OFFICIAL GUIDE TO
South Africa
2020/21

COMMUNICATIONS

Department of Communications and Digital Technologies (DCDT)

To encourage digital inclusion and economic growth, the DCDT is mandated to facilitate South Africa's digital transformation by creating an enabling policy and regulatory environment.

The department implements the provisions of the 2016 *National Integrated Information and Communications Technology (ICT) Policy White Paper*, particularly the participation of multiple stakeholders for inclusive digital transformation; interventions to reinforce competition and facilitate innovation across the value chain; measures to address issues raised by ICT and convergence; and the establishment of a new national postal policy framework.

It also provides for policies to address the digital divide and affordable access, supply-side issues and infrastructure roll-out, and demand-side issues to facilitate inclusivity.

Over the medium term, the department planned to focus on rolling out broadband to government buildings through the South Africa Connect project, implementing the broadcasting digital migration policy to release digital spectrum, and submitting legislation to Parliament to enable digital transformation.

The department's vision is to see all South Africans digitally empowered to create and participate in tech-enabled opportunities that drive inclusiveness, employment and economic transformation across our cities, towns and provinces.

By mid-2021, the department had finalised a Digital Economy Master Plan and was engaging various stakeholders in the development of the implementation plan. The department has since developed the National Digital and Future Skills Strategy whose objective is to establish an education and skills development ecosystem that provides all South Africans with the required skills to create and participate in the digital economy.

Digital migration

The implementation of broadcasting digital migration includes the provision of vouchers to poor households for devices that will allow analogue televisions (TVs) to receive digital signals, and compensation to the South African Post Office (SAPO) for the costs of administering the voucher and distribution systems. The department will coordinate and monitor the distribution of these vouchers in 2021/22.

The Analogue Switch-off process which commenced in March 2021 is targeting to release the much-needed 700 MHz and 800 MHZ digital dividend spectrum. The spectrum was expected to be released in a phased provincial manner across the country by the end of March 2022. This process combined with the Digital-to-Digital migration will make available a total of 168 MHz spectrum in each of the provinces.

Broadband connectivity

The DCDT was expected to monitor and maintain the provision of broadband services to 970 government buildings that have already been connected. It was also expected to finalise the feasibility study for Phase 2 of the roll-out by 2021/22, and use this study to secure funding to roll out broadband connections to identified facilities from 2022/23.

As part of the Presidential Employment Stimulus initiative, the department had by mid-2021, in collaboration with The Presidency, submitted a bid for funding to support digital access for low-income households and stimulate job creation and economic growth through household broadband connectivity and public WiFi access.

Enabling digital transformation

To achieve digital inclusion and economic growth, the department planned to implement a number of digital transformation policies over the medium term, including the Digital Economy Master Plan; the Presidential Commission on the Fourth Industrial Revolution report; and the revised ICT development strategy for small, medium and micro enterprises.

Entities

Sentech

Sentech was established in terms of the Sentech Act of 1996, and is responsible for providing broadcasting signal distribution services to licensed TV and radio broadcasters.

Over the medium term, the entity was expected to continue focusing on providing customers with satellite services, analogue and digital TV and radio services, and streaming services. This will enable the entity to ensure that it provides digital TV coverage to 85% of households per year, and that digital terrestrial TV is available for 99.9% of households each year.

It will also continue to work towards switching off the analogue signal as part of the broadcasting digital migration project, and will assist the Universal Service and Access Fund with the installation of set-top boxes.

The entity derives its revenue through TV, radio and streaming services rendered to customers, and the remainder through transfers from the department through project-specific funding for dual illumination, which is the operation of analogue and digital signals.

South African Broadcasting Corporation

The SABC derives its mandate from the Broadcasting Act of 1999. It is mandated to provide broadcasting and information services through a wide range of

programming that displays South African talent in educational and entertainment programmes; offer diverse views through a variety of news, information and analysis; and advance national and public interests through popular sports, for example.

Over the medium term, the corporation will continue to focus on implementing its turnaround plan to ensure financial sustainability. This entails improving the collection of licence fees, and creating new and compelling content to increase audience share and advertising revenue. To support operations that ensure sustainability, the corporation relies on legislative, policy and regulatory changes by the department.

Among these are the repeal of legislation that mandates pay-TV networks to carry the corporation's channels for which adequate compensation has not been finalised; and policy and regulatory support that makes it obligatory for pay-TV service providers to oblige their subscribers to have valid TV licences.

The corporation is enacting other commercial strategies to increase revenue, audience share and operational efficiencies. As such, the corporation will enhance its focus on new and compelling content.

South African Post Office

The SAPO is a government business enterprise established to provide postal and related services to the public, and derives its mandate from the Postal Services Act of 1998 and the SAPO SOC Ltd Act of 2011.

The Postal Services Act of 1998 grants the post office an exclusive mandate to conduct postal services in the reserved sector for items such as letters, postcards and parcels less than one kilogram. This Act provides for the regulation of postal services and the operational functions of the postal company, including universal service obligations.

Over the medium term, the post office was expected to continue focusing on providing universal access to postal and related services, stabilising its financial position, optimising its personnel to ensure operational effectiveness, and distributing social grants on behalf of the South African Social Security Agency. The SAPO generates revenue through the provision of postal and courier services.

State Information Technology Agency

The SITA was established through the SITA Act of 1998 and is mandated to provide IT, information systems and related services to and on behalf of government departments and organs of state.

This includes the provision and maintenance of transversal information and data-processing systems and their associated services, the maintenance of secure information systems, and the execution of its functions according to approved policies and standards.

Over the medium term, the agency planned to focus on creating partnerships with research institutions to ensure that innovative digital solutions are developed and implemented in government; ensuring that the skills of agency personnel keep pace with the evolving technological landscape; and ensuring that the State and its citizens are able to transact, communicate and interface in a secure and safe environment.

Broadband Infraco
Broadband Infraco's legislative mandate, as set out in the Broadband Infraco Act of 2007, is to provide ICT infrastructure and broadband capacity in South Africa. Its main objectives are to expand the availability and affordability of access to electronic communications, including but not limited to underdeveloped and underserviced areas; ensure that the bandwidth requirements for specific projects of national interests are met; and enable the State to provide affordable access to electronic communications networks and services.

Over the medium term, the entity aimed to focus on implementing the South Africa Connect broadband policy, and on expanding and maintaining its long-haul network to support client needs.

This will also include monitoring the performance of the undersea West Africa cable system, which enables connectivity between Europe and Africa. The entity facilitates the connection of 713 government sites to broadband, and aims to maintain the time taken to restore faults on the core network at 7.5 hours.

Film and Publication Board (FPB)
The FPB was established in terms of the Films and Publications Act of 1996, as amended. Its mandate is to regulate the creation, production, possession and distribution of certain publications and films by classifying them; imposing age restrictions on content; and rendering the exploitative use of children in pornographic publications, films or online material punishable.

Over the medium term, the FPB aimed to focus on improving and automating the registration process for distributors; conducting a targeted 20 000 inspections to ensure compliance with relevant legislation; and reviewing classification guidelines to take into account societal norms, standards and values.

Independent Communications Authority of South Africa (ICASA)
ICASA was established by the ICASA Act of 2000 to regulate the South African communications, broadcasting and postal services sectors. As a Chapter 9 institution in terms of the Constitution of the Republic of South Africa of 1996, it derives its mandate from the Electronic Communications Act of 2005 to license and regulate electronic communications and broadcasting services, and the Postal Services Act of 1998 to license and regulate the postal services sector.

The authority is empowered to monitor licensee compliance with licence terms and conditions, develop regulations for the three sectors, plan and manage the radio frequency spectrum, and protect consumers in relation to these services.

Over the medium term, the authority aimed to focus on increasing internet access, specifically to wireless broadband services, by licensing the international mobile telecommunications spectrum; protecting consumers against unfair practices by service providers; increasing competition in the telecommunications and broadcasting sectors through various services and projects; developing a framework for dynamic spectrum management; and monitoring the quality of the services it provides by implementing a system to manage network performance.

National Electronic Media Institute of South Africa (NEMISA)

NEMISA was established as a non-profit institute for education in terms of the Companies Act of 2008. Its programmes were initially structured to enhance the market readiness of students in broadcasting, but its mandate has been expanded to include the development of South Africans' e-skills capacity.

The institute is also responsible for the implementation of e-skills programmes in collaboration with its partners. Over the medium term, the institute aimed to focus on implementing its operating model and e-skills agenda in collaboration with government, education, business and civil society.

Identified e-skills priority areas include government e-enablement, creative new media industries, e-inclusion and social innovation.

Universal Service and Access Agency of South Africa (USAASA)

USAASA was established in terms of section 80 of the Electronic Communications Act of 2005. Its sole mandate is to promote universal service and access to electronic communications and broadcasting services.

Communication platforms

Radio

The SABC's national radio network of 18 radio stations reach over 28 million South Africans. The top five most listened to radio stations in the country are Ukhozi FM, Umhlobo Wenene FM, Lesedi FM, Thobela FM and Metro FM.

Commercial radio stations

Commercial radio stations in South Africa include:
• Algoa FM
• Classic FM
• Kaya FM
• YFM
• Highveld Stereo

- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda FM
- OFM
- East Coast Radio
- Cape Talk 567
- Radio 2000
- Capricorn FM
- Power FM
- Radio KFM
- Tru FM.

Community radio
In terms of Section 7 of the Electronic Communications Act of 2005, it is unlawful to provide or operate a broadcasting service without a licence. There are more than 165 licensed community stations in South Africa, which broadcast in a number of languages.

Television
SABC TV consists of three free-to air (FTA) channels namely, SABC1, SABC2 and SABC3 as well as two channels carried on a subscription digital satellite network, SABC Encore and the 24-hour news channel (Channel 404), SABC News. SABC News offers breaking news and continuous news updates in 51 African countries.
SABC1, SABC2 and SABC3 attract on average 28 million South African viewers a month, as they deliver top quality local and international content. SABC Encore, a retro channel which showcases programming from the 1980s, is an integral part of the SABC's strategy moving into a multichannel environment.

Community TV
There are at least 12 community TV stations operational in different parts of South Africa, including Soweto TV; GauTV; 1KZN; Cape Town TV; Tshwane TV; Mpuma Kapa TV and Onse TV.

FTA TV
e.tv is South Africa's first private and largest English-medium channel. The channel also has a pan-African presence through e.tv Africa, which is distributed on the DStv Africa bouquet and by local affiliates in African countries.

Satellite broadcasting

eNews Channel Africa (eNCA) is South Africa's first and most watched independent 24-hour TV news channel on the DStv platform (Channel 403). The 24-hour news service is broadcast live in the UK to over 10,5 million subscribers on the Sky digital satellite platform.

eNCA provides live news bulletins to nearly three million South African viewers each night on e.tv (in English, isiZulu and Sesotho) and to more than 200 000 Afrikaans viewers on kykNET. The SABC has a 24-hour news channel on DStv (Channel 404). Newzroom Afrika is a 24-hour TV news station on DStv channel 405.

Internet

Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2019 shows that 63,3% of South African households had at least one member who had access to, or used the Internet either at home, work, place of study, internet cafés or at public hotspots.

Access to the Internet using all available means was highest in Gauteng (74,8%), Western Cape (74,3%) and Mpumalanga (67,4%), and lowest in Limpopo (43,2%) and Eastern Cape (52,5%). Less than one-tenth (9,1%) of South African households had access to the Internet at home. Access to the Internet at home was highest among households in Western Cape (21,7%) and Gauteng (14,9%), and lowest in Limpopo (1,6%) and North West (2,3%).

Household access to the Internet at home was highest in Western Cape (21,7%) and Gauteng (14,9%) and lowest in Limpopo (1,6%). While 15,4% of households in metropolitan areas had access to the Internet at home, this was true for only 1,2% of rural households in general and less than one per cent of rural households in Eastern Cape (0,3%), Limpopo (0,7%) and Mpumalanga (0,9%).

Households were generally more likely to have access to the Internet at work than at home or at Internet cafés or at educational institutions. Households in Gauteng (28,0%) and Western Cape (25,4%) were most likely to access the Internet at work while those in Limpopo (7,2%) were least likely to do so.

Using mobile devices to access the Internet includes access on cellular telephones or using mobile access devices such as 3G cards. It is clear that mobile access to the Internet has made it much more accessible to households in rural areas.

Nationally, Internet access using mobile devices (58,7%) was much more common than access at home (9,1%), at work (18,6%) and elsewhere (10,7%). Although the use of mobile Internet access devices in rural areas (44,0%) still lags behind its use in metros (67,8%) and urban areas (59,5%), it is much more common in rural areas than any of the alternative methods.

Social media

About 40% of South Africa's population, some 22.89 million people out of an estimated population of over 57 million, are active social media users.

Telecommunications

South Africa has four major mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile. According to Stats SA's GHS of 2019, nationally, only 3,8% of households did not have access to either landlines or cellular phones in 2019. Households without access to these communication media were most common in Eastern Cape (9,3%) and Northern Cape (8,7%). Only 0,1% of South African households only used landlines. By comparison, 87,8% of South African households exclusively use cellular phones.

The exclusive use of cellular phones was most common in Mpumalanga (95,3%), Limpopo (94,4%) and North West (91,9%). Households that had higher usage of both cellular phones and landlines were most common in the more prosperous provinces, namely Western Cape (18,4%) and Gauteng (9,9%).

Households without access to landlines or cellular phones were most common in Buffalo City (6,6%) and Nelson Mandela Bay (6,2%), Only 0,1% of South African households living in metropolitan areas exclusively used landlines, compared to 85,3% that exclusively used cellular phones.

The exclusive use of cellular phones was most common in City of Tshwane (91,7%) and Ekurhuleni (90,0%). Almost one-fifth (19,9%) of households in Cape Town used both landlines and cellular phones compared to 3,8% in Buffalo City and 5,2% in Mangaung.

The media

South Africa has a vibrant and independent media, with print, broadcast and online offerings.

Print

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include Media24 (part of Naspers), Independent Media, Caxton Publishers & Printers and Tiso Blackstar Group. Other important media players include M&G Media; the Natal Witness Printing & Publishing Company; Primedia Publishing; Highbury Media and Kagiso Media.

Magazines

According to figures released by the Audit Bureau of Circulations of South Africa, there has been a steady decline in magazine circulation in South Africa over the

past months, with only a handful of commercial magazines achieving a steady increase in circulation.

Media organisations and role players

The **Publishers Support Services (PSS)** is an umbrella body incorporating print and digital media. It is a natural progression from the long-established Print Media South Africa and illustrates its commitment as an interactive organisation to keeping pace with the fast-changing media world of the 21st Century.

An evolving and vibrant association, its express purpose is to represent and promote all aspects concerning the industry and its members. PSS is a non-profit, voluntary association. Its membership includes more than 500 newspapers and magazine titles that cater for four different language groups.

The **South African National Editors' Forum** promotes excellence in journalism through fighting for media freedom, writing policy submissions, research, education and training programmes.

The **Forum of Journalists for Transformation** addresses issues that directly affect its members. The **Press Council**, the **Press Ombud** and the **Appeals Panel** are an independent co-regulatory mechanism set up by the print and online media to provide impartial, expeditious and cost-effective adjudication to settle disputes between newspapers, magazines and online publications, on the one hand, and members of the public, on the other, over the editorial content of publications.

The **Freedom of Expression Institute (FXI)** was formed to defend freedom of expression, to oppose censorship, to promote access to information and knowledge, and to promote media diversity. The FXI is the leading organisation on issues of freedom of expression and access to information as enshrined in the Bill of Rights in Section 16 of the Constitution of the Republic of South Africa of 1996.

The **Forum of Community Journalists** is an independent, non-profit, non-racial and voluntary organisation striving to promote and express the interests of all journalists employed on a permanent or freelance basis at regional community newspapers, magazines and online community publications in South Africa.

The **Broadcasting Complaints Commission of South Africa** serves as a voluntary watchdog to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct. **Media Monitoring Africa** is a non-profit organisation that acts in a watchdog role to promote ethical and fair journalism that supports human rights.

The **National Community Radio Forum** lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

Other press organisations operating in the country are the Foreign

Correspondents' Association of Southern Africa; Printing Industries Federation of South Africa; South African Typographical Union; Specialist Press Association; South African Guild of Motoring Journalists; Professional Photographers of South Africa; Media Institute of Southern Africa; Publishers' Association of South Africa, and various press clubs in major centres.

News agencies
Local and international news agencies based in South Africa include:
• African News Agency
• Reuters
• Agence France-Presse
• Associated Press
• Deutsche Presse Agentur
• United Press International.

Media awards
Some of South Africa's media awards include the:
• Mondi Shanduka Newspaper Awards
• Vodacom Journalist of the Year Awards
• South African Breweries (SAB) Environmental Media and Environmentalist of the Year Awards
• SAB Sports Media Awards
• Sanlam Financial Journalist of the Year Award
• CNN MultiChoice African Journalist Awards
• Discovery Health Journalism Awards
• Nat Nakasa Award
• Local Media Excellence Awards
• Liberty Radio Awards
• Isu Elihle Awards
• Sikuvile Journalism Awards
• MDDA/Sanlam Local Media Awards
• New Generation (Social & Digital Media) Awards.

Marketing and advertising awards
South Africa has a vibrant and dynamic marketing and advertising industry. Some of the awards include: Loeries; Assegai Awards; Creative Circle Annual Awards; Effie Awards; FM AdFocus Awards and Marketing Achievement Awards.