



TRAI/FY 2026-27/017

May 11, 2026

**Smt. Deepali Sharma**  
**Advisor (B&CS – I, II & III)**  
**Telecom Regulatory Authority of India**  
4<sup>th</sup>-7<sup>th</sup> Floors, Tower F,  
World Trade Centre, Nauroji Nagar,  
New Delhi – 110029

**Subject: Submission of inputs on TRAI's Consultation Paper on Formulation of a Regulatory Framework for Application-based Linear Television Distribution (ALTD) Services [Including Free Ad-Supported Streaming Television (FAST) Services]**

Dear Ma'am,

This is with reference to above-mentioned subject regarding the **Consultation Paper on Formulation of a Regulatory Framework for Application-based Linear Television Distribution (ALTD) Services [Including Free Ad-Supported Streaming Television (FAST) Services]** issued by TRAI.

In this regard, please find enclosed our comments to the consultation paper for your kind consideration.

Thanking You,

Yours Sincerely,  
**For Bharti Telemedia Limited**

**Rahul Vatts**  
**Chief Regulatory Officer**

Encl: a.a

**Copy to:**

1. Chairman, TRAI
2. Secretary, TRAI
3. Principal Advisor (B&CS), TRAI

**Bharti Telemedia Limited**

(A Bharti enterprises)

[CIN: U92200HR2006PLC130723 (new)]

Registered Office: Airtel Centre, Plot No. 16, Udyog Vihar, Phase - IV, Gurgaon,  
Gurgaon, Haryana, India, 122015

T: +91-11-4666 6100, F: +91-11-4166 6137, email: [secretarial.telemedia@bharti.in](mailto:secretarial.telemedia@bharti.in);

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

### Bharti Telemedia Limited's Response

#### TRAI Consultation Paper on Formulation of a Regulatory Framework for Application-based Linear Television Distribution (ALTD) Services [Including Free Ad-Supported Streaming Television (FAST) Services]

---

##### Executive Summary

1. Bharti Telemedia Limited (*referred to as 'Airtel' hereafter*) would like to begin by thanking the Authority for issuing the consultation paper on *Formulation of a Regulatory Framework for Application-based Linear Television Distribution (ALTD) Services [Including Free Ad-Supported Streaming Television (FAST) Services]*.
2. The Consultation Paper addresses a regulatory gap that has now become operationally material: the **carriage of linear television channels over the internet on a free, ad-supported, multi-device basis**, without any of the licensing, content, tariff, interconnection or consumer-protection obligations that bind every other distributor of the same content.
3. In such an environment, where **identical linear content is accessible across multiple access pipes**, it is imperative that a consistent and technology-neutral regulatory framework governs all distribution platforms, irrespective of the medium used to deliver the service to consumers.
4. Airtel would, therefore, further commend the Authority on proactively initiating a forward-looking consultative process to examine the evolving landscape of application-based linear television services, with a view to ensuring **regulatory clarity, technological neutrality and a level playing field** across linear content distribution platforms.
5. Today, high-speed broadband has snowballed across the country and this development has fundamentally altered how linear television content is accessed and consumed. The earlier dependence on specific distribution platforms for accessing linear television content has diminished significantly and **linear programming, live broadcasting, and both global and local content are consumed seamlessly across multiple screens**, including smartphones, personal computers and smart televisions. Further, the ability to cast content onto larger screens and the proliferation of internet-enabled TV sets have blurred the distinction between traditional and internet-based, content-delivery mechanisms.
6. ALTD services have emerged as front contenders within this evolving ecosystem and typically deliver **pre-scheduled linear television channels over the internet** through applications accessible on connected devices. At present, **such services remain largely unregulated**, are primarily ad-supported and free to viewers, and are made available via pre-installed applications on televisions, downloadable applications and websites. This is why this Consultation Paper is a particularly apposite and positive step towards extending regulatory oversight to **linear broadcast content delivered**

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

through broadband (OTT applications or smart televisions). It also aligns with Airtel's long-standing advocacy for just such a regulation.



Users consume same linear content across different distribution platforms viz. DTH, MSOs, Cable & ALTDs across wireline or wireless broadband

- As depicted in the illustration, users consume the same linear platform content across different distribution platforms and these platforms operate with impunity **despite not having the requisite licensing, permissions or oversight under the MIB's Uplinking and Downlinking Guidelines (2022) or the Cable Television Networks (Regulation) Act, 1995**. And also despite TRAI's earlier recommendations issued in January 2025 on Ground-Based Broadcasters (GBB) and in February 2025 on Service Authorisation that highlighted the issue of **regulatory arbitrage** and proposed a separate authorisation route for FAST channel distribution under the Television Channel Distribution Services framework.
- Within this context, therefore, it is important that TRAI has rightly recognised ALTD as a form of linear television distribution that warrants formal oversight**, particularly given its functional overlap with other registered DPO services and that TRAI has expanded the regulatory scope of the Consultation Paper to include Application-based Linear Television Distribution (ALTD), which covers FAST channels as well as app-based and web-based linear television services delivered over the internet, often on a free-to-view, multi-device basis.

### The market reality has converged. the regulation has not

- The same linear channel that a paying DTH subscriber receives at a declared MRP is today streamed live, free and at scale on smart-TV applications, FAST aggregators, broadcaster apps and the public broadcaster's own OTT platform. The medium has become invisible to the consumer. It is only the regulation that treats each medium differently.
- The TRAI **Performance Indicator Report (October–December 2025)** records a **fall in DTH subscribers from 66.62 million in December 2022 to 50.99 million in December 2025**. That is a **~23%** contraction in three years, even as Connected-TV households cross **68 million** and AVOD/FAST viewing now contributes **84%** of total streaming hours per household (FICCI-EY, March 2026). In other words, the licensed cable industry has cumulatively invested over ₹50,000 crore in distribution infrastructure that is increasingly being bypassed by an unregulated layer.

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

### The arbitrage is no longer theoretical, it is documented

11. A live audit of one major ALTD platform showed that 17 channels that had been declared 'pay' by registered DPOs were being made available entirely free, under the same MIB-approved name and logo. Additionally, premium live broadcast events (e.g., IPL 2023) were streamed free on affiliated OTT platforms while the same event on Pay TV required a DTH consumer to bear NCF + Star Sports MRP for the three-month window. The result is a regressive cross-subsidy in which paying DTH and cable consumers (disproportionately rural, semi-urban and lower-income) effectively subsidise free access for better-connected, higher-income OTT viewers.

### Guiding principles that will help remove the asymmetry

12. **Airtel's submission is anchored in** a single, principled framework that offers the Authority a clear choice between two equitable paths:

- a. **Preferred path: Regulatory forbearance for all registered DPOs.** The broadcasting sector, at the broadest level, requires forbearance and ease of doing business. In order to ensure this, carriage and content restrictions on registered DPOs should be eased to a standard comparable to OTT/ALTD platforms, and a specific TRAI exercise should identify and remove legacy DPO obligations overtaken by technological convergence. This will level down the asymmetry while preserving consumer welfare, investment incentives and competitive vitality.
- b. **Alternative path: 'Same Content, Same Rules' applied uniformly.** If forbearance for registered DPOs is not feasible, the only equitable alternative is to extend the corresponding obligations in full to ALTD providers, ensure that they are subject to the requirements (suitably adapted to digital delivery) applicable to DTH operators and exclude only those provisions that are satellite-specific.

What cannot continue is the present asymmetric regime in which licensed DPOs bear the full weight of legacy regulation while functionally identical ALTD/FAST services operate without comparable accountability.

### Airtel's overarching recommendation

13. TRAI should classify all ALTD providers as a category of Distribution Platform Operators (DPOs) under the Broadcasting (Television Channel Distribution) Services framework, with a dual-track authorisation framework under the Telecommunications Act, 2023:

- a. **Distribution track:** Mandatory authorisation for all ALTD providers (app-based, pre-installed, web-based, or hybrid) with the Application Provider designated as the primary responsible entity. Clear preference for India-incorporated, India-owned and India-operated entities with mandatory local presence, content monitoring from India and data localisation for foreign-operated services.
- b. **Programming track:** All linear channels carried on ALTD platforms mandated to hold valid MIB permission, either as satellite-based channels under the Uplinking/Downlinking Guidelines or as Ground-Based Broadcasters (GBBs) under the new GBB framework. GBBs must be regulated on substantively the same terms as satellite broadcasters, excluding only satellite-specific clearances (IN-SPACE, WPC, transponder obligations).

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

The principles in case of service authorisation should be set straight: **Maintain the contractual nature of authorisation, voluntary migration, existing licensees so as to avoid putting DPOs in a worse situation. Ensure that the same T&C applies to everybody providing the same service.**

### Key safeguards are important

14. In the alternative path, there are four key prerequisites if 'Same Content, Same Rules' is to be effective.

They are:

- a. **Strict, uniform MRP parity:** This should hold across DTH, Cable, IPTV, HITS and ALTD: no platform-specific tariff plan, bundle, or VAS arrangement to undercut declared MRP.
- b. **Reverse-Parity rule:** Any channel offered free on ALTD cannot be declared a pay channel for registered DPOs, in line with the precedent established under the 2024 Tariff Order.
- c. **Mandatory local Indian presence:** This should be mandatory for all foreign-operated ALTD providers and aggregators.
- d. **Pre-installation gate:** No ALTD app to be pre-installed, embedded, or featured on smart TVs / OS-level platforms / app stores in India unless the provider holds a valid MIB authorisation; existing apps to comply within a specified time frame of notification, failing which, delisting and graduated penalties should apply.

15. Broadcasters must be mandated to provide content to registered **DPOs at rates no higher than those offered by those offered by ALTD providers.** Any differential pricing favouring ALTD platforms inherently undermines the competitive position of traditional DPOs, accelerates DTH subscriber decline, diverts advertising revenue and unfairly burdens consumers. The current regulatory framework compounds this disparity through an advertising revenue asymmetry. **DTH operators receive no share of ad revenue generated on their networks as the entire amount flows to the broadcaster. FAST/ALTD providers, by contrast, negotiate ad revenue-share arrangements with broadcasters as a standard commercial term and have also started charging placement fees over and above ads monetisation.** This asymmetry is further deepened by a structural advantage FAST providers hold: **access to device-level consumer data.** FAST channels leverage this to offer content owners the gateway through which digital reach can be expanded by providing curated content to subscribers and this allows advertisers to approach audiences in a personalised way by server-side ad insertion and programmatic advertising. This enables dynamic, targeted ad monetisation on the same content stream.<sup>1</sup> DTH operators, meanwhile, are precluded from comparable monetisation under existing regulatory restrictions.

16. Registered DPOs seek to offer pay-ad-supported linear channel tiers, combining subscription light models. Although the current framework restricts this, ALTDs continue to monetise content since they are under no equivalent obligations. It is important, therefore, that DPOs be expressly allowed to offer pay-ad supported channel packages, where consumers pay a reduced subscription in exchange for accepting an advertising-mirroring structure of FAST services. **Such pay-ad-supported tiers by**

---

<sup>1</sup> <https://www.amagi.com/blog/monetize-fast-channels#:~:text=The%20most%20common%20split%20across,for%20selling%20their%20respective%20inventory.>

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

registered DPOs should be subject to the same regulations as ALTDs rather than mirroring the restrictive DTH/cable-specific constraints.

### **Regulatory parity must be established**

17. A linear television channel **must carry a single declared Maximum Retail Price (MRP) across DTH, Cable, IPTV, HITS and ALTD services**, with no platform-specific tariff plan, bundle or value-added-service arrangements permitted to undercut the declared MRP. Pay television channels must not be offered free or at lower prices on ALTD platforms compared to DTH, cable and IPTV. TRAI should also mandate that any channel available at no subscription fee on ALTD platforms cannot be declared a pay channel for registered DPOs (*in line with the precedent established under the TRAI Tariff Order in 2024*). Furthermore, all ALTD entities distributing linear television must be required to register with competent authorities and any unregistered entity distributing linear content must be treated as an illegal operator and subject to the full enforcement mechanisms under applicable law.
18. All ALTD providers must **deploy compliant subscriber management systems and digital rights management (DRM) solutions** that mirror the content security and anti-piracy requirements applicable to traditional distribution platforms. The Telecommunication Engineering Centre (TEC) must certify these systems to ensure uniform standards of encryption, authentication and signal integrity. All set-top boxes, streaming sticks, and other hardware devices used to deliver ALTD services must comply with the applicable Bureau of Indian Standards (BIS) certification requirements.

### **Wider factors should be considered**

19. The framework must be extended to Prasar Bharati's DTH operations (DD Free Dish) and OTT platform (WAVES) without exemption. Vertical-integration discipline must extend to ALTD operators to prevent exclusionary bundling and digital-divide harm. Viewership data must be integrated into BARC (or any other Television Rating Agency) under the MIB Rating Guidelines and TV Ratings Policy 2026. TRAI should additionally formulate clear and equitable OTT-broadcast guidelines to keep the regulatory regime adaptable to future technological developments. Additionally, the framework must be future-proofed for hybrid, free-plus-paid models, GBB integration and emerging delivery technologies (5G Broadcast, OS-level platforms, fiber-direct).
20. The ALTD market is dynamic and already shifting from purely ad-supported models towards hybrid structures, where some channels remain free while others are subscription based. The regulatory framework must therefore be designed to accommodate hybrid and paid models and integrate ground-based broadcasters and the next generation of distribution technologies. Further, with respect to Ground-Based Broadcasters, Airtel urges the Authority to reject any notion that GBBs are fundamentally distinct from or akin to Platform Services and to align their regulatory treatment fully with that of satellite broadcasters, excluding only those provisions that are satellite-specific.

**Adoption of the measures recommended in this response will help close existing regulatory gaps, protect consumer interests, promote fair competition and support the orderly growth of the broadcasting sector in India.**

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

### **In summary:**

#### **Guiding principles**

- **Preferred path: Forbearance for registered DPOs.** In other words, ease of carriage, content and pricing restrictions on registered DPOs should be comparable with those of OTT/ALTD platforms.
- **Alternative path: 'Same Content, Same Rules'.** If forbearance is not feasible, equivalent obligations should be extended in full to ALTD providers. The asymmetric status quo must not be allowed to continue.
- **Content-price non-discrimination:** Broadcasters should be mandated to provide content to registered DPOs at rates no higher than those offered to ALTD providers.
- **Future readiness:** Framework should accommodate hybrid free-plus-paid models, GBB integration and emerging delivery technologies.
- **Universal application:** Framework should apply uniformly to Prasar Bharati's DD Free Dish and WAVES OTT, on the same basis as it does to private operators.

#### **Overarching recommendations**

- Classify all **ALTD providers as Distribution Platform Operators (DPOs)** under the Broadcasting (Television Channel Distribution) Services framework.
- Simultaneously ensure **broadcasters and content providers fully comply with applicable Programming Services rules**, including the **authorisation requirement for Ground-Based Broadcasters (GBBs)**.

#### **Dual-Track authorisation framework**

- **Distribution track:** Mandatory authorisation for all ALTD providers, with the Application Provider as the primary responsible entity. Preference for India-owned and India-operated entities.
- **Programming track:** All linear channels carried on ALTD platforms to hold valid MIB permission. GBBs to be regulated on par with satellite broadcasters, excluding only satellite-specific clearances (IN-SPACE, WPC, transponder).
- **Terms and conditions to mirror existing DPO requirements:** Net worth, entry fee, bank guarantee, roll-out, cross-holding, Must-Carry / Must-Provide, Programme and Advertising Code compliance, grievance redressal, QoS and MRP transparency.

#### **Checks & balances for ALTD operators**

- **No differential pricing:** Pay channels not to be free or cheaper on ALTD vis-à-vis registered DPOs. Any channel free on ALTD should also be free for registered DPOs (2024 Tariff Order precedent).
- **Tariff Order parity:** Uniform MRP across all platforms; bundling with VAS or on-demand services should not be allowed to circumvent parity. Substance, not label, must govern.

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

- **Mandatory local Indian presence:** Foreign-operated ALTD providers to establish an Indian entity or appoint a compliant Indian partner, with content monitoring from India and DPDP-compliant data localisation., ensuring MIB/TRAI oversight.
- **Pre-installed app controls:** Smart-TV and OS-level apps to obtain prior MIB authorisation. Existing apps to comply within a specified transition window. Non-compliance to attract delisting and graduated penalties.
- **Vertical-integration discipline:** Cross-holding caps and Must-Provide obligations to extend to ALTD. No exclusive routing of premium live broadcast events to affiliated platforms.

### Content security, piracy and hardware compliances

- All ALTD providers must deploy compliant **subscriber management systems (SMS)** and **digital rights management (DRM)** solutions that mirror the content security and anti-piracy requirements applicable to traditional distribution platforms. The Telecommunication Engineering must certify these systems **Centre (TEC)** to ensure uniform standards of encryption, authentication and signal integrity.
- All set-top boxes, streaming sticks and other hardware devices used to deliver ALTD services must **comply with the applicable Bureau of Indian Standards (BIS) certification** requirements.
- Compliance obligations should be monitored through **periodic audits, mandatory reporting of piracy incidents and certification renewals**. Penalties for violations must include suspension of authorisation, monetary fines and consumer redressal measures to ensure accountability.

### Consumer Protection

- **All ALTD interfaces must comply with:** The Programme & Advertising Code, Advertising Standards Council of India (ASCI) Code, Consumer Protection Act, 2019 and the Misleading Advertisements & Endorsements, 2022.
- **India-resident Nodal / Grievance Officer;** time-bound complaint resolution; integration with the centralised broadcasting grievance portal; periodic reporting to TRAI.
- **DPDP Act** compliance with data localisation.
- **Digital accessibility:** WCAG 2.1-aligned interfaces, closed captions, audio description and sign-language interpretation, consistent with the RPwD Act and MIB Accessibility Guidelines.

### Television Ratings Policy

- ALTD viewership should be formally integrated into the TV Ratings Policy 2026 under the existing technology-neutral architecture ('any other platform wherever feasible'). **Viewership data must be integrated into BARC (or any other Television Rating Agency)** under the MIB Rating Guidelines and TV Ratings Policy 2026.
- Standardised, anonymised DPDP-compliant data contribution to BARC (or any other Television Rating Agency) for unified cross-platform ratings.

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

### **Future considerations: Hybrid Models & Implementation of Tariff, Interconnection and QoS**

- *ALTD services currently operate as per a free, ad-supported model. However, there is a clear trajectory towards hybrid models (where some channels/content remain/remains free while others need to be subscribed for) mirroring the evolution of traditional broadcasting. The regulatory framework must anticipate and address this evolution proactively.*
- *Once ALTD providers adopt any form of subscription or pay service, TRAI's **Tariff Order must apply in full** including MRP declaration, uniform pricing across platforms and non-discriminatory, channel-packaging rules.*
- *ALTD providers must enter into **interconnection agreements** with broadcasters on non-discriminatory terms.*
- *TRAI's **QoS Regulations must apply to ALTD services**, including minimum streaming quality standards, service availability/uptime requirements and consumer disclosure of QoS metrics.*
- ***Channel positioning & EPG placement** on ALTD home screens must be governed by transparent, non-discriminatory rules, analogous to the landing page/channel positioning obligations applicable to DTH operators.*
- *A periodic review of the framework must be conducted every three years.*

**The remainder of this document provides Airtel's response to the questions raised by TRAI in the consultation paper.**

Detailed responses

**Q1. What should be the appropriate definition and scope of Application-based Linear Television Distribution Services (ALTD Services) in the Indian broadcasting context, taking into account terminologies available internationally?**

**Stakeholders are requested to provide their comments with detailed justification.**

**Airtel's response**

Airtel strongly welcomes TRAI's timely initiative to address the regulatory gap in internet-delivered linear television and endorse the classification of ALTD / FAST services under the 'Television Channel Distribution Services' framework as recommended in the Authority's Service Authorisation Recommendations dated 21 February 2025.

**The definition adopted should be technology-neutral, function-led and channel-identity-anchored. It should be broad enough to capture the full universe of internet-delivered linear television distribution, including FAST channels, free-to-view linear streaming, paid linear streaming and hybrid free-plus-paid models, while remaining future-proof for emerging delivery technologies.**

**The existing legal architecture and the need to address the active tension within it**

1. The need for this exercise is more than just an attempt to close gaps in the framework. It is to address the tension created by the functioning of the ALTD platforms.
2. The **carriage of registered linear satellite TV channels on ALTD platforms today operate not merely outside of an analogous regulatory regime**, but in active and continuing tension with at least three of the subsisting provisions that remain binding on the broadcasters and the channels they distribute. These are:

- a. **Distribution platform definition:** The Hon'ble TDSAT, in *All India Digital Cable Federation v. Star India Pvt. Ltd.* [B.P. No. 217/2023], has recognised, prima facie, that OTT platforms do not fall within the definition of 'Distribution Platform' under Section 2(r) of the Telecommunication (Broadcasting & Cable) Services Interconnection Addressable Systems Regulations, 2017.
- b. **Decoder-supply restriction:** Clause 11(3)(f) of the **MIB's Uplinking and Downlinking Guidelines, 2022 expressly restricts the supply of satellite TV channel signal reception decoders to four categories alone** viz. MSOs/Cable Operators, DTH Operators, IPTV Service Providers and HITS Operators, a **list that categorically excludes ALTD/OTT platforms**. The carriage of registered linear satellite TV channels on ALTD platforms therefore operates not merely outside an analogous regulatory regime but in direct tension with subsisting statutory guidelines applicable to the broadcasters themselves.
- c. **Channel-identity / logo restriction:** Clause 20 of the Downlinking Guidelines, 2022 expressly provides:

*"20. Name and logo of a TV Channel - (1) A company/LLP shall display on the permitted TV channel only that name and logo which has been approved by the Ministry.*

*Provided that display of name/logo other than that permitted or display of dual logo would be treated as a violation of the Guidelines inviting penal action."*

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

3. The **MIB-approved name and logo are inseparably tied to the permitted TV channel**, i.e., a regulatory artefact whose lawful distribution perimeter is fixed by Clause 11(3)(f). **When the same MIB-approved name and logo are displayed on an ALTD/OTT service that is not within the four permitted distributor categories, the broadcaster is, in substance, deploying its MIB-approved channel identity outside the only carriage perimeter for which that approval was granted.** The Authority's framework must therefore not just create a new authorisation track, it must secure it by simultaneously patching up the active and ongoing breach of the existing one.
4. This is **reinforced by WAVES OTT's Notice** dated 17 November 2025 inviting **on-boarding of registered linear satellite TV channels**, the platform's reported 80 lakh first-year downloads and the reported proposal to direct television manufacturers to pre-install WAVES OTT on new smart televisions. The same issue extends to other ALTD service providers as well including Smart TVs and the linear streams on broadcaster apps. Each of these services, in carrying permitted linear channels under their MIB-approved identity outside the four permitted distributor categories, triggers the Clause 20 violation as a matter of plain reading of the Guidelines.
5. The lack of a regulation to manage this category is **not merely theoretical**. It **produces identifiable, repeated, cross-broadcaster breaches of Clauses 11(3)(f) and 20 of the very same Downlinking Guidelines that broadcasters remain bound by**. Recognising ALTD as a regulated DPO category is the only way to secure all breaches and go forward. It will convert the current state of facial illegality into a regulated, accountable carriage layer, subject to the same terms as DTH, Cable, IPTV and HITS.

### Recommended definition

In view of the above dynamics, Airtel suggests the following definition for ALTD services:

*'Application-based Linear Television Distribution (ALTD) Services refers to the distribution of one or more pre-scheduled linear television channels, including the channels that are displayed under the name and logo approved by the Ministry of Information and Broadcasting (MIB) under the Uplinking/Downlinking Guidelines or the Ground-Based Broadcasting framework or distributed via free OTT platforms, showing linear content to subscribers or end-users over the public internet (or any other internet-protocol-based network) by means of a software application, website, embedded application on smart or connected television, or any equivalent consumer interface, accessed through any consumer device including but not limited to smart televisions, connected televisions, mobile phones, tablets, set-top boxes, streaming sticks, or web browsers, whether such service is offered on a free, ad-supported (FAST) subscription, or hybrid models, with or without bundled value-added services such as catch-up, library or on-demand content'*

### Key elements of the definition

- **Linear, scheduled distribution:** The defining feature is the carriage of linear, pre-scheduled television channels, the same content type historically delivered by DTH, cable, IPTV and HITS. This is the **functional test**, not the delivery medium.
- **Channel identity / logo identity test:** Where a service carries a linear feed under the same name and MIB-approved logo as a permitted TV channel, the service is, by definition, distributing that permitted channel. The logo-identity test is decisive on three counts. It is the same product to the

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

broadcaster, the same product to the consumer, and the same product for the purposes of Clauses 11(3)(f) and 20 of the Downlinking Guidelines, 2022. A regulatory framework that adopts a narrower definition of 'distribution' would leave Clause 20 in a state of permanent contradiction with the very services it now seeks to recognise.

- **Delivery agnostic:** Whether delivered through a downloadable mobile application (e.g., JioTV, OTTs), a pre-installed smart TV application (e.g., Samsung TV Plus), a web-based interface (e.g., broadcaster websites) or any **hybrid combination** thereof, all such services should be treated as ALTD.
- **Device agnostic:** ALTD includes services accessed on smart TVs, mobile phones, tablets, web browsers, streaming sticks and connected set-top boxes, given that **consumer preferences for content do not vary across devices**.
- **Business-model agnostic:** The definition **must capture FAST (free, ad-supported), pay-linear streaming and hybrid models**. Any narrower scoping would create a fresh layer of arbitrage.
- **Inclusive of value-added services:** Where ALTD platforms also offer catch-up, library or on-demand content alongside linear channels, such VAS should fall within the scope of the regulatory framework, **mirroring the treatment of platform services on DTH**.

### Justification for the definition: The convergence rationale

#### 1. The consumer experience is the correct anchor for regulation.

ALTD platforms are **no longer secondary or small-screen substitutes**. They have emerged as the preferred medium for multi-user, large-screen viewing in Indian households. This is evidenced by:

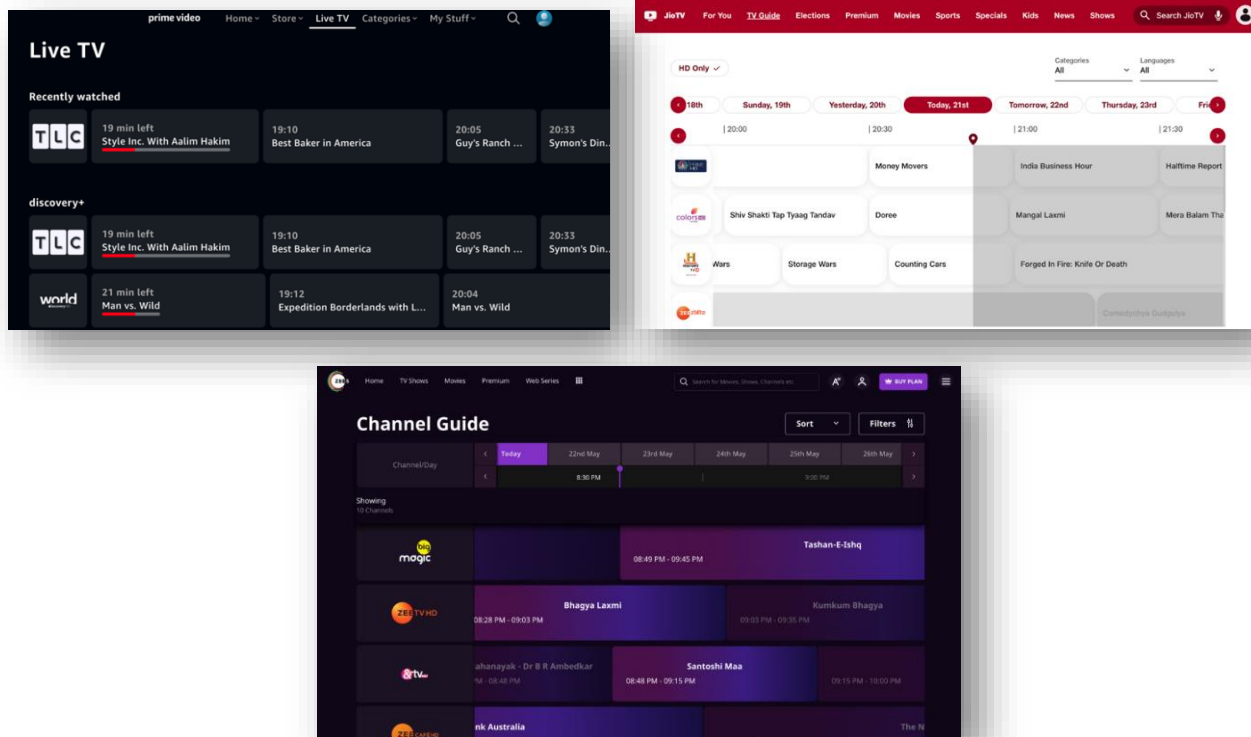
- a. Family and children-oriented content curation that mirrors DTH bouquets;
- b. Multi-screen subscription plans explicitly designed for simultaneous household viewing;
- c. Pre-installed presence on virtually every smart TV sold in India today.

Consumer preferences for content do not vary by delivery medium. Any regulatory framework that draws lines based on the underlying transport technology, rather than the service experienced by the viewer, is by definition out of step with the market it seeks to govern.

#### 2. Technology has converged, regulation has not.

The same linear television content that was once the exclusive domain of DTH, cable, IPTV and HITS is today **streamed live over the public internet through mobile applications, smart-TV interfaces and browsers**. The traditional push/pull and one-way/two-way distinctions have collapsed. A consumer watching Aaj Tak on a DTH set-top box and another watching the same channel on JioTV or Samsung TV Plus are consuming an identical product through functionally equivalent distribution layers. The medium has become invisible to the viewer. It is only regulation that treats it differently.

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services



### 3. The current asymmetry has produced clear regulatory arbitrage.

While DTH, cable, IPTV and HITS operators discharge a comprehensive set of obligations covering licensing, must-carry/must-provide, downlinking compliance, cross-holding restrictions, tariff, QoS and interconnection regulations, ALTD and FAST platforms distribute the very same channels with no equivalent accountability. The result is a documented breach of:

- TRAI's Must-Carry / Must-Provide principles;
- The MIB's Downlinking Guidelines; and
- Statutory cross-holding restrictions between broadcasters and distributors.

Recent TRAI data<sup>2</sup> shows that the paying DTH subscriber base declined sharply to **~50.99 million** by December 2025 (a **12.4% YoY drop**), reflecting **sustained cord-cutting and increased migration toward internet-delivered linear and on-demand options**. The downstream impact on the licensed distribution ecosystem is equally stark: pay-TV households have declined by approximately 40 million, 93% of LCOs have reported a contraction in their subscriber base since 2018, 49% have reported a fall in monthly income and the sector has witnessed estimated job losses of up to 5 lakhs, even as the licensed cable industry has cumulatively invested over ₹50,000 crore in capital expenditure to build the very distribution infrastructure now being bypassed.

While consumers benefit from greater choice, **unregulated ALTD platforms divert advertising revenue and allow carriage of channels without equivalent compliance on must-carry, tariff, interconnection, QoS and Programme/Advertising Codes**. This burdens paying DTH/cable consumers who effectively cross-subsidise unregulated free viewing. **This is not a marginal inconsistency. It is a structural distortion of the level playing field that this Authority is rightly seeking to correct.**

<sup>2</sup> [https://www.trai.gov.in/sites/default/files/2026-03/QPIR\\_03032026\\_0.pdf](https://www.trai.gov.in/sites/default/files/2026-03/QPIR_03032026_0.pdf)

**4. Platforms illustrate the scale of the unregulated layer.**

Several ALTD services exemplify the scale at which they are operating. As an aggregator hosting FAST channels (including curated feeds from broadcasters like Zee Entertainment, Viacom18, ETV Network, TV Today, India TV and global partners like Warner Bros), it functions as a full-fledged distribution layer, curating line-ups, controlling EPG/prominence, managing ad inventory and shaping discovery, yet currently operates outside the DPO framework. **The unregulated layer is no longer a fringe. It is fast becoming the mainstream.**

The most telling illustration, however, comes from the public broadcaster's own platform. Prasar Bharati launched WAVES OTT on 24 November 2024 and, through its Notice dated 17 November 2025, has actively invited applications for on-boarding linear satellite TV channels registered under Rule 6(6) of the Cable TV Network Rules, 1994 for live streaming on WAVES. As on January 2026, WAVES OTT was streaming 'Live TV News Channels' and several GEC/Movie channels on a 'Live' basis. A side-by-side comparison reveals that the content streamed on WAVES OTT was identical to that broadcast on cable TV, using the very same MIB-approved channel logos. The platform reportedly crossed 80 lakh downloads in its first year, with the Ministry now reportedly considering directions to television manufacturers to pre-install the WAVES OTT application on new smart TVs.

**When India's own public broadcaster, operating under the aegis of the very Ministry that frames the Downlinking Guidelines, is distributing licensed linear satellite TV channels through an OTT application, the regulatory vacuum in which ALTD services currently operate ceases to be merely a theoretical concern, it becomes an operational reality at the heart of the broadcasting ecosystem. This makes the formal recognition of ALTD as a regulated DPO category not merely desirable, but constitutionally and structurally essential to restoring the level playing field.**

**International reference points**

**Internationally, regulators are progressively acknowledging the convergence of broadcast and internet-delivered linear services.** The European Audiovisual Media Services Directive (AVMSD) treats linear and non-linear audiovisual media services within a unified regulatory framework, **calibrated by service type rather than delivery technology.**<sup>3</sup> AGCOM, Italian Communications Regulatory Authority, has built a framework for the provision of audio-visual media services via an alternative (to a FAST channel) communication network. The authorisation process is in accordance with Article 4 of Regulation, adopted under Resolution No. 295/23/CONS. The regulation governs the issuance of authorisation titles for the provision of audiovisual and radio media services via satellite, alternative electronic communication networks and on-demand services. Specifically, **it stipulates that FAST channels must obtain authorisation based on each individual programming schedule they offer.**<sup>4</sup> **Consequently, all audiovisual media service providers operating FAST channels, including those already available on Italian smart TVs, will be required to obtain specific authorisation from AGCOM for each programming schedule they offer.**

---

<sup>3</sup> Audio Visual Media Service Directive- General Principles, European Commission, click here: <https://digital-strategy.ec.europa.eu/en/policies/general-principles-avmsd>

<sup>4</sup> **Autorità per le Garanzie nelle Comunicazioni (AGCOM), Resolution No. 295/23/CONS: Regulation on the provision of audiovisual and radio media services. [Official Document \(Italian\)](#)**

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Under the **Online Streaming Act**, the Canadian Radio-television and Telecommunications Commission (CRTC) has updated its framework to **include online streaming services within the broadcasting regulatory system**. This ‘technology-neutral’ approach requires online undertakings that provide ‘programmes’ (including linear-style streaming) to contribute to the Canadian content ecosystem and adhere to specific registration and reporting requirements, mirroring obligations previously exclusive to traditional Broadcasting Distribution Undertakings (BDUs).<sup>5</sup>

**Several other jurisdictions are also moving towards technology-neutral oversight. India should align with this global trend while leveraging its existing robust DPO architecture.**

Therefore, Airtel recommends formally recognising ALTD operators as **Distribution Platform Operators (DPOs)** alongside DTH, Cable, IPTV and HITS. This will give effect to the principle of ‘**Same Content, Same Rules**’ and ensure that the playing field remains level and there is no parallel regime created.

**Q2. The ALTD Services ecosystem involves multiple entities, including Application providers, Television equipment manufacturers, Operating system providers, Broadcasters, Content providers, Content aggregators and other technology or solution providers.**

**However, the application provider appears to play a central role in the distribution of linear television channels across various business models. In this context, should the Application Provider be designated as the primary stakeholder responsible for obtaining authorisation for the provisioning of ALTD Services?**

**a. If yes, please provide detailed justification and supporting reasons.**

**b. If not, please identify the appropriate stakeholder(s) who should be responsible for obtaining such authorisation, along with rationale.**

### **Airtel’s response**

**Yes. The Application Provider should be designated as the primary stakeholder responsible for obtaining authorisation for the provisioning of ALTD Services.**

This designation should apply uniformly, irrespective of whether the application is downloadable from an app store, pre-installed on a smart television, embedded at the operating-system level, or accessed through a web-based interface. The authorisation should rest with the entity that exercises actual editorial, commercial and operational control over the linear distribution layer.

### **Application Providers should be designated the primary stakeholders.**

In the ALTD ecosystem, the Application Provider exercises substantive control over the distribution layer, performing functions directly analogous to those of existing DPOs. Specifically, the Application Provider controls the following key levers of distribution:

- **Content acquisition and channel line-up:** The Application Provider decides which linear channels are carried, on what commercial terms and from which broadcasters or aggregators.

---

<sup>5</sup> CRTC, The Online Streaming Act and New Regulatory Framework for Online Undertakings. [Link](#)

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

- **Distribution and signal delivery:** The **Application Provider** controls the technical delivery of linear channels to consumer devices, including encoding, packaging and content delivery network arrangements.
- **Electronic Programme Guide (EPG):** The **Application Provider** designs the EPG, channel categorisation and channel positioning – functions equivalent to LCN allocation in DTH/cable.
- **Bundling, packaging and positioning:** The **Application Provider** creates packs, prominence, search, recommendations and discovery features that materially influence what consumers watch.
- **Monetisation:** The **Application Provider** controls advertising inventory, subscription pricing, ad-tech integrations and revenue-sharing arrangements with broadcasters.
- **Consumer interface and experience:** The **Application Provider** designs the user interface, manages onboarding, account creation, billing, customer service and grievance redressal.
- **Compliance with content and advertising codes:** The **Application Provider** is the entity that can practically enforce compliance with the Programme Code and Advertising Code on its platform.

### Other ecosystem participants are not the right primary authorised entity.

While the ecosystem includes television OEMs, operating system providers, broadcasters, content aggregators and technology vendors, none of these is the appropriate primary authorised entity for the distribution layer. This is because of the following reasons:

- **Television OEMs and OS providers** supply the hardware/software platforms on which applications run. Their accountability is best addressed through a separate assurance and certification mechanism (*refer Airtel's response to Q6*) which obliges them to host or pre-install only those ALTD applications that are duly authorised by the MIB. They are not the entities that select channels, set tariffs or design the EPG.
- **Broadcasters and content owners** should **obtain their own programming-side authorisation under the ground-based broadcasting (GBB) framework**. Their obligations are at the content layer, not the distribution layer (*the GBB framework is discussed in our response to Q9 & Q15*) level.
- **Content aggregators** that simply package and resell linear channels to ALTD platforms operate behind the consumer interface and do not exercise distribution-layer control. Aggregators are Application Providers only for consumer-facing apps that they run and should be authorised accordingly. They should be contractually bound by Application Providers to supply only MIB authorised channels.
- **Other technology or solution providers** (CDN, encoding, ad-tech, billing) are vendors. Holding them as primary authorised entities would dilute accountability and create fragmented enforcement.

### This will ensure that there is a single point of accountability.

Designating the Application Provider as the single primary authorised entity provides the MIB and TRAI a single, accountable point of contact for: licensing and authorisation; enforcement of the Programme and Advertising Codes; tariff and pricing parity (*refer our response to Q10*); subscriber base and viewership reporting; grievance redressal; QoS compliance; and audits and inspections. This mirrors the existing architecture for DTH, IPTV and HITS, where the distribution platform operator is the principal authorised entity.

### **Application Providers should preferably be India-owned and India-operated**

Similar to this, keeping in mind the national interest, data sovereignty and effective oversight, there should be a **clear preference for Application Providers that are India-incorporated, India-owned and India-operated**. Foreign-operated ALTD providers and aggregators must be required to establish a local Indian entity or appoint a compliant Indian partner, which would then be the legal authorised entity responsible for content monitoring, grievance redressal, data localisation (where applicable) and **effective oversight by the MIB and TRAI**. *This is addressed further in Airtel's response to Q3.*

### **Hybrid models should also have a set of rules of governance**

Where the same group entity controls both the channel content and the consumer-facing application (i.e., a vertically integrated player), the **group must obtain both the programming-side authorisation (GBB) for the channels and the distribution-side authorisation (ALTD) for the application**, subject to the cross-holding restrictions *discussed in Airtel's response to Q4*. Authorisation cannot be bypassed on the grounds that the same group already holds another authorisation under a different layer.

**This dual authorisation or separate layer approach reflects an emerging global standard: Mature jurisdictions treat vertically integrated hybrid models, where one entity controls both content (programming) and the delivery mechanism (distribution), as two distinct regulatory functions, even when operated under a common parent entity.**

The Canadian Radio Television Telecommunications Commission explicitly **regulates vertical integration (app based/ALTD services) through the Broadcasting Distribution Regulations**. A company like Bell Canada must hold a separate license for its programming undertaking (e.g., CTV) and its broadcasting undertaking (Bell Fiber TV).<sup>6</sup> Bell Media markets Fibe Alt TV is an app-based live service streaming 500+ channels, yet it is regulated as part of Bell's distribution obligations. Its carriage rules, wholesale code compliance and interconnection conditions fall under the same CRTC framework that governs Broadcasting Distribution Undertakings.

In the UK, the **BBC's iPlayer and other connected TV platforms are treated as online TV services under Media Act, 2024**, even though the BBC operates as a linear broadcast channel. Ofcom now requires major CTVs and app-based platforms, including those owned by vertically integrated groups, to carry TV-style services to ensure public service broadcasters (e.g. BBC, ITV, Channel 4, Channel 5) are available and easily accessible, thereby subjecting the app-based environment to the same prominence and access obligations as traditional TV.<sup>7</sup> **This means that the BBC cannot treat its own app-platform as a regulation-free distribution layer outside the BBC-licence framework.**

**Hence, implementation of dual authorisations for hybrid ALTD models ensures regulatory parity, aligns with CRTC and Ofcom precedents and helps adapt India's framework to tech convergence-protecting consumers, diversity and competition while also enabling innovation.**

---

<sup>6</sup> <https://crtc.gc.ca/eng/archive/2011/2011-601.htm>

<sup>7</sup> <https://www.legislation.gov.uk/ukpga/2024/15/contents>

**Q3. What should be the terms and conditions, including fees or charges, for the grant of service authorisation to the application providers provisioning ALTD Services in India, under 'Television Channel Distribution Services' as recommended in Annexure-II of Authorisation Recommendations dated 21st February 2025?**

Stakeholders are requested to provide their detailed comments, including but not limited to the following conditions:

- a. Service Area
- b. Validity Period
- c. Eligibility Conditions
- d. Minimum Net Worth
- e. Processing Fee
- f. Entry Fee
- g. Bank Guarantee
- h. Authorisation Fee
- i. Security Deposit
- j. Roll-out Obligations
- k. Any other terms and conditions

Further, what terms and conditions/obligations should be put in place for foreign entities providing ALTD Services in India?

#### **Airtel's response**

The provision of broadcasting distribution services in India has, since the inception of the DTH regime, been governed by detailed license agreements between the licensee and the Ministry of Information and Broadcasting (MIB). Each **DTH license is a sacrosanct contract** that instils regulatory certainty and gives effect to the Constitutional mandate of transparency and fair play in the grant of authorisations.

**The principles in cases of service authorisation are straightforward: maintain the contractual nature of authorisation, voluntary migration, existing licensees to not be put in worse-off situations, the same T&C for DPOs providing the same service.** DTH Operators have committed crores in satellite transponder leases, conditional access systems, subscriber management infrastructure, and pan-India distribution networks on the strength of license terms that, by their very nature, cannot be unilaterally amended. The contractual right under existing DTH licenses creates a legitimate expectation that the operating, financial and content-related conditions on which those investments were made will be preserved through the licence period. This legitimate expectation **must not be disturbed under the proposed Broadcasting (Television Channel Distribution) Services framework.**

Any new authorisation regime must **allow existing DTH operators to continue under their current licences until natural expiry, with migration being voluntary and not mandatory.** Any relaxations, ease-of-doing-business measures, or enabling provisions extended to ALTD or other, new authorised entities must be made equally available to existing DTH licensees through appropriate amendments to current licence provisions. This will ensure that **incumbent operators are not placed in a worse-off position** than new entrants in the same regulated layer. Regulatory stability of this kind is not merely desirable, it is **essential**

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

to sustain continued investment into a sector that is already absorbing severe headwinds from unregulated ALTD/FAST competition, declining subscribers and shrinking advertising share.

The terms and conditions for ALTD Service authorisation should mirror the requirements as applicable on DTH operators, suitably adapted for the digital, internet-delivered nature of the service. Parity is essential to give effect to 'Same Content, Same Rules' and to remove the regulatory arbitrage that currently favours ALTD over registered DPOs. At the same time, the framework should be calibrated such that it avoids imposing legacy satellite or cable specific costs that have no operational relevance to internet delivery.

To provide clarity, the extant financial obligations for DTH and HITS operators are as follows:

Particulars	DTH	HITS
Entry Fee	₹10 crores	₹10 crores
Processing Fee	Not prescribed	₹1 lakh
Authorisation Fee	8% of AGR	Not prescribed
Net Worth	Not prescribed	₹10 crores
Bank Guarantee	₹5 crores initial, thereafter LF for two quarters	₹40 crores valid for 3 years

Although both DTH and HITS are capital-intensive sectors requiring significant financial investment, the existing regulations already ensure that DTH service providers demonstrate sufficient financial stability through mechanisms such as annual license fees, bank guarantees and entry fees and HITS operators have the mandatory net worth requirement of **INR 10 crores** ensuring they have the financial resources to support the infrastructure and operational demands of their business. DTH operators are required to pay an annual license/authorisation fee, which is **8% of their Adjusted Gross Revenue (AGR)**. They also have to submit a bank guarantee every year that amounts to the 'estimated sum payable, **equivalent to the License fee for two quarters and other dues otherwise not securitised,**' thereby ensuring their financial responsibility.

The DTH sector is experiencing severe headwinds as evidenced by TRAI's own data. The TRAI Performance Indicators Report (October - December 2025) reveals that the DTH subscriber base has declined sharply from 66.62 million in December 2022 to 50.99 million in December 2025<sup>8</sup>. Concurrently, the television industry's revenue has declined from ₹70,900 crore in 2022 to ₹69,600 crore in 2023-24 (down 1.8%), and further to ₹67,900 crore in calendar year 2024<sup>9</sup>. The **sustained decline highlights the structural challenges facing linear television**, even as it remains a dominant medium in terms of reach.

In contrast, **video-streaming revenues surged 55% in 2025 compared to 2024**, nearly tripling from their **2023 levels**, according to a recent FICCI EY report. This market compression is exacerbated by regulatory imbalances that impose disproportionate financial and operational burdens on licensed DTH operators vis-à-vis unregulated OTT platforms, ALTD services and DD Free Dish.

Against this backdrop, the **broadcasting sector at an overall level requires forbearance** across all registered DPOs and ease of doing business (EoDB) should be encouraged by reducing administrative burdens and

<sup>8</sup> [https://www.trai.gov.in/sites/default/files/2026-03/QPIR\\_03032026\\_0.pdf](https://www.trai.gov.in/sites/default/files/2026-03/QPIR_03032026_0.pdf)

<sup>9</sup> <https://www.storyboard18.com/television/broadcasting-sector-at-a-policy-crossroads-as-revenue-pressures-persist-trai-data-shows-87108.htm>

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

enhancing operational efficiency. This is the preferred path. However, should the Authority conclude that such forbearance for registered DPOs is not feasible, then, as the only equitable alternative, the corresponding regulatory obligations must be extended in full to ALTD providers to give effect to the principle of 'Same Content, Same Rules'. What cannot continue is the present asymmetric regime, where licensed DPOs bear the full weight of legacy regulation while functionally identical ALTD/FAST services operate without accountability. Airtel also requests that OTT platforms should be included in the authorisation framework and that the OTT providers should be mandatorily required to get authorisation and pay authorisation fee under the Telecommunications Act, 2023 for their operations in India.

With the above as context, the **requirements for ALTD providers should be aligned with those applicable to DTH operators**. Airtel's parameter-wise recommendations on the terms and conditions for ALTD authorisation are set out in the table that follows:

### Recommended Terms and Conditions

Parameter	Recommended position
<b>(a) Service area</b>	National / Pan-India. Internet-delivered services are inherently national in scope, and any sub-national service area carving would be artificial, unenforceable, and inconsistent with how ALTD platforms actually operate. This also <b>simplifies subscriber-base reporting, BARC (or any other Television Rating Agency) integration, and TRAI/MIB monitoring.</b>
<b>(b) Validity period</b>	The requirements for ALTD providers should mirror those applicable to DTH operators, with provision for renewal on substantially the same terms. This aligns with the validity period applicable to DTH and IPTV authorisations and provides the long-term certainty required to justify investment in the platform, content acquisition, and consumer experience.
<b>(c) Eligibility conditions</b>	<ul style="list-style-type: none"><li>• Applicant must be a <b>company incorporated in India under the Companies Act, 2013.</b></li><li>• Foreign-owned entities must <b>establish a locally incorporated Indian entity</b> (with the foreign holding subject to applicable FDI sectoral caps and security clearance norms applicable to DPOs).</li><li>• The Indian entity must have its registered office, network operations centre, content monitoring facility, and grievance redressal infrastructure <b>located in India.</b></li><li>• The applicant, its directors, and key managerial personnel must satisfy <b>security clearance norms applied to existing DPOs.</b></li></ul>
<b>(d) Minimum net worth</b>	A <b>reasonable, tiered net worth requirement</b> should be specified, calibrated to the digital nature of the operation. As a guiding principle, the <b>minimum net worth should be sufficient to deter frivolous or unreliable entrants while not being so high as to suppress legitimate competition.</b> We recommend the Authority to adopt requirements for ALTD providers as those applicable to DTH operators

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Parameter	Recommended position
<b>(e) Processing fee</b>	Treatment to be similar to the processing fee applicable to DTH operators payable at the time of application, to cover administrative costs of evaluation.
<b>(f) Entry fee</b>	<p>A reasonable one-time entry fee should be submitted by ALTD Providers, similar to the fee applicable to DTH operators.</p> <p>The entry fee should not be set low as to invite a flood of unreliable applicants.</p>
<b>(g) Bank Guarantee</b>	<p>The preferred path is forbearance across all registered DPOs; failing that, equivalent obligations must apply to ALTD providers as the present asymmetric regime cannot continue. Performance Bank Guarantee at a level commensurate with the entry fee and roll-out obligations, encashable in case of breach, mirroring the structure applicable to DTH. Even in case of DTH, our ask has been that <b>Bank Guarantees should be done away with altogether as that will free up the working capital flow for service providers.</b></p> <p>This <b>protects the public interest and gives the Authority a credible enforcement lever.</b></p>
<b>(h) Authorisation Fee (or License Fee)</b>	<p>Today, in the broadcasting sector's entire value chain, DTH operators are the only ones subjected to license fees. This creates a non-level playing field and is discriminatory and against the basic premise of government's endeavour to have a balanced regulatory framework. No License Fee is being paid by other competitors of DTH Operators, such as Cable and HITS operators, despite providing the same set of service to the same market. Therefore, in the interest of parity and a level playing field, <b>the license fee requirement for DTH Services should be done away with in its entirety.</b></p> <p><b>Therefore, the preferred path is forbearance across all registered DPOs; failing that, equivalent obligations must apply to ALTD providers as the present asymmetric regime cannot continue.</b></p> <p>An annual authorisation fee should be charged on a percentage-of-Adjusted-Gross-Revenue (AGR) basis, mirroring the framework applicable to existing DPOs. The percentage may be set in line with the DTH AGR-share level, with TRAI specifying clearly what is included and excluded in AGR (e.g., advertising revenues, subscription revenues, VAS revenues, carriage fees received).</p> <p>This ensures <b>parity in fiscal treatment</b> between ALTD and registered DPOs and removes the current revenue-side arbitrage.</p>
<b>(i) Security deposit</b>	The requirement should mirror that applicable to DTH operators to secure compliance with terms & conditions, dues, and contractual obligations to consumers & broadcasters.

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Parameter	Recommended position
<b>(j) Roll-out obligations</b>	<p>The requirement should mirror that applicable to DTH operators. Further, clear, time-bound roll-out obligations <b>should be prescribed</b> including commercial launch of the ALTD service within <b>12 months of grant of authorisation</b>.</p> <p>In case the Roll out Obligations is not met within one year, the authorisation shall be liable to be withdrawn, and the BG may be forfeited.</p>
<b>(k) Other Terms</b>	<p>Additional obligations applicable:</p> <ul style="list-style-type: none"> <li>• <b>The Authorised Entity, i.e., a Broadcaster, shall provide its channel only to registered Distribution Service Providers for onward retransmission to the end consumer. Basically, carriage of only MIB-permitted linear channels</b> (satellite or GBB) should be allowed.</li> <li>• The applicant company shall <b>make full disclosure</b>, at the time of application, of Shareholders Agreements</li> <li>• The <b>Central Government shall have the right to take over the service, equipment and network of the Authorised Entity</b> or revoke/terminate/suspend the Authorisation either in part or in whole of the Service Area in the interest of National Security or in case of emergency or war or low intensity conflict or any other eventuality in public interest as declared by the Government of India.</li> <li>• Compliance with <b>Programme Code and Advertising Code</b> on every linear channel and VAS offering</li> <li>• Must-Carry obligations for mandated channels (<b>DD, public-interest channels</b>) on Pan-India basis</li> <li>• <b>Quality of Service compliance</b>: minimum streaming uptime, channel availability, complaint resolution timelines (centralised, time-bound grievance redressal)</li> <li>• <b>MRP transparency and tariff compliance</b></li> <li>• <b>Reporting of subscriber base, viewership, and revenue</b> at periodic intervals</li> <li>• Data privacy and localisation obligations consistent with the <b>Digital Personal Data Protection Act, 2023</b></li> <li>• Compliance with <b>IT Rules, 2021</b> for content-related grievance redressal.</li> </ul>

**Specific obligations for foreign entities providing ALTD services in India**

No ALTD services that are being delivered to Indian consumers **should be permitted to operate beyond the regulatory reach of the MIB and TRAI**, even if they are fully or partially operated from outside India. Several

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

existing, pre-installed smart TV applications, FAST aggregators, and OS-level platforms are operated by foreign-headquartered entities and currently **provide linear television to Indian consumers without any Indian regulatory accountability**. This is a material gap that must be closed.

Airtel recommends the following obligations for all foreign entities:

1. **Mandatory local incorporation:** A foreign-headquartered ALTD provider must incorporate a local Indian subsidiary or appoint a compliant Indian partner (with majority Indian control over compliance functions) who will act as the legal authorised entity. The authorisation cannot be issued to a foreign entity directly.
2. **Local presence and infrastructure:** The Indian authorised entity must have a physical office in India, an Indian-resident Compliance Officer, a Grievance Redressal Officer and a Nodal Contact Officer for the MIB and TRAI. Customer-facing functions (grievance, refunds, KYC where applicable) must be discharged from India.
3. **Content monitoring from India:** Linear channel monitoring, content take-down capability and Programme Code/Advertising Code compliance functions must be operationally located in India to ensure timely action.
4. **Data localisation:** Subscriber data, viewership data, transaction data and grievance records must be stored on servers located in India, in line with the Digital Personal Data Protection Act, 2023 and any sectoral data localisation directions issued by the MIB or TRAI.
5. **FDI compliance:** Foreign holdings in the Indian authorised entity must comply with the sectoral FDI cap applicable to the corresponding DPO category, with mandatory security clearance for the Indian entity, its directors and key managerial personnel.
6. **Liability and jurisdiction:** The Indian authorised entity must accept exclusive Indian jurisdiction for all regulatory and consumer-related disputes and must indemnify the Authority against acts of the foreign parent that breach the authorisation.
7. **Sanctions for non-compliance:** For any foreign-operated ALTD service that continues to operate without a duly authorised Indian entity beyond a transition period, the Authority should empower the MIB to direct app stores, OEMs and OS providers to delist or block such applications, in addition to monetary penalties.

### **Transition for existing ALTD Providers**

Existing ALTD/FAST applications (whether downloadable, pre-installed or web-based) that are currently operating in India **must obtain authorisation under the new framework within a defined transition window from the date of notification**.

During this window, they must (i) submit applications, (ii) cease onboarding any new linear channels not permitted by the MIB, (iii) commence Programme/Advertising Code compliance and (iv) align tariffs with the Tariff Order. Continued operations beyond the transition window without authorisation should attract delisting from app stores, removal of pre-installation arrangements with OEMs and escalating monetary penalties.

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

**Q4. What should be the common terms and conditions applicable for the authorised entities provisioning ALTD Services in India, under ‘Television Channel Distribution Services’ as recommended in Part-I of Annexure-III in the Authorisation Recommendations dated 21<sup>st</sup> February 2025? Stakeholders are requested to provide their detailed comments on the following conditions:**

**a. Renewal of Authorisation**

**b. Renewal Fee**

**c. Equity Holding and Management Control**

**d. Restriction on cross-holding of equity shares/capital contribution between:**

**i. TV broadcasters and application providers provisioning ALTD services**

**ii. Application providers provisioning ALTD services and other DSPs**

**e. Transfer / Surrender of Service Authorisation**

**f. Sharing of Infrastructure**

**g. Any other terms and conditions**

### **Airtel’s Response**

The **preferred path across all registered DPOs is forbearance**. Failing that, equivalent obligations must apply to all ALTD providers as the present asymmetric regime cannot be allowed to continue. **Parity (and not lighter regulation) must be the operative principle**, since lighter common terms would simply reproduce the regulatory arbitrage that this Consultation Paper aims to address.

The common terms and conditions applicable to the authorised entities provisioning ALTD Services should **mirror the terms being applied to the existing DTH operators**. Within this context, Airtel’s parameter-wise recommendations on the common terms and conditions for ALTD authorisation are set out in the table as follows:

<b>Parameter</b>	<b>Recommended position</b>
<b>(a) Renewal of Authorisation</b>	Renewal should be <b>available on</b> the same terms and conditions as applicable to DTH operators.
<b>(b) Renewal fee</b>	A reasonable renewal fee should be specified, set <b>in line with the renewal fee applicable to DTH operators</b> .
<b>(c) Equity holding and management control</b>	Equity holding and management control should be <b>in line with the requirements as applicable on DTH operators</b> , namely:  (i) Any change in the equity structure, amendment in the shareholder agreement/capital contribution in the LLP agreement of the Authorised Entity wherever applicable, shall only be carried out with prior approval of the Central Government  (ii) any restructuring or re-organisation of the authorisation between holding entities, subsidiaries or entities under common management shall require prior Central Government approval, with revised shareholding/partnership/FDI patterns to be reported within 30 days where

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Parameter	Recommended position
	<p>the change involves 10% or more, and the resulting entity continuing to satisfy all eligibility conditions;</p> <p>(iii) the Central Government shall retain the right to suspend or cancel authorisation in the interest of public interest or national security, including in cases of misuse, sub-contracting of core functions, or substantive change in ownership/management control without prior approval; and</p> <p>(iv) any modification in FDI/FII policy during the authorisation period shall be complied with within six months of notification, failing which the entity shall be treated as non-compliant.</p> <p>Additionally, we suggest:</p> <p>(i) <b>Indian incorporation:</b> Authorised entity must be a company incorporated in India.</p> <p>(ii) <b>FDI:</b> Foreign equity holding in the authorised entity must comply with the sectoral FDI cap applicable to the corresponding DPO category, with prior security clearance.</p> <p>(iii) <b>Indian management control:</b> Majority of the Board, Chairperson, Managing Director, Chief Executive Officer, Chief Financial Officer, and Chief Operating Officer should be Resident Indian Citizens. Critical compliance functions (Compliance Officer, Grievance Redressal Officer, Nodal Officer) must be Resident Indian Citizens.</p> <p>(iv) <b>Change in control:</b> Any change in equity holding above prescribed thresholds, or change in management control, must require prior approval of the MIB.</p>
<b>(d)(i) Cross-holding: TV Broadcasters ↔ ALTD Application Providers</b>	<p>Vertical cross-holding between a TV broadcaster (whether satellite-based or GBB) and an ALTD Application Provider <b>must be capped as per the requirements applicable to DTH operators</b>, mirroring the cross-holding restriction currently applicable between broadcasters and DPOs. This is essential to prevent: (i) preferential access to a broadcaster's channels by its affiliated ALTD platform; (ii) discriminatory denial of channels to competing DPOs; and (iii) circumvention of Must-Provide obligations through internal vertical arrangements.</p> <p>Any holding above the threshold should require prior MIB approval and trigger consequential obligations (e.g., disclosure, must-provide affirmation).</p>
<b>(d)(ii) Cross-holding: ALTD Application Providers ↔ Other DPOs</b>	<p>Cross-holding between an ALTD Application Provider and any other DPO (DTH, IPTV, Cable, HITS) should <b>similarly be capped as per the requirements applicable to DTH operators</b>, to preserve genuine inter-platform competition and avoid platform-level concentration.</p> <p>Where two DPO categories are operated by the same group, both must hold separate authorisations, observe arm's-length commercial dealings, and be</p>

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Parameter	Recommended position
	subject to consolidated subscriber-base reporting to prevent cross-subsidy and tariff arbitrage.
<b>(e) Transfer / Surrender of Service Authorisation</b>	<p><b>Transfer:</b> An ALTD authorisation should not be transferable except with <b>prior written approval of the MIB</b>. The transferee must independently satisfy all eligibility conditions, security clearance norms, and FDI norms applicable at the time of transfer.</p> <p><b>Surrender:</b> An authorised entity may surrender its authorisation on giving advance written notice to the MIB and TRAI, accompanied by a clear plan for orderly migration of subscribers, refund of unutilised subscription amounts, retention of grievance records, and continued compliance during the wind-down period. The Bank Guarantee may be released on certified completion of wind-down obligations.</p>
<b>(f) Sharing of Infrastructure</b>	Requirements to be <b>aligned with those applicable to DTH operators</b> .
<b>(g) Any Other Terms</b>	<p>(i) Annual compliance certification by the authorised entity, signed by an Indian-resident Compliance Officer.</p> <p>(ii) Periodic third-party audit of subscriber base, AGR computation, and Programme/Advertising Code compliance.</p> <p>(iii) Mandatory cooperation with MIB/TRAI inspection rights.</p> <p>(iv) Disclosure of material litigation, regulatory action, and security incidents.</p> <p>(v) Adherence to net neutrality, accessibility (EPG, captions, audio descriptions where prescribed), and consumer protection norms.</p> <p>(vi) Compliance with the Digital Personal Data Protection Act, 2023 and IT Rules, 2021 (Part III) for content-related grievance handling.</p> <p>(vii) Authorised entity shall ensure that its facilities are not used for transmitting any objectionable or obscene content, messages or communication inconsistent with the laws of India. The use of the facility or service for anti-national activities to be construed as an offence punishable under the Indian Penal Code and applicable laws and will attract immediate termination of Authorisation.</p> <p>(viii) No Authorised entity shall carry or include in Service any television broadcast or channel which has not been registered by the Central Government for being viewed within the territory of India.</p>

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

Q5. What should be the specific terms and conditions applicable for the authorised entities provisioning 'ALTD Services' in India, under the 'Television Channel Distribution Services' as recommended in Part-II of Annexure-III in 'Authorisation Recommendations dated 21st February 2025'? Stakeholders are requested to provide their detailed comments on the following conditions:

- a. Reservation of operational channel capacity by Vertically Integrated Entity
- b. Platform Services (PS) offered by application providers provisioning ALTD services
- c. Monitoring and inspection of facilities
- d. Supply of information to Central Government / TRAI
- e. Contravention of terms and conditions of authorisation
- f. Any other terms and conditions

Further, whether the mandatory sharing of Sports Broadcasting Signals with Prasar Bharati and the compulsory transmission of certain channels as mandated for DTH, HITS and IPTV services should be applied to the application providers provisioning 'ALTD Services'. Stakeholders are requested to provide their comments with detailed justification on all such obligations that should be made applicable on such entities.

Stakeholders are requested to provide comments with detailed justification.

### Airtel's Response

The preferred path across all registered DPOs is forbearance. Failing that, equivalent obligations must apply to ALTD providers as the present asymmetric regime cannot be allowed to continue. **Parity (and not lighter regulation) must be the operative principle**, since lighter common terms would simply reproduce the regulatory arbitrage that this Consultation Paper aims to redress.

Specific terms and conditions applicable to **the entities authorised to provision ALTD services should then mirror those currently applicable to DTH, IPTV and HITS providers**, recognising that the underlying service (distribution of pre-scheduled linear television channels) is functionally identical across all four DPO categories. Differential treatment in specific obligations would only reinstate the regulatory arbitrage that this Consultation Paper sets out to remove.

Within this context, Airtel's parameter-wise recommendations on the specific terms and conditions for ALTD authorisation are set out in the table as follows:

Parameter	Recommended position
(a) Reservation of operational channel capacity by Vertically Integrated Entity	<p>Where an ALTD authorised entity is part of a vertically integrated group that also owns broadcasters, the proportion of total operational channel capacity (or EPG slots / featured-channel slots / curated lists) that may be allocated to channels of the same group should be capped, mirroring the framework applicable to DTH operators.</p> <p>We recommend a <b>cap broadly aligned with the existing benchmarks</b>, with EPG positioning, recommendation feeds, and 'Featured' slots all counted</p>

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Parameter	Recommended position
	within this cap. This prevents self-preferencing and ensures genuine consumer choice.
<b>(b) Platform Services (PS) offered by ALTD application providers</b>	<p>On-demand access offered by ALTD providers, analogues to platform channels offered by DTH operators (as value added services). PS offerings on ALTD must comply with the same MIB framework as applicable to PS channels on DTH: (i) Prior MIB permission for each PS channel; (ii) PS channels must not be linear feeds of permitted television channels; (iii) Compliance with Programme and Advertising Codes; (iv) Prescribed PS fees per channel as applicable to other DPOs (Rs. 10,000 per channel).</p> <p>Importantly, <b>VAS (catch-up, library, on-demand)</b> offered alongside linear channels must not be used to bundle pay channels at zero or subsidised price.</p>
<b>(c) Monitoring and inspection of facilities</b>	<p>ALTD authorised entity <b>should be subject to MIB and TRAI monitoring and inspection rights identical to those applicable to other DPOs, for instance:</b></p> <ul style="list-style-type: none"> <li>• Provide the necessary facility for continuous monitoring of the broadcasting service at its own cost and maintain the recordings of programmes and advertisements carried on the platform for a period of <b>90 days from the date of broadcast</b> and produce the same to the Authority, as and when required.</li> <li>• Furnish any such <b>information at periodic intervals</b> as may be required by the Authority concerning Channels or content being transmitted or provided under the service, technical parameters etc. <b>in the format as may be prescribed by the Licensor from time to time.</b></li> <li>• Provide access to the Authority or its duly authorised representative to all its facilities including equipments, records, systems, etc.</li> <li>• The Authority can ordinarily carry out the inspection after reasonable notice except in circumstances where giving such a notice will defeat the very purpose of the inspection.</li> </ul> <p>The authorised entity must not impede or delay inspection.</p>
<b>(d) Supply of information to Central Government / TRAI</b>	<p><b>Mandatory periodic reporting</b> on aspects as applicable to DTH operators such as: (i) Subscriber base reporting (PMR reportings to TRAI and quarterly subscriber base reporting to MIB as applicable); (ii) Changes related to nodal officer / charges / removal or modification of channels; (iii) Revenue data; (iv) Programme/Advertising Code complaints and resolution; (v) QoS metrics: consumer grievances, response times, complaint resolution and resolution rates; (vi) Viewership data (in standardised, compatible form); (vii) Any material change in shareholding, management, or operations; etc.</p>

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

Parameter	Recommended position
	Reports should be submitted in <b>formats specified by TRAI/MIB at monthly, quarterly or other prescribed intervals.</b>
<b>(e) Contravention of terms and conditions of authorisation</b>	<p>Penalty regime should apply as applicable to DTH operators.</p> <p>Egregious breaches (e.g., carriage of unpermitted channels despite warning, breach of national security obligations) should attract revocation. <b>The penalty regime must be transparent and rule-based.</b></p> <p>For <b>violation of authorisation conditions</b>, in addition to any other action which may include revocation of authorisation, a penalty up to Rs. 50 crores can be imposed by the Authority (<i>similar to DTH operators</i>).</p>
<b>(f) Any other terms and conditions</b>	<p><b>(i) Mandatory integration with BARC (or any other Television Rating Agency)</b> for unified, cross-platform viewership ratings; <b>(ii) Mandatory disclosure of channel positioning, EPG logic, and recommendation/featuring algorithms to TRAI and PMR reportings;</b> <b>(iii) Accessibility obligations (closed captions, audio description, EPG accessibility) consistent with MIB Accessibility Guidelines;</b> <b>(iv) Transparency in advertising disclosures (clear demarcation of sponsored content);</b> <b>(v) Maintenance of operational continuity plans (DR/BCP) for the platform;</b> <b>(vi) Reporting and cooperation in case of cyber-security incidents.</b></p>

### Mandatory sharing of sports broadcasting signals with Prasar Bharati

**Yes. All entities authorised to provision ALTD services should be subject to the mandatory sharing of sports broadcasting signals with Prasar Bharati to ensure consistency across also distribution platforms.<sup>10</sup> The definition of distribution must be amended to encompass internet-delivered linear streams to fulfil the Act's primary public interest objective.**

### Compulsory transmission of mandated channels (Must Carry)

**Yes. The compulsory transmission of mandated channels (notably Door darshan and other public-service channels notified from time to time) should also apply to all entities authorised to provision ALTD services.**

Must-Carry obligations form an integral part of TRAI's regulatory framework for distribution platforms and have been a long-standing feature of DTH, IPTV, HITS and Cable. They serve essential public-policy goals: (i) universal access to public-service broadcasting; (ii) availability of national, social and emergency content (including DD News, agriculture and educational channels); and (iii) continuity of public-interest content during disasters and emergencies. The same goals are even more relevant for internet-delivered linear platforms, which now reach many of the homes that have moved away from traditional DTH/cable subscriptions.

**ALTD platforms must be required to carry mandated channels in their EPG with comparable prominence to that expected of DTH/IPTV, on a non-discriminatory basis.** This must be a mandatory, non-derogable obligation.

<sup>10</sup>Section 3, The Sports Broadcasting Signals (Mandatory Sharing with Prasar Bharati) Act, 2007 (Act No. 11 of 2007).

**Q6. What type of assurance or certification mechanism should be prescribed for television manufacturers and operating system providers to ensure that applications provisioning ALTD services, (whether pre-integrated with television sets or made available for download through application stores or web platforms) are duly authorised by MIB.**

### **Airtel's Response**

Television OEMs (smart TV manufacturers) and Operating System (OS) providers form the **gatekeeping layer between consumers and ALTD applications**. Without their active cooperation, even a robust authorisation framework for application providers can be circumvented through pre-installed apps, OS-level integrations and unmoderated app-store listings.

Airtel, therefore, **strongly supports the introduction of a clear, MIB-administered assurance and certification mechanism for OEMs and OS providers** with binding obligations and meaningful sanctions for non-compliance.

### **Recommended assurance or certification framework**

#### **1. Pre-installation gate-prior MIB permission must be mandatory for all ALTD apps pre-integrated on a smart TV or OS-level platform**

No ALTD application should be pre-installed, pre-loaded, embedded or made available on the home screen / launcher / EPG of any smart television, connected television or OS-level platform sold or distributed in India unless that **application provider holds a valid MIB authorisation for ALTD Services**. The OEM and OS provider must verify the validity of the authorisation at the time of integration, model launch and firmware update. This obligation should apply to (i) smart TV brands manufactured or assembled in India; (ii) imported smart TV brands sold in India; and (iii) OS-level platforms that aggregate ALTD content (e.g., FAST aggregators, manufacturer-curated linear hubs).

#### **2. App-store gate-publication only of authorised ALTD apps**

App stores operating on smart TVs, mobile devices, laptops and tablets in India should be required, on direction of the MIB / TRAI, to publish or **make available for download only those ALTD applications whose providers hold valid MIB authorisation for ALTD services**. Where an app store is operated by an OEM or OS provider, the obligation rests on the OEM/OS provider directly. Where it is operated by a third party (e.g., generic mobile app stores), MIB-issued directions should be served to the app-store operator. Listings of unauthorised ALTD apps should be expeditiously removed at the direction of MIB.

#### **3. Web-based gate-disclosure and accountability for browser-accessed ALTD**

Web-based ALTD platforms (accessed through browsers) cannot be gated by an OEM or OS and must be addressed through the **direct authorisation of the application provider** and, where necessary, **web-blocking directions with respect to unauthorised foreign-operated services that refuse to comply**. However, OEMs and OS providers that ship browsers with bookmarks, default home pages, or featured-content tiles linking to ALTD providers must ensure that those linked services are duly authorised.

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

### **4. Self-certification + periodic audit**

OEMs and OS providers should be required to file an **annual self-certification with the MIB** confirming that all ALTD applications integrated, pre-installed, or made available through their devices, app stores, or platforms are **duly MIB-authorized**.

The TRAI should retain the right to (i) conduct audits, (ii) require demonstrative product walkthroughs and (iii) commission independent third-party audits at the OEM/OS provider's cost in cases of suspected non-compliance. The self-certification regime gives OEMs and OS providers a clear, predictable compliance pathway while preserving robust verification.

### **5. Mandatory take-down / delisting capability**

OEMs and OS providers must build, maintain and demonstrate the technical capability to (i) remotely remove a pre-installed ALTD application from devices already in the field through firmware update or app management push, (ii) delist an ALTD application from their app store and (iii) disable an OS-level shortcut or featured tile for an ALTD service.

Where the MIB issues a directed delisting / take-down notice (e.g., authorisation revoked, persistent breach, security concern, court order), the OEM / OS provider must comply within the prescribed timelines.

### **6. Equal treatment across brands and OS platforms**

The assurance mechanism should **apply uniformly to all OEMs** (Indian and foreign) selling smart TVs in India and to all OS providers whose OS is shipped on devices sold in India. Foreign OEMs and OS providers must designate an Indian-resident liaison officer for MIB and TRAI correspondence and must accept Indian jurisdiction for all compliance and dispute purposes.

### **7. Disclosure of pre-integration / featuring arrangements**

OEMs and OS providers must disclose to the MIB the commercial arrangements (like default-channel agreements) underlying any pre-installation, default-launcher prominence, or 'Featured' status accorded to specific ALTD applications. This is essential to ensure that prominence is not used to confer an unfair advantage on unauthorised services and to support the cap on vertical preferencing discussed in Airtel's response to Q5.

### **8. Penalties for non-compliance**

The penalty regime for OEMs and OS providers should include: (i) directions to cease pre-installation of non-compliant apps within prescribed timelines; (ii) financial penalties for each model / device shipped with non-compliant pre-installations; (iii) public disclosure of non-compliance findings; (iv) where OEMs/OS providers persistently breach, escalation to import / sales restrictions through coordination with the relevant ministries. The penalty framework must be transparent, graduated and respect principles of natural justice.

### **Transition for existing devices and platforms**

For smart TVs already sold to consumers and for ALTD applications already pre-installed, OEMs and OS providers should be required, within a specified time frame of notification of the framework, to: (i) verify **whether each pre-installed ALTD application has obtained MIB authorisation**, (ii) push firmware updates / app updates that **disable or remove non-authorized ALTD applications**, and (iii) **inform consumers of the transition**. This is essential to prevent retrospective legitimisation of unauthorised services and to give effect to the level-playing-field objective of this framework.

**Q7. What kind of assurance mechanisms should be instituted to ensure that authorised application providers provisioning ALTD Services carry only those television channels authorised/permitted by MIB for distribution in India?**

**What penalty / disincentive / deterrent mechanisms should be instituted for non-compliance?**

**Please provide comments with justification.**

### **Airtel's Response**

The, **authorised ALTD platform must carry only those linear television channels that are duly permitted by the MIB**, either as satellite-based channels under the Uplinking/Downlinking Guidelines or as Ground-Based Broadcasting (GBB) channels under the GBB framework. This is the only way to **ensure content accountability, prevent regulatory arbitrage and protect consumers from non-compliant content**. The assurance mechanism should be a combination of **self-certification, MIB-maintained whitelist, audit, real-time monitoring and a graded penalty** regime.

### **Recommended assurance mechanisms**

#### **1. MIB-maintained whitelist of permitted television channels (*monthly / quarterly release*)**

The MIB should maintain and publish a digital, machine-readable, real-time whitelist of all linear television channels permitted for distribution in India, covering both satellite-based and GBB channels. The whitelist should include channel name, registered broadcaster, language, genre, permission status and effective dates of permission. This **whitelist should become the single source of verification against which every ALTD platform must reconcile its channel line-up**.

#### **2. Self-certification of channel line-up at authorisation on launch of any new channel as well as periodically**

ALTD authorised entities should be required to file: (i) A complete channel-line-up self-certification at the time of authorisation, confirming that every channel carried is on the MIB whitelist; (ii) An updated certification each time a channel is added or removed (within 7 days of the change); (iii) A quarterly compliance certificate signed by the Indian-resident Compliance Officer; and (iv) An annual third-party audit report. **Self-certification places primary accountability on the authorised entity and gives the MIB a paper trail for enforcement**.

#### **3. Real-time monitoring infrastructure**

ALTD authorised entities should be required to operate a content-monitoring facility located in India with capability to (i) Capture and retain a rolling 90-day record of every linear feed carried; (ii) Timestamp and log every channel addition/removal; (iii) Make these records available to the MIB and TRAI on request; and (iv) Maintain a take-down capability that allows removal of a channel from the platform within prescribed timelines. A central, India-based content monitoring facility (not a foreign, cloud-based monitoring outpost) is essential for genuine accountability.

#### **4. Verification at the broadcaster-onboarding stage**

Before carrying any new linear channel, the ALTD authorised entity must **verify that the broadcaster (whether satellite-based or GBB) holds valid MIB permission for that specific channel**. The agreement between the broadcaster and the ALTD authorised entity should expressly require the broadcaster to

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

maintain its permission throughout the carriage period and to inform the ALTD platform immediately on any suspension, revocation or expiry. The ALTD platform must be contractually obliged to take down a channel whose permission lapses.

### 5. MIB / TRAI inspection and audit rights

The MIB and TRAI must retain unrestricted rights to inspect the ALTD platform's channel line-up, EPG, content monitoring records and broadcaster carriage agreements at any time. Random spot-checks by the MIB may be conducted by accessing the consumer-facing application directly. Where suspected non-compliance is identified, formal audits by independent third-party auditors should be commissioned at the authorised entity's cost.

### Penalty / disincentive / deterrent mechanisms for non-compliance

A graduated, transparent and proportionate penalty regime is essential, in line with the penalty applicable to the DTH operators.

### Process safeguards

All penalty actions must **follow due process** in line with the existing frameworks. This protects against arbitrary action and gives the Authority clarity on what conduct triggers what consequence.

**Q8. Whether there is a need to prescribe any specific terms and conditions for value-added services offered by ALTD service providers? If yes, what should be the terms and conditions? Stakeholders are requested to provide their detailed comments with justification.**

### Airtel's Response

**Yes. Specific terms and conditions for Value Added Services (VAS) offered by ALTD providers are essential.**

VAS is one of the principal vectors through which the current regulatory arbitrage is exploited. ALTD platforms can today bundle linear pay channels with on-demand catalogues, catch-up content, library content, sports highlights and exclusive originals. For instance, consider the following examples of possible arbitrage:

- **Free linear, Paid VAS:** An ALTD platform offers a package 'Subscribe to our ₹99/month Premium Catch-Up & Library Pack and get the linear feed of Star Sports, Aaj Tak HD and Zee Cinema FREE.'

[*Why this is impermissible:* Star Sports, Aaj Tak HD and Zee Cinema are declared pay channels with MRPs of (say) ₹22.42, ₹14 and ₹19, respectively under the Tariff Order. The platform is, in substance, distributing ₹55+ worth of declared pay channels at zero. The ₹99 "VAS fee" is a label but the underlying linear distribution is below MRP. The platform would have to charge ₹99 for the VAS plus the full declared MRPs for each linear pay channel separately and transparently.]

- **The bundled discount:** 'Subscribe to our linear pay channel pack at full MRP (₹150/month) and get unlimited access to our 5,000-hour content library worth ₹500/month absolutely FREE.'

[*Why this is impermissible:* This looks fine on the surface (the linear is at MRP). But if the VAS library is genuinely worth ₹500/month and is being given away, the platform is effectively running a ₹500 discount that is economically tied to the linear subscription. If the VAS would normally be sold for

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

₹500 and is now ₹0 only because of the linear subscription, this is a conditional discount that circumvents pricing parity as the consumer is being incentivised to take the linear bundle at MRP only because of the tied free VAS, which a competing DTH operator (without a comparable VAS arsenal) cannot match.]

While Airtel's preferred approach remains **forbearance across all registered DPOs**, any alternative must involve equivalent obligations for ALTD providers. **Parity (and not lighter regulation) is the operative principle** since lighter common terms for ALTD would simply reproduce the regulatory arbitrage that this Consultation Paper aims to redress.

Without clear regulation, such bundling can be used to (i) effectively offer **pay channels free or at a deep discount under the guise of 'VAS access'** (ii) **circumvent the TRAI Tariff Order** and (iii) **destabilise the MRP regime that paying DTH/cable subscribers continue to bear, etc. VAS terms must therefore be regulated** in a manner that closes these arbitrage loopholes while leaving genuine, non-circumventing innovation untouched.

### **Recommended Terms and Conditions for VAS on ALTD platforms**

#### **1. Definitional clarity.**

'VAS' on an ALTD platform should be defined to **include all non-linear content offerings made available alongside or in conjunction with linear television channels** including catch-up viewing, time-shifted viewing, library/back-catalogue content, on-demand episodic content, sports highlights, exclusive originals, interactive features and any other service offered to consumers as a **value-add to the linear channel line-up**. The **definition should be broad enough to capture bundled, tied and conditional offerings**, regardless of how they are labelled.

#### **2. No bundling of linear pay channels with VAS at zero or differential price.**

This is the single most important VAS rule. A linear pay channel must not be offered free or at a price lower than its declared MRP on the grounds that it is bundled with a VAS subscription, an on-demand catalogue or any other ancillary offering. Specifically:

- Where a consumer pays a single price for 'VAS + linear channels', the linear-channel component must be priced at or above its MRP and this allocation must be disclosed transparently to the consumer and to TRAI.
- If a linear channel is provided 'free' to subscribers of a VAS subscription (e.g., 'Subscribe to Library Pack X and get Channel Y free'), where Channel Y is a declared pay channel, it is a tariff violation. Then it must be treated as if Channel Y has been declared a free-to-air channel for the purposes of registered DPOs, in line with TRAI's 2024 Tariff Order precedent.
- Conditional-discount structures (e.g., volume discounts, family-pack discounts) must be subject to the same uniformity tests that apply to the other DPOs.

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

### **3. Compliance with Programme Code, Advertising Code and consumer protection norms**

VAS content (whether linear-derived or original) must comply with the **Programme Code and Advertising Code** on the same basis as linear channels. **Additionally, accessibility features must be provided.** Misleading advertisements within VAS interfaces must be subject to the Advertising Code.

### **4. Transparency and disclosure.**

ALTD providers must disclose to consumers: (i) **full list of VAS offerings**; (ii) **pricing of each VAS offering**; (iii) **the linear channels (if any) bundled with each VAS offering**; (iv) **the price allocation between linear and VAS components in any bundled offer**; and (v) **any conditional or promotional pricing**. Periodic reporting to TRAI should be mandated.

### **5. Tariff order applicability**

To the extent that a VAS offering includes or is conditional upon access to declared linear channels, the Tariff Order should apply. There should not be an exception to the applicability of the Tariff Order on VAS. More detail will be provided on the pricing methodology in the response to Q10.

### **6. Platform services treatment**

Where the ALTD provider creates its own 'PS-style' linear-feed content as part of its VAS offering (e.g., a curated linear feed of library content), such PS channels must obtain prior **MIB permission, comply with PS-channel rules applicable to DTH operators and not be a re-packaged feed of any permitted television channel.**

### **7. Anti-circumvention obligations**

ALTD providers must, by undertaking, refrain from: (i) creative re-labelling of pay channels as 'VAS components' to escape Tariff Order discipline; (ii) zero-rating of pay-channel access through bundles; and (iii) any other artifice that circumvents the pricing-parity principle. Breach of the anti-circumvention undertaking should attract strict action.

### **8. Periodic review**

Given the pace of innovation in OTT/ALTD VAS offerings, TRAI should review the VAS terms every 2 years in consultation with stakeholders to ensure that genuine innovation is not stifled and that emerging arbitrage modes are addressed promptly.

**Q9. Whether the broadcasters/content owners providing or intending to provide television channels on ALTD platforms operating in India be mandated to obtain authorisation either for:**

- **Satellite-based Broadcasting and/or**
- **Ground-based Broadcasting**

**along with its applicable terms and conditions, before entering into the agreements with authorised entities provisioning ALTD services to consumers? If yes, provide reasons with justifications.**

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

### Airtel's Response

Yes, broadcasters and content owners intending to provide television channels on ALTD platforms operating in India must be mandated to obtain authorisation, both for satellite-based broadcasting and ground-based broadcasting (GBB) before entering into agreements with authorised ALTD service providers. Airtel's reasoning is set out below.

### A dual-track framework.

The evolving Indian broadcasting landscape, influenced by the *Telecommunications Act, 2023*, is shifting toward a **dual-track** architecture:

- **The Distribution Track:** Governing the pipe or medium through which content travels.
- **The Programming Track:** Governing the source or the content itself.

For this architecture to remain stable for **ALTD services**, both tracks must have equivalent levels of accountability. If the **source** (the broadcaster) and the **medium** (the ALTD provider) are both not authorised, it will create an uneven regulatory regime for satellite-based channel provision. Therefore, mandating authorisation regardless of whether the delivery is via satellite or terrestrial server is structurally essential to ensure the integrity of the entire broadcasting value chain.

### GBBs are *de facto* broadcasters and must be treated as such.

A significant and growing number of linear channels carried on ALTD platforms today originate from Ground Based Broadcasters—content assembled and delivered from terrestrial servers rather than satellite uplinks. The TRAI Consultation Paper itself acknowledges this reality, characterising GBBs as '*de facto broadcasters*' that '*largely follow the same processes to create, assemble and distribute channels as traditional satellite-based channels*'.

Further, the output (linear TV content) is indistinguishable to the consumer. Hence, it is imperative that GBB broadcasters be brought under the same regulatory framework as satellite broadcasters. This will ensure content accountability regardless of the delivery medium.

### Same Content Same Rules

Given that ground-based broadcasters and satellite-based broadcasters share a common operational model differing only in the medium of transmission, it is reasonable and logical that they should fall under a similar regulatory framework including in terms of the requirements under **TRAI's Tariff Order, Interconnection regulations and Quality of Service Regulations as well as MIB's Programming and Advertisement Code**.

The only distinction should be the removal of **certain satellite-specific requirements such as permissions for spectrum use from the Department of Space (DoS) and the Wireless Planning & Coordination (WPC) Wing, which are not applicable to ground-based technologies**. This will ensure that GBBs adhere to the same standards of content, service and fairness as their satellite-based counterparts. Enforcing these regulations uniformly across both satellite-based and ground-based broadcasters is vital to maintaining a level playing field and promoting fair competition across the sector.

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

In the absence of a formal authorisation framework, GBBs and ALTDs could enter opaque 'private' arrangements that bypass the transparency requirements of the current broadcasting sector. To ensure transparency, a mandated **Reference Interconnect Offer (RIO)** between GBBs and ALTDs should be adopted. RIO will ensure that interconnection terms are transparent and published. This will prevent the formation of 'walled gardens' and will protect all the players in the ecosystem.

Currently, the lack of an authorisation requirement for ground-based content allows providers to bypass the costs and compliance burdens faced by traditional broadcasters. This creates an **asymmetry between players operating in the same field** where one set of players is heavily regulated while another (offering the exact same service) is not regulated at all. Standardising authorization requirements is the only way to level their playing field and promote healthy, fair competition. Therefore, it is recommended that **ALTD be brought under the service authorisation framework as a category of DPOs and the framework for GBBs should mirror the satellite framework in every aspect of content accountability, pricing and interconnection, excluding only those provisions that are satellite-specific and have no operational analogue in internet-based linear distribution.** This will ensure content parity regardless of how it reaches the screen.

**Q10. In view of the availability of the pay television channels on ALTD platforms, what pricing methodology should be adopted for price parity of television channels across these platforms? Please provide detailed justification for your response.**

### **Airtel's Response**

As mentioned in Airtel's earlier responses, forbearance should be applied across all registered DPOs. Failing this, equivalent obligations must apply to ALTD providers as the present asymmetric regime must not be allowed to continue. **Parity (and not lighter regulation) must be the operative principle**, since lighter common terms for ALTD would simply reproduce the regulatory arbitrage that this Consultation Paper aims to redress.

**In the case of regulatory parity, a strict, uniform Maximum Retail Price (MRP) across all distribution platforms, including DTH, Cable, IPTV, HITS, and ALTD is crucial. This is the single most important specific ask of this response.**

As per the latest FICCI-EY report on India's Media & Entertainment economy (March 2026)<sup>11</sup>, trends associated with CTV (powered by **one of the smart TVs**) are as follows:

- CTV continued its robust growth trajectory with one of the smart TVs reporting 25% y-o-y increase in India.
- 26% increase in the number of AVOD users compared to a 25% increase in SVOD users.
- AVOD/FAST contributed 84% share in the total streaming hours (*of the five streaming apps used on average per household*).
- 66% of viewers consumed both OTT & linear TV on CTVs

<sup>11</sup> <https://www.ey.com/content/dam/ey-unified-site/ey-com/en-in/insights/media-entertainment/documents/ey-stories-scale-and-impact-unlocking-indias-media-and-entertainment-economy.pdf>

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

The transition toward 'linear digital content' is indeed fuelled by rapid hardware adoption. Further, CTV has moved decisively into the mainstream. In 2025, India had approximately 68 million connected TV households, of which around 40 million were active on a weekly basis — a sharp increase from 30 million in 2024. This shift is largely attributed to the declining cost of smart TVs and the expansion of high-speed fiber-to-the-home (FTTH) infrastructure rather than specific content breakthroughs.<sup>12</sup> Research indicates that 65% of CTV users consume linear content through the pre-installed ALTD apps because they **bypass the 'subscription barrier' inherent in DTH.**<sup>13</sup>

This unchecked availability of pay channels on ALTD platforms at zero or sharply discounted prices is the most acute manifestation of regulatory arbitrage in the broadcasting sector today. It directly erodes the economics of registered DPOs, accelerates DTH subscriber decline, shifts advertising revenue to unregulated players and, most unfairly, it forces paying DTH/cable subscribers to cross-subsidise the same content being given away free elsewhere. The Tariff Order is undermined the moment its discipline ceases to apply to the medium with the largest reach.

### Recommended pricing methodology.

#### **Principle 1 - Uniform MRP across all delivery platforms.**

A linear television channel must **carry one declared MRP across every delivery platform** on which it is distributed in India – DTH, Cable, IPTV, HITS and ALTD. The broadcaster must declare the MRP under the Tariff Order in the same manner as today, and this MRP must apply identically to every authorised DPO. **There must be no separate 'ALTD MRP', no separate 'internet MRP' and no platform-specific tariff plan that effectively undercuts the declared MRP.**

#### **Principle 2 - No declared pay channel may be offered free or at less than the MRP on ALTD.**

If a channel is declared a 'pay channel' under the Tariff Order, it must be charged at not less than its declared MRP on every ALTD platform. ALTD platforms must not be permitted to:

- Carry a declared pay channel as a 'free' channel.
- Offer a declared pay channel at a discounted price below MRP, whether directly or through bundling/conditional discounts.
- Bundle a declared pay channel with VAS, on-demand, or library content in a manner that effectively prices the linear channel at zero or below MRP.

**This is not a hypothetical concern, it is the present-day reality on ALTD platforms in India.**

For instance, in the case of one of the ALTDs available in India, several channels declared as pay channels by registered DTH operators are being **made available entirely free of cost to viewers** on the ALTD platform with usage of the same logo and channel name as available on a DTH platform.

An illustrative (non-exhaustive) list is set out below:

---

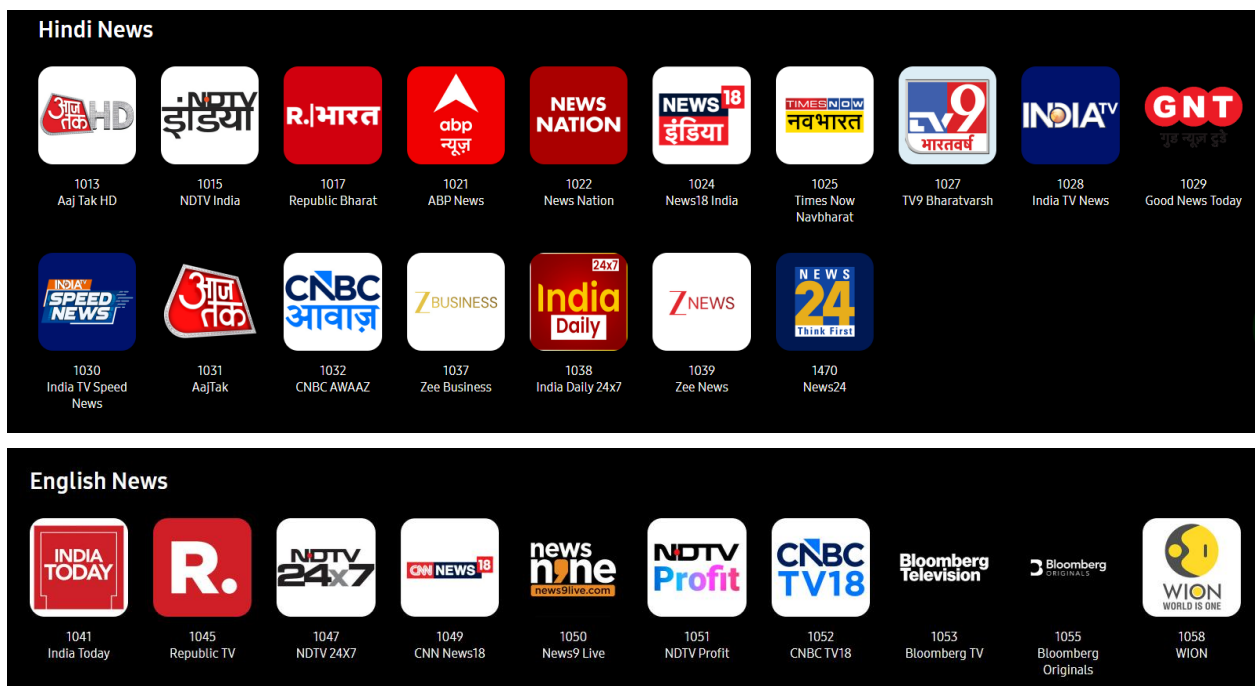
<sup>12</sup> FICCI-EY. (2025). *Shape the future: Indian media and entertainment is scripting a new story*. Ernst & Young. [https://www.ey.com/en\\_in/media-entertainment/media-entertainment-report-2025](https://www.ey.com/en_in/media-entertainment/media-entertainment-report-2025)

<sup>13</sup> GroupM & Kantar. (2024). *The Changing Landscape of Indian TV: CTV and the Rise of Linear Digital*. GroupM India. <https://www.groupm.com/newsroom/groupm-india-unveils-the-ctv-report-2024>

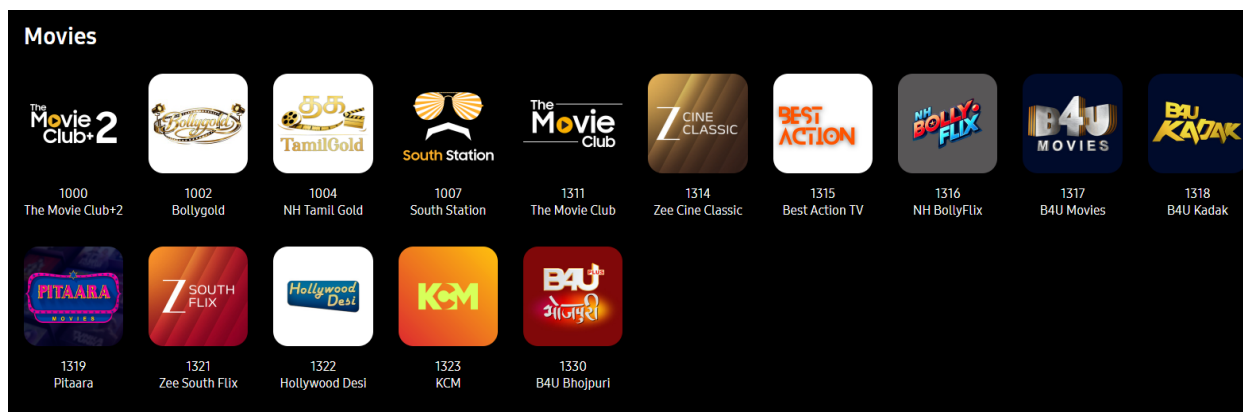
**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Channel number	ALTD LCN	Status on ALTD	Status on Airtel DTH
138	Epic	Free	Paid
310	Aaj Tak HD	Free	Paid
329	CNBC AWAAZ	Free	Paid
331	Zee Business	Free	Paid
389	NDTV 24X7	Free	Paid
391	India Today	Free	Paid
395	WION	Free	Paid
396	CNBC TV18	Free	Paid
538	Zee 24 Taas	Free	Paid
566	News18 Punjab Haryana	Free	Paid
582	News18 Gujarati	Free	Paid
584	CNBC Bajar	Free	Paid
603	News18 Odia	Free	Paid
723	Zee 24 Ghanta	Free	Paid
725	News18 Bangla	Free	Paid
782	News18 Tamil Nadu	Free	Paid
978	News18 Kannada	Free	Paid

Sample screenshots of the screen display are as under (*mirroring the DTH ecosystem*):



## TRAI CP on Formulation of a Regulatory Framework for ALTD Services



This data demonstrates a systemic, cross-genre, cross-language pattern of pricing arbitrage spanning a varied number of channels. The **arbitrage is therefore not a stray anomaly limited to a particular genre or broadcaster**; it is a **structural feature of the unregulated ALTD ecosystem that operates at scale on the largest installed base of smart televisions in India.**

The consequences are direct and quantifiable:

- A consumer paying Airtel DTH (or any other registered DPO) for these channels at their declared MRP is, in substance, paying for content that the same broadcaster has elected to monetise free-of-cost to a viewer on the very next sofa via advertising on another ALTD platform.
- The **broadcaster captures advertising revenue on the ALTD distribution while simultaneously collecting subscription revenue (net of DPO share) on the regulated DPO distribution**, a double monetisation structurally unavailable to the registered DPO. **Revenue from ads on FAST channels in India were \$194.7mn in 2025 and projected to be \$353mn in 2030.** Connected TV ad revenues grew 42% to INR 99 billion in 2025 whereas Linear TV ad revenue declined 10.3% in 2025. The total revenue from ads across Linear TV + Connected TV may grow to INR 377 billion by 2028 as per the FICCI-EY report.
- The **DPO is left enforcing Tariff Order discipline on a paying customer base while the same content circulates free on an unregulated platform**, accelerating churn, eroding ARPU and undermining the Must-Provide regime.

**The remedy under Principle 2 is therefore both necessary and overdue.** Once a channel is declared 'pay' under the Tariff Order, it must not be charged at less than the declared MRP on every distribution medium in India including every ALTD platform.

The **broadcaster's choice is binary and principled**: declare the channel pay everywhere (including on ALTD at full MRP) or declare it free everywhere (including for registered DPOs under the Reverse-Parity Rule in Principle 3). What cannot continue is the present asymmetric regime that taxes paying DTH/cable subscribers to subsidise free-to-viewer distribution on unregulated ALTD platforms.

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

**Principle 3 - If a channel is free on ALTD, it cannot be a pay channel for registered DPOs (Reverse-Parity Rule).**

This is a critical, precedent-supported safeguard. If a broadcaster chooses to make a channel **available free on any ALTD platform** (as is the case with several FAST channels and broadcaster-app channels today), then, by definition, that channel is in substance a free-to-air channel and the broadcaster must not be permitted to declare it as a pay channel for the purposes of any registered DPO. **TRAI has already adopted this principle in the 2024 Tariff Order context and it must be applied unambiguously to ALTD.**

This principle has three immediate practical consequences: (i) it ends the loophole where the same channel is monetised through ad revenue free on ALTD while being charged as a pay channel on DTH; (ii) it removes the inequitable cross-subsidy borne by paying DTH consumers; and (iii) it gives broadcasters a clear, principled choice: **declare pay everywhere, or free everywhere.**

**Principle 4 - Bundling and VAS must not circumvent pricing parity,**

*As detailed in Airtel's response to Q8, no ALTD platform may use VAS, on-demand catalogues, library content, advertising-supported tiers, free-trial periods (beyond a strictly limited duration), or conditional discount mechanisms to offer pay channels below MRP. **The substance, not the label, governs the analysis.*** TRAI should issue clarificatory guidelines listing common arbitrage patterns and their treatment. As per the FICCI-EY report cited earlier, FAST channels can expand Connected TV inventory by repackaging archival and niche content into always on, genre-based streams that capture lean-back viewing on smart TVs where AVOD dominates.

### **Strict pricing parity is essential**

#### **1. Erosion of DTH economics**

Unregulated ALTD/FAST growth is directly eroding DTH economics through subscriber decline, downward pressure on carriage revenue and migration of advertising spend. **Paying DTH customers should not bear higher costs for content that is freely available or subsidised on ALTD platforms.**

#### **2. Distortion of consumer welfare**

There is OTT at the top of the pyramid, and DD Free Dish at the bottom. Private DTH services in the middle are being squeezed. The disparity in treatment between regulated DPOs and unregulated ALTD/OTT platforms has resulted in violations of TRAI's Must-Carry / Must-Provide principles, the MIB's Downlinking Guidelines and cross-holding restrictions, leading to a non-level playing field.

Consumer welfare is best served not by some consumers paying for what others get free but by uniform, transparent pricing across platforms.

#### **3. TRAI's prior recommendations support parity**

TRAI's January 2025 GBB Recommendations and February 2025 Authorisation Recommendations have already recognised the need for parity. The Reverse-Parity Rule was foreshadowed in the 2024 Tariff Order context. **The Authority is on firm ground in extending these principles to ALTD / FAST.**

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

### 4. Regulation must be technology-neutral, focused on the consumer

With the convergence of technologies, consumers can access the same content through various mediums regardless of delivery method. Push/pull and one-way/two-way distinctions are outdated and hold no value in today's converged content ecosystem. Consumer preferences for content choices do not vary across mediums. ALTD pricing arbitrage is an artefact of regulation lagging behind technology rather than of any real difference in underlying service.

#### Regulatory forbearance

As a corollary to the strict pricing parity recommended above, **TRAI should simultaneously consider regulatory forbearance and deregulation for compliant DPOs** (easing carriage and content restrictions for registered DPOs) **in a manner similar to the flexibility currently extended to OTT content platforms**. This balanced approach (levelling up regulation on ALTD while levelling down unnecessary legacy restrictions on registered DPOs) will restore the fundamentals of the broadcasting industry, support its long-term viability and protect consumer choice. Either approach must be applied consistently across platforms; what cannot continue is the current asymmetric regime.

**Q. 11 What obligations are required to be specified for the authorised entities provisioning ALTD services, with respect to consumer protection and grievance redressal mechanism, considering the different modes of service access such as smart televisions, websites, mobile applications etc.? Please provide your comments with detailed justification.**

#### Airtel's response

##### Consumer Protection and Grievance Redressal

A specific and enforceable consumer protection framework for ALTD services is necessary because ALTD combines elements of broadcasting, software distribution and digital interfaces, yet currently does not uniformly bear the sector-specific obligations that apply to traditional DPOs.

At the most basic level, every entity authorised to offer ALTD services should be required to establish clear consumer support and grievance redressal mechanisms in India, similar to those required of a DTH operators. Additionally, the Authority should ensure that business can be carried out smoothly and all the DPOs are shown forbearance when it comes to conducting business. The following should be enforced:

- **Adherence to the Programme & Advertisement Code:** All ALTD interfaces must comply with the **Programme & Advertisement Code** as prescribed under the Cable Television Networks (Regulation) Act, 1995 and Cable Television Networks Rules, 1994. This will ensure that content does not offend good taste or decency, contains no attacks on religious communities and remains sensitive to the socio-cultural fabric of India. All commercial communications, ads, banners and VAS-based promotions must align with the **Consumer Protection Act, 2019, Misleading Advertisements & Endorsements, 2022, and Advertising Standards Council of India (ASCI) Code**.
- **Time-bound grievance resolution:** All consumer complaints (channel non-availability, content violations, pricing disputes, EPG errors, service interruptions, and inappropriate/misleading advertising,

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

malfunctioning of application, degradation of service, etc.) must be acknowledged and resolved in a time bound manner, consistent with TRAI's Quality of Service Regulations, 2017.

- **Centralised grievance portal:** TRAI & MIB should mandate integration of ALTD grievances into a centralised portal (or extend the existing broadcasting grievance portals to cover ALTD), so that subscribers have a single point of escalation regardless of the delivery platform.
- **Transparency Obligations:** MRP disclosure, channel lists, terms of service and content classification must be clearly displayed on all interfaces (smart TV, website, mobile app) just as DPOs are obligated to. Any change in channel availability, pricing or material must be communicated to users in the form of scrolls.
- **Periodic Reporting:** TRAI should also mandate periodic reporting by ALTD authorised entities on complaint volumes, categories, resolution times and pending matters. Such reporting will help the Regulator distinguish between isolated incidents and systemic patterns. **A channel removal issue affecting a few users may be operational; repeated complaints about inaccessible menus, hidden price information, or non-functional captions may indicate a platform design flaw requiring regulatory intervention.** Reportings also have a disciplining effect and encourage platforms to improve service quality before regulatory penalties become necessary.
- **Data Privacy:** ALTD providers must comply with India's data protection framework with respect to user data collected through apps and smart TV platforms. Where personally identifiable information is collected, explicit consent and data localisation requirements must apply. In the ALTD environment, viewership analytics, ad-tech integrations and recommendation engines are central to business models. Consumer transparency should therefore include meaningful disclosures rather than generic privacy notices.
- **Digital Accessibility:** Under current Indian law and international benchmarking, the following standards must be integrated into the design and deployment of ALTD services:
  - **Hardware and OS Compliance:** Manufacturers of Smart TVs and streaming devices must integrate native accessibility features (screen readers, high-contrast modes) as specified in the **2019 Accessibility Standards for Televisions**.<sup>14</sup>
  - **Application & Web Interface: Accessibility Requirements for Products and Services – ICT (Information and Communication Technology),** the Indian adaptation of WCAG 2.1 (Web Content Accessibility Guidelines) published by the Bureau of Indian Standards (BIS) to ensure content discovery and navigation is fully accessible.<sup>15</sup>
  - **Content Accessibility:** Platforms are increasingly required to provide accessibility overlays, including **Closed Captioning (CC), Audio Description (AD), and Sign Language Interpretation**, aligning with the broader mandate of the Rights of Persons with Disabilities (RPwD) Act.

---

<sup>14</sup> Ministry of Information and Broadcasting. (2019). *Accessibility Standards for Television Programs for Hearing Impaired*. Government of India. These standards mandate that TV manufacturers and service providers provide features like closed captioning and sub-titles in a standardized format.

<sup>15</sup> Bureau of Indian Standards (BIS). (2021). IS 17802: Indian Standard for Accessibility for ICT Products and Services.

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

The **regulations applicable to ALTD services must be commensurate with those applicable to other distribution platforms delivering linear television content to Indian consumers**. By extending the Programme and Advertisement Code, enforcing time-bound grievance redressal through a centralised portal, mandating meaningful data privacy disclosures and embedding digital accessibility standards into platform design, the framework ensures that the migration of linear television to internet-based delivery does not dilute the consumer protections and content integrity standards that have long governed traditional broadcasting.

These obligations (a streamlined, digitally-enabled compliance architecture) can uphold robust standards while reducing administrative friction, ensuring that ALTD platforms operate not only as technologically modern but as legally responsible participants in the evolving broadcasting ecosystem.

### **Content security, piracy and hardware compliances**

All entities distributing linear television content over IP networks - ALTD must be required to register with competent authorities. Any unregistered entity distributing linear content should be treated as an illegal operator and subject to the full enforcement mechanisms under applicable law (*as applicable to other illegal DPOs*).

All ALTD providers offering pay or hybrid content **must deploy a BIS/TEC-certified Conditional Access System (CAS) and a TRAI-compliant Subscriber Management System (SMS)** mirroring obligations as applicable on licensed DTH operators. All ALTD providers must **deploy compliant subscriber management systems (SMS) and digital rights management (DRM) solutions** that mirror the content security and anti-piracy requirements applicable to traditional distribution platforms. The Telecommunication Engineering must certify these systems **Centre (TEC)** to ensure uniform standards of encryption, authentication and signal integrity.

All hardware used in ALTD delivery - STBs, set-top boxes, streaming sticks, and other hardware devices used to deliver ALTD services must comply with the applicable Bureau of Indian Standards (BIS) certification requirements.

Compliance obligations should be monitored through **periodic audits, mandatory reporting of piracy incidents and certification renewals**. Penalties for violations must include suspension of authorisation, monetary fines and consumer redressal measures to ensure accountability. **Pre-installed ALTD applications must be certified before deployment on any device sold in India and device manufacturers must obtain prior MIB approval before rollout**. Existing non-compliant applications must achieve compliance within three months of notification. Non-compliance must attract penalties including mandatory delisting.

**Q. 12: With the revised guidelines now including multiple viewing platforms in audience measurement, stakeholders are requested to furnish their comments on the right methodology for integrating ALTD service data into the television ratings framework, as well as the proposed timelines for implementation, supported by detailed justifications.**

**AND**

**Q. 13: Under the revised guidelines, television distribution platforms and/or OTT platforms may publish periodic viewership data of broadcasters/channels they carry on their platforms and/or on their websites, without prior registration. In this context, stakeholders are invited to provide their comments on how such an enablement can be aligned with the proposed authorisation framework for application providers provisioning ALTD services, along with any related considerations.**

### Airtel's response

#### Integration into Television Ratings

- With the emergence and growth of ALTD platforms, as well as the increasing availability of the same linear television channels on other platforms (including both linear and on-demand formats), the distribution and **consumption of linear television content is no longer confined to conventional distribution platforms alone. Viewers increasingly access the same linear channels across multiple delivery platforms, including internet-based platforms, leading to a fragmentation of viewership across distribution modes.** As linear television subscribers increasingly migrate to internet-based delivery, the exclusion of ALTD platform viewership from ratings data creates a structural measurement gap that distorts audience metrics and undermines the reliability of BARC (or any other Television Rating Agency) data.
- It is therefore essential that consumption and distribution of linear content via ALTD platforms be **formally integrated into the rating methodology as also mandated under the MIB's TV Ratings Policy 2026** (clause 5.1.1.) which specifies the following:

*'Ratings ought to be **technology neutral and shall capture data across multiple viewing platforms viz. cable TV, Direct-to-Home (DTH), Terrestrial TV, OTT, connected TVs, and any other platform wherever feasible.***

Such integration would ensure that **BARC (or any other Television Rating Agency) data captures a unified and holistic view of linear content audiences, regardless of the delivery platform**, thereby enabling broadcasters and advertisers to rely on a single, comprehensive measurement standard. This will ensure that broadcasters and advertisers have a unified metric for linear content, regardless of whether it is delivered via traditional cable or internet-based ALTD. The resolution to this does not require a new framework, as it already promotes **technologically neutral** ratings architecture expressly designed to capture data across a diverse ecosystem including cable TV, Direct-to-Home (DTH), Terrestrial TV, OTT, connected TVs and any other platform wherever feasible.

- Given the flexibility of the current policy, which covers '**any other platform wherever feasible**', **formally recognising ALTD under this clause** will eliminate measurement silos and provide a holistic view of linear audience reach. To operationalise this integration, the following mandates are proposed:  
**Contribute to industry wide measurement:** ALTD platforms should be **recognised as eligible data contributors under Para 5.1.1 of the TV Ratings Policy 2026<sup>16</sup> (as cited above)** which governs the broader television ratings ecosystem. Under this pathway, **ALTD providers would be formally required to contribute aggregated viewership data** covering channels distributed through their platforms into

<sup>16</sup> <https://mib.gov.in/sites/default/files/2026-03/tv-rating-policy-2026-dated-27032026.pdf>

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

BARC's (or any other Television Rating Agency) consolidated measurement framework. This would enable ALTD-sourced audience data to be incorporated into industry-wide ratings and ensure that linear content delivered over the internet is reflected in the same unified metric used by broadcasters and advertisers across all other distribution platforms.

- **Voluntary Data Publication (Clause 14.3; MIB's TV Ratings Policy, 2026):** Consistent with current provisions for DPOs and OTT platforms, ALTD providers be permitted to publish periodic viewership data for the channels they host directly on their websites. This should be allowed **without** the requirement of prior registration or specific permission under these guidelines facilitating immediate transparency. Integrating ALTD viewership data into the TV Ratings Policy 2026 is a logical and necessary extension of the framework's existing technological neutrality. It requires no new regulatory architecture, only a formal recognition that internet-based linear delivery is now an established and significant mode of consumption that must be counted. By doing so, the policy will ensure that BARC (or any other Television Rating Agency) data remains a credible, comprehensive and future-proof standard for linear television audience measurement in India.

**Q14. Considering the scenario wherein application providers provisioning ALTD services may adopt a hybrid business model offering free and/or paid services, stakeholder comments are invited on how such services should be subject to the regulatory framework, particularly with respect to tariff, interconnection and quality of service aspects. Please provide your comments with justification.**

### Airtel's response

#### Hybrid Business Models

The regulatory framework for ALTD must be **future-proof and should not assume that the present market structure will remain unchanged**. The ALTD currently operates largely on an advertisement-supported basis but is likely to evolve into hybrid models combining free and paid elements. This evolution is commercially predictable. As ALTD matures, platforms may offer paid services and combine FAST channels, paid linear channels, VOD libraries, premium ad-free tiers, interactive features, sponsored placement, pay-per-view elements and data-driven recommendation models within the same service environment. **If the framework does not anticipate this transition now, the market will quickly move into forms of arbitrage that the initial regulation failed to address.**

As a general principle, the **preferred path is forbearance across all registered DPOs**. Failing that, equivalent obligations must apply to ALTD providers as the present asymmetric regime cannot be allowed to continue. Therefore, to ensure parity, the requirements that are applicable for DTH operators must be applicable for ALTD providers as well.

The principal for hybrid regulation should be:

- **Continuity of channel level parity:** A pay channel should remain subject to MRP and parity discipline even when it is packaged inside a hybrid subscription, mixed with video on demand,

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

or made available through a premium digital bundle. The platform should not be permitted to argue that the linear component has **lost its separate identity merely because it is now part of a combined digital offering.**

- **Interconnection fairness:** As hybrid ALTD models expand, broadcasters and ALTD distributors will negotiate increasingly complex commercial arrangements involving channel carriage, promotional placement, EPG placement, ad inventory, data-sharing, premium packaging and audience guarantees. **The framework should ensure that authorised ALTD providers can obtain channels on fair, reasonable and non-discriminatory terms, while allowing broadcasters to protect signal integrity, brand identity and content protection.** A complete absence of interconnection norms could enable strategic exclusion. An excessively rigid regime could discourage innovation. The response should, therefore, recommend principles-based interconnection rules adapted to the digital environment, rather than no rules at all.
- **QoS Parity:** In hybrid environments, QoS becomes even more important because the same service may offer a mix of free and paid experiences. Consumers should not be subjected to misleading degradation, artificial buffering or confusing entitlement errors merely because they are moving between free and paid tiers within the same app ecosystem. **QoS benchmarks should therefore address login persistence, stream initiation, playback continuity, caption synchronisation, accessible compatibility and responsiveness of customer support.**
- **Transparency:** Hybrid models can become highly opaque if there are free channels, pay channels, add-on packs, sponsored channels, VOD entitlements and premium features and they are all presented through fluid or algorithmically tailored interfaces. **Therefore, it is recommended that platforms clearly disclose which channels are free, which are pay, what features are included in each tier and what restrictions apply.** In a hybrid world, consumer transparency becomes inseparable from market fairness.

Specific implementation of **NTO Regulations on ALTD will be as follows:**

### **a. Tariff Regulation:**

- Once ALTD providers adopt any form of subscription or pay service, TRAI's Tariff Order<sup>17</sup> must apply in full, including MRP declaration, uniform pricing across platforms and non-discriminatory channel packaging rules.
  - ALTD providers offering a mix of free and paid services must clearly segregate the two, with MRP declared for all pay channels/packages consistent with broadcaster declarations.
  - Bundling free and paid content must not result in below-MRP effective pricing for pay channels as this would violate tariff uniformity obligations.
-

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

### **b. Interconnection Regulations:**

- TRAI's Interconnection Regulations<sup>18</sup> - including Must Carry and Must Provide obligations - must apply to authorised ALTD providers from the date of authorisation including in the current free, ad-supported phase (not just upon adoption of a hybrid model).
- ALTD providers must enter into interconnection agreements with broadcasters on non-discriminatory terms. Terms governing channel placement fees, marketing and placement agreements and commercial arrangements must be transparent and subject to TRAI oversight to prevent preferential or anti-competitive practices.
- Channel positioning on ALTD home screens and EPG placement must be governed by transparent, non-discriminatory rules analogous to the landing page/channel positioning obligations applicable to DTH operators.

### **c. Quality of Service (QoS):**

- TRAI's QoS Regulations must apply to ALTD services, covering minimum streaming quality standards, service availability/uptime requirements and consumer disclosure of QoS metrics.
- ALTD providers must periodically report QoS metrics to TRAI consistent with QoS reporting obligations of DTH/cable operators.

### **d. Future proofing provisions:**

- The regulatory framework must include an explicit clause enabling TRAI to extend additional obligations (e.g., tariff, interconnection, QoS) to ALTD providers upon adoption of any paid/hybrid model without requiring fresh consultation.<sup>19</sup>
- The framework must accommodate emerging technologies (e.g., 5G Broadcast, AI-driven personalisation, interactive advertising) without creating new regulatory arbitrage. A periodic review mechanism (every 3 years) is recommended.
- Prasar Bharati's DTH platform and its OTT service WAVES must be brought within the same authorisation/licensing framework. There must be no exemption for public broadcaster platforms from regulatory obligations applicable to all other DPOs. Consistency in application is fundamental to a fair and level playing field.

**Q15. Whether there are other issues (such as channel positioning on home screen, EPGs, revenue sharing, interconnection agreements including marketing and placement agreements, etc.), not specifically covered in this consultation paper, which may be relevant for consideration while**

---

<sup>18</sup>TRAI, *Telecommunication (Broadcasting and Cable) Services Interconnection (Addressable Systems) Regulations, 2017*, as amended, available at: <https://traai.gov.in>

<sup>19</sup>Telecommunications Act, 2023, Government of India, available at: <https://dot.gov.in>

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

formulating the regulatory framework for ALTD services? Stakeholders are also requested to share relevant international best practices or regulatory approaches, if any, along with appropriate justification.

### **Airtel's response**

In addition to Airtel's responses to specific questions, there are a few additional important issues that need to be brought to the attention of the Authority. These are integral to a coherent, future-proof and equitable regulatory framework for ALTD.

#### **1. Inclusion of Prasar Bharati in the same regulatory regime**

For the framework to genuinely operate on a level-playing-field, it must apply uniformly to all distributors of linear television, including Prasar Bharati. Specifically:

- Prasar Bharati's DTH operations (DD Free Dish) should be brought fully within the Broadcasting (Television Distribution) Services Rules in the same manner as private DTH operators, in terms of obligations, authorisation, tariff transparency, subscriber-base reporting and grievance redressal.
- Prasar Bharati's OTT/ALTD platform (WAVES) should be brought fully within the ALTD framework being formulated on the same basis as any other ALTD authorised entity.
- Public-service broadcasting obligations of Prasar Bharati can and should be preserved through Must-Carry and Must-Provide obligations on private platforms, not through asymmetric exemptions for Prasar Bharati's own platforms.

Without this, parity will be incomplete and the same arbitrage that the Authority is seeking to address will simply migrate to a different category of player.

#### **2. Regulatory framework for Ground-Based Broadcasters (GBB) aligned with Satellite Broadcasters**

Several linear channels carried on ALTD platforms are GBB channels. The regulatory treatment of GBBs is therefore inseparable from the ALTD framework. Airtel urges the Authority to maintain its earlier position and ensure that:

- GBBs are regulated on substantively the same terms as satellite-based broadcasters, excluding only those provisions that are satellite-specific (e.g., IN-SPACE / DoS clearances, WPC clearances, transponder-related obligations).
- The Tariff Order, Interconnection Regulations and Quality of Service Regulations should apply uniformly to GBBs and satellite-based broadcasters.
- Must-Carry and Must-Provide obligations apply to GBBs in the same manner as satellite broadcasters; broadcasters bear the cost for Must-Carry, DPOs bear the cost for Must-Provide, with parties free to agree otherwise.
- Vertical-integration restrictions should mirror those applicable to satellite broadcasters and DPOs.
- A reasonable, tiered fee structure for GBBs, calibrated to scale of operation: A moderate processing fee in line with satellite-based broadcasters; tiered annual fees scaled by number of states of operation; a reasonable net worth requirement; proportionate Performance Bank Guarantees.
- Migration provisions: A satellite-based broadcaster wishing to additionally use terrestrial transmission should not face fresh fees beyond a notification requirement. A GBB wishing to additionally use satellite transmission must obtain the satellite-broadcasting permissions.

## TRAI CP on *Formulation of a Regulatory Framework for ALTD Services*

Simultaneous satellite + terrestrial operation should be permitted with both authorisations held in parallel.

- The Authority should reject any framing that treats GBBs as akin to Platform Services or as fundamentally distinct from satellite broadcasters – the operational model is the same; only the transmission medium differs.
- Any modifications to the existing MIB's Uplinking and Downlinking Guidelines, 2022 to align them with GBB operations should first be subject to public consultation before notification.

### 3. Vertical integration / cross-ownership of broadcasters and distribution platforms - equal content access and prevention of exclusionary bundling

Equal access to broadcast content for all carriage providers is the fundamental principle and objective behind any technology-neutral broadcasting regulatory framework. The very purpose of such a framework is to create a level playing field and a non-discriminatory competitive environment in which consumers, not gatekeepers, decide which distribution platform they subscribe to. The ALTD framework being formulated must extend the same discipline, failing which the entire architecture will be hollowed out by migration of content and viewership to the unregulated layer.

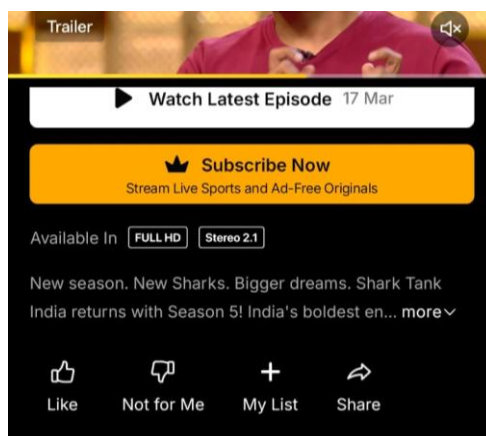
The exclusionary risk has two distinct manifestations, both visible today:

- **Vertically integrated broadcaster (distributor exclusivity):** Where a broadcaster (or an entity in control of a broadcaster) holds a stake in, or operates, a distribution platform (including an ALTD/OTT platform) and routes premium or marquee content exclusively (or on materially better commercial terms) to its own platform, the entire universe of subscribers on competing distribution platforms is foreclosed from accessing that content on the medium of their choice. This directly contradicts the consumer-choice premise of the broadcasting framework.
- **Single-mode distribution platform exclusivity:** The risk worsens where a single-mode distribution platform (typically an OTT or ALTD platform with a captive subscriber base via an affiliated telecom or device ecosystem) secures exclusive rights to broadcast content and bundles that content for its own subscribers alone. The rest of the subscriber universe is foreclosed entirely, and the broadcaster–distributor relationship collapses into end-to-end vertical control of both content origination and last-mile delivery, precisely the outcome that the existing cross-holding, market-share and capacity-reservation rules were designed to prevent.

**Concrete illustration – IPL 2023 and the ALTD/OTT vs DTH price gap.** The pricing asymmetry created by this regulatory imbalance is no longer hypothetical. **The Indian Premier League, 2023 was made available free to OTT viewers on a platform owned by a vertically integrated player, while the same live content was accessible to DTH subscribers only through Star Sports as a declared pay channel.** A DTH consumer thus had to bear, over a three-month IPL window, an NCF of approximately ₹154 plus, a Star Sports MRP of approximately ₹22.42 per month for the very same live event being given away free to a viewer with broadband access on the affiliated OTT platform. The economic gap is not driven by any underlying difference in the cost of delivering the content. It is purely an artefact of the **asymmetric regulatory regime** wherein TRAI's tariff discipline binds the registered DPO while the affiliated ALTD/OTT distribution sits entirely outside it.

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

**Consumer welfare and digital-divide consequences.** This regulatory asymmetry has a sharply regressive distributional effect. The affluent strata of the Indian community with access to high-speed broadband, smart devices and marginal data costs are able to consume premium live broadcast content free on OTT platforms. The **DTH and cable subscriber base, which is disproportionately rural, semi-urban and lower-income and which relies on Pay TV as the primary medium for big-screen live content, is required to pay full Tariff Order MRPs for the same content.** The most adversely affected segment is therefore the precise segment that public-policy interventions in the broadcasting sector are meant to protect. Over-regulation of the registered DPO universe, combined with the effective forbearance for ALTD/OTT, has resulted in a situation in which regulation actively widens, rather than narrows, the digital divide.



*Example: Shark Tank India is exclusively offered on the premium subscription of SonyLiv app, rather than being offered on Sony channel (as was available previously)*

**Recommendations:** The ALTD framework must therefore expressly extend and operationally enforce the following principles to all ALTD authorised entities including those owned, controlled by, or affiliated to broadcasters:

- **Mandatory equal-access /non-exclusive in supply:** Broadcasters must offer all linear broadcast content to all authorised carriage providers viz. DTH, cable, IPTV, HITS and ALTD on non-discriminatory terms benchmarked to TRAI's mandated tariff and interconnection regulations. No exclusive supply to an affiliated ALTD/OTT distribution platform should be permitted for any linear channel or live broadcast event of national or mass-market significance.
- **Extension of cross-holding and vertical-integration rules to ALTD:** The existing cross-holding cap between broadcasters and DPOs must apply to ALTD authorised entities. An ALTD platform, owned or controlled by a broadcaster (or by an entity controlling a broadcaster), must be treated identically to a vertically-integrated DPO under the existing framework.
- **No bundled exclusivity with telecom/device ecosystems:** Where an ALTD service is bundled with an affiliated data plan, smart-television operating system or device, broadcast content carried on that ALTD service must **remain available on a non-discriminatory basis to all other authorised distributors.** Conditional access tied to subscription to an affiliated telecom or device ecosystem must not be permitted to operate as *de facto* exclusivity.
- **Premium live events (non-exclusivity safeguard):** TRAI should, in consultation with MIB, examine whether national-significance live broadcast events (sporting events of mass appeal, events of

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

national importance) warrant a specific **non-exclusivity safeguard analogous to the 'must-provide' principle** to ensure that DTH, cable and IPTV subscribers are not foreclosed from such content by exclusive ALTD/OTT carriage arrangements.

The principle is simple and consistent with the rest of this response: **the broadcasting framework cannot, on the one hand, preserve cross-holding and vertical-integration discipline for the regulated DPO universe and, on the other hand, leave the ALTD/OTT layer free to replicate (and, indeed, institutionalise) precisely the end-to-end vertical control that the framework was designed to prevent.** Either the discipline is applied uniformly or it is done away with altogether

### **4. Channel positioning and EPG**

Channel positioning and EPG design have material impact on consumer attention and channel viewership. The framework should require:

- Non-discriminatory EPG positioning by genre and language, mirroring the principles applicable to DTH/IPTV.
- Cap on self-preferencing within EPG and recommendation feeds for vertically integrated platforms.
- Mandatory prominence for Must-Carry mandated channels comparable to the prominence accorded to such channels on DTH/IPTV.

### **5. Audience measurement - Unified integration**

ALTD platforms today collect rich, anonymised, aggregated viewership data but do not contribute it to a standardised, cross-platform audience measurement system. This perpetuates a fragmented, distorted picture of television viewership and disadvantages registered DPOs whose data is fully integrated into BARC (or any other Television Rating Agency).

- All ALTD authorised entities should be required to integrate viewership data into BARC (or any other Television Rating Agency) in standardised formats specified by the MIB Rating Guidelines.
- Cross-platform unified ratings (DTH + Cable + IPTV + HITS + ALTD) should be the basis for advertising sales, carriage fee negotiation and policy-making.
- Privacy safeguards (DPDP Act compliance, anonymisation, aggregation) should be built into the data-sharing framework.

### **6. Futureproofing for hybrid free-plus-paid models, Tariff and Interconnections and Emerging Technologies**

Today most ALTD services are ad-supported. The market is rapidly evolving towards hybrid free-plus-paid models, paid linear streaming and new delivery formats (5G Broadcast, terrestrial cellular, fiber-direct, OS-level platforms). The framework must be designed to accommodate these evolutions:

- Explicit provisions allowing ALTD authorised entities to operate hybrid free-plus-paid models, subject to the pricing-parity rules.
- Tariff and interconnection implications of paid ALTD must mirror DTH/IPTV.
- GBB integration with ALTD distribution should be addressed coherently, recognising that GBB content increasingly reaches consumers through ALTD platforms.

## **TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

- Periodic review of the framework (every 3 years) to address emerging technologies and market developments.

### **7. Regulatory forbearance for registered DPOs**

The corollary of 'Same Content, Same Rules' is that **where the rules applicable to OTT and ALTD content platforms are lighter, the rules applicable to registered DPOs should be reviewed for Regulatory forbearance**. Specifically:

- Easing of carriage and content restrictions for registered DPOs to a standard comparable to OTT platforms, where the underlying public-policy rationale for stricter rules has eroded due to convergence.
- Lighter, principles-based regulation of innovative content packaging, bundling and dynamic pricing for registered DPOs (consistent with Tariff Order discipline).
- A specific TRAI exercise to identify and remove legacy DPO obligations that have been overtaken by technological change.

This **balanced approach (levelling up where ALTD has been under-regulated, levelling down where DPO regulation has lagged convergence) will restore the fundamentals of the broadcasting industry**.

### **8. OTT broadcast carriage guidelines**

MIB has jurisdiction over digital content intermediaries through the IT (Intermediary Guidelines and Digital Media Ethics Code) Rules, 2021 but no comprehensive guidelines exist for the carriage of OTT broadcast content. TRAI today regulates the carriage of linear broadcast content delivered by entities authorised under the Telecommunications Act, 2023 (DTH) and registered cable networks under the Cable Television Networks (Regulation) Act, 1995 but the carriage of OTT broadcast content does not fall within TRAI's regulatory ambit. The ALTD framework being formulated is the right vehicle to close this gap.

Going further, **TRAI should consider equitable OTT broadcast carriage guidelines covering all OTT-delivered linear and broadcast-equivalent services. This will ensure a cohesive, technology-neutral regime**.

### **9. Consumer protection – centralised, time-bound grievance redressal**

ALTD authorised entities should be required to operate a **centralised, time-bound grievance redressal system mirroring DPO**, with: (i) Multiple channels of complaint registration (in-app, web, telephone, email); (ii) Escalation to an Indian-resident Grievance Redressal Officer– each ALTD to appoint a nodal/ grievance officer and display contact details prominently; (iii) Adhere to time bound complaint resolution benchmarks; (iv) Periodic reporting of complaint volumes and resolution rates to TRAI. This is critical given the multi-device, multi-channel nature of ALTD service; (v) Escalation mechanisms to the Ministry of Information & Broadcasting (MIB) should be built in for unresolved cases.

### **10. International best practices**

The European Audiovisual Media Services Directive (AVMSD) provides one model of technology-neutral regulation, treating linear and non-linear audiovisual services within a unified regulatory framework. Other jurisdictions are progressively moving towards technology-neutral, function-led oversight. The Indian

## TRAI CP on Formulation of a Regulatory Framework for ALTD Services

framework should incorporate the principle of technology neutrality while staying anchored in the existing DPO architecture and the proposed Broadcasting (Television Channel Broadcasting, Television Channel Distribution, Radio Broadcasting) Services framework. **ALTD should be the fifth DPO category, not a parallel regime.**

The Infocomm Media Development Authority (IMDA) of Singapore utilises a converged regulatory framework. They use a Service-Based Class License for various content delivery methods. They do not necessarily care if you use a leased line or the open internet; if you are distributing media to the public, you fall under the same broad regulatory umbrella.<sup>20</sup> This reinforces that ALTD should be seen as just another way to perform the function of a DPO.

Canada recently updated its regulatory framework to address the convergence of internet and traditional media. Instead of creating a separate "Internet Distribution" law, the **Online Streaming Act** amended the existing *Broadcasting Act* to include "online undertakings" as a specific category of broadcasting.<sup>21</sup>

The above mentioned are **direct precedents that India can use when it comes to treating ALTD not as a parallel regime but as a specific category under the existing DPO framework.** It will ensure that online entities contributing to the same market as cable and satellite are subject to similar public interest obligations.

### Concluding submission

Airtel thanks the Authority once again for the opportunity to contribute to this consultation. The framework recommended in this response is **built on a single, principled architecture: 'Forbearance for registered DPOs as the preferred path' and 'Same Content, Same Rules' as the only equitable alternative.** What cannot continue, on either path, is the present asymmetric regime that taxes paying DTH and cable consumers to subsidise unregulated free distribution of identical content on ALTD platforms.

Further, a DPO category for ALTD, a dual-track authorisation, strict pricing parity, mandatory local Indian presence for foreign operators, OEM/OS-level assurance, full GBB-satellite parity, BARC (or any other Television Rating Agency) integration, etc. will **close the existing regulatory gaps, protect consumer interests, promote fair competition, restore the economic fundamentals** of the broadcasting sector and support its orderly, technology-neutral growth.

Key elements are summarised as follows:

Requirement	What it covers (mirroring DPOs)	Digital adaptation for ALTD	Why it matters (arbitrage fix)
<b>Authorisation, Net worth, Entry fee, Bank Guarantee, Roll-out</b>	Minimum financial strength, eligibility, security clearance, and time-bound roll-out obligations	Mirror DTH framework	Deters fly-by-night entrants; ensures accountable, well-capitalised operators in a layer that today has zero entry barriers

<sup>20</sup> Singapore: Broadcasting Act 1994 (2020 Revised Edition), <https://sso.agc.gov.sg/Act/BA1994>

<sup>21</sup> Online Streaming Act, S.C. 2023, c. 8 (amending the Broadcasting Act), available at: [Online Streaming Act](#).

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Requirement	What it covers (mirroring DPOs)	Digital adaptation for ALTD	Why it matters (arbitrage fix)
<b>Equity / Cross-holding restrictions</b>	Prevents vertical integration that harms competition	Mirror DTH cross-holding caps; extend to ALTD vis-à-vis broadcasters and other DPOs; vertically integrated groups to hold separate authorisations on each track	Prevents end-to-end vertical lock-in (e.g., affiliated broadcaster–OTT exclusivity for premium live events) that the existing framework was designed to prevent
<b>Must Carry</b>	Mandatory carriage of channels	Same; ALTD to carry mandated channels in EPG with prominence comparable to DTH/IPTV	Ensures public interest content and non-derogable public-policy floor
<b>Must Provide (Broadcaster-specific)</b>	Linear content mandatorily provided to all authorised DPOs on non-discriminatory terms	Extend to ALTD; mandatory equal-access for premium live events of national significance; no exclusive supply to affiliated platforms	Closes the most acute manifestation of arbitrage: exclusive routing of marquee content (e.g., IPL) to affiliated OTT/ALTD while denying parity to paying DTH consumers; pricing & availability of content should align customer experience
<b>Tariff Order – Uniform MRP &amp; reverse-parity rule</b>	Single declared MRP across all platforms; pay channels at not less than MRP everywhere	Apply Tariff Order in full to ALTD; channel free on ALTD = free for all registered DPOs; bundling/VAS/free-trial structures cannot circumvent MRP	Ends the cross-subsidy borne by paying DTH/cable consumers; restores integrity of the Tariff Order at the medium with the largest reach
<b>Platform Services/ VAS discipline</b>	Prior MIB permission for PS channels; PS fee per channel; PS not to be linear feeds of permitted channels	Mirror PS framework on ALTD; substance-over-form test for VAS bundling; anti-circumvention undertaking	Stops VAS, catch-up, library, and conditional bundles from becoming a wrapper for free distribution of declared pay channels

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Requirement	What it covers (mirroring DPOs)	Digital adaptation for ALTD	Why it matters (arbitrage fix)
<b>Programme &amp; Advertising Code compliance</b>	Full content and advertising-code compliance	Same; India-based content-monitoring facility with 90-day rolling record; whitelist verification of every linear channel	Ends the present state of unregulated content carriage, including channels operating outside MIB permission
<b>Grievance redressal</b>	Centralised, time-bound mechanism with India-resident Grievance and Nodal Officers	Multi-channel registration (in-app, web, telephone, email); periodic reporting to TRAI; integration with central broadcasting grievance portal	Ensures consumer-protection parity across delivery media; closes the current accountability gap on multi-device ALTD services
<b>Quality of Service (QoS) &amp; Transparency (MRP disclosure)</b>	Streaming/uptime standards; transparent MRP and channel-list disclosure; PMR reporting; subscriber-base, viewership and revenue reporting	Same, adapted for digital delivery; QoS benchmarks as per TRAI's NTO	Eliminates hidden pricing and opaque tier-switching; enables independent verification of platform performance and scale
<b>Conditional access, DRM &amp; hardware compliance</b>	TEC-certified CAS/SMS for licensed DPOs; BIS-certified hardware	Equivalent DRM/SMS requirement for ALTD providers; BIS certification for streaming sticks, set-top boxes, and connected-TV hardware used in ALTD delivery	Prevents content piracy; ensures uniform encryption, authentication and signal-integrity standards
<b>Accessibility</b>	EPG, device, and content accessibility under MIB Guidelines and the RPwD Act	Native accessibility on smart-TV OS; WCAG 2.1-aligned interfaces; closed captions, audio description, sign-language interpretation	Accessible platforms; Universal, equitable access; statutory compliance with the RPwD Act in the ALTD environment
<b>Audience Measurement (Integration with BARC or any other Television Rating Agency)</b>	Mandatory integration of viewership data with BARC (or any other Television Rating Agency) for unified, cross-platform ratings	Standardised, anonymised, DPDP-compliant data contribution under the MIB Rating Guidelines and TV Ratings Policy 2026	Eliminates measurement silos; produces a credible, technology-neutral basis for advertising sales, carriage

**TRAI CP on Formulation of a Regulatory Framework for ALTD Services**

Requirement	What it covers (mirroring DPOs)	Digital adaptation for ALTD	Why it matters (arbitrage fix)
			negotiations, and policy-making
<b>OEM / OS / App-Store Assurance</b>	(No equivalent in DTH; ALTD-specific)	Pre-installation gate, app-store listing gate, take-down capability, annual self-certification, disclosure of pre-integration arrangements	Prevents the gatekeeping layer (smart-TV OEMs, OS providers, app stores) from becoming a back-door route for unauthorised ALTD services
<b>Local Indian Presence (Foreign Operators)</b>	(No equivalent in DTH; ALTD-specific)	Mandatory Indian incorporation, India-resident officers, content monitoring from India, data localisation, exclusive Indian jurisdiction	Closes the most material enforcement gap in the current ecosystem, i.e., foreign-operated FAST aggregators and OS-level platforms beyond MIB/TRAI reach
<b>Reciprocal Forbearance for Registered DPOs</b>	(Pari passu deregulation) - TRAI exercise to ease carriage and content restrictions, lighter principles-based regulation of innovative bundling and dynamic pricing	Same principle if applied on DTH	Restores fundamentals of the broadcasting sector; the corollary of 'Same Content, Same Rules' on the alternative path

The two paths set out in this submission are not equally preferred. - Forbearance for registered DPOs is the principled first choice and the most consumer-welfare-enhancing outcome. **Even so, choosing either of the two paths set out will mean that the asymmetric status quo does not continue. Either ALTD must be regulated on substantively the same terms as the platforms it competes with, or the platforms it competes with must be released from obligations that ALTD is not shackled by.** There is no third path that preserves both consumer welfare and the integrity of the broadcasting framework.

Airtel remains available to engage with the Authority on any aspect of this submission and to provide further detail or supporting data as may be required.