

SOUTH AFRICA YEARBOOK 2017/18

# Communications



South Africa's combined information and communications technology (ICT) sector and general communication between government and citizens as well as between citizens and the private sector is governed by three bodies:

- The Department of Communications (DoC)
- Government Communication and Information System (GCIS)
- The Department of Telecommunications and Postal Services (DTPS).

## Department of Communications

The Ministry of Communications is responsible for the overarching communications policy and strategy, information dissemination and publicity, as well as the branding of the country abroad.

The DoC comprises the following entities: Brand South Africa (Brand SA); the Film and Publication Board (FPB); the Independent Communications Authority of South Africa (ICASA), the Media Development and Diversity Agency (MDDA) and the South African Broadcasting Corporation (SABC).

The vision of the DoC of providing vibrant and sustainable communication services for an informed citizenry and a positive image of South Africa supports its mission of creating an enabling environment for the provision of inclusive communication services to all South Africans; in a manner that promotes socio-economic development and investment through broadcasting, new media, print media and new technologies, and brand the country locally and internationally.

The DoC is responsible for the national communications policy and strategy; information dissemination and publicity; and the branding of South Africa. Improved communication and marketing will promote an informed citizenry and assist the country in promoting investments, economic growth and job creation. The department's mandate is derived from section 192 of the Constitution, which provides for the independence of broadcasting regulation in the public interest, the International Telecommunications Union and the World Intellectual Property Organisation.

The National Development Plan (NDP) envisages an active citizenry that participates in the social, economic and political life of the country. This is given expression by outcome 14 (nation building and social cohesion) of government's 2014-2019 medium-term strategic framework, which is closely aligned with the work of the Department of Communications. Over the medium term, the department will continue to focus on transforming the communications sector through the rollout of the digital terrestrial television (DTT) project, developing responsive communications policies and regulatory frameworks, and effectively overseeing public entity within the communications sector.

Migration to digital terrestrial broadcasting is expected to have a positive impact on South African society as it will provide for an informed citizenry that is responsive to the needs, challenges and opportunities of the country. Once the migration is complete, high definition television telecast facilities will be available, along with expanded community, FM and satellite radio services to the entire population. In this regard, the implementation of the department's digital terrestrial migration project will be monitored to ensure that 1,5 million set-top boxes and other devices related to digital terrestrial television are installed over the MTEF period.

To eliminate cross border interference during the migration process, provinces that border neighbouring countries (Mpumalanga, Limpopo, KwaZulu-Natal, Eastern Cape, Free State, Northern Cape and North West) will be targeted first. Over the medium term, the department plans to compile 12 reports on consumer access to digital broadcasting; coordinate 30 public awareness and registration campaigns in provinces; target non-subsidised households that rely on the retail market to acquire digital terrestrial devices; and conduct national, provincial and regional road shows to raise awareness and communicate timelines associated with the rollout process.

The DoC is spearheading the process of migrating broadcasting signals from analogue to digital. South Africa's national digital network coverage comprises digital terrestrial television (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 financially disadvantaged TV-owning households with free STBs.

South Africa was given until June 2015 to meet the International Telecommunications Union's deadline to switch off analogue transmitters as part of the broadcasting digital migration project. However, the project was delayed following a court ruling that declared part of the digital migration policy unlawful and invalid, and effectively placed the manufacture of digital terrestrial TV STBs on hold.

As a result of the delay, Sentech continued to maintain both the analogue and digital platforms until the issue was resolved. The Analogue Switch-Off Event took place in Carnarvon, Northern Cape in October 2016.

During the 2017/18 financial year, the 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.

## DoC legislation

The department is responsible for the administration and implementation of the following legislation:

- The Films and Publications Act, 1996 (Act 65 of 1996).
- The Broadcasting Act, 1999 (Act 4 of 1999).
- The MDDA Act, 2002 (Act 14 of 2002).
- The ICASA Act, 2000 (Act 13 of 2000).
- The Electronic Communications and Transactions Act, 2002 (Act 25 of 2002).
- The Electronic Communications Act, 2005 (Act 36 of 2005).

## DoC entities

### Brand SA

Brand SA develops and implements a proactive and coordinated international marketing and communication strategy for South Africa to contribute to job creation and poverty reduction; and to attract inward investment, trade and tourism.

The new slogan, "South Africa: Inspiring New Ways", represents the next phase of the country's development, where South Africa has moved from possibility to delivery, and is now an important regional power.

Internationally, Brand SA lobbies and networks extensively among global opinion leaders to shift perceptions about the country and the continent.

Being a member of the Brazil-Russia-India-China-South Africa (BRICS) trade bloc, for example, provides a platform to engage and influence perceptions.

Brand SA also regularly brings groups of international journalists to the country to interact with government and business representatives, experience local life and culture, and learn about the country's latest technological developments.

## Film and Publication Board

The FPB assists the public to make informed choices about whether a particular film is appropriate by displaying guidelines that identify classifiable elements such as strong language, violence, sex, nudity, drug abuse, blasphemy and religious prejudice.

The Films and Publications Act of 1996 recognises the right of adults to freedom of expression with the exception when it comes to child pornography; it therefore 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.

Over the medium term, the FPB will focus on:

- informing and educating society to empower adults and protect children against harmful content
- implementing compliance as well as monitoring and evaluation
- developing leading-edge technology to perform online content regulation, classify content for films, games and adult publications
- conducting research on the impact of content on the public.

In this regard, the FPB was allocated R86,4 million in 2016/17.

The Film and Publication Board 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 (1996).

The board is also responsible for monitoring age restricted business premises for compliance with their licence and registration terms.

### Independent Communications Authority of South Africa

ICASA was established in July 2000 as a merger of the telecommunications regulator, the South African Telecommunications Regulatory Authority and the Independent Broadcasting Authority.

The ICASA Amendment Act, 2014 (Act 2 of 2014) provided for the additional incorporation of the Postal Regulator into ICASA. It also increased ICASA's council complement from seven to nine councillors.

ICASA is responsible for regulating the telecommunications, broadcasting and postal industries in the public interest and ensure affordable services of a high quality for all South Africans. ICASA is further tasked with:

- issuing licences to telecommunications and broadcasting service providers
- enforcing compliance with rules and regulations
- protecting consumers from unfair business practices and poor quality services
- hearing and deciding on disputes and complaints brought against licensees
- controlling and managing the effective use of radio frequency spectrum.

ICASA is a Chapter 9 institution in terms of the South African Constitution and is an entity of the DoC.

The NDP recognises the need for universal access to and the availability of a wide range of services at a cost and quality at least equal to South Africa's main peers and competitors. Over the medium term, ICASA will focus on increasing access to wireless broadband services to meet the demand for them;

protecting consumers against harmful practices employed by operators in the use of premium-rated services; increasing competition in the telecommunications and broadcasting sector; and developing a framework for dynamic spectrum management.

The authority contributes to outcome 14 (nation-building and social cohesion), and indirectly to outcome 6 (an efficient, competitive and responsive economic infrastructure network) and outcome 12 (an efficient, effective and development oriented public service), of government's 2014-2019 medium-term strategic framework.

The authority plans to increase competition in the telecommunications and broadcast sector by regulating the industry and making sure that all licensees have equal opportunities. The authority plans to protect consumers against harmful practices employed by operators in the use of premium rated services by reviewing the number of portability regulations in the telecommunications sector.

In the commercial broadcasting sector, the authority is set to license the multiplex 3 frequency spectrum and free to air television services. These activities are budgeted for in the licensing programme with an allocation of R168,3 million over the medium term.

To promote competition in the sector, the authority seeks to increase access of the high demand spectrum from the current 566.695MHz to 890.305MHz by 2020/21. Access to spectrum will enable the authority to rollout wireless broadband infrastructure by licences.

To meet the demand for wireless broadband services, the authority is set to increase mobile network coverage by 15% and extend network traffic measurements to include data and voice calls. The authority also plans to obtain inputs from the 5G Forum global network, and update the national radio frequency plan and radio frequency migration strategy.

### Media Development and Diversity Agency

The MDDA promotes media development and diversity to ensure that all citizens can access information in a language of their choice; and to transform media access, ownership and control patterns in South Africa. It was established in terms of the MDDA Act of 2002.

A public-private partnership, the MDDA's mandate is to promote media development and diversity by providing the most disadvantaged, those traditionally sidelined by the mainstream media, access to information in the language of their communities.

The agency functions independently from and at arm's length of its funders and political-party and commercial interests. This arrangement enables Government, the media industry and

donors to work together to address the legacy of imbalances in media access.

Its mandate includes:

- creating an enabling environment for media development and diversity that reflects the needs and aspirations of all South Africans
- redressing exclusion and marginalisation of disadvantaged communities and people from access to the media and the media industry
- promoting media development and diversity by providing support primarily to community and small commercial media projects
- encouraging ownership and control of, and access to, media by historically disadvantaged communities as well as by historically diminished indigenous language and cultural groups
- encouraging the development of human resources and training as well as capacity-building within the media industry, especially among historically disadvantaged groups
- encouraging the channelling of resources to the community media and small commercial media sectors
- raising public awareness with regard to media development and diversity issues.

### South African Broadcasting Corporation

The SABC is the country's only public service broadcaster. An Act of Parliament established the SABC in August 1936. At its inception, the SABC only had one English radio station. In 1976, it launched the country's then first and only television channel.

The SABC is made up of 18 radio stations, which cater for the country's 11 official languages, as well as the iXun and Khwe language; and also four television channels, which include a 24-hour news channel.

The SABC, which is governed by the Broadcasting Act of 1999 (as amended), has developed editorial policies which guide and give direction to the corporation's public broadcasting mandate and licence conditions, as set by ICASA and the provisions of the Broadcasting Act of 1999.

The organisation's vision, "Broadcast for Total Citizen Empowerment", propels it in fulfilling its public-service mandate as a broadcaster.

The SABC remains South Africa's most accessible broadcaster and therefore government continues to support it to discharge its public broadcasting service mandate. The DoC has a duty to promote the growth and development of the local content industries to ensure that there is enough content for digital platforms in all 11 official languages.

Local television producers have been engaged, resulting in the appointment of commissioning editors in all nine provinces



where shooting and packaging of the content will be done. This is a radical shift from how the SABC used to commission content, where the shooting and packaging of content used to take place in main cities.

## Government Communication and Information System

The mandate of the GCIS is derived from Section 195(g) of the Constitution, which stipulates that the public should be provided with information that is timely, accurate and accessible.

This is in support of the constitutional principles of freedom of expression, transparency and openness of government. The department is responsible for providing strategic leadership and coordinating government communication to ensure that the public are informed and have access to government programmes and policies that benefit them.

Chapter 15 of the NDP emphasises the need to unite all South Africans around a common goal, ensure that citizens are active in their own development, and build a capable and developmental state.

This is given expression by Outcome 12 (an efficient, effective and development oriented public service) and Outcome 14 (nation building and social cohesion) of government's 2014-2019 MTSF, with which the work of the GCIS is closely aligned.

The department provides information about government policies, plans, programmes and activities to the public.

Among other things, the GCIS is responsible for maintaining government's website ([www.gov.za](http://www.gov.za)), which provides general information about government.

Among other products, the GCIS publishes the *South Africa Yearbook*, *Pocket Guide to South Africa*, *Vuk'uzenzele* newspaper, *Public Sector Manager* magazine and My District Today newsletter. It is also responsible for the South African Government News Agency, [SAnews.gov.za](http://SAnews.gov.za).

The Thusong Service Centre Programme enables communities to access government information and services.

Thusong Service Centres are one-stop centres providing integrated services and information from government and other civil society groups, to communities close to where they live as part of a comprehensive strategy to better their lives.

They also enable communities to access opportunities offered by other civil-society groups such as businesses, non-governmental organisations and parastatals.

The GCIS also gathers public opinion, research and analysis of media coverage to understand the communications environment and to inform government messages.

The department provides media bulk-buying services, which are designed to reduce the cost to government on advertising;

facilitate a rapid response mechanism to hasten government's response to issues arising in the media; and provide media production services to support other government departments.

The GCIS was expected to assist the Independent Electoral Commission in driving campaigns around voter registration and Department of Home Affairs on ensuring that citizens have the correct documents to vote in the 2019 General Elections.

In August 2018, Cabinet approved the Government Communication Policy, which seeks to establish norms and standards to professionalise and strengthen the government communication system. This applies to communication coordination and use of alternative media across the three spheres of government and across government departments at a national level

## Department of Telecommunications and Postal Services

The DTPS is mandated to develop 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 DTPS 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.

Over the medium term, the department will expand and modernise ICT infrastructure by implementing the South Africa Connect broadband policy, coordinating the migration to digital broadcasting, and implementing the legislative framework stemming from the 2016 *National Integrated ICT Policy White Paper*.

In 2018, the DTPS, through Broadband Infraco and State Information Technology Agency (SITA), started connecting government facilities in the eight districts which have been identified for the rollout of SA Connect, the country's broadband plan and strategy.

In 2017, the department gazetted the Electronic Communications Amendment Act for public comment, which among other things, creates the legislative environment for the establishment of the Wireless Open Access Network (WOAN). It also established the National Rapid Deployment Coordinating Centre to assist network providers by reducing time and costs for deploying their telecommunication infrastructure.

Cabinet approved the National e-Strategy, the e-Government

Strategy and the ICT SMME Development Strategy, which aims to accelerate the development, growth, and sustainability of small and medium enterprises in the ICT sector.

This is meant to stimulate the creation of jobs and for greater economic inclusion, while also aiming to enhance entrepreneurship, increase the usage of ICT tools for all small businesses, and to improve their profitability and competitiveness.

Cabinet approved the framework for the establishment of a State ICT Infrastructure Company and the State IT Company. The State ICT Infrastructure Company will be formed through the merger of Sentech and Broadband Infraco.

The State IT Company will be formed through the reconfiguration of SITA. The department will also facilitate and coordinate the implementation of the national e-strategy to realise the e-services programme. Finalising a national e-strategy will plan for the digital transformation of South Africa to achieve the ideals of the NDP by prioritising sectoral electronic services such as e-health, e-agriculture and e-education.

The six state-owned enterprises under the DTPS 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 Infraco and SITA.

## Legislation

The Electronic Communications Act of 2005 allows the Minister of Telecommunications and Postal Services to draft policies to fulfil South Africa's obligations under bilateral, multilateral and international treaties and conventions; set guidelines for the determination of certain licence fees by ICASA; promote universal service and electronic communications services in underserved areas; promote the participation of small business in the ICT sector; and enhance the capacity of and exercise oversight of SOEs.

In addition to the Electronic Communications Act of 2005, the department's mandate is derived from the following legislation:

- The Electronic Communications and Transactions Act of 2002.
- The Sentech Act, 1996 (Act 63 of 1996).
- The Postal Services Act, 1998 (Act 124 of 1998).
- The SAPO SOC Ltd Act, 2002 (Act 22 of 2011).
- The South African Postbank Limited Act, 2010 (Act 9 of 2010).
- The SITA Act, 1998 (Act 88 of 1998).
- The Broadband Infraco Act, 2007 (Act 33 of 2007).

## DTPS entities

### South African Post Office

SAPO is a Schedule 2 Public Entity in terms of the Public

Finance Management Act of 1999 (PFMA). It is a government business enterprise established to provide postal and related services to the public, and derives its mandate from the SAPO SOC Ltd Act of 2011 and the South African Postbank Limited Act of 2010.

The Postal Services Act of 1998 grants it an exclusive mandate to conduct postal services. This Act makes provision for the regulation of postal services and operational functions of the postal company, including universal service obligations and the financial services activities of Postbank.

The entity's strategic goals are to:

- maintain good corporate governance principles
- remain customer centric by providing quality services
- invest in employees by building capacity and implementing transformation programmes
- attain financial sustainability while delivering on Government's social mandate
- provide affordable postal and related services that meet the needs of customers
- remain environmentally conscious by promoting green practices
- provide a secure, efficient and integrated infrastructure for better responses to its stakeholders
- continue the corporatisation of Postbank and the upgrading of its banking systems.

Post offices have become important service-delivery centres, offering 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 television licences.

Over the medium term, the SAPO plans to focus on continuing to provide access to postal and related services, and increasing the number of addresses to allow wider access to postal and financial services in underserved areas.

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.

With effect from 30 September 2018, the SAPO took over the payment of social grants. The new gold card is safer and does not allow for illegal deductions and fraudulent transactions to take place.

It is designed to protect social grants beneficiaries from illegal deductions for things such as electricity, airtime and loans.

The only deductions that are permitted on the new gold South African Social Security Agency card are for funeral policies on non-child grants, which should also not be more than 10% of the total grant.

### Sentech

Sentech Limited is an SEO established in terms of the Sentech Act of 1996 and is listed as a schedule 3B public entity in terms of the PFMA of 1999. The company is mandated to provide broadcasting signal distribution for broadcasting licensees, with a particular focus on accelerating the implementation of government ICT interventions within the framework of the NDP and the strategic integrated project for expanding access to communication technology.

In 2002, the company's mandate was expanded to provide an international voice gateway and common carrier multimedia services in accordance with Government's imperative to liberalise the telecommunications sector.

The entity's strategic goals over the medium term were to:

- align its strategic roadmap with shareholder programmes to enable the development of open access government participation in the communications industry through infrastructure-based investment
- continue working to support and realise Government's ICT vision and goals, including innovation in broadcasting and media services, and content management and distribution
- create solutions that enhance the customer experience and are in line with Government's mandate of access to communication services for all citizens
- repackage social responsibility interventions and create community social investment ICT programmes that improve lives, create value and are sustainable.

Sentech derives commercial revenue from terrestrial television services, terrestrial FM and AM radio services, satellite linking, facility rentals and the sale of satellite decoders.

### National Electronic Media Institute of South Africa

NEMISA's vision is for South Africa to be an e-skilled society by 2030. Its mission is to provide a national integrated e-skills development framework for sustainable socio-economic development in South Africa and to radically advance the human capacity development in e-skills (digital skills).

NEMISA collaborates with relevant Post School Education and Training Institutions and other organisations offering e-skills programmes to maximise the use of existing infrastructure and resources and to ensure that education and training respond to the demands and needs for e-skills in the country.

### Universal Service and Access Agency of South Africa

USAASA is a public body as confirmed by Schedule 3A of the Public Finance Management Act 1 of 1999. The existence, functions, duties and mandate of the Agency are governed by sections 80 – 91 of the Electronic Communications Act 36 of 2005 which came into operation on 19 July 2006. The new amendments to the ECA, which have a direct bearing on governance of the Agency, came into operation on 21 May 2014.

The agency has the responsibility to:

- strive to promote the goal of universal access and universal service;
- encourage, facilitate and offer guidance in respect of any scheme to provide universal and access, universal services or telecommunication services in terms of the Reconstruction and development Plan (RDP);
- foster the adoption and use of new methods of attaining universal access and universal service;
- make recommendations to enable the Minister to determine what constitutes universal access, universal service and under served areas;
- conduct research into and keep abreast of developments in the Republic and elsewhere on information communication technology, electronic communications services and electronic communications facilities;
- continually survey and evaluate the extent to which universal access and service have been achieved;
- make recommendations to the Minister in relation to policy on any matter relating to universal access and universal service;
- advise the Authority (ICASA) on any matter relating to universal access and universal service;
- continually evaluate the effectiveness of this Act and things done in terms thereof towards the achievement of the goal of universal access and universal service;
- manage the Universal Service and Access Fund (USAF) in accordance with the provisions of the Act;
- submit annual reports in its operations, budget and expenses to the Minister;
- use the USAF exclusively for the payment of certain subsidies; and
- provide incentives to network licensees to construct operate and maintain networks in areas declared under-served by ICASA.

### State Information Technology Agency

SITA was established in 1999 to consolidate and coordinate the State's information technology resources in order to achieve cost savings through scale, increase delivery capabilities and enhance interoperability. SITA is committed to leveraging Information Technology (IT) as a strategic resource for

government, managing the IT procurement and delivery process to ensure that the Government gets value for money, and using IT to support the delivery of e-Government services to all citizens.

### **.za Domain Name Authority**

ZADNA is a not-for-profit company that manages and regulates the .za namespace. It is accountable to the DTPS, but does not receive government funding, which means it is exempt from complying with the PFMA of 1999.

The ZA Central Registry, through ZADNA's guidance and the African Union (AU) Commission, has made significant progress in its application for the right to establish and operate an Africa Internet namespace for the benefit of Africa.

ZADNA has also ensured that Cape Town, Durban and Johannesburg are not left behind in the Internet revolution, which will bring about new website addresses such as hotels.capetown, tourism.durban and business.johannesburg.

The ZA Central Registry, formerly known as UniForum SA, was established as a non-profit organisation in 1988 by a group of end users, developers, and vendors. It was assigned the responsibility of administering the co.za domain name space in 1995, three years after the first co.za domain name was registered.

The World Wide Web started to take off globally, and the number of co.za domain name registrations rose rapidly. In 1995, the co.za zone contained in the region of 400 entries. Today there are 1,1 million domains.

According to the ZA Central Registry, co.za ranks as a medium to large zone and within the top 30 registries worldwide in terms of size.

### **Telkom**

Telkom is Africa's largest integrated communications company, providing integrated communications solutions to nine different countries across Africa. The organisational structure comprises three major business units: Telkom South Africa, Telkom International and Telkom Data Centre Operations.

It is listed on the Johannesburg Stock Exchange Ltd and majority-owned by the DoC. Telkom was the country's only fixed-line operator until 2006, when the country's second fixed-line operator, Neotel, began its operations.

According to international auditing and tax advisory powerhouse PwC, Telkom will continue to dominate the fixed broadband market in South Africa, with DSL subscriptions forecast to reach 1,66 million by the end of 2018. Total fixed broadband subscriptions in South Africa are forecast to number 2,06 million by the end of 2018.

According to Statistics South Africa's (Stats SA) General

Household Survey (GHS) 2017, only 0,1% of households had only a landline.

### **Broadband Infraco**

Broadband Infraco sells high-capacity long-distance transmission services to licensed fixed and mobile network operators, internet service providers and other value-added network service providers.

In 2016/17, Broadband Infraco expanded its network to more than 14 900 km of fibre. It optimised 41 points of presence to enable third parties to access to its network. In 2017/18, Broadband Infraco will continue to aggregate state network services and lead in connecting sites in pilot districts.

To enhance South Africa's international connectivity and the speed of broadband, Broadband Infraco has co-invested with the private sector in the deployment of the West African Cable System (WACS).

The WACS is the fifth submarine cable system linking South Africa to the world. Broadband Infraco's investment in the WACS entitled it to 11,4% of the system's total capacity, which would help South Africa meet its target of providing broadband connectivity to all who need it by 2020.

The cable system has 15 established terminal stations en route, and will reduce the cost to connect Africa's west coast with the high-speed global telecommunications network for years to come.

### **South African Accreditation Authority**

The South African Accreditation Authority was established in terms of the Electronic Communications and Transactions Act of 2002. The authority is responsible for the accreditation of authentication and certification products and services used in support of electronic signatures.

It is also concerned with monitoring of the activities of authentication and certification service providers whose products or services have been accredited within the Republic of South Africa.

The Director-General of the DTPS is appointed as the South African Accreditation Authority, and may appoint Deputy South African Accreditation Authorities and officers from employees of the department after consultation with the Minister.

### **Programmes and initiatives**

#### **Broadband infrastructure development**

Broadband is an essential digital resource for accessing basic services, products, commerce and job creation. It has the potential to create job opportunities and open new markets that will allow businesses – particularly small, medium and micro-enterprises (SMMEs) – to grow.

Given the strategic importance of broadband, the DTPS, together with the ICT industry, has committed to delivering 100% broadband penetration and creating a million jobs by 2020.

The department's aim is to increase access to broadband through the digital development and digital future pillars in line with South Africa Connect (the national broadband policy and strategy) by:

- implementing Phase 1 of the digital development programme, which is focused on providing connectivity to 2 800 of 5 803 sites or identified government institutions by March 2017
  - implementing Phase 2 of the digital development programme, which is focused on providing connectivity to 1 797 of 35 211 sites by March 2019
  - establishing the wholesale open access network through developing the implementation plan for wholesale open access network(s) by March 2018.
- It also wants to improve security by establishing cybersecurity institutional capacity by:
- establishing a fully fledged cybersecurity hub by March 2019
  - facilitating and monitoring the implementation of the cybersecurity awareness plan by March 2019.

In addition, the DTPS wants to create an effective national spectrum framework to ensure that citizens realise socio-economic benefits from the use of the radio spectrum by finalising the South African positions and proposals for the World Radiocommunication Conference 2019 in line with the participation plan and framework by March 2019.

The department is aware of the interconnectedness of broadband and the licensing of radio frequency spectrum, which is a scarce natural resource.

The Broadband Strategy and Implementation Plan outlines fibre connectivity across the country to district level.

An infrastructure gap analysis study has indicated that there is a gap between the high-capacity backbone and access to network infrastructure.

This gap is biggest in rural areas and in particular in former homeland states where the most marginalised communities live. There are also some urban areas with high population densities that remain unserved.

However, the real gap is in the last-mile or "local loop" infrastructure. There is considerable duplication and potential underexploitation of infrastructure in metropolitan areas because these areas were commercially attractive to service providers.

To address this gap, Government had found it necessary to consider a range of interventions on both the demand and supply-side of broadband.

Supply side interventions to encourage investment and rollout of infrastructure include:



- support for public/private investment initiatives
- increased competition
- expansion of core and access networks
- enablement of infrastructure sharing
- promotion of coordinated build programmes
- allocation of prime spectrum to support universal access.

To complement the supply chain, Government determined a number of demand-side interventions. These seek to stimulate the uptake and usage of broadband services and products:

- increased affordability of services and devices
- aggregation of government demand to enhance procurement
- alignment of regulatory framework
- development of ICT skills and e-literacy
- development of local content, applications
- stimulation of niche manufacturing.

### Internet

The South African Internet user population passed the 20-million mark for the first time in 2016, reaching 21 million, and was expected to grow to at least 22.5 million in 2017.

This is the main finding of the Internet Access in South Africa 2017 study, released in July 2017 by World Wide Worx.

The report reveals that the single most common use of the Internet among South African adults is communication, reported by almost a third (31%) of respondents, followed by social networking (24,9%) and information (23,7%), both reported by almost a quarter of respondents. Only then comes entertainment at 22,1%.

According to Stats SA's GHS 2017, just over six-tenths of South African households (61,8%) had at least one member who used the Internet either at home, their places of work or study or at Internet cafés.

Access to the Internet at home was highest among households in Western Cape (25,7%) and Gauteng (16,5%), and lowest in Limpopo (2,2%) and Eastern Cape (3,5%).

### Social media

The SA Social Media Landscape 2019 report, released on 15 October 2018 by Ornico, the Brand Intelligence organisation, and World Wide Worx, shows that across age groups, the racial divide and lifestyle measures, there is little difference in Facebook penetration.

The data highlights the impact of the launch in South Africa of Facebook Lite in 2015, and some network operators allowing it to be used without data charges being incurred.

This meant a massive uptake of Facebook Messenger as a cheap or free means of sending instant messages, and led to Facebook spreading evenly among all population segments.

The Social Media Landscape report shows that there are now

21-million Facebook users in South Africa, representing 28% of the population. This is up from 19-million users a year ago.

The study reveals that Instagram grew a massive 73% , from 3.8 million to 6.6 million in 2017. This is largely thanks to the intense usage of the photo-sharing platform by media, music and fashion personalities.

The top 25 most followed South Africans on Instagram include only one individual from outside these ranks: cricketer AB de Villiers, who enjoys a massive fan base in India, takes the number one position of South Africans on Instagram, with no less than 6.4-million followers.

The rapid growth brings Instagram into the Big Five of social networks in South Africa, behind Facebook, YouTube, Twitter and LinkedIn. Although Twitter growth has flattened – both globally and in South Africa – it still picked up another 300 000 new followers in 2017 to take it to 8.3-million users.

By mid-2018, it was estimated that there were over nine million YouTube users in South Africa. The most popular YouTube channel in the country, for the fifth year running, remains Kruger Sightings, the wildlife video-sharing community started by then schoolboy Nadav Ossendryver when he was 15. It has passed the million subscriber mark and has had around 800-million views.

LinkedIn, which is intended for business and career networking, now has 6.8-million users in South Africa, up 11 % from 2017.

### 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.

The Cybersecurity Hub, pooling public and private sector threat information is responsible for processing and disseminating information to relevant stakeholders in the industry and civil society.

### Mobile communications

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

According to Stats SA's GHS 2017, nationally, only 3,5% of households did not have access to either landlines or cellular phones in 2017. Inadequate access to telephones was most common in Northern Cape (10,0%) and Eastern Cape (7,1%).

Nationally, 88,2% of households had access to at least one cellular phone, while 8,2% of households had access to both a landline and a cellular phone.

Only 0,1% of households had only a landline. However, access to these means of communication differed by province. Households

in historically rural provinces such as Mpumalanga (95,0%) and Limpopo (94,4%) were very reliant on the more accessible cellular telephones than landlines.

By contrast, a combination of both cellular phones and landlines in households were most prevalent in the more affluent provinces, namely Western Cape (19,6%) and Gauteng (10,2%).

### Postal sector

The cornerstone of national policy for the postal sector is the provision of a universal service at an affordable price and an acceptable standard for all citizens. To ensure this, a universal service obligation has been placed on SAPO.

To offset the cost of providing a basic service in low-density, rural or unviable areas, it has also been common practice to confer exclusive rights and privileges, i.e. a monopoly on the provision of the basic letter service.

Mail Business has 26 mail-sorting centres for domestic mail and parcels, and three international sorting centres for international mail and parcels. Between these centres, some six million mail items are handled daily and 50 tons of parcels are processed a year.

Specialised SAPO products include:

- Securemail
- Speed Services Couriers
- Parcelplus
- insurance and cash-on-delivery
- Postbank
- a courier freight group made up of XPS and PX
- Docex.

### Philatelic Services

SAPO's Philatelic Services is responsible for producing South Africa's postage stamps and other stamp-related products.

SAPO prints more than 380 million postage stamps a year. They not only reach every corner of South Africa, but also the rest of the world. Although stamps are produced mainly to serve as prepayment for postage, their beauty and historical significance have inspired people to collect them since the first postage stamps were produced in England in 1840.

Over the years, many of them have become valuable collector's items. For example, the first triangular postage stamp was issued on 1 September 1853 in the Cape of Good Hope, which was a British colony at the time. The triangular-shaped stamp, which became known as the Cape Triangular, was the first stamp to be issued in Africa and has become a highly sought-after collector's item worldwide.

Stamp issues are divided into two main categories:

- Definitive stamps are issued every five to seven years and comprise a set of designs in a full range of face values to

provide for the country's postal needs. They usually reflect a particular theme.

- Commemorative stamps are issued according to an annual commemorative stamp-issuing programme. Between 12 and 15 commemorative issues are produced per year. They often commemorate significant historical events or people, or coincide with important days.

### Postbank

The Postbank Limited Act of 2010 allows SAPO to prioritise the banking needs of the unbanked majority, thus facilitating their inclusion into the economic mainstream. The Act established the Postbank division of SAPO as a separate legal entity, with the principal aim of expanding the existing range of banking services to, among others:

- improve access to affordable services, including loans, especially in rural and lower-income communities
- promote a culture of saving.

## The media

South Africa is fortunate to have vibrant and independent media.

According to the Bill of Rights, as contained in the Constitution, 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
- academic freedom and freedom of scientific research.

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

In March 2017, there were 280 community broadcasting services, 275 community radio and five community TV stations; and it was estimated that there were 31 radio stations that only broadcast on the Internet.

### 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:

- 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 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 DoC. 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 grass roots 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 (IBA), now the Independent Communications Authority of South Africa (ICASA).

In 2002, the MDDA Act of 2002 was promulgated giving further, significant impetus to the transformation of the media. Published figures indicate that listenership of community radio as compared to total radio audience has moved from 8% in 1997 to 28% some 20 years later and a national listenership of 9 million out of the total radio audience of approximately 33 million.

The community radio sector also contributes to the promotion of indigenous languages and cultural groups. Across the more than 150 community broadcast projects that have received funding from the MDDA, the full spectrum of South African languages can be heard.

### Television

The SABC's television network comprises three television channels – all free-to-air. South African television is broadcast in all 11 official languages.

### Community TV

In 2007, Soweto TV was the first community television station to obtain a seven-year broadcasting licence from ICASA.

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 television licences is on hold until the migration from analogue to digital broadcasting is complete.

### Free-to-air TV

e.tv 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.

### 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's also has its own 24-hour news channel on DStv (Channel 404).

## 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), 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; RamsayMedia, 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

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.

## Online media

In 2016, almost 70% of South Africans browsed the web on their mobile. From 2015, this was an increase of 15%, according to the South Africa Mobile Report released by the Interactive Advertising Bureau South Africa, an independent, voluntary, non-profit association focused on growing and sustaining a vibrant and profitable digital industry within South Africa.

A total of 4 993 mobile internet users in South Africa were

surveyed from November 2016 to January 2017.

News24 is the largest site in the country, followed by Gumtree and TimesLive. According to the Effective Measure statistics, News24 attracted 5,9 million unique visitors in June 2016. Gumtree was second with 4,4 million visitors and TimesLive third with 3,4 million.

## 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. By the end of 2018, the PDMSA membership included more than 700 newspaper and magazine titles that cater for four different language groups.

The members include Caxton and CTP; Independent Newspapers; Media24; *Mail & Guardian*, and the Association of Independent Publishers, the latter which represents the interests of more than 250 independent publishers in southern Africa.

Tiso Blackstar Group – whose stable includes the *Sunday Times*, *Sowetan*, *Financial Mail* and *The Herald* – is the largest, national English-language publishing group in South Africa and the country's second-largest digital publisher.

It also owns the largest music and independent film catalogue in Africa; TV channels, TV production facilities and radio stations in Ghana, Kenya, Nigeria and South 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.

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 section 16 of the South African Constitution.

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** 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.

**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
- SANEF's Nat Nakasa Award
- Local Media Excellence Awards
- Liberty Radio Awards
- Isu Elihle Awards
- Standard Bank Sikuville Awards
- New Generation Social & Digital Media 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 of South African society.

### **Advertising awards**

South Africa has a vibrant and dynamic advertising industry. The Loeries® are Africa and the Middle East's premiere initiative that recognises, rewards, inspires and fosters creative excellence in the brand communication industry.

The 40th Annual Loerie Awards ceremony was held at the Inkosi Albert Luthuli International Convention Centre in August 2018.

A total of 287 Loeries were awarded across 14 categories, including six Grands Prix, 31 Golds, 69 Silvers, 113 Bronzes, 18 Craft Golds and 50 Craft Certificates.

More than 2 500 entries were received, with 15% of entries from outside South Africa. A total of 700 brands were represented by 265 agencies from 15 countries across Africa and the Middle East.