South Africa Yearbook 2020/21

Communications

Communications and Digital Technologies

The Department of Communications merged with the Department of Telecommunications and Postal Services, with effect from 1 April 2020, to form the new Department of Communications and Digital Technologies (DCDT).

The DCDT is mandated to enable South Africa's digital transformation to achieve inclusion and economic growth by creating relevant policy and regulatory environment. This is done through the implementation of the *2016 National Integrated ICT Policy White Paper*, which provides for 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 information and communications technology (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 DCDT will 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.

Rolling out broadband through South Africa Connect

The DCDT will monitor and maintain the provision of broadband services to 970 government buildings that have already been connected at a projected cost of R773.6 million over the Medium Term Expenditure Framework (MTEF) period. The department expects 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 March 2022/23.

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 DCDT will coordinate and monitor the distribution of these vouchers in 2021/22, for which R95 million is allocated to be paid to the SAPO. To release spectrum for mobile broadband, the Universal Service and Access Fund (USAF) was allocated R1.1 billion in 2020/21. By May 2021, the DCDT had completed analogue switch-off at 32 sites in three priority provinces (the Free State, the Northern Cape and North West) – 40% of the planned sites.

Enabling digital transformation

To achieve digital inclusion and economic growth, the DCDT plans 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 (4IR) Report; and the Revised ICT Development Strategy For Small, Medium And Micro Enterprises (SMMEs).

The department plans to submit a number of legislation to Cabinet, including the Electronic Communications Amendment Bill; the State Information Technology (IT) Company Bill and State ICT Infrastructure Company Bill – achieve greater alignment and efficiency among state-owned ICT companies; and the Digital Development Fund Bill to replace the USAF. To achieve these targets, expenditure in the ICT Policy Development and Research programme is expected to be R152.1 million over the MTEF period.

White Paper on Audio and Visual Content Services Policy Framework

In September 2020, Cabinet approved the draft *White Paper on Audio and Visual Content Services* Policy Framework. This White Paper is necessary as there is a growing need to level the playing field between traditional broadcasting, on-demand services providers – these include catch-up TV service, video on-demand services as well as news portals – and video-sharing platforms.

This White Paper proposes policy and regulatory changes and makes recommendations to reposition the audio-visual media sector for future growth and investment promotion. It also emphasises the review of:

- sports broadcasting rights matters,
- promotion of foreign direct investment within the broadcasting sector,
- licensing of the over-the-top services (OTT),
- competition issues in relation to pay-TV and free-to-air markets,
- availability of spectrum for the transmission of audio-visual content, and
- skills development to fast-track digital transformation within the audio-visual sector.

Legislation

The DCDT derives its mandate from the following legislation:

- the Broadcasting Act, 1999 (Act 4 of 1999), as amended, which establishes a broadcasting policy in South Africa;
- the Electronic Communications Act, 2005 (Act 36 of 2005), as amended, which provides the legal framework for convergence in the broadcasting, broadcasting signal distribution, and telecommunications sectors. It also allows for the granting of new licensees and social obligations; the control of the radio frequency spectrum; and the regulation of electronic communication network services, electronic communication services, and broadcasting services;
- the Film and Publications Act, 1996 (Act 65 of 1996), as amended, which provides for the classification of certain films and publications, and establishes the Film and Publication Board (FPB) and Tribunal;
- the Independent Communications Authority of South Africa (ICASA) Act, 2000 (Act 13 of 2000), which establishes the regulator in the sector; and
- the Postal Services Act, 1998 (Act 124 of 1998), as amended, which makes provision for the regulation of postal services.

Budget
For the 2020/21 financial year, the DCDT was allocated R5.7 billion.

Expenditure is expected to decrease at an average annual rate of 9.6%, from R3.3 billion in 2020/21 to R2.4 billion in 2023/24. Driving this decrease is the conclusion of a one-off allocation of R1.1 billion in 2022/23 for the Broadcasting Digital Migration Project, and Cabinet-approved reductions, over the MTEF period, of R743.7 million, mainly on transfers to public entities (R442 million) and compensation of employees (R224.2 million).

The department will rely mostly on natural attrition as a strategy to fall within the expenditure ceiling for compensation of employees. Expenditure in this regard is expected to decrease at an average annual rate of 1.2%, from R302.2 million in 2020/21 to R291.3 million in 2023/24, driven by the expected decrease in the number of personnel from 367 to 343 over the same period.

Impact of COVID-19 on the ICT sector
The pandemic has affected several industries across the globe – with ICT being one of them. The industry witnessed a dynamic change during these times, with some of the technologies finding new applications and others witnessing an all-time low.

The ICT sector has proved to be the pillar of many economies, both developed and developing countries. With that realisation, many organisations have made investments into the sector, from new Internet service providers to postal services companies, and TV and radio broadcasters. Nevertheless, it is important that the sector focuses on adopting the 4IR.

Technologies that gained traction during the period include OTT services, video conferencing technology, artificial intelligence (AI), video streaming platforms, team collaboration software, mobile security technology, video on demand market and cloud gaming market amongst others. Technologies that witnessed a dip in sales and applications include industry 4.0 market, wireless sensors market, robotic process automation market and the radar sensor market.

With organisations promoting working remotely, there is already an exponential rise in video calls/phone calls, as an increasing number of people are organising meetings via applications (apps) or collaboration platforms. Digital media and OTT content players are benefiting while virtual private networks, cybersecurity, and data security are other technologies that will see a surge as most workforces are operating remotely. Cloud services is further expected to grow, boosted by higher usage of content, gaming downloads, video conferencing, and the impact of remote access to corporate networks. There will also be an increased focus on technologies like AI, big data, augmented reality and virtual reality, among others going forward.

Other areas where there is an uptake include e-learning, online education, and e-governance. As shoppers self-isolate and avoid crowded areas, the clear winner is the e-commerce sector, with digital payment taking over a lot faster than the physical payment options.

The media industry (both traditional broadcasters and newer streaming platforms) are playing a vital role during the pandemic in providing correct and responsible health information to the public, with search engines and social media platforms. In terms of the morale of those isolated, access to the wealth of quality content available is important.

The current circumstances may also accelerate the adoption of 5G to meet the demands of bandwidth, performance and network slicing. There will be more focus on the sufficiency of networks to carry the significantly increased traffic as working from home continues to ramp up. Social distancing and self-isolation mean that telecommunication has become an elevated essential service. Communications service providers – both mobile network operators and cable operators, should be able to meet the challenge of their new critical role in the changed world.

Access to ICT goods and services in South Africa continues to grow. Household access to mobile telephony has reached a plateau, closing in on universal service, with over 96% of households reporting one or more members having cellphones. Fixed-line telephony access continues to shrink, with households using them to supplement communications.

The level of household Internet access is far lower, with some households reporting one or more members having access to or using the Internet. However, most of this access takes place using mobile devices, with just over 10% of households reporting Internet access at home.

Telecommunications sector
The telecommunications sector is a critical part of modern lifestyles and has significant influence on the growth of the country's economy as it strengthens productivity levels. South Africa's telecommunications sector has continued to grow despite the economic challenges faced by the nation. Mobile subscriptions and Internet penetration, and other related services continue to grow. South Africa's fibre network and data centre markets are expanding rapidly.

The ICASA continues to work on regulatory initiatives aimed at reducing the cost to communication and engaged with the Competition Commission on its final findings and recommendations report for the data services market inquiry. The purpose of the inquiry was to investigate the cause and reason for alleged high prices for data services in South Africa, and to make recommendations that would lead to lower prices for data services.

Mobile subscriptions, device ownership, and Internet penetration continues to grow, and the majority of service revenue growth is due to double-digit increases in the value of data. South Africa's fibre and data centre markets are expanding rapidly.

Telecommunications companies are having to adapt to widespread disruption; the structural shift from voice to data is impacting traditional margins and increases in data traffic are being offset by a proportional decline in effective data prices. The market is maturing, and operators are having to compete to grow their share of the prepaid and lower-income markets, from which the majority of future growth is expected to come. Investment in the sector is highly influenced by South Africa's poor economic growth, regulatory changes and technological developments.

Broadcasting sector
The broadcasting sector plays a very important role in education, entertainment and informing the public through

radio and TV (both public and commercial broadcasting). The sector has been affected by the rapid changes in technology, which are changing the broadcasting landscape. The process of migrating broadcasting signals from analogue to digital is expected to clear the radio frequency spectrum currently occupied by broadcasters to enable the provision of wireless mobile broadband services and other innovative applications.

While broadcasting revenues continue to grow annually, on-demand audio and video online streaming services are causing significant disruptions in the broadcasting sector globally and will offer serious competition to South African broadcasters in the near future. The digital revolution sweeping video entertainment is affecting community TV stations, free-to-air and public broadcasters, while subscription TV services are having to adapt to keep up with these developments.

Local broadcasters are planning or implementing new business models to integrate their offerings with digital platforms. The sector was undermined by sustainability concerns and numerous issues at the South African Broadcasting Corporation (SABC). The delays in digital migration also had an impact. Meanwhile, the DCDT is prioritizing interventions towards final analogue switch-off.

While TV and radio revenues continue to grow, streaming services such as DStv's Showmax, Netflix and Amazon Prime Video are disrupting traditional broadcasting. The dramatic digital revolution sweeping video entertainment is affecting community TV stations, free-to-air, public broadcasters and subscription TV services. Traditional TV and pay-TV are facing a threat of survival. The radio sector is faced with an increase in audio content created for online delivery and via mobile phones and an increase in non-traditional players entering the market.

Postal Services sector

The postal services sector contributes 3.16% to the country's gross domestic product. This includes the courier and express parcel services. Letter post is declining both in terms of volumes and its percentage contribution to revenue that is generated in the sector. The trend for the decline in letter mail volumes is attributed to the electronic substitution effects. Through identification and review of legislative gaps in the postal sector, there is an emphasis for the sector to ensure that postal outlets offer connectivity through Internet services.

Although the courier, express and parcel services sector faces weak economic conditions, it is benefitting from the growth in e-commerce sales, increasing demand for just-in-time deliveries and from the service provided by the post office. Increasing customer demand for speedy and flexible deliveries and the growth of disruptive start-ups and innovative delivery options are forcing traditional operators to review their distribution strategies and in some cases partner with or invest in new disruptive on-demand delivery organisations to provide innovative and alternative delivery options.

While the poor economy, low business and consumer confidence are affecting the volume of goods requiring express delivery, the development of the on-demand economy is providing growth drivers for the industry. These include the need for speedy deliveries created by the rise in online shopping, service delivery levels from the Post Office, the need for just-in-time delivery of parts and components to minimise stock levels and save costs and delivery demands for medical products.

The continuous development of drones, robots and autonomous vehicles are driving ongoing change in the industry.

Entities

Broadband Infraco (BBI)

The BBI's legislative mandate, which is set out in the BBI Act, 2007 (Act 33 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; to ensure that the bandwidth requirements for specific projects of national interest are met; and to enable the State to provide affordable access to electronic communications networks and services.

Over the medium term, the entity will focus on implementing the South Africa Connect Broadband Policy and 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.

Expenditure is expected to increase at an average annual rate of 4.3%, from R673.7 million in 2020/21 to R763.8 million in 2023/24. This is driven by increased spending on goods and services, which accounts for 55.1% (R1.2 billion) of total projected spending over the medium term, mostly related to the cost of providing connectivity services. As the entity increases its connectivity infrastructure service offerings, revenue is expected to increase at an average annual rate of 9.9%, from R557 million in 2020/21 to R738.5 million in 2023/24. The company's total budget for 2020/21 was R871.1 million.

Film and Publications Board

The FPB was established in terms of the Films and Publications Act, 1996 (Act 65 of 1996), as amended, and is listed as a schedule 3A public entity in terms of the Public Finance Management Act (PFMA), 1999 (Act 1 of 1999). 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 board will 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 consider societal norms, standards and values.

Expenditure is expected to increase at an average annual rate of 4.6%, from R113.8 million in 2020/21 to R130.2 million in 2023/24. Compensation of employees accounts for an estimated 54.7% (R203.4 million) of expenditure over the MTEF period.

The board expects to derive 84.8% (R307.7 million) of its revenue over the medium term through transfers from the DCDT, and the remainder through fees for classification and registration. Total revenue is expected to increase at an average annual rate of 4.6%, from R113.8 million in 2020/21 to R130.2 million in 2023/24. The board's total budget for 2020/21 was R117.2 million.

Independent Communications Authority of South Africa

The authority was established by the ICASA Act of 2000 to regulate the South African communications, broadcasting and postal services sectors. It is listed as a Schedule 1 public entity in terms of the PFMA of 1999, and is a Chapter 9. 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 will 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.

The authority plans to issue 13 community TV licences per year over the medium term and monitor 245 broadcasting licences.

Expenditure is expected to decrease at an average annual rate of 4.2%, from R559 million in 2020/21 to R491.4 million in 2023/24. As the authority requires highly specialised personnel to conduct its work, spending on compensation of employees accounts for an estimated 77% (R1.2 billion) of expenditure over the MTEF period.

The authority expects to derive 96.8% (R1.5 billion) of its revenue, over the medium term, through transfers from the DCDT and the remainder through interest on investments. The institute's total budget for 2020/21 was R99.2 million.

National Electronic Media Institute of South Africa (NEMISA)

The NEMISA was established as a non-profit institute for education in terms of the Companies Act, 2008 (Act 71 of 2008), and is listed as a Schedule 3A public entity in terms of the PFMA of 1999.

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 will 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. As such, the institute aims to provide specialist technology skills to 17 750 citizens by 2023/24, and increase the number of learners trained in e-literacy from 30 000 in 2020/21 to 250 000 in 2023/24.

Expenditure is expected to increase at an average annual rate of 1.9%, from R97.4 million in 2020/21 to R103.1 million in 2023/24. Goods and services, mainly rental costs, account for an estimated 32.6% (R97.9 million) of expenditure over the medium term, while transfers and subsidies to higher education institutions to fund e-skills projects account for an estimated 34.8% (R106 million).

The institute derives all of its revenue through transfers from the DCDT, which is expected to increase in line with expenditure at an average annual rate of 1.9%, from R97.4 million in 2020/21 to R103.1 million in 2023/24. The institute's total budget for 2020/21 was R99.2 million.

In an effort to ensure that all South Africans have access to telecommunications and government services during the COVID-19 pandemic, the ICASA assigned temporary radio frequency spectrum to mobile network operators. The DCDT working with the departments of the Basic Education and Higher Education and Training and, in partnership with mobile network operators and internet service providers, approved 471 local websites to be zero-rated for educational purposes.

The zero-rated websites include technical and vocational education and training colleges, universities, basic education sites and sites that provide information which could help South Africans contain the spread of the pandemic.

Zero rating of telecommunications and data services for health, education and public service pronouncements is a very important intervention to empower society and the youth, in particular, to mitigate the negative impact of COVID-19 on their education prospects.

This will continue to help provide up-to-date and accurate medical information, statistics, as well as information about new government regulations.

Sentech

Sentech was established in terms of the Sentech Act, 1996 (Act 63 of 1996), and is listed as a Schedule 3B public entity in terms of the PFMA of 1999. It is responsible for providing broadcasting signal distribution services to licensed TV and radio broadcasters.

Over the medium term, the entity will continue to focus on providing customers with satellite, analogue and digital TV, radio 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 USAF with the installation of set-top boxes.

Goods and services account for an estimated 45.7% (R1.8 billion) of expenditure over the MTEF period, mostly for service expenses such as satellite costs; and spending on compensation of employees accounts for an estimated 41% (R1.7 billion) as the entity's work requires highly skilled personnel. Total expenditure is expected to increase at an average annual rate of 4.4%, from R1.2 billion in 2020/21 to R1.4 billion in 2023/24. The entity expects to derive 90.6% (R3.8 billion) of its revenue over the MTEF period through TV, radio and streaming services rendered to customers, and the remainder through transfers from the DCDT through project-specific funding for dual illumination, which is the operation of analogue and digital signals.

Revenue is expected to increase at an average annual rate of 1.4%, from R1.3 billion in 2020/21 to R1.4 billion in 2023/24.

South African Broadcasting Corporation

The SABC derives its mandate from the Broadcasting Act of 1999 and is listed as a Schedule 2 public entity in the PFMA of 1999. The corporation 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.

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 will rely on legislative, policy and regulatory changes by the DCDT.

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. The SABC has moved to ensure that it acquires content based on a projected return on investment and has made progress in identifying non-core assets that can be disposed of to meet funding requirements. It is reducing its operational costs, including through staff retrenchments.

Expenditure is expected to increase at an average annual rate of 4.2%, from R6.4 billion in 2020/21 to R7.2 billion in 2023/24, driven by increased investment in content, audience research and broadcasting costs. The corporation expects to implement risk-mitigation plans and optimise its personnel structure. Accordingly, the corporation's number of personnel is set to decrease from 2 899 in 2020/21 to 2 523 in 2023/24.

The SABC is self-funding. Transfers from the DCDT account for an estimated 3.4% (R644.4 million) of revenue over the medium term, while proceeds from TV licence fees account for an estimated 17.1% (R3.5 billion). The remaining 74.3 % (R15.5 billion) is expected to be generated by advertising and other commercial activities. Total revenue is expected to increase from R5.2 billion in 2020/21 to R7.5 billion in 2023/24 due to an anticipated R2 billion increase in advertising and commercial revenue, and a R280 million increase in the collection of TV licence fees.

South African Post Office

The SAPO is a Schedule 2 public entity in terms of the PFMA of 1999. It 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 the SAPO state-owned company Limited Act, 2011 (Act 22 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 makes provision for the regulation of postal services and the operational functions of the postal company, including universal service obligations.

Over the medium term, the SAPO will continue to focus 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. To ensure these imperatives are achieved, expenditure is expected to increase at an average annual rate of 7.5%, from R6.2 billion in 2020/21 to R7.7 billion in 2023/24.

Compensation of employees accounts for a projected 58% (R12.6 billion) of expenditure over the medium term. R1.5 billion over the medium term is allocated to fund universal service obligations to provide accessible and affordable postal services in underserviced areas. This allocation is expected to allow the entity to maintain 2 120 points of presence, including post offices, retail postal agencies and mobile units.

The post office generates revenue through the provision of postal and courier services. Revenue is expected to increase at an average annual rate of 8.5%, from R4.4 billion in 2020/21 to R5.6 billion in 2023/24.

State Information Technology Agency (SITA)

The agency was established through the SITA Act, 1998 (Act 88 of 1998), and is listed as a Schedule 3A public entity. The agency 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 will 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.

Expenditure is expected to increase at an average annual rate of 5.55%, from R7.2 billion in 2020/21 to R8.5 billion in 2023/24. Goods and services accounts for an estimated 65.3% (R15.9 billion) of expenditure over the medium term, mostly for the provision of IT services.

Compensation of employees accounts for an estimated 28.8% (R7 billion) of expenditure as the agency requires highly skilled personnel. As the implementation of the strategic projects such as South Africa Connect, Cloud Infrastructure and the Gauteng Broadband Network are expected to require substantial capital investment over the MTEF period, R1.2 billion is earmarked for the acquisition of assets.

The agency generates revenue by providing ICT infrastructure and services to government departments and organs of state. Revenue is expected to increase at an average annual rate of 12.1%, from R6.2 billion in 2020/21 to R8.7 billion in 2023/24.

Universal Service and Access Agency of South Africa (USAASA)

The USAASA was established in terms of Section 80 of the Electronic Communications Act of 2005 as a statutory body and is listed as a Schedule 3A public entity in terms of the PFMA of 1999. Its sole mandate is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services.

The agency is allocated R350 million over the MTEF period through transfers from the DCDT. This will mainly be used to implement Phase 2 of the Broadcasting Digital Migration Project, which is expected to be completed during the MTEF period. Of this amount, R95 million will be paid to the SAPO over the medium term for distribution costs. The agency's total budget for 2020/21 was R265.7 million.

Universal Service and Access Fund

The USAF was established in terms of Section 89 (1) of the Electronic Communications Act of 2005, and is listed as a Schedule 3A public entity in the PFMA of 1999. The fund's sole mandate is to subsidise ICT equipment and services, and electronic communications and broadcasting networks for needy people in underserviced areas. The fund is managed by the USAASA.

Over the medium term, the fund will focus on the implementation of the broadcasting digital migration project, which will ensure the release of much-needed spectrum. The fund will also provide sites with Internet connectivity and maintain these connections.

The fund is allocated R1.4 billion over the medium term, mostly for implementing projects related to broadcasting digital migration. This funding is expected to increase from R500.4 million in 2020/21 to R1.1 billion in 2021/22, and will be used to provide vouchers to low-income households for devices that will allow analogue TVs to receive digital signals once the former is switched off.

The fund derives all its revenue through transfers from the DCDT and has no personnel. Total revenue is expected to decrease at an average annual rate of 39.1% over the medium term as the one-off allocations for broadcasting digital migration conclude in 2022/23. The fund had a total budget of R741.8 million for 2020/21.

Programmes and projects

National e-Government Strategy and Roadmap

The e-government or digital government concept is the innovative use of communications technologies (including mobile devices), websites, apps and other ICT services and platforms to link citizens and the public sector, and facilitate collaborative and efficient governance. ICT is perceived as a key enabler to governments globally, in efforts to deliver better services and efficiency while enhancing their relationship with citizens and business.

The National Development Plan stipulates that by 2030, government will make extensive use of ICT to engage with and provide services to citizens. This will be achieved through an enabling coordinated and integrated e-Strategy that cuts across government departments and sectors.

The purpose of the National e-Government Strategy and Roadmap is to guide the digital transformation of South Africa into an inclusive digital society where all citizens can benefit from the opportunities offered by digital technologies to improve their quality of life. This strategy defines a renewed approach and programme of action that will radically improve the electronic government situation in South Africa.

Fourth Industrial Revolution

The 4IR has necessitated that countries develop new policies, strategies and innovation plans to enable an inclusive developmental approach that will comprise of the representatives of a cross section of stakeholders, including the public sector, business, academia and research institutions, experts, labour, SMMEs, youth, women and non-governmental organisations. In essence, South African policies, strategies and plans should seek to advance the goals of inclusivity and shared growth. A core short-term focus of South Africa's national response will be on the impact of the changing technological landscape on the economy and employment.

The country needs a more broad-based approach that looks at threats and opportunities that technological change and convergence will have on South Africa's other development imperatives. This includes economic infrastructure, environmental sustainability and transitioning to a low-carbon economy, an integrated and inclusive rural economy, human settlements, education, training and innovation, health, social protection, safer communities, and building a capable and developmental state.

The DCDT's priorities are anchored in an endeavour to prepare South Africa for the 4IR. Key initiatives in this regard included coordinating the establishment of the Presidential Advisory Commission on the 4IR to ensure that the country is in a position to seize opportunities and manage the challenges of rapid advances in ICT. The commission acts as an advisory body that ensures that South Africa leverages on the benefits of the latest technology by coordinating and planning across the industries and sectors that will underpin the drive towards the 4IR.

Its work is centred on eight work streams dealing with the impact of technological advancement on human capital and the future of work as well as social and economic development.

The 30-member commission, chaired by President Cyril Ramaphosa, comprises eminent persons from different sectors of society and reflects a balance in gender, youth, labour and business, including digital start-ups as well as digital entrepreneurships.

The commission's objectives are to:

- develop an integrated country strategy and plan to respond to 4IR, including detailed interventions to be carried out achieving global competitiveness of the key economic sectors (agriculture, finance, mining, manufacturing, ICT, and science, technology and innovation);
- advise on a technology research and development programme to advance 4IR;
- advise on strategies for skills development and future of work;
- make recommendations on enabling relevant infrastructure for the country to participate in the digital economy; and
- make recommendations on an institutional framework and mechanism to coordinate 4IR programmes.

The commission also serves as a platform to address challenges identified through research and consultation, and ensures that ICTs are regarded as drivers in creating jobs, through innovations and development of ICT SMMEs.

In October 2020, government announced the release of the 4IR Commission Report for public consumption. The report identified eight key priorities that are important for the country to focus on, both for government and the private sector, as well as civil society. Among the areas of focus highlighted in the report is investment in human capital, establishing an AI institute and the establishment of a platform for advanced manufacturing.

The report highlighted the importance of government to secure data for it to be used commercially for, among others, innovation by small businesses. The commission recommended that government incentivise future industries, platforms and application technologies.

4IR ICT Skills Programme

The DCDT, through the Media, Information and Communication Technology Sector Education and Training Authority, has launched the 4IR Skills Programme as part of its efforts to create one million new jobs by 2030.

The programme, which provides skills in key 4IR domains namely; data science, 3D printing, cloud computing, drone piloting, software development, cyber security and digital content production, is in partnership with Deviare, Microsoft, Cisco and Leaders in Motion Academy. Deviare has developed an online platform *4IRSkills.Africa* to initiate recruitment of learners for the programme. *4IRSkills.Africa* is an active platform for building the capability and capacity for future digital skills that can be applied across sectors in African.

The learning methodology promotes blended, high touch and outcome-oriented learning, giving learners the opportunity to access training anywhere anytime through virtual classrooms, access to global teaching assistants and mentorship programmes.

National Digital and Future Skills Strategy

The combined impact of digital technology trends, such as the Internet of Things (IoT), big data, robotics, and AI, is changing the ways in which people, economies and societies operate. The ability of countries, organisations and individuals to participate in the growing social and economic revolution, to benefit from and to be enriched by it, increasingly depends on the acquisition and deployment of digital skills.

Globally and locally, the mining, manufacturing and services sectors are in the process of being transformed by digital automation, AI and a range of other digital technologies. Furthermore, government entities, private sector firms and development institutions increasingly rely on digital technologies to drive economic growth, promote social development and provide cultural enrichment.

Legacy skills, and even existing ICT skills, are becoming obsolete, while new digital skills are in short supply. This means that countries seeking to advance the competitiveness of their key economic sectors and public services need to adopt a continual skills upgrade approach, where both ordinary citizens and research specialists acquire and advance their digital skills as part of a broad spectrum of 21st century skills. The whole of society must become digitally adoptive and digitally adaptive to ensure digital inclusivity for future generations.

The challenges implied by these ongoing developments, therefore, requires that South Africa adopts a clear and comprehensive digital and future skills strategy in order to foster the country's ability to engage with, compete within, and benefit from the emergent digital revolution, also referred to as the 4IR.

In August 2020, the DCDT published the National Digital and Future Skills Strategy. The strategy envisages a society of digitally skilled South Africans. It sets out a structured series of initiatives intended to contribute to the capacities of South Africans to meet the challenges arising from the increasing deployment and adoption of digital technologies in economy and society, understanding that the digital revolution (using cloud technologies that enable big data; bringing virtual and augmented reality into a real world environment; introducing autonomous vehicles and drones; making IoT, AI, robotics and 3D printing part of everyday life) occurs within the context of the broader 4IR (working with advanced materials, biotechnology innovations, and the wider landscape of scientific innovation).

The combined impact of these technology trends is having a substantial impact on the world of work, on schooling, education and research, individuals and communities. The strategy presents a vision of a South Africa in which all its people are able to benefit from enhanced digital skills, thereby contributing to a significantly enhanced quality of life, improved education and higher economic growth. Digital skills are one of the key skills sets required for the creation of new kinds of 21st century jobs. Originality, agility, critical thinking and problem-solving are important 21st century skills that must be interwoven with digital skills.

The strategy elements needed to realise that the digital skills vision will need to be undertaken by a range of stakeholders, including government, private sector, and educational institutions, who should engage in continuous, structured consultation, collaboration and coordination involving all stakeholders.

The strategy is underpinned by current research and its implementation will be assessed through ongoing monitoring and evaluation.

Positioning South Africa as a global ICT leader

The DCDT's international programme is focused on positioning South Africa as a global ICT leader; influencing the debates and decisions of multilateral organisations in favour of national interest and development agenda; increasing investment in the economy; and promoting South African business and technological capabilities.

South Africa was elected to the International Telecommunications Union (ITU) Council for the period 2019 – 2022. The ICASA Radio Communications Manager Mandla Mchunu, representing South Africa, was elected to the Radio Regulations Board of the ITU for the period 2019 – 2022. South Africa was also elected to the African Telecommunications Union Council for the same period.

As a legacy of the ITU Telecom World, the DCDT has launched a Digital Transformation Centre whose objective is to incubate enterprise talent and harness innovation. With the support from the ITU, the World Economic Forum and other partners, the centre will assist the entry and growth of SMMEs in various aspects of these future communication systems and networks, focusing on management of intellectual property rights, standardisation, conformance testing, and SMME innovation. It will further support the production and usage of ICT technologies and break the current monopolies in the electronic manufacturing industry.

On 17 May each year, South Africa joins the rest of the word to commemorate World Information Society Day. The purpose of the day to help raise awareness of the possibilities that the use of the Internet and other ICTs can bring to societies and economies, as well as of ways to bridge the digital divide. The 2021 event was held under the theme; "Accelerating Digital Transformation in Challenging Times".

The origins of World Telecommunication and Information Society Day date back to the signing of the First International Telegraph Convention on 17 May 1865, which marked the establishment of the ITU.

The international branch of the DCDT continues to be the primary vehicle through which the department pursues government's priority of contributing to a better South Africa and safer Africa in a better world.

The country also served as a member of the Universal Postal Union (UPU) Council of Administration for a second term, 2017 – 2020. It was also responsible for chairing a new committee dealing with strategy. South Africa has contributed significantly to the UPU's work in developing national address systems. The country's use of global positioning systems to allocate addresses to people in rural and undeveloped areas has proved critical.

Internet

According to Statistics South Africa's *General Household Survey (GHS) 2019*, released in December 2020, 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 hot spots. Access to the Internet using all available means was highest in Gauteng (74.8%), the Western Cape (74.3%) and Mpumalanga (67.4%), and lowest in Limpopo (43.2%) and the 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 the Western Cape (21.7%) and Gauteng (14.9%), and lowest in Limpopo (1.6%) and North West (2.3%).

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 1% of rural households in the 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 the 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. 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

The emergence of social media as a social and business communication tool in the last few years has been dramatic. In South Africa, a country where first and third-world conditions are often separated by just a few kilometres, social media has levelled the playing field and created a platform that is affordable for everyone, easy to use and highly effective as a communication tool.

According to *datareportal.com*, there were 25.00 million social media users in South Africa in January 2021. The number of social media users in South Africa increased by 3.0 million (+14%) between 2020 and 2021. The number of social media users in South Africa was equivalent to 41.9% of the total population in January 2021.

Online retail

According to World Wide Worx, online retail in South Africa more than doubled in just two years, due to the explosion in demand for home deliveries brought about by the COVID-19 pandemic. *Online Retail in South Africa 2021*, a study conducted by World Wide Worx with the support of Mastercard, Standard Bank and Platinum Seed, shows that the total growth for online retail in South Africa in 2020 came to 66%, bringing the total of online retail in South Africa to R30.2 billion.

According to the study, the categories experiencing the highest growth, aside from data and airtime top-up, were clothing, at 56%, and groceries, at 54%.

Cybercrime and cybersecurity

Cyberspace comes with new types of challenges to governments of the world and it, therefore, introduces a further dimension to national security.

The cyberworld is a borderless platform that enables more sophisticated threats such as cybercrime, cyberterrorism, cyberwar and cyber-espionage. For this reason, cyberthreats need to be addressed at both the global and national levels.

The National Cybersecurity Hub is South Africa's National Computer Security Incident Response Team, and strives to make cyberspace an environment where all South Africans can safely communicate, socialise, and transact in confidence. It offers alerts and warnings, announcements, security-related information dissemination, incident-handling and incident response support as services to its constituents.

These services can be categorised as proactive, reactive and social services. Incidents are logged via the National Cybersecurity Hub website and depending on their evaluation, they are timeously resolved or escalated to other agencies for further investigation.

Mobile communications

South Africa has one of the largest telecommunications markets on the continent. It has four mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile.

Mobile phones are the dominant technology for voice and data communication among base of pyramid (BoP) users and for informal businesses. People in this group access the Internet mostly via their mobile phones and smartphones because they have taken over functions that used to be performed by computers. Users are also finding innovative ways to bypass expensive cellphone SMS rates by using Facebook Zero or other instant message services such as WhatsApp.

Although half of the South African population lives below the poverty line, more than 75% of those in low-income groups, who are 15 years or older, own a mobile phone. In terms of mobile ownership at the BoP, households with an income of less than R432 per month, per household member, is relatively high, compared to other African countries. This is according to research commissioned by infoDev, a global partnership programme within the World Bank Group, about the use of mobile phones amongst BoP users.

About 98.5% low-income groups who own mobile phones in South Africa have a prepaid SIM card, but there is a small percentage (1.5%) of BoP mobile owners who have post-paid contracts.

According to the GHS 2019, nationally, only 3.8% of households did not have access to either landlines or cellular phones. Households without access to these communication media were most common in the Eastern Cape (9.3%) and Northern Cape (8.7%). About 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 the 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.

PostNet

PostNet is South Africa's largest privately-owned counter network in the document and parcel industry, trading across more than 400 owner-managed retail stores. It serves in excess of 70 000 walk-in customers per day, countrywide. There are five product types within PostNet: courier, copy and print, digital, stationery and mailboxes.

The media

South Africa has vibrant and independent media. According to the Bill of Rights, everyone has the right to freedom of expression, which includes:

- freedom of the press and other media;
- freedom to receive or impart information or ideas;
- freedom of artistic creativity; and
- academic freedom and freedom of scientific research.

Several laws, policies and organisations act to protect and promote press freedom in South Africa.

Radio

Radio is a great communications medium and still enjoys the broadest reach of any media category in South Africa. The diversity of stations, formats, voices and offerings ensures that most of the public's needs are catered for.

It also fulfils a vital need for information and entertainment, with relatively low costs to the distributors and the listeners. As a communication medium, radio has very few barriers to access. SABC radio has more than 25 million listeners weekly in South Africa.

The fact that radio cuts across boundaries of illiteracy strengthens the importance of the medium to the consumer and the advertiser.

The SABC's national radio network comprises 18 radio stations, of which 15 are dedicated specifically to public service broadcasting. These include 11 full-spectrum stations, one in each of the official languages of South Africa: a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English; and a community station broadcasting in the !Xu and Khwe languages of the Khoisan people of the Northern Cape.

The SABC has three stations in its commercial portfolio. These are 5FM, Metro FM and Good Hope FM. Channel Africa broadcasts live on three platforms: shortwave, satellite and the Internet. Its broadcasts are in Chinyanja, Silozi, Kiswahili, English, French and Portuguese.

Commercial radio stations

Commercial radio stations in South Africa include:

- YFM
- 702 Talk Radio
- Metro FM
- 5FM
- Channel Africa
- Good Hope FM
- 567 Cape Talk
- Radio 2000
- Capricorn FM
- Radio KFM
- Lotus FM
- X-K FM
- TruFM
- RSG
- Power 98.7.

Radio platforms such as 94.2 Jacaranda FM, 94.7 Highveld Stereo, OFM, Algoa FM, Classic FM, Kaya FM and East Coast Radio were initially SABC stations, but were sold to private owners to diversify radio ownership in South Africa as part of the transformation of the public broadcaster. Many of South Africa's radio stations are also available online.

Community radio

Community broadcasting remains an important project for the South African Governmemt. From the early days of Cape Town's Bush Radio, Africa's oldest community radio station project, to today's broadcasting landscape which boasts more than 200 stations across the country's nine provinces, community radio has provided communities with an indispensable platform from which to raise awareness of their grassroots issues, irrespective of race, gender, disability or economic class.

Still a relatively youthful sector, community radio can trace its origins back to Bush Radio, the idea for which started in the 1980s when community activists and alternative media producers explored ways in which media could be used for social upliftment. The radio was officially formed in 1992, broadcasting illegally, following numerous attempts to apply for a broadcast license from the apartheid government.

It was however only after the first democratic elections of 1994 that South Africa saw the liberalisation of the airwaves with the establishment of an independent regulator, the Independent Broadcasting Authority, now the ICASA.

Television

The SABC's TV network comprises of three free-to-air channels and two other channels carried on a subscription digital satellite network. South African TV is broadcast in all 11 official languages and in sign language.

Community TV

Soweto TV was the first community TV station to obtain a seven-year broadcasting licence from ICASA in 2007. Since then, more seven-year licences have been issued to stations operating in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay. The issuing of new community TV licences is on hold until the migration from analogue to digital broadcasting is complete.

Free-to-air TV

eMedia Holdings owns e.tv – South Africa's first private, free-to-air TV channel, launched in 1998. It is the largest English-medium channel in the country and third-largest overall.

e.tv 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. The company launched a 24-hour news channel on the DStv platform, eNews Channel Africa (eNCA) in 2008.

Satellite broadcasting

MultiChoice started as the subscriber management arm of M-Net. It is the leading multichannel digital satellite TV operator across the African continent. MultiChoice provides its DStv services to different market segments. The DStv bouquets cater for different lifestyles and pockets, from entry level to premium.

StarSat offers three main packages and multiple add-on packages that viewers can use to customise their experience.

eSat.tv (branded eNCA) supplies TV, mobile and online news to various channels in South Africa, including the 24-hour eNCA (Channel 403). The company provides live news bulletins to viewers each night on e.tv in English, on eKasi+ in IsiZulu (available on OpenView HD) and on kykNET through eNuus in Afrikaans (available on DStv).

Newzroom Afrika is a premier South African 24-hour TV news channel on the DStv Platform (Channel 405).

Print

Technical handling of the print media in South Africa rates among the best in the world. This is one reason why newspapers and magazines have held their own in a volatile information era, characterised by the vast development of various new forms of media-delivery platforms via the Internet.

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include:

- Media24 (part of Naspers, the largest media group in Africa);
- Independent News & Media (Pty) Ltd group;
- Caxton Publishers & Printers Ltd; and
- Arena Holdings.

Other important media players include:

- M&G Media Ltd;
- The Natal Witness Printing & Publishing Company (Pty) Ltd;
- Primedia Publishing Ltd;
- Ramsay Media; and
- Kagiso Media.

Some of the prominent daily and weekly newspapers in South Africa include, *The Sunday Times, Citizen, Sowetan, The Daily Sun, The Witness, Sunday World, City Press, The Weekly Mail and Guardian, Beeld, Pretoria News, The Star, Die Burger, The Cape Argus, Cape Times, Son, Daily Dispatch, The Herald, The Daily News, The Mercury, The Witness, Business Day, Die Volksblad, Diamond Fields Advertiser, Isolezwe, Rapport, Sunday Tribune, Sunday Sun, Ilanga, The Post* and *Soccer Laduma.*

Magazines

Some of the prominent magazines in South Africa are: *The Financial Mail, Finweek, Entrepreneur, Forbes Africa,* *Noseweek, BusinessBrief, Leadership, Farmer's Weekly, Landbouweekblad, Plaastoe, Veeplaas, Personal Finance, TV Plus, Drum, Huisgenoot, YOU, The Big Issue, Taalgenoot, Leisure, Easy DYI, Sarie Kos, Elle, Decoration, SA Home Owner, Tuis Home, VISI, Woolworths' Taste, Fresh Living/ Kook en Kuier, Braintainment, Destiny Man, Blaque Magazine, GQ, Men's Health, Popular Mechanics, Stuff, Tjop & Dop, Amakhosi, Kick Off, Golf Digest, Compleat Golfer, Magnum's Game, Hunt/Wild, Jag, SA Hunter, Zigzag, Modern Athlete, CAR, Leisure Wheels, Drive Out/WegRy, Auto Trader, Bike SA, SA 4x4, Speed and Sound, Getaway, Weg/Go, Glamour, Elle, Fair Lady, Finesse, Destiny Magazine, Ideas/Idees, Leef, Move!, True Love, Fitness Magazine, Kuier, Marie Claire, Sarie, Women's Health* and *Longevity.*

In 2020, South Africa's print media said goodbye to a number of magazines, including *Cosmopolitan SA,* which was published by Associated Media Publishing – one of the largest independent media houses in South Africa. The company announced that it would be closing down from 1 May 2020 due to challenges presented by the COVID-19 outbreak. The company also published *House & Leisure* and *Good House Keeping* magazines.

Caxton Publishers, which houses at least 10 of the country's most iconic magazines, announced similar news in May 2020. Affected magazines included *Bona, People, Women & Home, Country Life, Essentials, Food & Home, Garden & Home, Rooi Rose, Vrouekeur* and *Your Family.*

Media organisations and role players

The non-profit-making Print and Digital Media South Africa (PDMSA) was originally formed to bring together under one roof, publishers of diverse print genres. The PDMSA recognised the advantages of extending its footprint online by extending its membership to include digital media publications.

The purpose of the PDMSA is to represent, promote, interact with and intervene in all matters concerning the collective industry and of common interest. It represents more than 700 newspaper and magazine titles in South Africa.

The PDMSA is a member of a number of international bodies such as the World Association of Newspapers and the Federation of Periodical Press. Allied to the PDMSA, but not a constituent member, is the Audit Bureau of Circulations, responsible for auditing and verifying print media circulation figures.

The Association of Independent Publishers (AIP) represents the interests of more than 250 independent publishers in southern Africa.

The South African National Editors' Forum (SANEF) was formed at a meeting of the Black Editors' Forum, the Conference of Editors and senior journalism educators and trainers, in October 1996.

SANEF membership includes editors and senior journalists from the print, broadcast and online/Internet media, as well as journalism educators from all the major training institutions in South Africa.

The Forum of Black Journalists addresses issues that directly affect its members.

Members of the public who have complaints or concerns about reports in newspapers and magazines can submit their grievances to the Office of the Press Ombudsman. Should they not be satisfied with the resultant ruling, they can lodge an appeal with an independent appeal panel. The Office of the Press Ombudsman was set up by the PDMSA, SANEF and the Media Workers' Association of South Africa.

The Freedom of Expression Institute was established in 1994 to protect and foster the rights to freedom of expression and access to information, and to oppose censorship.

The Forum of Community Journalists is an independent body that represents, promotes and serves the interests of all community-newspaper journalists in southern Africa. The decision to become an independent body followed the restructuring of the Community Press Association into the AIP.

The Broadcasting Complaints Commission of South Africa is an independent self-regulatory body that serves as a voluntary watchdog, to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct. Members include the SABC, M-Net, Radio 702 and the Trinity Broadcasting Network. However, the commission does not deal with x-rated material, the broadcast of which is prohibited under criminal law.

Media Monitoring Africa (formerly Media Monitoring Project) 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 (NCRF) lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

The NCRF is a national, member-driven association of community-owned and run radio stations and support-service organisations.

Radio station members are independent, non-profit community-based organisations.

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,
- South African Guild of Motoring Journalists,
- Professional Photographers of South Africa,
- Media Institute of Southern Africa,
- Publishers' Association of South Africa, and
- Press clubs in major centres.

News agencies

The African News Agency, Africa's first syndicated multimedia content service, began publishing South African and international news stories in 2015. The main foreign news agencies operating in South Africa are:

- Reuters
- Agence France-Presse
- Associated Press
- Deutsche Presse Agentur
- United Press International.

Journalism and media awards

South Africa's most important awards include the:

- Mondi Shanduka Newspaper Awards,
- Vodacom Journalist of the Year Awards,
- South African Brfeweries Environmental Media and Environmentalist of the Year Awards,
- Sanlam Financial Journalist of the Year Award,

- CNN MultiChoice African Journalist Awards,
- Discovery Health Journalism Awards,
- SANEF's Nat Nakasa Award, and
- Local Media Excellence Awards.

Advertising

South Africa has a vibrant and dynamic advertising industry. Local advertising agencies are often recognised internationally for their excellence.

Advertising Standards Authority (ASA)

The ASA is the protector of the ethical standards of advertising in South Africa, and protects consumers against manipulative advertising and unfair claims.

It is an independent body established and funded by the marketing communication industry to manage advertising in the public interest by means of self-regulation.

The ASA cooperates with government, statutory bodies, consumer organisations and industry to ensure that advertising content complies with the Code of Advertising Practice.

The code is the ASA's guiding document based on the International Code of Advertising Practice, prepared by the International Chamber of Commerce.

Drawn up by the ASA with the participation of representatives of the marketing communication industry, the code is amended from time to time to meet the changing needs of the industry and the South African society.

Public relations

Public Relations Institute of Southern Africa (PRISA)

Established in 1957, the PRISA represents professionals in public relations and communication management throughout the southern African region and has registered practitioners in Botswana, Namibia, Lesotho, Eswatini and South Africa.

It is a founding member of the Global Alliance for Public Relations and Communication Management, and initiated the formation of the Council for Communication Management in South Africa. The council is the coordinating body representing various groupings of professionals in South Africa.

PRISA plays a leading role in uniting professionals and driving transformation. As the recognised leader of the public relations and communication management profession in southern Africa and beyond, PRISA provides the southern African industry with the local professional advantage.