



OFFICIAL GUIDE TO
South Africa
2018/19
Communications



Department of Communications (DoC) and Digital Technologies (DCDT)

Following the reconfiguration of government departments in June 2019, the DoC was merged with the Department of Telecommunications and Postal Services (DTPS) to form the new DCDT.

The then DoC was spearheading the process of migrating broadcasting signals from analogue to digital. South Africa's national digital network coverage comprises DTT transmission coverage of 84% of the population with the remaining 16% to be covered by satellite network. DTT is a reliable and cost-efficient means to distribute linear TV content and has many advantages over the analogue broadcasting system. One of its major advantages for communities is that it clears the analogue spectrum for the delivery of broadband mobile Internet and Wi-fi services.

To view digital TV signals on an ordinary analogue TV set, consumers will need a set-top box (STB). Government will provide about five million poor TV-owning households with free STBs. Once the migration is complete, high definition TV telecast facilities would be available, along with expanded community, FM and satellite radio services to the entire population.

During the 2017/18 financial year, the then DoC developed the *White Paper on Audio-Visual and Digital Content Policy for South Africa*, which provides enabling mechanisms to facilitate ownership of the new audio-visual digital content value chain by previously disadvantaged communities and small, medium and micro enterprises.

Fourth Industrial Revolution (4IR)

In 2018, Communications (and Digital Technologies) Minister Stella Ndabeni-Abrahams announced the “Building a Capable 4IR Army” capacity development programme to ensure that communities are equipped to take advantage of new digital technologies, unlock future jobs and drive competitiveness. One million young people will be trained in data science and related skills by 2030.

By mid-2019, through a partnership with the Media, Information and Communication Technologies Sector Education and Training Authority, 1 000 young people were being trained on Data Science, Digital Content Production, 3D Printing, Cybersecurity, Drone Piloting, Software Development and Cloud Computing.

Though various support programmes such as the South Africa Research Chairs initiative and other targeted human capital development initiatives, the Department of Science and Innovation is building essential capability in all technology areas underpinning the 4IR.

These include programmes in data science and analytics, blockchain and distributed ledger technologies, additive manufacturing, artificial intelligence, robotics, quantum technologies.

Since access to broadband and connectivity is a lever to socio-economic inclusion and an absolute necessity, government aims to connect the 22 million unconnected people in the country through the Broadband Connectivity initiative.

In April 2019, President Cyril Ramaphosa established the 31-member Presidential Commission on the 4IR. The commission is mandated to advise government on 4IR policies, develop a framework for implementation of a multisectoral 4IR strategy; and coordinate, monitor and evaluate multisectoral initiatives that will position South Africa as a globally competitive player in 4IR.

Film and Publication Board

The FPB regulates and controls the creation, production, possession, exhibition and distribution of certain films, interactive computer games and publications in terms of the Films and Publications Act of 1996. The board is also responsible for monitoring age restricted business premises for compliance with their licence and registration terms.

The Act recognises the right of adults to freedom of expression, except with respect to child pornography, and requires the board to intervene where there is a risk of harm to children.

The board spearheads a national anti-child-pornography campaign to educate learners about ways to avoid victimisation. Child-pornography websites can be reported by calling the board's toll-free number 0800 148 148.

This system will also allow distributors to renew their licences.

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. The regulator's mandate is defined in the Electronic Communications Act of 2005 as licensing and regulating electronic communications and broadcasting services, and in the Postal Services Act of 1998 as regulating the postal services sector.

Enabling legislation also empowers the regulator 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.

South African Broadcasting Corporation

The SABC is one of the key institutional pillars of our democracy, delivering essential content to millions of South Africans on multiple platforms. To this end, the SABC contributes to the strengthening of democracy by promoting nation-building and social cohesion, through compelling and accessible local content programmes. The SABC manages 18 radio stations and three television channels.

Department of Telecommunications and Postal Services

Following the reconfiguration of some government departments in June 2019, the DTSPS was merged with the DoC to form the new DCDT.

The then DTSPS was mandated to develop Information and Communications Technology (ICT) policies and to ensure the development of robust, reliable, secure and affordable ICT infrastructure. The department also contributes to building an ICT skills base in the country to ensure equitable prosperity and global competitiveness.

The NDP envisages that by 2030, the ICT sector will underpin the development of a dynamic and connected information society, and a vibrant knowledge economy that is inclusive and prosperous. Drawing from this vision, the contributes to Outcome 6 (an efficient, competitive and responsive economic infrastructure network) of government's 2014-2019 MTSF by ensuring that ICT infrastructure and services are accessible, affordable, robust, reliable and secure.

The six state-owned enterprises under the DCDT are the South African Post Office (SAPO), Sentech; National Electronic Media Institute of South Africa (NEMISA); Universal Service and Access Agency of South Africa (USAASA); .za. Domain Name Authority (ZADNA); Universal Service and Access Fund (USAF); Broadband Infracore and SITA.

South African Post Office

The SAPO provides postal and related services to the public. Post offices offer South Africans a convenient place to accept and deliver cash-on-delivery items, which is a very important service in rural communities where some people shop from catalogues.

In addition, more than a million South Africans walk through the doors of post offices near where they live to access their social grants.

Post offices also offer services that include enabling South Africans to renew their vehicle registration, and pay their municipal accounts and TV licences.

The Philatelic Services of the SAPO is responsible for producing South Africa's postage stamps and other stamp-related products. Over the years, many of them have become valuable collector's items.

The Postbank caters for the banking needs of the unbanked majority, thus facilitating their inclusion into the economic mainstream and expanding the existing range of banking services.

Sentech

Sentech is mandated to provide common carrier broadcasting signal distribution services to licensed broadcasters in South Africa. The company's mandate has since been expanded to provide international voice services and common carrier multimedia services in accordance with government's imperative to liberalise the telecommunications sector.

National Electronic Media Institute of South Africa

NEMISA offers national certificates and short courses in the areas of television production, animation and radio production. The institute's programmes are structured to enhance the market readiness of students in a wide range of broadcasting disciplines.

Universal Service and Access Agency of South Africa

The sole mandate of USAASA is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services.

.za.Domain Name Authority

ZADNA is a non-profit company that manages and regulates the .za namespace. It is accountable to the DTSPS, but does not receive government funding.

Universal Service and Access Fund

The USAF's sole mandate is to make payments for subsidies towards the provision of ICT equipment and services, and construct and extend electronic communication and broadcasting networks for needy persons in underserved areas. The fund is managed by USAASA and is financed by contributions from all telecommunications licensees except community broadcasting service licensees.

Broadband Infraco

Broadband Infraco is intended to improve market efficiency in the long distance connectivity segment by increasing available long distance network infrastructure. It will also avail capacity to stimulate private sector innovation in telecommunications services and content offerings.

Broadband Infraco provides long distance national and international connectivity to licensed private sector partners, licence-exempt projects of national importance and to previously underserved areas.

State Information Technology Agency

SITA consolidates and coordinates the State's information technology (IT) resources in order to achieve cost savings through scale, increase delivery capabilities and enhance interoperability.

SITA is committed to leveraging IT as a strategic resource for government, managing the IT procurement and delivery process to ensure that government gets value for money. The agency also uses IT to support the delivery of e-Government services to all citizens.

It serves as the IT business for the largest employer and consumer of IT products and services in South Africa – the South African Government.

Communication platforms

Radio

The SABC's national radio network of 18 radio stations command a 70.5% share of the market, translating to 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
- 94.7 Highveld Stereo
- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda 94.2
- OFM
- East Coast Radio
- 567 Cape Talk
- Radio 2000
- Capricorn FM
- Power FM
- Radio KFM.

Stations such as Jacaranda 94.2, Highveld Stereo, Radio Oranje, Radio Algoa 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 available online.

Television

TV remains the medium of choice for most South Africans. According to Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2018, more than four-fifths of households in the country owned TV sets (82,2%) in 2018.

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 as it aspires to be a Pan-African channel.

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 and 1990s, is an integral part of the SABC's strategy moving into a multi-channel environment.

Community TV

Soweto TV was the first community TV station to obtain a seven-year broadcasting licence from ICASA. There are five community TV stations operational in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay.

FTA TV

e.tv, which was launched in 1998, is South Africa's first private FTA TV channel. It is the largest English-medium channel in the country and the second 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. Kwesé Free TV, the second entry in the FTA market, obtained its broadcast licence in 2019.

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 also has its own 24-hour news channel on DStv (Channel 404). Newzroom Afrika, the new 24-hour TV news station on DStv channel 405 which replaced ANN7, was launched in May 2019.

Internet

Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2018 shows that about 64,7% of South

African households had at least one member who had access to, or used the Internet either at home, work, place of study or Internet cafés.

Access to the Internet using all available means was highest in Gauteng (74,6%), Western Cape (72,4%) and Mpumalanga (70,2%), and lowest in Limpopo (46,2%) and Eastern Cape (55,3%).

Marginally over one-tenth (10,4%) of South African households had access to the Internet at home. Access to the Internet at home was highest among households in Western Cape (25,8%) and Gauteng (16,7%), and lowest in Limpopo (1,7%) and North West (3,0%).

Household access to the Internet at home was highest in Western Cape (25,8%) and Gauteng (16,7%) and lowest in Limpopo (1,7%). While 17,3% of households in metropolitan areas had access to the Internet at home, this was true for only 1,7% of rural households in general and less than one per cent of rural households in North West (0,8%) and Limpopo (0,6%).

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 and Western Cape were most likely to access the Internet at work while those in Limpopo 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. Mobile access to the Internet has made it much more accessible to households in rural areas.

Nationally, Internet access using mobile devices (60,1%) was much more common than access at home (10,4%), at work (16,2%) and elsewhere (10,1%). Although the use of mobile Internet access devices in rural areas (45,0%) still lags behind its use in metros (67,5%) and urban areas (63,7%), it is much more common in rural areas than any of the alternative methods.

According to *Media Update*, an online publication dedicated to reporting on, among others, the latest news and information relevant to the South African (and African) advertising and marketing; media and entertainment; and social media industries, the average South African spends eight hours and 25 minutes a day on the Internet. This is higher than the global average of six hours and 41 minutes.

In 2019, over 31 million people in South Africa were using the Internet (54% of the population), up from the 30.8 million people in 2018.

Social media

The online *Media Update* publication states that 40% people in South Africa use social media (23 million people), below the global average of 45% but five million more people than in 2018.

On average, South Africans spend two hours and 48 minutes on social media, above the global average of two hours and 16 minutes. The publication further states that South Africans have an average of eight social media accounts, with WhatsApp being the most popular messaging app in the country.

According to *Media Update*, the reasons why people join social media include the following:

- **40%:** to stay up-to-date with current events and news;
- **39%:** to stay in touch with what friends are doing;
- **38%:** to find funny or entertaining content;
- **37%:** to fill up spare time;
- **33%:** general networking of other people;
- **32%:** to share photos and video with others;
- **31%:** to research/find products to buy; and
- **30%:** because a lot of friends use social media.

Cybercrime and cybersecurity

Identity fraud, stalking, online child pornography and terrorism have become daily occurrences that threaten communities' ability to enjoy the benefits of new technologies.

A 2018 study conducted by the University of the Western Cape confirmed that, among those studied, South Africa is one of the 10 most vulnerable countries on the globe at risk to cyber-attacks.

Government continues to improve the implementation of a coordinated, capacitated and resourced state-led national response and the implementation of the National Cybersecurity Policy Framework as an effort to fight cybercrime and improve the country's global rating on Cyber Security.

Telecommunications

South Africa has five major mobile operators, namely CellC, MTN, Vodacom, Telkom Mobile and Virgin Mobile.

According to Stats SA's GHS of 2018, nationally, only 3,4% of households did not have access to either landlines or cellular phones. Households without access to these communication media were most common in Northern Cape (10,3%) and Eastern Cape (7,6%). Only 0,1% of South African households used only landlines.

By comparison, 89,5% of South African households exclusively use cellular phones. The exclusive use of cellular phones was most common in Mpumalanga (96,5%), Limpopo (94,5%), North West (92,1%) and Gauteng (90,7%).

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 (7,8%).

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, the largest media group in Africa), the Irish-based Independent News & Media (Pty) Ltd group, Caxton Publishers & Printers Ltd and Tiso Blackstar Group. Other important media players include M&G Media Ltd; the Natal Witness Printing & Publishing Company (Pty) Ltd; Primedia Publishing Ltd; Highbury Media; Ramsay 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 **Print and Digital Media South Africa (PDMSA)** is an umbrella body incorporating print and digital media.

By mid-2019, the PDMSA membership included more than 700 newspaper and magazine titles that cater for four different language groups.

The members include Tiso Blackstar Group; Caxton and CTP; Independent Newspapers; Media24; *Mail & Guardian*, and the Association of Independent Publishers.

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
- Standard Bank Sikuville 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
- APEX Awards.

