noted that in case of a household with multiple TV connection, a single connection is coming to subscriber which is then divided in different rooms of the home in case of cable. Similarly, for DTH, one dish is installed to provide multiple connection within home. Moreover, generally one bill is generated for the consumer. Since activities are common, there is a clear case of some cost saving to the DPOs in such connection which needs to be passed on to subscribers.

4.9 Looking at the concerns raised by subscribers, a committee was also formed to discuss the issue of discount in NCF for multiple TV connections in a household. Some members of the committee also mentioned that incremental cost and efforts required to provide 2nd TV connection onwards in a given home is less compared to that of providing 1st connection. However, the present framework envisages each connection in multi-home separately. Therefore, once it is allowed, they will be happy to provide discounts to the subscribers having multi TV connections in a household. Accordingly, the committee unanimously was of the view that there is no harm in providing some discount on NCF for multiple TVs in a household. DTH operators mentioned that they are already offering discount in NCF

for 2nd TV onwards in a household. Representatives of MSOs mentioned that they are also willing to offer discount in NCF for 2nd TV onwards in a household.

4.10 Representatives of DPOs mentioned that as per provisions of new regulatory framework broadcasters declare MRP of channels and bouquet of channels on per month per subscriber basis. They further mentioned that in new framework each set top box is considered as one subscriber and broadcasters also charge them for each subscriber. DPOs were of the view that they can provide discount in DRP of channels and bouquets of channels, in case broadcasters also offer discount in MRP of channels and bouquets of channels for 2nd TV onwards in a household subject to a robust system whereby DPO is able to authenticate the number of 2nd TV onwards in a home. Representatives of broadcasters mentioned that it may be very difficult to identify and authenticate the number of multiple TVs in a household. In such a situation it is not possible for them to provide discount on MRPs of their channels and bouquets of channels for 2nd TV onwards in a household at this stage. However, if a need arises, the issue may be deliberated through an open consultation process. All DPOs agreed that since each set top box is being considered as an active subscriber, complete flexibility should be given to subscribers in selection of channels for each TV in a given household.

Apropos the above, issues for consultation are as follows:

- Q14. Should regulatory provisions enable discount in NCF and DRP for multiple TV in a home?**
- Q15. Is there a need to fix the cap on NCF for 2nd and subsequent TV connections in a home in multi-TV scenario? If yes, what should be the cap? Please provide your suggestions with justification.**

Q16. Whether broadcasters may also be allowed to offer different MRP for a multi-home TV connection? If yes, is it technically feasible for broadcaster to identify multi TV connection home?

Q17. Whether Distributors should be mandated to provide choice of channels for each TV separately in Multi TV connection home?

Discounts on Long term subscriptions

4.11 As per provisions of new regulatory framework, DPOs are required to declare network capacity fee (NCF) and distributor retail prices (DRPs) of channels and bouquet of channels on monthly basis. Subscribers when choose TV packs usually pay NCF and DRPs at the monthly rate declared by DPOs. A number of DPOs represented to TRAI that they want to offer long term subscriptions and as subscribers pay amount of subscription in advance, they would like to offer discount to subscribers. However, there are no explicit provisions for long duration subscriptions and discount thereon in new regulatory framework. TRAI has also received several complaints from subscribers on the discontinuation of the long term subscriptions by various service providers.

4.12 To address this issue, a committee having industry representative was formed to deliberate on this issue too. During the meeting of the committee, representatives of DPOs emphasized that as per new regulatory framework they are required to declare monthly NCF and DRP of channels and bouquet of channels. They further suggested that since a subscriber opting for a long-term subscription pays the amount of applicable NCF and DRP in advance for entire duration of subscription, he/she expects discount on NCF and DRP of channels and bouquet of channels. Members of the committee deliberated on pros and cons of allowing discount both on NCF and DRP. After detailed deliberation, members of the committee were of the view that there is no harm in providing reasonable discount for long term subscriptions. However, there should be a minimum duration to be

considered for long term subscription. Some members were of the view that recommending very short period may be misused by the service providers by giving heavy discount on long duration subscription. In turn, it may compromise the sanity of monthly DRP and NCF. However, making this duration long will not get attraction the subscribers and very purpose will be defeated. Some members were of the view that any subscription with a minimum duration of 6 months or above may be treated as long term subscription. Representatives of some DTH operators mentioned that subscription with 3 months as minimum duration should be treated as long term subscription. Representative of one DTH operator further mentioned that existing long-term subscriptions with 3 months should be allowed to continue till their expiry and new schemes to be announced henceforth will be in accordance with the decision of the committee.

- 4.13 Some members of committee were of the view that there should not be any restriction on the discount on NCF as it may be required for attracting consumer in the market and DPOs should have full flexibility to offer NCF on Long duration plan. The committee unanimously was of the view that NCF is entirely in the domain of DPOs. Hence, they should be given complete freedom to offer any discount on the NCF part in the long-term subscriptions. However, issue of providing discount on DRP of channels or bouquets of channels declared on monthly basis require in-depth deliberations. IBF representatives stated that the broadcasters would have no objection to DPOs offering discounts on the DRPs. DRP primarily flows from the MRP of the channel or bouquet of channels for which interconnection agreements have been done between DPOs and broadcasters. Subscribers are identified by active set top boxes and it is difficult to identify long term subscription based on active subscriber base. While some methods can be worked out, but possibility of disputes and manipulations cannot be ruled out. As such, huge discounts on DRP may distort the market. In order to

regulate such discounts members pointed out that DPOs may use permissible discount of upto 15% to encourage long term subscriptions, which can be passed on to subscribers by DPOs. DPOs are free to give further discount on the MRP in declaring DRPs. Accordingly, members felt that as far as discount on DRPs is concerned, heavy discount on the DRP may distort the market or some unfair practices may start in the market. Therefore, there should be a reasonable cap on the discount on DRP of channels and bouquet of channels for long term subscriptions.

4.14 During the discussion it was also informed that long term subscriptions are more for attraction of the consumer and sometimes offer are like one/two month subscription free on long term pack etc, . Therefore, it may be difficult for DPO s to put everything in very straight jacket of discount on NCF.

Q.18 How should a long term subscription be defined?

Q.19 Is there a need to allow DPO to offer discounts on Long term subscriptions? If yes, should it be limited to NCF only or it could be on DRP also? Should any cap be prescribed while giving discount on long term subscriptions?

Q.20 Whether Broadcasters also be allowed to offer discount on MRP for long term subscriptions?

Placement of channels in EPG

4.15 As per the present regulatory framework, Every distributor of television channels is required to display all channels available on its platform in the electronic programme guide (EPG) and each channel should be listed under the respective genre of the channel as declared by the broadcaster and one channel shall appear at one place only. It is also permitted for the distributor to classify the channels under one genre into sub-genres based on language or region and such channels should be assigned unique logical channel numbers within the sub-genres. It

was also mandated that the channels of same language should be put together within the same sub-genre.

4.16 The objective of such scheme is that consumers who is interested in one specific type of genre is not forced to move across all channels to get TV channel of his choice. Further, this was also targeted to address the menace of some DPOs who charged hefty placement fee and change the LCN numbers to disadvantage of broadcasters if these requests were not acceded. There is a need to bring order in industry to ensure fairness to all broadcasters as far as placement of their channels is concerned. After examining details of existing practice of placement of channels in EPG submitted by some DPOs, it was observed that DPOs have adopted different approaches for placement of channels in EPG. Some DPOs have arranged channels language wise and then within genre wise under each language. Some DPOs have arranged channels genre wise and then language wise under each genre. This issue was flagged by some DPOs during discussions on implementation of new regulatory framework. Accordingly, the committee mentioned earlier was also asked to look into various issues associated with it.

4.17 Representatives of DPOs mentioned that the present practice of placement of channels in EPG should be continued and reviewed after some time as any change in EPG at this point may cause inconvenience to subscribers. They further submitted that any change in existing practice of placement of channels in EPG adopted by them might result in change of LCN, which may further cause inconvenience to consumers in locating channels in EPG. There is no uniformity in the practice followed by different DPOs in respect of placement of channels in EPG. Some prefer classification first on language basis then genre, while some prefer genre and then language. Some other prefer mixed approach. No consensus could be achieved regarding placement of TV channels in EPG. There could be number of options for placement of channels in EPG. One may argue that why Authority desires to regulate

it at all, let the DPOs decide on the basis of their consumer expectation? But the flip side of this argument is that in this case DPO may exploit broadcasters especially small one in the name of placement of channels apart from creating consumer inconvenience.

4.18 This can be better understood as: suppose there are G1, G2, G3 are genre and there are L1, L2, L3 language for each genre. As per present framework channels should be arranged G1:L1, G1:L2, G1:L3, G1:L4..... G2:L1, G2:L2, G2:L3 and so on. In this option, consumer who understand specific language is required to move all across the channels to watch his own language channel, if want to watch GEC, News etc.

4.19 Second option could be: Channels are arranged such as L1:G1, L1:G2, L1:G3.....L2:G1,L2:L2,L2:G3..... and so on. In this option, consumer who understand specific language is not required to move all across the channels to watch his own language channel, if want to watch GEC, News etc.

4.20 The other option could be to give freedom to Distributor to place the channels with the rider that Gx:Ly should be together to protect the interest of the broadcasters. This will give sufficient flexibility to the DPOs, to place the TV channels as per the consumer expectations. However, it will not allow DPO to exploit placement of the channels as they have to place channels of one genre and one language together. As in this case, each DPOs may adopt different pattern of Gx:Ly, DPOs can also be mandated to report the pattern adopted in advance to the Authority and maintain the same till the channels continue on the platform. Views of the stakeholders are invited.

Q 21 Is the freedom of placement of channels on EPG available to DPOs being misused to ask for placement fees? If so, how this problem can be addressed particularly by regulating placement of

channels on EPG?

Q 22 How the channels should be listed in the Electronic Program Guide (EPG)?

Promotional offers by DPOs:

- 4.21 During the discussion with Distributors, they raised concern that though tariff order permit broadcasters to offer promotional scheme on MRP on it's a-la-carte channels, but it does not allow DPOs to offer any promotional schemes either on network capacity fee or on DRP of the channels. Such schemes may be required for the DPOs also to attract customer in a new market and therefore, Authority may consider permitting DPOs also to offer promotional schemes.
- 4.22 In the present Regulatory framework, Broadcasters are permitted to offer promotional schemes on maximum retail price(s) per month of its a-la-carte pay channel(s). However, such scheme should not exceed ninety days at a time and the frequency of any such scheme should not exceed twice in a calendar year. It is further mandated that the price(s) of a-la-carte pay channel(s) offered under any such promotional scheme should be considered as maximum retail price(s) during the period of such promotional scheme.
- 4.23 Authority noted that in the present tariff order 2017 there is no provision of promotional schemes for DPOs. Therefore, if any, promotional schemes are to be allowed to DPO then its pros and cons must be examined. One may argue that the important thing which must be kept in mind is that in television sector the subscribers becomes captive to the DPO due to non-interoperability of the set top boxes. Therefore, any promotional tariff should clearly indicate the applicable tariff post promotional offer. In any case if DPOs are allowed to offer promotional scheme then issues such as time period for the schemes, frequency of any such schemes etc., has to be determined through established consultative process. Others may say that in view

of the above stakeholders are requested to comment on the following:

- Q 23 Whether distributors should also be permitted to offer promotional schemes on NCF, DRP of the channels and bouquet of the channels?**
- Q 24 In case distributors are to be permitted, what should be the maximum time period of such schemes? How much frequency should be allowed in a calendar year?**
- Q 25. What safeguards should be provided so that consumers are not trapped under such schemes and their interests are protected?**

Flexibility in offering NCF:

- 4.24 Some DPOs has also raised the issue that the present tariff order does not permit DPOs to offer different NCF for the different regions. They requested Authority to allow them variable NCF on the basis of regions. They may like to offer different NCF for DAS-I, DAS-II, DAS-III and DAS-IV areas as the affordability of the consumers for various regions is different and it will help them to better serve the consumers. Some DPOs also demanded more flexibility in offering the tariff to subscribers and they requested that DPOs should be allowed to prescribe different NCF on the basis of no of channels chosen by the subscriber. This will help them to provide attractive tariff plan to consumer.
- 4.25 It has also been observed that some DPOs offering a large number of FTA channels free of cost to the subscriber without taking any additional NCF. However, these are the specific channels chosen by the DPO and consumers do not have the choice to choose the channels. One way of looking this offering could be that as they are not asking money from the subscriber and therefore there should be no problem and these are complimentary in nature. However, if you look from other angle, it will be very clear that it is distorting the market and DPO are giving preferential treatment to some of the channels. In fact, the

Authority in para 81 of the EM of TTO 2017 noted that in order to provide flexibility to distributors of television channels and protect the interests of customers/viewers the ceiling of Rs. 130/- has been prescribed. Distributors of television channels are free to fix Network Capacity Fee below this ceiling. However, the Network Capacity Fee will be agnostic to the type of the channels carried over the network. It cannot vary based on the channels subscribed by a subscriber.

Q 26 Whether DPOs should be allowed to have variable NCF for different regions? How the regions should be categorised for the purpose of NCF?

Q 27 In view of the fact that DPOs are offering more FTA channels without any additional NCF, should the limit of one hundred channels in the prescribed NCF of Rs. 130/- to be increased? If so, how many channels should be permitted in the NCF cap of Rs 130/-?

Mandatory DD channels:

4.26 TRAI has also received several consumers complaints wherein consumers have shown concerns about the mandatory DD channels within one hundred channels. They are of the view that since NCF is prescribed to cater for 100 SD channels capacity, subscribers must be allowed the freedom to select 100 SD channels. Mandatory 25 channels of DD are an additional burden on the consumers. They are of the opinion that either customers should be given freedom not to choose any/all DD mandatory channels or these channels should be over and above the 100 channels selected by the subscriber.

4.27 The Authority observed channels notified by Central Government to be mandatorily provided to all the subscribers, any change in the rules made by MIB cannot be superseded by the Regulations. However, the Authority may give recommendations after due consultation process on this issue. Another way of solving this problem could be that as

there is no additional cost on DPO in offering these 25-mandatory channels over and above the One hundred channels chosen by the subscriber in the NCF of Rs. 130/- particularly looking at the trends where large number of FTA channels are being provided by few DPOs without any additional NCF over 100 permitted channels. Therefore, these channels can be excluded from the One hundred channels for which freedom has been given to the subscribers. In this regard, Stakeholders' view are solicited on the following issues:

Q 28 Whether 25 DD mandatory channels be over and above the One hundred channels permitted in the NCF of Rs. 130/-?

Q 29 In case of Recommendations to be made to the MIB in this regard, what recommendations should be made for mandatory 25 channels so that purpose of the Government to ensure reachability of these channels to masses is also served without any additional burden on the consumers?

Any Other Issues

Q 30 Stakeholders may also provide their comments on any other issue relevant to the present consultation.

Chapter V
Summary of Issues for Consultation

- Q1. Do you agree that flexibility available to broadcasters to give discount on sum of a-la-carte channels forming part of bouquets has been misused to push their channels to consumers? Please suggest remedial measures.**
- Q2. Do you feel that some broadcasters by indulging in heavy discounting of bouquets by taking advantage of non-implementation of 15% cap on discount, have created a non-level field vis-a-vis other broadcasters?**
- Q3. Is there a need to reintroduce a cap on discount on sum of a-la-carte channels forming part of bouquets while forming bouquets by broadcasters? If so, what should be appropriate methodology to work out the permissible discount? What should be value of such discount?**
- Q4. Is there a need to review the cap on discount permissible to DPOs while forming the bouquet? If so, what should be appropriate methodology to work out the permissible discount? What should be value of such discount?**
- Q5. What other measures may be taken to ensure that unwanted channels are not pushed to the consumers?**
- Q6. Do you think the number of bouquets being offered by broadcasters and DPOs to subscribers is too large? If so, should the limit on number of bouquets be prescribed on the basis of state, region, target market?**

- Q7. What should be the methodology to limit number of bouquets which can be offered by broadcasters and DPOs?**
- Q8. Do you agree that price of individual channels in a bouquet get hedged while opting for a bouquet by subscribers? If so, what corrective measures do you suggest?**
- Q9. Does the ceiling of Rs. 19/- on MRP of a a-la-carte channel to be part of a bouquet need to be reviewed? If so, what should be the ceiling for the same and why?**
- Q10. How well the consumer interests have been served by the provisions in the new regime which allows the Broadcasters/Distributors to offer bouquets to the subscribers?**
- Q11. How this provision has affected the ability and freedom of the subscribers to choose TV channels of their choice?**
- Q12. Do you feel the provision permitting the broadcasters/Distributors to offer bouquets to subscribers be reviewed and how will that impact subscriber choice?**
- Q13. How whole process of selection of channels by consumers can be simplified to facilitate easy, informed choice?**
- Q14. Should regulatory provisions enable discount in NCF and DRP for multiple TV in a home?**
- Q15. Is there a need to fix the cap on NCF for 2nd and subsequent TV connections in a home in multi-TV scenario? If yes, what should be the cap? Please provide your suggestions with justification.**

- Q16. Whether broadcasters may also be allowed to offer different MRP for a multi-home TV connection? If yes, is it technically feasible for broadcaster to identify multi TV connection home?**
- Q17. Whether Distributors should be mandated to provide choice of channels for each TV separately in Multi TV connection home?**
- Q18. How should a long term subscription be defined?**
- Q19. Is there a need to allow DPO to offer discounts on Long term subscriptions? If yes, should it be limited to NCF only or it could be on DRP also? Should any cap be prescribed while giving discount on long term subscriptions?**
- Q20. Whether Broadcasters also be allowed to offer discount on MRP for long term subscriptions?**
- Q21. Is the freedom of placement of channels on EPG available to DPOs being misused to ask for placement fees? If so, how this problem can be addressed particularly by regulating placement of channels on EPG?**
- Q22. How the channels should be listed in the Electronic Program Guide (EPG)?**
- Q23. Whether distributors should also be permitted to offer promotional schemes on NCF, DRP of the channels and bouquet of the channels?**
- Q24. In case distributors are to be permitted, what should be the maximum time period of such schemes? How much frequency**

should be allowed in a calendar year?

- Q25. What safeguards should be provided so that consumers are not trapped under such schemes and their interests are protected?**
- Q26. Whether DPOs should be allowed to have variable NCF for different regions? How the regions should be categorized for the purpose of NCF?**
- Q27. In view of the fact that DPOs are offering more FTA channels without any additional NCF, should the limit of one hundred channels in the prescribed NCF of Rs. 130/- to be increased? If so, how many channels should be permitted in the NCF cap of Rs 130/-?**
- Q28. Whether 25 DD mandatory channels be over and above the One hundred channels permitted in the NCF of Rs. 130/-?**
- Q29. In case of Recommendation to be made to the MIB in this regard, what recommendations should be made for mandatory 25 channels so that purpose of the Government to ensure reachability of these channels to masses is also served without any additional burden on the consumers?**
- Q30. Stakeholders may also provide their comments on any other issue relevant to the present consultation.**

Annexure I

Comparison of Prices of channels declared by broadcasters in Old framework and New framework

S.No	Name of the channel	Genre	Wholesale rates as per Old Regulatory Framework (in Rs) (A)	Normalised equivalent wholesale prices (B = A*1.25)	MRP as per New Regulatory Framework (in Rs) (C)	% change	Declared as SD or HD
1	Prarthana	Devotional	2.10	2.63	2.00	-23.81	SD
2	Asianet	GEC	5.23	6.54	19.00	190.63	SD
3	Asianet HD	GEC	25.00	31.25	19.00	-39.20	HD
4	Star Suvarna	GEC	5.04	6.30	19.00	201.59	SD
5	Star Suvarna HD	GEC	25	31.25	19.00	-39.20	HD
6	Vijay HD	GEC	25.00	31.25	19.00	-39.20	HD
7	ETV HD	GEC	40.00	50.00	19.00	-62.00	HD
8	ZEE Sarthak	GEC	3.99	4.99	19.00	280.95	SD
9	SAB	GEC	6.17	7.71	19.00	146.35	SD
10	SAB HD	GEC	25.00	31.25	19.00	-39.20	HD
11	SET HD	GEC	25.00	31.25	19.00	-39.20	HD
12	SONY ENTERTAINMENT CHANNEL (SET)	GEC	8.99	11.24	19.00	69.08	SD
13	MAA HD	GEC	25.00	31.25	19.00	-39.20	HD
14	MAA TV	GEC	5.25	6.56	19.00	189.52	SD
15	Star Bharat HD	GEC	25.00	31.25	19.00	-39.20	HD
16	Star Jalsha	GEC	5.04	6.30	19.00	201.59	SD
17	Star Jalsha HD	GEC	25.00	31.25	19.00	-39.20	HD
18	Star Plus	GEC	7.87	9.84	19.00	93.14	SD
19	Star Plus HD	GEC	25.00	31.25	19.00	-39.20	HD
20	Gemini TV	GEC	4.63	5.79	19.00	228.29	SD
21	Gemini TV HD	GEC	40.00	50.00	19.00	-62.00	HD
22	SUN TV	GEC	5.25	6.56	19.00	189.52	SD
23	Sun TV HD	GEC	40.00	50.00	19.00	-62.00	HD
24	Surya TV HD	GEC	20.00	25.00	19.00	-24.00	HD
25	Udaya TV HD	GEC	20.00	25.00	19.00	-24.00	HD
26	Colors	GEC	8.99	11.24	19.00	69.08	SD
27	Colors HD	GEC	30.00	37.50	19.00	-49.33	HD
28	Colors Kannada	GEC	4.67	5.84	19.00	225.48	SD
29	Colors Kannada HD	GEC	25.00	31.25	19.00	-39.20	HD
30	& TV HD	GEC	30.00	37.50	19.00	-49.33	HD

31	Zee Bangla	GEC	3.64	4.55	19.00	317.58	SD
32	Zee Bangla HD	GEC	30.00	37.50	19.00	-49.33	HD
33	Zee Café HD	GEC	30.00	37.50	19.00	-49.33	HD
34	Zee Kannada	GEC	3.35	4.19	19.00	353.73	SD
35	Zee Kannada HD	GEC	30.00	37.50	19.00	-49.33	HD
36	Zee Marathi	GEC	3.60	4.50	19.00	322.22	SD
37	Zee Marathi HD	GEC	30.00	37.50	19.00	-49.33	HD
38	Zee Tamil HD	GEC	30.00	37.50	19.00	-49.33	HD
39	Zee Telugu	GEC	4.67	5.84	19.00	225.48	SD
40	Zee Telugu HD	GEC	30.00	37.50	19.00	-49.33	HD
41	Zee TV	GEC	5.83	7.29	19.00	160.72	SD
42	Zee TV HD	GEC	30.00	37.50	19.00	-49.33	HD
43	Vijay TV	GEC	1.80	2.25	17.00	655.56	SD
44	ETV	GEC	4.49	5.61	17.00	202.90	SD
45	Udaya TV	GEC	5.17	6.46	17.00	163.06	SD
46	Colors Marathi HD	GEC	25.00	31.25	17.00	-45.60	HD
47	Star Pravah HD	GEC	25.00	31.25	15.00	-52.00	HD
48	Zee Café	GEC	3.60	4.50	15.00	233.33	SD
49	Colors Bangla HD	GEC	25.00	31.25	14.00	-55.20	HD
50	Disney International HD	GEC	25.00	31.25	12.00	-61.60	HD
51	Surya TV	GEC	5.17	6.46	12.00	85.69	SD
52	& TV	GEC	9.02	11.28	12.00	6.43	SD
53	Zee Tamil	GEC	5.25	6.56	12.00	82.86	SD
54	Tarang	GEC	4.49	5.61	10.00	78.17	SD
55	Star Bharat	GEC	9.21	11.51	10.00	-13.14	SD
56	Colors Marathi	GEC	4.67	5.84	10.00	71.31	SD
57	Star Pravah	GEC	5.04	6.30	9.00	42.86	SD
58	Star World HD	GEC	20.00	25.00	9.00	-64.00	HD
59	Star World Pmiere HD	GEC	25.00	31.25	9.00	-71.20	HD
60	SUN Life	GEC	5.25	6.56	9.00	37.14	SD
61	Colors Infinity HD	GEC	25.00	31.25	9.00	-71.20	HD
62	Comedy Central (HD)	GEC	20.00	25.00	9.00	-64.00	HD
63	Star World	GEC	2.05	2.56	8.00	212.20	SD
64	ETV Plus	GEC	4.67	5.84	7.00	19.91	SD
65	AXN HD	GEC	25.00	31.25	7.00	-77.60	HD
66	Colors Bangla	GEC	4.67	5.84	7.00	19.91	SD
67	Colors Tamil HD	GEC	25	31.25	7.00	-77.60	HD
68	Jaya TV HD	GEC	40.00	50.00	6.00	-88.00	HD
69	Colors Oriya	GEC	4.67	5.84	6.00	2.78	SD
70	Asianet Plus	GEC	2.94	3.68	5.00	36.05	SD
71	AXN	GEC	6.52	8.15	5.00	-38.65	SD

72	Gemini Life	GEC	4.67	5.84	5.00	-14.35	SD
73	Colors Gujarati	GEC	4.67	5.84	5.00	-14.35	SD
74	Colors Infinity	GEC	6.52	8.15	5.00	-38.65	SD
75	Comedy Central	GEC	6.51	8.14	5.00	-38.56	SD
76	AATH	GEC	4.20	5.25	4.00	-23.81	SD
77	Raj TV	GEC	4.62	5.78	3.00	-48.05	SD
78	Mega TV	GEC	2.10	2.63	3.00	14.29	SD
79	Colors Super	GEC	5.00	6.25	3.00	-52.00	SD
80	Colors Tamil	GEC	5.25	6.56	3.00	-54.29	SD
81	Vijay Super	GEC	5.25	6.56	2.00	-69.52	SD
82	Discovery Jeet HD	GEC	30.00	37.50	2.00	-94.67	HD
83	ETV Abhiruchi	GEC	4.67	5.84	2.00	-65.74	SD
84	Discovery Jeet	GEC	8.98	11.23	1.00	-91.09	SD
85	ETV Life	GEC	4.20	5.25	1.00	-80.95	SD
86	UTV Bindass	GEC	4.20	5.25	1.00	-80.95	SD
87	Mega 24	GEC	2.10	2.63	1.00	-61.90	SD
88	PAL	GEC	9.21	11.51	1.00	-91.31	SD
89	Zee Yuva	GEC	5.04	6.30	1.00	-84.13	SD
90	Zoom	GEC	3.51	4.39	0.50	-88.60	SD
91	Vissa TV	GEC	1.96	2.45	0.50	-79.59	SD
92	Living Foodz HD	Infotainment	4.00	5.00	10.00	100.00	HD
93	SONY BBC EARTH HD	Infotainment	25.00	31.25	10.00	-68.00	HD
94	National Geographic HD	Infotainment	16.00	20.00	10.00	-50.00	HD
95	Histroy TV 18 HD	Infotainment	20.00	25.00	7.00	-72.00	HD
96	Discovery HD World	Infotainment	21.00	26.25	6.00	-77.14	HD
97	Nat Geo Wild HD	Infotainment	30.00	37.50	5.00	-86.67	HD
98	Discovery Channel	Infotainment	6.74	8.43	4.00	-52.52	SD
99	Discovery Channel – Tamil	Infotainment	6.74	8.43	4.00	-52.52	SD
100	SONY BBC EARTH	Infotainment	6.72	8.40	4.00	-52.38	SD
101	The History Channel	Infotainment	6.72	8.40	3.00	-64.29	SD
102	Animal Planet HD World	Infotainment	24.15	30.19	3.00	-90.06	HD
103	TLC HD world	Infotainment	24.15	30.19	3.00	-90.06	HD
104	Animal Planet	Infotainment	2.25	2.81	2.00	-28.89	SD
105	TLC	Infotainment	4.04	5.05	2.00	-60.40	SD
106	EPIC TV	Infotainment	20.00	25.00	2.00	-92.00	SD
107	National Geographic Channel (NGC)	Infotainment	2.58	3.23	2.00	-37.98	SD
108	FY1 TV18 (HD)	Infotainment	30.00	37.50	1.00	-97.33	HD
109	Discovery Science	Infotainment	5.04	6.30	1.00	-84.13	SD

110	Discovery Turbo	Infotainment	4.20	5.25	1.00	-80.95	SD
111	Nat Geo Wild	Infotainment	6.72	8.40	1.00	-88.10	SD
112	Food Food TV	Infotainment	7.56	9.45	1.00	-89.42	SD
113	Living Foodz	Infotainment	6.72	8.40	1.00	-88.10	SD
114	Living Zen	Infotainment	6.72	8.40	0.10	-98.81	SD
115	NICKS HD+	Kids	25.00	31.25	10.00	-68.00	HD
116	The Disney Channel	Kids	4.00	5.00	8.00	60.00	SD
117	Hungama TV	Kids	3.51	4.39	6.00	36.75	SD
118	Chintu TV	Kids	5.62	7.03	6.00	-14.59	SD
119	Chutti TV	Kids	5.62	7.03	6.00	-14.59	SD
120	NICK	Kids	2.70	3.38	6.00	77.78	SD
121	Kochu TV	Kids	5.62	7.03	5.00	-28.83	SD
122	Cartoon Network HD+	Kids	25.00	31.25	5.00	-84.00	HD
123	Cartoon Network	Kids	5.62	7.03	4.25	-39.50	SD
124	POGO	Kids	5.62	7.03	4.25	-39.50	SD
125	Disney Junior	Kids	5.62	7.03	4.00	-43.06	SD
126	Marvel HQ	Kids	4.00	5.00	4.00	-20.00	SD
127	Kushi TV	Kids	5.62	7.03	4.00	-43.06	SD
128	Discovery Kids Channel	Kids	5.56	6.95	3.00	-56.83	SD
129	Sony YAY!	Kids	5.62	7.03	2.00	-71.53	SD
130	SONIC	Kids	5.46	6.83	2.00	-70.70	SD
131	Baby TV HD	Kids	30.00	37.50	1.00	-97.33	HD
132	NICK JR	Kids	5.62	7.03	1.00	-85.77	SD
133	Travel XP HD	Lifestyle	40.00	50.00	9.00	-82.00	HD
134	Travel XP Tamil	Lifestyle	3.75	4.69	1.50	-68.00	SD
135	Good Times	Lifestyle	4.04	5.05	1.50	-70.30	SD
136	Fox Life	Lifestyle	1.98	2.48	1.00	-59.60	SD
137	Fox Life HD	Lifestyle	30.00	37.50	1.00	-97.33	HD
138	Topper TV	Miscellaneous	60.00	75.00	59.32	-20.91	SD
139	Jalsha Movies HD	Movies	25.00	31.25	19.00	-39.20	HD
140	MAA Movies HD	Movies	25.00	31.25	19.00	-39.20	HD
141	Star Movies HD	Movies	25.00	31.25	19.00	-39.20	HD
142	Gemini Movies HD	Movies	25.00	31.25	19.00	-39.20	HD
143	KTV	Movies	6.75	8.44	19.00	125.19	SD
144	KTV HD	Movies	40.00	50.00	19.00	-62.00	HD
145	& Pictures HD	Movies	30.00	37.50	19.00	-49.33	HD
146	&Prive HD	Movies	30.00	37.50	19.00	-49.33	HD
147	Zee Cinema HD	Movies	30.00	37.50	19.00	-49.33	HD
148	MAX HD	Movies	25.00	31.25	17.00	-45.60	HD
149	Gemini Movies	Movies	7.64	9.55	17.00	78.01	SD
150	Udaya Movies	Movies	6.47	8.09	16.00	97.84	SD

151	Zee Cinemalu HD	Movies	30.00	37.50	16.00	-57.33	HD
152	Asianet Movies	Movies	7.46	9.33	15.00	60.86	SD
153	PIX HD	Movies	25.00	31.25	15.00	-52.00	HD
154	SET MAX	Movies	7.64	9.55	15.00	57.07	SD
155	Zee Cinema	Movies	5.83	7.29	15.00	105.83	SD
156	Movies Now HD	Movies	149.00	186.25	12.00	-93.56	HD
157	Star Movies	Movies	7.42	9.28	12.00	29.38	SD
158	HBO HD	Movies	35.00	43.75	12.00	-72.57	HD
159	Surya Movies	Movies	7.64	9.55	11.00	15.18	SD
160	MN +	Movies	149.00	186.25	10.00	-94.63	HD
161	PIX	Movies	5.39	6.74	10.00	48.42	SD
162	MAA Movies	Movies	7.77	9.71	10.00	2.96	SD
163	Star Gold HD	Movies	25.00	31.25	10.00	-68.00	HD
164	Star Gold Select HD	Movies	25.00	31.25	10.00	-68.00	HD
165	Star Movies Select HD	Movies	25.00	31.25	10.00	-68.00	HD
166	HBO	Movies	7.01	8.76	10.00	14.12	SD
167	Zee Cinemalu	Movies	7.64	9.55	10.00	4.71	SD
168	Movies Now	Movies	10.42	13.03	10.00	-23.22	SD
169	MNX HD	Movies	30.00	37.50	9.00	-76.00	HD
170	Romedy Now HD	Movies	30.00	37.50	9.00	-76.00	HD
171	Adithya TV	Movies	7.64	9.55	9.00	-5.76	SD
172	Star Gold	Movies	7.42	9.28	8.00	-13.75	SD
173	Star Gold Select	Movies	7.77	9.71	7.00	-27.93	SD
174	MNX	Movies	7.42	9.28	6.00	-35.31	SD
175	Romedy Now	Movies	7.42	9.28	6.00	-35.31	SD
176	ETV Cinema	Movies	7.77	9.71	6.00	-38.22	SD
177	Jalsha Movies	Movies	7.77	9.71	6.00	-38.22	SD
178	Udaya Comedy	Movies	6.75	8.44	6.00	-28.89	SD
179	& Picture	Movies	7.56	9.45	6.00	-36.51	SD
180	Suvarna Plus	Movies	5.25	6.56	5.00	-23.81	SD
181	Gemini Comedy	Movies	2.38	2.98	5.00	68.07	SD
182	Alankar	Movies	5.04	6.30	4.00	-36.51	SD
183	Surya Comedy	Movies	4.50	5.63	4.00	-28.89	SD
184	Colors Cineplex	Movies	7.64	9.55	3.00	-68.59	SD
185	J Movies	Movies	2.52	3.15	2.25	-28.57	SD
186	UTV Movies	Movies	6.30	7.88	2.00	-74.60	SD
187	UTV Action	Movies	4.20	5.25	2.00	-61.90	SD
188	MAA Gold	Movies	5.25	6.56	2.00	-69.52	SD
189	Zee Bollywood	Movies	1.35	1.69	2.00	18.52	SD
190	Zee Bangla Cinema	Movies	6.80	8.50	2.00	-76.47	SD
191	Zee Talkies	Movies	6.96	8.70	2.00	-77.01	SD
192	Raj Digital Plus	Movies	3.24	4.05	1.50	-62.96	SD

193	MAX 2	Movies	7.64	9.55	1.00	-89.53	SD
194	Movies OK	Movies	7.14	8.93	1.00	-88.80	SD
195	WB	Movies	2.77	3.46	1.00	-71.12	SD
196	Zee Action	Movies	4.49	5.61	1.00	-82.18	SD
197	Zee Talkies HD	Movies	30.00	37.50	19.00	-49.33	HD
198	Gemini Music HD	Music	20.00	25.00	19.00	-24.00	HD
199	Sun Music HD	Music	25.00	31.25	19.00	-39.20	HD
200	Sun Music	Music	3.15	3.94	6.00	52.38	SD
201	Udaya Music	Music	3.15	3.94	6.00	52.38	SD
202	MTV HD+	Music	25	31.25	5.00	-84.00	HD
203	Gemini Music	Music	3.15	3.94	4.00	1.59	SD
204	Surya Music	Music	3.15	3.94	4.00	1.59	SD
205	MTV	Music	3.15	3.94	3.00	-23.81	SD
206	Jaya Max	Music	2.52	3.15	2.25	-28.57	SD
207	Tarang Music	Music	2.10	2.63	2.00	-23.81	SD
208	Mega Musiq	Music	2.10	2.63	2.00	-23.81	SD
209	VH 1 (HD Distribution)	Music	20.00	25.00	2.00	-92.00	HD
210	Raj Musix	Music	2.10	2.63	1.00	-61.90	SD
211	MIX	Music	3.15	3.94	1.00	-74.60	SD
212	MAA Music	Music	3.15	3.94	1.00	-74.60	SD
213	MTV Beats HD	Music	25	31.25	1.00	-96.80	HD
214	VH 1	Music	1.35	1.69	1.00	-40.74	SD
215	Raj Musix Kannada	Music	2.31	2.89	0.25	-91.34	SD
216	MTV Beats	Music	3.15	3.94	0.10	-97.46	SD
217	Zing	Music	2.25	2.81	0.10	-96.44	SD
218	JAN TV PLUS	News	1.00	1.25	50.00	3900.00	SD
219	Times Now World	News	15.00	18.75	5.00	-73.33	HD
220	CNBC TV 18	News	3.82	4.78	4.00	-16.23	SD
221	ET NOW	News	3.57	4.46	3.00	-32.77	SD
222	Times Now	News	3.82	4.78	3.00	-37.17	SD
223	NDTV 24*7	News	3.82	4.78	3.00	-37.17	SD
224	Mirror Now	News	3.57	4.46	2.00	-55.18	SD
225	BBC World News	News	2.25	2.81	1.00	-64.44	SD
226	ETV - Telangana	News	2.52	3.15	1.00	-68.25	SD
227	ETV Andhra Pradesh	News	2.52	3.15	1.00	-68.25	SD
228	NDTV Profit	News	2.70	3.38	1.00	-70.37	SD
229	Sun News	News	0.62	0.78	1.00	29.03	SD
230	CNBC Awaaz	News	2.02	2.53	1.00	-60.40	SD
231	CNBC Bazaar	News	3.82	4.78	1.00	-79.06	SD
232	CNBC TV 18 Prime HD	News	15.00	18.75	1.00	-94.67	HD
233	India Today	News	1.35	1.69	1.00	-40.74	SD

234	WION	News	3.86	4.83	1.00	-79.27	SD
235	AajTak	News	3.15	3.94	0.75	-80.95	SD
236	Jaya Plus	News	1.68	2.10	0.50	-76.19	SD
237	CNN International	News	0.67	0.84	0.50	-40.30	SD
238	CNN News 18	News	2.25	2.81	0.50	-82.22	SD
239	Raj News	News	1.68	2.10	0.25	-88.10	SD
240	AajTakTez	News	0.90	1.13	0.25	-77.78	SD
241	News 18 Lokmat	News	3.30	4.13	0.10	-97.58	SD
242	News 18 Bangla	News	3.82	4.78	0.10	-97.91	SD
243	News 18 Bihar Jharkhand	News	4.67	5.84	0.10	-98.29	SD
244	News 18 Gujarati	News	3.82	4.78	0.10	-97.91	SD
245	News 18 Kannada	News	3.82	4.78	0.10	-97.91	SD
246	News 18 Madhya Pradesh / Chattisgarh	News	4.67	5.84	0.10	-98.29	SD
247	News 18 Odia	News	3.86	4.83	0.10	-97.93	SD
248	News 18 Punjab / Haryana / Himanchal Pradesh	News	3.82	4.78	0.10	-97.91	SD
249	News 18 Rajasthan	News	4.67	5.84	0.10	-98.29	SD
250	News 18 Urdu	News	4.67	5.84	0.10	-98.29	SD
251	News 18 Uttar Pradesh/ Uttaranchal	News	4.67	5.84	0.10	-98.29	SD
252	Gemini News	News	3.37	4.21	0.10	-97.63	SD
253	Udaya News	News	3.03	3.79	0.10	-97.36	SD
254	Zee 24 Kalak	News	3.82	4.78	0.10	-97.91	SD
255	Zee 24 Taas	News	3.82	4.78	0.10	-97.91	SD
256	Zee Business	News	2.16	2.70	0.10	-96.30	SD
257	Zee Madhya Pradesh Chattisgarh	News	3.82	4.78	0.10	-97.91	SD
258	Zee Odisha	News	4.67	5.84	0.10	-98.29	SD
259	Zee Punjab Haryana Himachal	News	0.67	0.84	0.10	-88.06	SD
260	Zee Rajasthan News	News	4.62	5.78	0.10	-98.27	SD
261	Zee Salaam	News	3.86	4.83	0.10	-97.93	SD
262	Zee Uttar Pradesh Uttrakhand	News	3.86	4.83	0.10	-97.93	SD
263	Zee 24 Ghanta	News	2.70	3.38	0.10	-97.04	SD
264	SIX HD	Sports	35.00	43.75	19.00	-56.57	HD
265	Ten 1	Sports	6.74	8.43	19.00	125.52	SD
266	Ten 1 HD	Sports	35.00	43.75	19.00	-56.57	HD
267	Star Sports HD 1	Sports	35.00	43.75	19.00	-56.57	HD
268	Star Sports 1	Sports	14.89	18.61	19.00	2.08	SD

269	Star Sports 1 HD Hindi	Sports	35.00	43.75	19.00	-56.57	HD
270	Star Sports 1 Hindi	Sports	12.58	15.73	19.00	20.83	SD
271	Star Sports HD 2	Sports	35.00	43.75	19.00	-56.57	HD
272	Star Sports Select 1	Sports	15.12	18.90	19.00	0.53	SD
273	Star Sports Select HD 1	Sports	35.00	43.75	19.00	-56.57	HD
274	Ten 2 HD	Sports	35.00	43.75	17.00	-61.14	HD
275	Ten 3	Sports	15.12	18.90	17.00	-10.05	SD
276	Ten 3 HD	Sports	35.00	43.75	17.00	-61.14	HD
277	Star Sports 1 Tamil	Sports	14.89	18.61	17.00	-8.66	SD
278	SIX	Sports	14.70	18.38	15.00	-18.37	SD
279	Ten 2	Sports	14.70	18.38	15.00	-18.37	SD
280	Star Sports Select HD 2	Sports	35.00	43.75	10.00	-77.14	HD
281	SONY ESPN HD	Sports	35.00	43.75	7.00	-84.00	HD
282	Star Sports Select 2	Sports	15.12	18.90	7.00	-62.96	SD
283	Star Sports 2	Sports	15.12	18.90	6.00	-68.25	SD
284	SONY ESPN	Sports	15.12	18.90	5.00	-73.54	SD
285	Dsport	Sports	12.60	15.75	4.00	-74.60	SD
286	Star Sports First	Sports	15.12	18.90	1.00	-94.71	SD

Annexure-II**Subscription of channels on a-la-carte vs. bouquet basis**

S.No	Name of Broadcaster	Name of channel	% of subscribers provided / chosen channel on a-la-carte basis	% of subscribers provided / chosen channel as apart of bouquet
1	Zee Entertainment Enterprises Limited	&Flix	17.70	82.30
2	Zee Entertainment Enterprises Limited	&Flix HD	27.65	72.35
3	Zee Entertainment Enterprises Limited	& Picture	9.70	90.30
4	Zee Entertainment Enterprises Limited	& Pictures HD	23.29	76.71
5	Zee Entertainment Enterprises Limited	&Prive HD	12.87	87.13
6	Zee Entertainment Enterprises Limited	& TV	8.40	91.60
7	Zee Entertainment Enterprises Limited	& TV HD	19.47	80.53
8	TV Today Network Ltd.	AajTak	19.96	80.04
9	TV Today Network Ltd.	AAJ Tak HD	19.06	80.94
10	TV Today Network Ltd.	AajTakTez	7.54	92.46
11	Sony Pictures Networks India Pvt Ltd.	AATH	22.97	77.03
12	SUN TV Network Limited	Adithya TV	5.81	94.19
13	Odisha Television Limited	Alankar	13.22	86.78
14	Discovery Communications India	Animal Planet	15.23	84.77
15	Discovery Communications India	Animal Planet HD World	18.12	81.88
16	STAR India Private Limited	Asianet	27.59	72.41
17	STAR India Private Limited	Asianet HD	44.05	55.95
18	STAR India Private Limited	Asianet Movies	16.45	83.55
19	STAR India Private Limited	Asianet Plus	19.26	80.74
20	Sony Pictures Networks India Pvt Ltd.	AXN	11.89	88.11
21	Sony Pictures Networks India Pvt Ltd.	AXN HD	18.78	81.22
22	STAR India Private Limited	Baby TV HD	15.31	84.69
23	BBC Global News India Private Limited	BBC World News	53.84	46.16
24	Zee Entertainment Enterprises Limited	Big Ganga	6.68	93.32
25	Zee Entertainment Enterprises Limited	Big Magic	5.48	94.52
26	Turner International Pvt Ltd.	Cartoon Network	16.71	83.29

27	Turner International Pvt Ltd.	Cartoon Network HD+	59.50	40.50
28	SUN TV Network Limited	Chintu TV	4.12	95.88
29	SUN TV Network Limited	Chutti TV	4.89	95.11
30	TV 18 Broadcast Ltd.	CNBC Awaaz	7.89	92.11
31	TV 18 Broadcast Ltd.	CNBC Bazaar	26.14	73.86
32	TV 18 Broadcast Ltd.	CNBC TV 18	7.31	92.69
33	TV 18 Broadcast Ltd.	CNBC TV 18 Prime HD	24.67	75.33
34	Turner International Pvt Ltd.	CNN International	20.05	79.95
35	TV 18 Broadcast Ltd.	CNN News 18	11.15	88.85
36	TV 18 Broadcast Ltd.	Colors	15.96	84.04
37	TV 18 Broadcast Ltd.	Colors Bangla	53.39	46.61
38	TV 18 Broadcast Ltd.	Colors Bangla Cinema	3.67	96.33
39	TV 18 Broadcast Ltd.	Colors Bangla HD	31.30	68.70
40	TV 18 Broadcast Ltd.	Colors Cineplex	10.29	89.71
41	TV 18 Broadcast Ltd.	Colors Cineplex HD	19.37	80.63
42	TV 18 Broadcast Ltd.	Colors Gujarati	28.29	71.71
43	TV 18 Broadcast Ltd.	Colors Gujarati Cinema	11.29	88.71
44	TV 18 Broadcast Ltd.	Colors HD	36.09	63.91
45	TV 18 Broadcast Ltd.	Colors Infinity	6.79	93.21
46	TV 18 Broadcast Ltd.	Colors Infinity HD	28.32	71.68
47	TV 18 Broadcast Ltd.	Colors Kannada	25.04	74.96
48	TV 18 Broadcast Ltd.	Colors Kannada Cinema	21.04	78.96
49	TV 18 Broadcast Ltd.	Colors Kannada HD	51.82	48.18
50	TV 18 Broadcast Ltd.	Colors Marathi	22.75	77.25
51	TV 18 Broadcast Ltd.	Colors Marathi HD	30.02	69.98
52	TV 18 Broadcast Ltd.	Colors Oriya	56.84	43.16
53	TV 18 Broadcast Ltd.	ColorsRishtey	12.33	87.67
54	TV 18 Broadcast Ltd.	Colors Super	24.62	75.38
55	TV 18 Broadcast Ltd.	Colors Tamil	19.99	80.01
56	TV 18 Broadcast Ltd.	Colors Tamil HD	11.96	88.04
57	TV 18 Broadcast Ltd.	Comedy Central	14.94	85.06
58	TV 18 Broadcast Ltd.	Comedy Central (HD)	17.07	82.93
59	Discovery Communications India	Discovery Channel	8.19	91.81
60	Discovery Communications India	Discovery Channel Tamil	25.66	74.34
61	Discovery Communications India	Discovery HD World	18.47	81.53
62	Discovery Communications India	Discovery Jeet	7.04	92.96
63	Discovery Communications India	Discovery Jeet HD	1.20	98.80
64	Discovery Communications India	Discovery Kids Channel	4.73	95.27
65	Discovery Communications India	Discovery Science	7.06	92.94
66	Discovery Communications India	Discovery Turbo	2.95	97.05
67	Disney Broadcasting (India) Limited	Disney International HD	21.42	78.58
68	Disney Broadcasting (India) Limited	Disney Junior	5.03	94.97
69	Discovery Communications India	Dsport	2.38	97.62

70	EPIC Television Networks Pvt Limited	EPIC TV	46.97	53.03
71	Bennett, Coleman & Company Limited	ET NOW	2.50	97.50
72	Eenadu Television Pvt Limited	ETV	9.77	90.23
73	Eenadu Television Pvt Limited	ETV - Telangana	12.86	87.14
74	Eenadu Television Pvt Limited	ETV Abhiruchi	12.28	87.72
75	Eenadu Television Pvt Limited	ETV Abhiruchi HD	1.28	98.72
76	Eenadu Television Pvt Limited	ETV Andhra Pradesh	7.02	92.98
77	Eenadu Television Pvt Limited	ETV Cinema	14.74	85.26
78	Eenadu Television Pvt Limited	ETV Cinema HD	4.08	95.92
79	Eenadu Television Pvt Limited	ETV HD	81.79	18.21
80	Eenadu Television Pvt Limited	ETV Life	12.77	87.23
81	Eenadu Television Pvt Limited	ETV Life HD	0.76	99.24
82	Eenadu Television Pvt Limited	ETV Plus	13.56	86.44
83	Eenadu Television Pvt Limited	ETV Plus HD	2.27	97.73
84	STAR India Private Limited	Fox Life	33.44	66.56
85	STAR India Private Limited	Fox Life HD	28.08	71.92
86	TV 18 Broadcast Ltd.	FY1 TV18	5.72	94.28
87	TV 18 Broadcast Ltd.	FY1 TV18 (HD)	1.75	98.25
88	SUN TV Network Limited	Gemini Comedy	14.12	85.88
89	SUN TV Network Limited	Gemini Life	12.88	87.12
90	SUN TV Network Limited	Gemini Movies	15.79	84.21
91	SUN TV Network Limited	Gemini Movies HD	34.10	65.90
92	SUN TV Network Limited	Gemini Music	15.15	84.85
93	SUN TV Network Limited	Gemini Music HD	18.21	81.79
94	SUN TV Network Limited	Gemini News	0.01	99.99
95	SUN TV Network Limited	Gemini TV	18.59	81.41
96	SUN TV Network Limited	Gemini TV HD	45.67	54.33
97	New Delhi Television Limited (NDTV)	Good Times	7.95	92.05
98	Turner International Pvt Ltd.	HBO	25.81	74.19
99	Turner International Pvt Ltd.	HBO HD	45.36	54.64
100	TV 18 Broadcast Ltd.	Histry TV 18 HD	18.12	81.88
101	Disney Broadcasting (India) Limited	Hungama TV	12.50	87.50
102	TV Today Network Ltd.	India Today	16.87	83.13
103	Mavis Satcom Limited	J Movies	21.93	78.07
104	STAR India Private Limited	Jalsha Movies	38.49	61.51
105	STAR India Private Limited	Jalsha Movies HD	26.60	73.40
106	CSL Info Media Private Limited	JAN TV PLUS	0.20	99.80
107	Mavis Satcom Limited	Jaya Max	24.73	75.27
108	Mavis Satcom Limited	Jaya Plus	23.46	76.54
109	Mavis Satcom Limited	Jaya TV HD	38.98	61.02
110	SUN TV Network Limited	Kochu TV	4.55	95.45
111	SUN TV Network Limited	KTV	8.21	91.79
112	SUN TV Network Limited	KTV HD	29.75	70.25

113	SUN TV Network Limited	Kushi TV	13.32	86.68
114	Zee Entertainment Enterprises Limited	Living Foodz	4.27	95.73
115	Zee Entertainment Enterprises Limited	Living Foodz HD	1.86	98.14
116	Zee Entertainment Enterprises Limited	Living Travelz	0.85	99.15
117	STAR India Private Limited	MAA Gold	21.34	78.66
118	STAR India Private Limited	MAA HD	45.07	54.93
119	STAR India Private Limited	MAA Movies	26.57	73.43
120	STAR India Private Limited	MAA Movies HD	35.32	64.68
121	STAR India Private Limited	MAA Music	27.17	72.83
122	STAR India Private Limited	MAA TV	26.39	73.61
123	Disney Broadcasting (India) Limited	Marvel HQ	4.89	95.11
124	Sony Pictures Networks India Pvt Ltd.	MAX 2	16.21	83.79
125	Sony Pictures Networks India Pvt Ltd.	MAX HD	31.50	68.50
126	Sliverstar Communications Ltd.	Mega 24	15.14	84.86
127	Sliverstar Communications Ltd.	Mega Musiq	15.57	84.43
128	Sliverstar Communications Ltd.	Mega TV	22.71	77.29
129	Bennett, Coleman & Company Limited	Mirror Now	2.57	97.43
130	Sony Pictures Networks India Pvt Ltd.	MIX	6.93	93.07
131	Bennett, Coleman & Company Limited	MN +	29.81	70.19
132	Bennett, Coleman & Company Limited	MNX	7.15	92.85
133	Bennett, Coleman & Company Limited	MNX HD	25.50	74.50
134	Bennett, Coleman & Company Limited	Movies Now	12.81	87.19
135	Bennett, Coleman & Company Limited	Movies Now HD	23.38	76.62
136	STAR India Private Limited	Movies OK	30.84	69.16
137	TV 18 Broadcast Ltd.	MTV	8.53	91.47
138	TV 18 Broadcast Ltd.	MTV Beats	9.57	90.43
139	TV 18 Broadcast Ltd.	MTV Beats HD	23.54	76.46
140	TV 18 Broadcast Ltd.	MTV HD+	6.26	93.74
141	STAR India Private Limited	Nat Geo Wild	4.61	95.39
142	STAR India Private Limited	Nat Geo Wild HD	15.99	84.01
143	STAR India Private Limited	National Geographic Channel (NGC)	6.81	93.19
144	STAR India Private Limited	National GeographicHD	14.57	85.43
145	New Delhi Television Limited (NDTV)	NDTV 24*7	32.88	67.12
146	New Delhi Television Limited (NDTV)	NDTV India	42.41	57.59

147	New Delhi Television Limited (NDTV)	NDTV Profit	6.82	93.18
148	TV 18 Broadcast Ltd.	News 18 Assam / North East	5.74	94.26
149	TV 18 Broadcast Ltd.	News 18 Bangla	49.20	50.80
150	TV 18 Broadcast Ltd.	News 18 Bihar Jharkhand	8.69	91.31
151	TV 18 Broadcast Ltd.	News 18 Gujarati	20.28	79.72
152	TV 18 Broadcast Ltd.	News 18 India	9.89	90.11
153	TV 18 Broadcast Ltd.	News 18 Kannada	18.95	81.05
154	TV 18 Broadcast Ltd.	News 18 Kerala	55.86	44.14
155	TV 18 Broadcast Ltd.	News 18 Lokmat	20.60	79.40
156	TV 18 Broadcast Ltd.	News 18 Madhya Pradesh / Chattisgarh	9.17	90.83
157	TV 18 Broadcast Ltd.	News 18 Odia	55.55	44.45
158	TV 18 Broadcast Ltd.	News 18 Punjab / Haryana / Himanchal Pradesh	8.02	91.98
159	TV 18 Broadcast Ltd.	News 18 Rajasthan	9.51	90.49
160	TV 18 Broadcast Ltd.	News 18 Tamil Nadu	19.45	80.55
161	TV 18 Broadcast Ltd.	News 18 Urdu	3.97	96.03
162	TV 18 Broadcast Ltd.	News 18 Uttar Pradesh/ Uttaranchal	8.15	91.85
163	NOIDA Software Technology Park Ltd	NHK World Premium	76.29	23.71
164	TV 18 Broadcast Ltd.	NICK	13.48	86.52
165	TV 18 Broadcast Ltd.	NICK JR	9.54	90.46
166	TV 18 Broadcast Ltd.	NICKS HD+	15.77	84.23
167	Sony Pictures Networks India Pvt Ltd.	PAL	15.52	84.48
168	Sony Pictures Networks India Pvt Ltd.	PIX	14.31	85.69
169	Sony Pictures Networks India Pvt Ltd.	PIX HD	23.03	76.97
170	Turner International Pvt Ltd.	POGO	14.23	85.77
171	Odisha Television Limited	Prarthana	16.04	83.96
172	Raj Television Network Limited	Raj Digital Plus	15.19	84.81
173	Raj Television Network Limited	Raj Musix	21.67	78.33
174	Raj Television Network Limited	Raj Musix Kannada	46.12	53.88
175	Raj Television Network Limited	Raj News	14.59	85.41
176	Raj Television Network Limited	Raj TV	19.62	80.38
177	Bennett, Coleman & Company Limited	Romedy Now	5.44	94.56
178	Bennett, Coleman & Company Limited	Romedy Now HD	20.89	79.11
179	Sony Pictures Networks India Pvt Ltd.	SAB	6.53	93.47
180	Sony Pictures Networks India Pvt Ltd.	SAB HD	26.01	73.99

181	Sony Pictures Networks India Pvt Ltd.	SET HD	35.04	64.96
182	Sony Pictures Networks India Pvt Ltd.	SET MAX	9.85	90.15
183	Sony Pictures Networks India Pvt Ltd.	SIX	17.40	82.60
184	Sony Pictures Networks India Pvt Ltd.	SIX HD	25.88	74.12
185	TV 18 Broadcast Ltd.	SONIC	8.21	91.79
186	Sony Pictures Networks India Pvt Ltd.	SONY BBC EARTH	7.79	92.21
187	Sony Pictures Networks India Pvt Ltd.	SONY BBC EARTH HD	8.20	91.80
188	Sony Pictures Networks India Pvt Ltd.	SONY ENTERTAINMENT CHANNEL (SET)	13.83	86.17
189	Sony Pictures Networks India Pvt Ltd.	SONY ESPN	24.61	75.39
190	Sony Pictures Networks India Pvt Ltd.	SONY ESPN HD	12.19	87.81
191	Sony Pictures Networks India Pvt Ltd.	SONY Marathi	7.91	92.09
192	Sony Pictures Networks India Pvt Ltd.	SONY Wah	11.14	88.86
193	Sony Pictures Networks India Pvt Ltd.	Sony YAY!	4.44	95.56
194	STAR India Private Limited	Star Bharat	11.79	88.21
195	STAR India Private Limited	Star Bharat HD	20.66	79.34
196	STAR India Private Limited	Star Gold	21.27	78.73
197	STAR India Private Limited	Star Gold HD	32.03	67.97
198	STAR India Private Limited	Star Gold Select	22.06	77.94
199	STAR India Private Limited	Star Gold Select HD	41.44	58.56
200	STAR India Private Limited	Star Jalsha	42.74	57.26
201	STAR India Private Limited	Star Jalsha HD	32.99	67.01
202	STAR India Private Limited	Star Movies	25.61	74.39
203	STAR India Private Limited	Star Movies HD	33.94	66.06
204	STAR India Private Limited	Star Movies Select HD	28.83	71.17
205	STAR India Private Limited	Star Plus	26.34	73.66
206	STAR India Private Limited	Star Plus HD	32.56	67.44
207	STAR India Private Limited	Star Pravah	19.04	80.96
208	STAR India Private Limited	Star Pravah HD	19.76	80.24
209	STAR India Private Limited	Star Sports 1	27.86	72.14
210	STAR India Private Limited	Star Sports 1 Bangla	18.39	81.61
211	STAR India Private Limited	Star Sports 1 HD Hindi	28.48	71.52
212	STAR India Private Limited	Star Sports 1 Hindi	22.49	77.51
213	STAR India Private Limited	STAR SPORTS 1 KANNADA	10.82	89.18
214	STAR India Private Limited	Star Sports 1 Tamil	9.07	90.93
215	STAR India Private Limited	Star Sports 1 Telugu	7.06	92.94

216	STAR India Private Limited	Star Sports 2	4.14	95.86
217	STAR India Private Limited	Star Sports 3	4.17	95.83
218	STAR India Private Limited	Star Sports First	4.24	95.76
219	STAR India Private Limited	Star Sports HD 1	12.06	87.94
220	STAR India Private Limited	Star Sports HD 2	11.51	88.49
221	STAR India Private Limited	Star Sports Select 1	9.23	90.77
222	STAR India Private Limited	Star Sports Select 2	12.73	87.27
223	STAR India Private Limited	Star Sports Select HD1	22.19	77.81
224	STAR India Private Limited	Star Sports Select HD2	20.25	79.75
225	STAR India Private Limited	Star Suvarna	22.69	77.31
226	STAR India Private Limited	Star Suvarna HD	54.25	45.75
227	STAR India Private Limited	Star Utsav	23.98	76.02
228	STAR India Private Limited	Star Utsav Movies	23.69	76.31
229	STAR India Private Limited	Star World	8.60	91.40
230	STAR India Private Limited	Star World HD	24.08	75.92
231	STAR India Private Limited	Star World Premiere HD	20.58	79.42
232	SUN TV Network Limited	SUN Life	3.98	96.02
233	SUN TV Network Limited	Sun Music	6.74	93.26
234	SUN TV Network Limited	Sun Music HD	24.02	75.98
235	SUN TV Network Limited	Sun News	9.23	90.77
236	SUN TV Network Limited	SUN TV	19.78	80.22
237	SUN TV Network Limited	Sun TV HD	34.44	65.56
238	SUN TV Network Limited	Surya Comedy	4.97	95.03
239	SUN TV Network Limited	Surya Movies	7.60	92.40
240	SUN TV Network Limited	Surya Music	4.81	95.19
241	SUN TV Network Limited	Surya TV	15.24	84.76
242	SUN TV Network Limited	Surya TV HD	38.55	61.45
243	STAR India Private Limited	Suvarna Plus	30.43	69.57
244	Odisha Television Limited	Tarang	17.57	82.43
245	Odisha Television Limited	Tarang Music	17.48	82.52
246	Sony Pictures Networks India Pvt Ltd.	Ten 1	26.48	73.52
247	Sony Pictures Networks India Pvt Ltd.	Ten 1 HD	21.26	78.74
248	Sony Pictures Networks India Pvt Ltd.	Ten 2	10.44	89.56
249	Sony Pictures Networks India Pvt Ltd.	Ten 2 HD	14.61	85.39
250	Sony Pictures Networks India Pvt Ltd.	Ten 3	10.84	89.16
251	Sony Pictures Networks India Pvt Ltd.	Ten 3 HD	16.02	83.98
252	Disney Broadcasting (India) Limited	The Disney Channel	8.89	91.11
253	TV 18 Broadcast Ltd.	The History Channel	3.29	96.71
254	Bennett, Coleman & Company Limited	Times Now	9.42	90.58

255	Bennett, Coleman & Company Limited	Times Now World	17.70	82.30
256	Discovery Communications India	TLC	2.20	97.80
257	Discovery Communications India	TLC HD world	11.81	88.19
258	Greycells18 Media Limited	Topper TV	100.00	0.00
259	Media World Wide Limited	Travel XP	30.84	69.16
260	Celebrities Management Pvt Limited	Travel XP HD	11.18	88.82
261	Celebrities Management Pvt Limited	Travel XP Tamil	7.21	92.79
262	SUN TV Network Limited	Udaya Comedy	6.16	93.84
263	SUN TV Network Limited	Udaya Movies	9.95	90.05
264	SUN TV Network Limited	Udaya Music	6.44	93.56
265	SUN TV Network Limited	Udaya News	44.96	55.04
266	SUN TV Network Limited	Udaya TV	7.35	92.65
267	SUN TV Network Limited	Udaya TV HD	42.96	57.04
268	Disney Broadcasting (India) Limited	UTV Action	15.80	84.20
269	Disney Broadcasting (India) Limited	UTV Bindass	8.54	91.46
270	Disney Broadcasting (India) Limited	UTV HD	75.40	24.60
271	Disney Broadcasting (India) Limited	UTV Movies	18.14	81.86
272	TV 18 Broadcast Ltd.	VH 1	3.06	96.94
273	TV 18 Broadcast Ltd.	VH 1 (HD Distribution)	3.44	96.56
274	STAR India Private Limited	Vijay HD	43.84	56.16
275	STAR India Private Limited	Vijay Super	13.69	86.31
276	STAR India Private Limited	Vijay TV	21.26	78.74
277	Raj Television Network Limited	Vissa TV	25.02	74.98
278	Turner International Pvt Ltd.	WB	23.15	76.85
279	Zee Entertainment Enterprises Limited	WION	8.04	91.96
280	Zee Entertainment Enterprises Limited	ZEE 24 Ghanta	14.10	85.90
281	Zee Entertainment Enterprises Limited	Zee 24 Kalak	12.41	87.59
282	Zee Entertainment Enterprises Limited	Zee 24 Taas	18.57	81.43
283	Zee Entertainment Enterprises Limited	Zee Action	8.18	91.82
284	Zee Entertainment Enterprises Limited	Zee Anmol	10.59	89.41
285	Zee Entertainment Enterprises Limited	Zee Anmol Cinema	10.42	89.58
286	Zee Entertainment Enterprises Limited	Zee Bangla	17.78	82.22
287	Zee Entertainment Enterprises Limited	Zee Bangla Cinema	35.26	64.74
288	Zee Entertainment Enterprises Limited	Zee Bangla HD	31.70	68.30
289	Zee Entertainment Enterprises Limited	Zee Bihar Jharkhand	7.74	92.26
290	Zee Entertainment Enterprises Limited	Zee Bollywood	7.77	92.23

291	Zee Entertainment Enterprises Limited	Zee Business	6.08	93.92
292	Zee Entertainment Enterprises Limited	Zee Cafe	10.60	89.40
293	Zee Entertainment Enterprises Limited	Zee Cafe HD	20.56	79.44
294	Zee Entertainment Enterprises Limited	Zee Cinema	8.70	91.30
295	Zee Entertainment Enterprises Limited	Zee Cinema HD	25.34	74.66
296	Zee Entertainment Enterprises Limited	Zee Cinemalu	14.60	85.40
297	Zee Entertainment Enterprises Limited	Zee Cinemalu HD	23.44	76.56
298	Zee Entertainment Enterprises Limited	Zee ETC	4.43	95.57
299	Zee Entertainment Enterprises Limited	Zee Hindustan	6.25	93.75
300	Zee Entertainment Enterprises Limited	Zee Kannada	17.51	82.49
301	Zee Entertainment Enterprises Limited	Zee Kannada HD	33.93	66.07
302	Zee Entertainment Enterprises Limited	Zee Keralam	17.72	82.28
303	Zee Entertainment Enterprises Limited	Zee Keralam HD	5.02	94.98
304	Zee Entertainment Enterprises Limited	Zee Madhya Pradesh Chhattisgarh	6.47	93.53
305	Zee Entertainment Enterprises Limited	Zee Marathi	17.61	82.39
306	Zee Entertainment Enterprises Limited	Zee Marathi HD	37.92	62.08
307	Zee Entertainment Enterprises Limited	Zee News	10.11	89.89
308	Zee Entertainment Enterprises Limited	Zee Odisha	49.04	50.96
309	Zee Entertainment Enterprises Limited	Zee Punjab Haryana Himachal	6.77	93.23
310	Zee Entertainment Enterprises Limited	Zee Rajasthan News	5.94	94.06
311	Zee Entertainment Enterprises Limited	Zee Salaam	3.18	96.82
312	Zee Entertainment Enterprises Limited	ZEE Sarthak	45.94	54.06
313	Zee Entertainment Enterprises Limited	Zee Talkies	18.44	81.56
314	Zee Entertainment Enterprises Limited	Zee Talkies HD	28.06	71.94
315	Zee Entertainment Enterprises Limited	Zee Tamil	17.05	82.95
316	Zee Entertainment Enterprises Limited	Zee Tamil HD	21.58	78.42
317	Zee Entertainment Enterprises Limited	Zee Telugu	13.88	86.12

318	Zee Entertainment Enterprises Limited	Zee Telugu HD	32.03	67.97
319	Zee Entertainment Enterprises Limited	Zee TV	10.89	89.11
320	Zee Entertainment Enterprises Limited	Zee TV HD	27.05	72.95
321	Zee Entertainment Enterprises Limited	Zee Uttar Pradesh Uttarakhand	6.50	93.50
322	Zee Entertainment Enterprises Limited	Zee Yuva	15.17	84.83
323	Zee Entertainment Enterprises Limited	Zing	8.74	91.26
324	Bennett, Coleman & Company Limited	Zoom	29.93	70.07

Annexure III

Bouquet price less than or equal to a channel price within the bouquet

New Delhi Television Limited (NDTV)					
S. No.	Bouquet Name	S.No	Channels in Bouquet	A la Carte MRP of Channel (in Rs.) (excluding taxes)	MRP of Bouquet (in Rs.) (excluding taxes)
1	NDTV North INFO	1	NDTV 24*7	3.00	3.00
		2	NDTV India	1.00	
		3	NDTV Profit	1.00	
			Total Sum of MRP	5.00	
2	NDTV SOUTH INFO	1	NDTV 24*7	3.00	2.50
		2	NDTV Profit	1.00	
			Total Sum of MRP	4.00	
3	NDTV SOUTH LIFE	1	NDTV 24*7	3.00	2.75
		2	Good Times	1.50	
			Total Sum of MRP	4.50	

Disney Broadcasting (India) Limited					
Sr. No.	Bouquet	S.No	Channels in Bouquet	A la Carte MRP of Channel (in Rs.) (excluding taxes)	MRP of Bouquet (in Rs.) (excluding taxes)
1	HD Bouquet	1	Disney International HD	12.00	8.00
		2	UTV HD	8.00	
			Total Sum of MRP	20.00	

Turner International Pvt Ltd.					
S. No.	Bouquet Name	S.No	Channels in Bouquet	A la Carte MRP of Channel (in Rs.) (excluding taxes)	MRP of Bouquet (in Rs.) (excluding taxes)
1	Turner Kids Pack	1	Cartoon Network	4.25	4.25
		2	POGO	4.25	
			Total Sum of MRP	8.50	
2	Turner Family Pack	1	Cartoon Network	4.25	10.00
		2	CNN International	0.50	
		3	HBO	10.00	
		4	POGO	4.25	
		5	WB	1.00	
			Total Sum of MRP	20.00	

Mavis Satcom Limited					
S. No.	Bouquet Name	S.No.	Channels in Bouquet	A la Carte MRP of Channel (in Rs.) (excluding taxes)	MRP of Bouquet (in Rs.) (excluding taxes)
1	Bouquet	1	Jaya TV HD	6.00	6.00
		2	Jaya Plus	0.50	
		3	Jaya Max	2.25	
		4	J Movies	2.25	
			Total Sum of MRP	11.00	

Annexure IV**Details of channels whose prices have been reduced to Rs. 19 or below
in new regulatory framework**

S. No.	Name of channel	RIO Rate (as per old framework)	MRP as per New Regulatory Framework 2017
1	FY1 TV18 (HD)	30.00	1.00
2	Histry TV 18 HD	20.00	7.00
3	Star Suvarna HD	25.00	19.00
4	Asianet HD	25.00	19.00
5	MN +	149.00	10.00
6	Romey Now HD	30.00	9.00
7	Movies Now HD	149.00	12.00
8	MNX HD	30.00	9.00
9	Discovery HD World	21.00	6.00
10	Animal Planet HD World	24.15	3.00
11	TLC HD world	24.15	3.00
12	Discovery Jeet HD	30.00	2.00
13	Disney International HD	25.00	12.00
14	ETV HD	40.00	19.00
15	Jaya TV HD	40.00	6.00
16	SONY BBC EARTH HD	25.00	10.00
17	Fox Life HD	30.00	1.00
18	Nat Geo Wild HD	30.00	5.00
19	Baby TV HD	30.00	1.00
20	SET HD	25.00	19.00
21	SIX HD	35.00	19.00
22	PIX HD	25.00	15.00
23	MAX HD	25.00	17.00
24	SONY ESPN HD	35.00	7.00
25	Ten 2 HD	35.00	17.00
26	Ten 3 HD	35.00	17.00
27	SAB HD	25.00	19.00
28	Star Sports HD 2	35.00	19.00

29	Star Sports HD 1	35.00	19.00
30	Star Bharat HD	25.00	19.00
31	Star Gold HD	25.00	10.00
32	Star Movies HD	25.00	19.00
33	Star Plus HD	25.00	19.00
34	Star World Premiere HD	25.00	9.00
35	Star Sports 1 HD Hindi	35.00	19.00
36	Star Movies Select HD	25.00	10.00
37	Star World HD	20.00	9.00
38	Star Pravah HD	25.00	15.00
39	Star Jalsha HD	25.00	19.00
40	Jalsha Movies HD	25.00	19.00
41	Star Sports Select HD 1	35.00	19.00
42	Star Sports Select HD 2	35.00	10.00
43	MAA HD	25.00	19.00
44	Star Gold Select HD	25.00	8.00
45	MAA Movies HD	25.00	19.00
46	Sun TV HD	40.00	19.00
47	KTV HD	40.00	19.00
48	Sun Music HD	25.00	19.00
49	Gemini TV HD	40.00	19.00
50	Gemini Music HD	20.00	19.00
51	Gemini Movies HD	25.00	19.00
52	Surya TV HD	20.00	19.00
53	Udaya TV HD	20.00	19.00
54	Cartoon Network HD+	25.00	5.00
55	HBO HD	35.00	12.00
56	Comedy Central (HD)	20.00	9.00
57	VH 1 (HD Distribution)	20.00	2.00
58	Colors Infinity HD	25.00	9.00
59	Colors HD	30.00	19.00
60	NICKS HD+	25.00	10.00
61	Colors Kannada HD	25.00	19.00
62	Colors Marathi HD	25.00	17.00
63	Colors Bangla HD	25.00	14.00
64	MTV Beats HD	25	1.00

65	Cineplex HD	25	5.00
66	Colors Tamil HD	25	7.00
67	MTV HD+	25	5.00
68	Vijay HD	25.00	19.00
69	Zee Café HD	30.00	19.00
70	Zee TV HD	30.00	19.00
71	Zee Cinema HD	30.00	19.00
72	& TV HD	30.00	19.00
73	& Pictures HD	30.00	19.00
74	Zee Marathi HD	30.00	19.00
75	Zee Bangla HD	30.00	19.00
76	Zee Tamil HD	30.00	19.00
77	Zee Cinemalu HD	30.00	16.00
78	Zee Telugu HD	30.00	19.00
79	Zee Kannada HD	30.00	19.00
80	Zee Talkies HD	30.00	19.00