South Africa and the ICT revolution

President Zuma, post his election in May 2014, announced that the previous Department of Communications would be reconfigured. The Department of Telecommunications and Postal Services (formerly known as the DoC) would now be responsible for creating a vibrant Information and Communication Technologies (ICT) sector for all South Africans. On the other hand, the new Communications Ministry (new DoC) would develop overarching communication policy and strategy, disseminate information and publicity, as well as brand the country abroad.

This Fact Sheet in reflecting on projects and programmes is referring to the work of the previous DoC (now Department of Telecommunications and Postal Services) and not the current Ministry of Communications.

Over the past 20 years South Africa has taken advantage of technological innovations to support and stimulate development and, despite many challenges, has progressed in advancing the Information and Communications Technology (ICT) sector. More citizens have access to a diverse range of communications services than before and are enjoying the socioeconomic benefits. The advance has taken place against the background of major transformation since the end of apartheid. In 1994, government had begun grappling with the creation of an enabling environment to support fundamental change across all sectors, including telecommunications.

Creating an enabling environment

The South African Constitution forms the backdrop for the laws and regulations that have come to govern the telecommunications sector: the Telecommunications Act, 1996 (Act 103 of 1996); the Telecommunications Amendment Act, 1997 (Act 12 of 1997), the Independent Communications Authority of South Africa Act (IcasaAct) 2000, and the Electronic Communications Act of 2005.

The 1996 *White Paper on Telecommunications* created the framework that was to shape the laws of the sector. The White Paper was underpinned by a number of objectives that defined the approach of the new government, including:

- Black economic empowerment
- Human resource development
- Stable and predictable regulation
- Universal service and access
- A reduced digital divide.

The White Paper recognised the importance of communications in development and envisaged universal access and high level service delivery to all, including those from disadvantaged rural and urban communities. Universal service and access was considered crucial for all citizens as a way specifically of contributing towards reducing the digital divide, and the

Telecommunications of 1996 established the Universal Service Agency (USA). This agency (and, later, the Universal Service and Access Agency of South Africa (USAASA)) was tasked with the rollout to underserviced areas and was to facilitate universal and affordable provision to all communities.

Transformation of the sector was incorporated into the White Paper through the express support for the economic empowerment of the historically disadvantaged, as well as meaningful participation in economic activity within the industry. There was also consideration of the market structure, with recognition of the need to address competitiveness in the industry through market liberalisation. Telkom, however, was initially going to retain exclusivity in the market for five years in exchange for the rollout of services to those who previously had no access.

In 1996, the Telecommunications Act was promulgated – the primary objective being 'to provide for the regulation and control of telecommunications matters in the public interest'. This Act set out the fundamental rules of the telecommunications industry, detailing licensing obligations as well as establishing the telecoms regulator. At the time, the South African Telecommunications Regulatory Authority (Satra) regulated telecommunications seen as a national resource and managed the radio frequency in the national interest, although broadcasting was excluded.

'To provide for the regulation and control of telecommunications matters in the public interest'.

Later, with the amalgamation of the IBA and Satra in line with the convergence of technologies, Icasa emerged in 2000 as the independent regulator, free from party political control and responsible for the regulation of the ICT sector. The establishment clauses in the Telecommunications Act were replaced by

provisions in the Icasa Act. The regulator assumed responsibility for interconnection agreements that looked at quality and levels of service; fees and tariffs to be paid between parties; the re-issuing of licences and monitoring of licence conditions; and a numbering plan (a numbering system that is used in telecommunications to allocate numbers to subscriber telephones).

The Electronic Communications Act of 2005, which replaced the IBA/Broadcasting and Telecommunications Act, was intended to ensure that the regulatory approach was similar in the telecomms and broadcasting sectors. It also allowed for more competition through various regulations including facilities leasing, interconnection and the rapid rollout of ICT infrastructure and spectrum management. [152]

> ## The Telecommunications Act was intended to ensure that the regulatory approach was similar for the telecomms and broadcasting sectors.

By early 2014, the Independent Communications Authority of South Africa Amendment Bill and the Electronic Communications Amendment Bill were in the final stages of the parliamentary process of being enacted into law. The aim of the former was to make Icasa more effective, involving technical issues and empowering the CEO, aligning it with broad based black economic empowerment principles, and reducing the licensing process turnaround time from 90 to 60 days. The main aims of the Electronic Communications Amendment Act were to establish the Broadband Council and to align the Electronic Communications Act with broad based black economic empowerment principles and with the international convention for people with disabilities.

ICTs in South Africa – the past 20 years

Twenty years ago, Telkom and the Post Office were state-owned entities; telecommunications companies (telcos) were traditionally monopolies; and there was pronounced disparity of service provision. Subsequently, political and democratic development, innovative ideas and technology advances changed not only South Africa but also the world. After the end of apartheid, the democratic government began creating the conditions to build a new society. At the same time, revolutionary advances in computing power and communication technology were also setting the stage for a major change in the way people would work, live and play. Electronic circuit boards became globally mass-produced chips, and over time Twitter and social networks emerged and attracted billions of users all over the world. Calls over the Internet were almost free. More and more South Africans were engaging with this technology.

Before 1994, the situation had been very different. In the first place, the telecom-munications sector was racially disparate. In 1985, the number of telephone lines per hundred inhabitants was 8.4, of which 65.7 per cent were in white hands (down from about 90 per cent in white hands in 1978).[153] The 1994 Central Statistical Services October Household Survey found that only 11.6 per cent of black households had a phone and 47 per cent had no telephone access at all whereas 87.4 per cent of white households had a phone and only 6.4 per cent had no telephone access.[154] In 1995, the government announced plans[155] to sell a share in Telkom to a 'strategic equity partner' for about R4.4 billion, put in four million new lines and restructure the corporation. In 1996, only 19 000 telephones served an Eastern Cape population of about four million,[156] about 0.5 telephones per hundred people. By April 1997, the number of lines was 4.26 million,[157] or 11.2 lines per hundred people.

Technology overtook events and the growth of fixed lines never materialised. Instead, in 1993 two cellular companies, Vodacom and MTN, were issued licences.[158] By 1996, cellular phone connections were double that of new, fixed lines installed by Telkom, with between 650 000 and 700 000 cellular subscribers countrywide.[159] On 27 May 1997, Vodacom announced that South Africa had a million cellphones.[160] This growth continued, and today the mobile phone penetration rate is about 136 per cent of the population (because some people have more than one phone or sim-card), while only 7.9 per cent have access to landline phones. In 2012, the cellular market grew by around 9.41 million subscribers to reach a total user base of 66.56 million, a significant increase that suggests that the surging growth within that sector shows no sign of slowing in the near future.

The growth in the Internet and access had also been phenomenal over this period. Although today only 33.7 per cent of South Africans have access to the Internet,[161] this is up from almost zero in the early 1990s, when the Internet was globally almost exclusively the communications medium of scientists and engineers.[162] Just two decades prior to that, the operating protocol TCP/IP (Transmission Control Protocol/Internet Protocol) had been defined and provided a basis for communication across diverse computer networks.

When 'browsers' were developed in the 1990s to interface with the World Wide Web (WWW), interest from the commercial sector grew rapidly, and in 1995 the quantity of data traffic overtook voice traffic on the world's telecommunications networks.[163] Worldwide, new policies and laws followed to support these developments. In South Africa numerous legislative instruments were introduced between 1993 and 2013 as the ICT sector changed and technology advanced.

An increase in the use of smartphones more recently has also contributed towards bringing many more people online, as they Google the Internet and send e-mails. South Africa had followed the pattern where growth in telecommunications was largely driven by growth in mobile penetration (2G, or voice). This pattern has re-emerged, since mobile telephone technology has also become the main driver for mobile broadband, and 3G was implemented in 2009. Since the end of 2012, LTE (a further improvement to cellphones) has slowly become available.

One of the biggest challenges to effective Internet services is the poor bandwidth in South Africa. Bandwidth is basically the size of the pipe delivering the digital signals; if there is insufficient bandwidth, a movie may pause or freeze while the receiving device catches up.

At the end of September 2012, the household broadband penetration remained firmly below the 10 per cent mark. Developments that were expected to boost growth, such as the rollout of competitive, mass-market, fixed line services by the second national operator Neotel and the planned implementation of local loop unbundling, failed to materialise. Furthermore, the high prices charged for Internet access are preventing many South Africans from acquiring a high-speed Internet subscription.

Local loop unbundling is the regulatory process where an operator makes its local network (the copper cables that run from customers premises to the telephone exchange) available to other companies. Operators are then able to upgrade individual lines and offer services such as high speed Internet access, direct to the customer.

ICTs – what opportunities for South Africa?

A revealing view of what a digital world may eventually look like is to observe what is happening in countries that are further along the digitisation path. We have already seen profound change. As digitisation proceeds, more and more of the captured information is available for downloading from websites and information is readily available in a way unknown to previous generations. This has had a considerable impact on the media: the technology shifts have enabled anyone and everyone to publish and upload information. Breaking news can therefore come from the community and can be much more interactive than delivery of the news by newspapers or radio broadcast.

Information from and about government (such as what social grants one might be eligible for) can be made far more accessible through the use of ICTs. Learning materials can be broadcast into a classroom from a single source. Electricity load control equipment, used to switch off hot water geysers for short periods during peak electricity usage, could be managed from a national control centre, reducing power outages. The most valuable benefit of social networking, however, may be in education, since digital networks greatly facilitate the sharing of information and knowledge.

Information also has enormous economic benefit. Many people buy and sell things online, where online stores, open 24/7, have sprung up selling almost anything. Trading in shares, currency and commodity futures, once the preserve of share brokers and derivatives traders, is now open to anyone able to access bank websites. These sites often delay presenting the latest prices by 15 minutes, requiring an additional small charge for receiving the prices in real time – an example of the value of receiving news immediately, so that one can act on it and buy or sell shares or derivatives before others in the market. Computers are

even programmed to communicate directly with each other, so that when a news event occurs that may cause an economic reaction, trading is done automatically and immediately, without human intervention.

A number of studies also show that ICTs have the ability to deliver significant economic benefits. On the most obvious level improved communication and information flows can improve productivity and efficiency within the economy. However, ICTs can also bring job opportunities, not only in the construction and maintenance of the networks but in more specialized areas, such as software development. This will require that the e-literacy is improved at basic and secondary school as well as tertiary levels.

ICTs have provided a host of new opportunities which range from being able to access information to doing business online. Government is working on universal service and access and reducing the digital divide so that all South Africans can benefit from the ICT revolution.

National economies are feeling the benefit of digitisation and convergence. Online shopping is one of the most popular and profitable areas of the economy across the world. In 2009, the World Bank estimated that for every 10 per cent of a country's population that was provided with broadband access, the GDP would grow by 1.38 per cent. In short, the ICT transformation has resulted in phenomenal change. ICTs have enabled services that can include breaking real-time news stories,

applying for identity documents online, receiving textbooks electronically at schools, interactive communication with healthcare workers, submitting tax returns, managing e-Toll accounts and so on – as well as online shopping, and searching for and applying for jobs. Generally, lives will be made easier and be more productive.

Mobile broadband

Mobile broadband has the potential to further expand this transformative experience by bringing the Internet to consumers. Across Africa, the lack of affordability, coverage, and reliability of fixed networks means that mobile broadband is the only way for the vast majority of consumers to access the Internet. Mobile broadband uptake will be supported in the coming years by the increased penetration of smart phones. The number of smart phones sold is forecast to grow 40 per cent per year, on average, up to 2017. Smart phones were expected to make up 25 per cent of all handsets in 2013.

The improved affordability of smart phones and other Internet-enabled devices will result in an estimated volume of smart phone sales in South Africa, Tanzania, Nigeria, and Kenya of 106 million devices. The availability of cheap smart phones will allow entire segments of the population that are currently unconnected to incorporate Internet browsing and the information age into their daily lives.

The issues for South Africa

Concerns have emerged in recent years to challenge South Africa's participation in the digital world. They include access and cost (supply side), skills as well as general content/ knowledge sharing (demand side).

Access is one of the biggest challenges in the developing world, caused by a lack of infrastructure, particularly in rural areas, and resulting in what has been dubbed the 'digital divide'. A general lack of awareness of the opportunities made possible by a digital world

exacerbates this, as does a shortage of skills to design and build local applications. It may be argued that access to healthcare and clean water are more important than access to ICT, but access to ICT services can facilitate acquiring them.

The following reflects some of the key challenges and the way the government has attempted to tackle them:

1. The lack of infrastructure in both rural and urban areas is the fundamental obstacle to progress

The concept of Thusong service centres, originally known as multipurpose community centres, was officially adopted in 1999. These centres were then identified as the primary focal points where government could offer a wide range of services and information to poor communities. The focus of the Thusong services centres is on rural and underserviced communities and they aim at addressing the historical factors that limit citizens from accessing government services and information.

Coupled with the lack of access is poor levels of awareness of ICTs. Telecentres are not easily accessible or adequately used by the communities, and some are dysfunctional. Even where citizens are aware of or able to access telecentres, they may have no idea how to use the Internet. Access, therefore, is only one part of the problem. Knowledge of functionality is also essential.

The broadband policy developed by the DoC was also introduced as one way of facing up to accessibility by setting targets so that by 2016, 50 per cent of the population will have broadband access at a speed of 5Mbps, and by 2030 the whole population will have it at a speed of 10Mbps (and 80 per cent at 100Mbps).

2. The lack of ICT skills

In order for South Africa to move faster in its pursuit of ICTs, there must be an increase in e-literacy but, also, more must be done to encourage ICT graduates in higher education. The more knowledgeable and educated people are about ICTs, the quicker the transition and the spread of valuable information.[164]

The high cost of communication has not been resolved but progress is being made.

The DoC has established the e-Skills Institute to build ICT skills for those needing an introduction to computers and others seeking high-end jobs in the knowledge economy. In 2012/13, according to the department's Annual Report, the e-Skills Institute has been active not only in curriculum development but also in training over 1 000 young people in e-Literacy. National e-skills programmes have been designed to provide the required capacity for those in the knowledge economy where job opportunities exist, and partnerships with higher education institutions are resulting in the consideration of advances in e-skills transfer methods.

3. The high cost of communication

Service providers in the electronic communication environment enjoy huge profits and costs to consumers are exceeding high. For example, in its 2013 Annual Report, Vodacom reports a net profit of R13 224 million and a revenue of R69 917 million. That means a profit margin of 18.9 per cent and a monthly profit of over 1 billion rands. The imbalance between cost, profit and service provided must be changed if South Africa wants to elevate its ICT use and functionality in the near future.

The previous broad telecommunications policy of managed liberalisation served its purpose to a certain extent, but was less successful in lowering the costs of access and use, causing consumers to benefit less than business. Government has a mandate to step in when markets do not function properly or exclude segments of the population.

The high cost of communication has not been resolved but progress is being made. The DoC has finalised a new policy directive on transparent pricing policy; has convened a pricing workshop as part of a consultative process on the cost-to-communicate; and has engaged the network operators and the relevant government departments to explore the possibilities of reducing the cost to communicate without undermining the independent role of Icasa, whose independence as a regulator of the broadcasting sector is enshrined in the Constitution. Network operators have proposed an industry forum where the minister could engage the sector on pricing matters and the state of the ICT sector, and it is intended that the minister will consider the proposal to establish a standing industry/CEO forum.

Lack of content

Software and technology must be designed for all people, including those with disabilities, those who are illiterate, and those who speak indigenous languages but not English. The lack of appropriate content and software for them is a major problem affecting South Africa's connectivity and use of ICTs.

The constitutional provisions that cover the rights of access to information and to choice of language and that promote equality of all persons set the framework for policy and legislation in all spheres of society, including ICTs. According to a survey conducted in 2010,[165] software for computers was not found to be user-friendly and did not make use of indigenous languages. People with disabilities were also placed at a disadvantage in terms of content (sign language and sub-titles) and infrastructure (user-friendly end-user hardware such as cell phones and jumbo TV remote controllers). This places severe limitations on access to ICTs – with the ripple effect of limited

access to information, and in a rapidly changing technological world where access to economic benefits will increasingly rely on understanding and access to information, it may further increase the divide between rich and poor.

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South Africa's communication future

The National Development Plan (NDP)

The NDP presents a vision for 2030 South Africa: a dynamic information-based, inclusive and prosperous society and knowledge economy, underpinned by ICTs. The NDP says that by 2030: 'A seamless information infrastructure will meet the needs of citizens, business, and the public sector, providing access to the wide range of services required for effective economic and social participation – at a cost and quality at least equal to South Africa's competitors.'

The NDP suggests a phasing of priorities in order to realise its vision:

- **The short term (2012 – 2015):**
  The DoC is going to develop an e-strategy to assist in achieving the government's goals of eliminating poverty and reducing inequality. This will includes plans for spectrum allocation and a clear strategy for universal access. In addition, e-literacy, skills development and capacity building interventions should be introduced to support ICT diffusion.

- **The Medium Term: (2015 – 2020):**
  The focus will shift to broadband penetration. By 2020, the government plans for the entire population to have broadband access.

All citizens and communities should be able to disseminate news and information online. The ordinary citizen will be able to use the Internet: to find information; to read the news; to complete tax returns online and access government policies and laws, as well as ministers' speeches and other documents; to engage in buying and selling activities (e-commerce); and to participate in new forms of entertainment.

As there is uncertainty about the pace of technological development and services, benchmarking performance against other countries is preferable to setting numerical targets.

- **Long-term (2020 – 2030):**
  The e-strategy will be implemented and ICTs will be used to support rather than limit the global competitiveness of South Africa. By 2030, government will be using ICTs to engage and provide services to citizens. All individuals will be able to use a core set of ICT services and access a wide range of entertainment, information and educational services.

The vision of the NDP implies that we will derive long-term benefits from a knowledge-based economy by harnessing ICT to aid South Africa in meeting its developmental goals of job creation, economic growth, poverty alleviation, and competitiveness. Ultimately, South Africa needs an e-strategy, because technology is continuing to move the world towards a digital society and for South Africa to remain competitive and relevant it must be a part of this change.

Broadband policy

The DoC has redrafted a vision for broadband services, which was published in December 2013.

The previous 2010 broadband policy used a definition of broadband recommended by the International Telecommunications Union (ITU): an always-on connection that has a download speed of at least 256 kbps. The new policy

proposes a less specific definition: an ecosystem of high-capacity, high-speed and high-quality electronic networks, services, applications and content that enhances the variety, utility and value of information and communication for different types of users. Targets for different types of users will be reviewable and are initially proposed as follows:

Target	Penetration Measure	Baseline (2013)	By 2016	By 2020	By 2030
Broadband access in Mbps user experience	Per cent of population	33.7% Internet access*	50% at 5Mbps	90% at 5Mbps; 50% at 100Mbps	100% at 10Mbps; 80% at 100Mbps
Schools	Per cent of schools	25% connected	50% at 10Mbps	100% at 10Mbps 80% at 100Mbps	100% at 1 Gbps
Health facilities	Per cent of health facilities	13% connected	50% at 10Mbps	100% at 10Mbps 80% at 100Mbps	100% at 1 Gbps
Government facilities	Per cent of government offices		50% at 5Mbps	100% at 10Mbps	100% at 100Mbps
*Research ICT Africa, 2012 ICT Access and Use Survey[167]					

Spectrum Policy

Progress has been made towards developing an effective spectrum policy to facilitate the development of wireless technologies in support of universal access and economic development.

With the changeover from analogue terrestrial broadcasting to digital, additional spectrum will become available. The NDP suggests that spectrum allocation is the biggest regulatory bottleneck that impacts on the distribution of wireless services needed for the economy and society to flourish.

As spectrum becomes available, regulators are being called upon to discourage spectrum hoarding where licensees buy spectrum that they do not use or use in a limited way. Mechanisms for spectrum allocation will need to be improved generally and allocation of spectrum licences should be technology neutral.

The NDP outlines government's primary role to be 'to determine policy that promotes market access, and so create effective institutions to

ensure competition, and regulate operator behaviour and market failure.'

National integrated ICT policy

The DoC is leading a process to review the various policies in the postal, telecommunications, broadcasting and information technology sectors. A panel of experts, made up of academics and industry leaders, issued a Green Paper in January 2014. The panel is looking for an integrated policy that will lead to legislation and will take South Africa into the future by promoting investment in the sector, digitising many government services (e-government), and stimulating e-commerce, including becoming linked into a global market.

Implications for the media of the future

Although many people are hesitant to fully jump into a digital world, there might not be the option of abstaining for much longer. Old methods of communication are slowly being eliminated – particularly print media. For generations, people have relied on newspapers for most of their information, and while papers are still being produced they are no longer the preferred method of information dissemination. This shift to online content has stimulated many discussions and policies around the world, in terms of everything from freedom of the press, and libel to the verification of sources and honest reporting. It is only a small area of what being 'connected' really represents for people, but it is yet another form of digitisation that is dramatically affecting lives.

Reports have recently shown that print media has declined significantly in South Africa. Combined levels of circulation dropped from 2.34 million circulated copies from July to September 2012 to 2.16 million users from July to September 2013. That level is expected to continue falling. On the other hand, news websites are thriving, and while the decline of print media is certainly the end of an era, online subscription numbers mean that people are still hungry for information and knowledge. Three online news sources top the list in impressive fashion, and eBis MBA, which tracks website traffic around the world, names Yahoo News, Huffington Post and CNN as the top three sources for news, with an estimated 110, 85, and 70 million unique monthly viewers respectively. In South Africa, in 2012 News24 came in ninth in the 'Top 20' report. Independent online was 18th. Those are impressive numbers, and that is the sort of website traffic that is not only profitable, but also informative and stimulating for the general public.

Digital media is faster to access and is easier to engage with and retain. Consuming information is of utmost important in modern society, and some of the most valuable information for people comes from the media. South Africa wants to remain competitive and in-tune with global society, and must make digital media an accessible and functional tool for its entire population. This is the road ahead, and South Africa is moving in the right direction through policy development and governmental awareness of the issues relating to supply and demand. The ICT sector and the increased online presence of South Africa's citizens will continue to grow, but this growth must be accompanied by consistent technical support and educational opportunities.

by Nandi Mokoena

Each edition of the media landscape series will provide an update on those media cases that have been brought before the Competition Commission/ Tribunal. In 2013/14 this was a complaint brought against Media24. Nandi Mokoena, Communications: Competition Tribunal.

In November 2013, the Competition Tribunal ('Tribunal') started a hearing into a complaint brought by the Competition Commission ('Commission') against Media24. The Commission alleged that between 2004 and 2009 Media24 deliberately drove a competitor, Gold-Net News, out of the market for advertising in community newspapers. According to the Commission, Media24 did this by positioning a competing community newspaper, Goudveld Forum, as a 'fighting brand' against Gold-Net News and running the brand at a loss until Gold-Net News eventually closed down in 2009. Having succeeded with this strategy, the Commission alleged, Media24 closed Goudveld Forum in January 2010 and either retrenched Goudveld Forum staff or redeployed them to other Media24 publications including Vista, which operated in the same geographic area as Gold-Net News and Goudveld Forum.

Media24 denied the commission's allegations, saying that Goudveld Forum covered its costs during the 2004-2009 period and that there was no truth to the allegation that Media24 kept Goudveld Forum open in order to inhibit or deter competition with Vista. Media24 also denied that Gold-Net News closed down due to anti-competitive strategies on Media24's part,

citing the 2008 economic downturn and other possible reasons for Gold-Net News's decline.

The commission's complaint to the Tribunal came after Berkina Twintig (Pty) Ltd, trading as Gold-Net News, filed a case against Media24 with the Commission in 2009. Gold-Net News claimed that from 2004 to 2009 Media24 drastically reduced its advertising rates to a level lower than its production and overhead costs, leading Gold-Net News to reduce its advertising rates to unsustainable levels. Following an investigation, the Commission found this conduct to be in contravention of the Competition Act which prohibits dominant firms from unjustifiably pricing below cost. The conduct allegedly took place in what the Commission termed 'the Goldfields area' which comprises Welkom, Odendaalsrus, Allanridge, Riebeeckstad, Virginia, Henneman, Bronville, Jerusalem, Wesselbron, Bultfontein, Theunissen, Ventersburg, Thabong, Meloding, Kutluanong and Phomolong. According to the Commission, Media24's conduct resulted in advertisers and readers being deprived of the benefit of competition between community newspapers.

The Tribunal's hearing into these allegations began on 12 November 2013 and was initially set to end in March 2014. However, the hearing took longer than expected and continued for two weeks in May, with further hearings in November 2014. The Tribunal expects to hear testimony from 17 witnesses in this case. It is unlikely that there will be a decision this year.

Endnotes

Chapter 1:

Evolving media policy of the ANC: Time to go back to the drawing board?

1   For an updated description of ownership and a profile of media staff, see Reg Rumney's contribution in this volume.

2   Omnicom Media Group South Africa (2014) *South Africa and SADC: OMD Media Facts Future of the Media* p. 45.

3   ANC spokesperson Jackson Mthembu accused Ronnie Kasrils of wanting to rule intelligence from the grave, describing his critique as mere 'ranting'.

Chapter 3:

Twenty years of SA media ownership (1994 – 2014)

4   The idea to establish a pay-TV station was initiated by Koos Bekker of Naspers precisely because advertising revenue in print was down. Naspers initially wanted the other three major media companies – Times Media, Avusa and Perskor (Caxton) – to be involved. However, over time only Naspers was involved in this project.

Chapter 4:

Indigenous languages and South Africa's Media Environment

5   Wakefield, A (2013) SA Newspaper circulation in decline. (13th November 2013). – Available at: http://www.iol.co.za/business/news/sa-newspaper-circulation-in-decline-1.1606748.

6   Evans, S and Faull, L (2013) New Age: Dawn of advertising riches with no circulation figures, *Mail & Guardian*. (25th January 2013). Available at: http://mg.co.za/article/2013-01-25-00-new-age-dawn-of-advertising-riches-with-no-circulation-figures.

7   Evans, S and Faull, L (2013) New Age: Dawn of advertising riches with no circulation figures, *Mail & Guardian*. (25th January 2013). Available at: http://mg.co.za/article/2013-01-25-00-new-age-dawn-of-advertising-riches-with-no-circulation-figures.

8   Omnicom Media Group SA (2013): The *Future of Media Blueprint OMD South Africa and SADC Media Facts 2013*: Available at: http://www.omd.co.za/media_facts/FOM029_Blueprint_OMD_mediafacts2013.pdf

9   Growth of Media Opportunities, OMD Media, Future of Media: Blueprint 2013.

10 Mandla Langa has received South Africa's National Order of Ikhamanga (Silver) for literary, journalistic and cultural achievements. He is worked extensively in the media environment – as the Chairperson of the Independent Broadcasting Authority (IBA), has served on the SABC board etc.

11 MDDA (2014) Mandla Langa acknowledges 20 years of freedom and diversity. (28th May 2014) Available at: http://www.bizcommunity.com/article/196/15/113972.html

12 UNESCO Frequently asked questions on endangered languages. Available at: http://www.unesco.org/new/en/culture/themes/endangered-languages/faq-on-endangered-languages/

13 Switzer L and Switzer, D (1979) *The Black Press in South Africa*, Boston: G K Hall & Co.

14 Media Monitoring Africa (MMA) (2012): SABC's commitment to Quality and Diversity Available at: http://www.mediamonitoringafrica.org/images/uploads/SABC_2012_PDF_2.pdf

15 Mtimde L *The Role of the MDDA in Promoting Multi-lingualism in Local Government*.

16 Makhafola, G (2013) South Africa hungry for news in African languages. (17th February 2013). Available at: www.iol.co.za

Chapter 5:

Twenty years of freedom: Whose democracy are we reporting?

[18] The print and digital media industry is taken here to include mainstream and community media. Print media includes newspapers and magazines while digital media includes mobile and apps.

[19] One of the core areas to be addressed is media ethics. How ethical is our media? What ethical challenges have they overcome and which challenges are presented by the changing media environment? These questions, while critical, are beyond the scope of this chapter.

[20] For current purposes, media monitoring is understood to be: the carrying out of close content analysis using a standardised methodology, collecting and analysing data informed by discourse analysis; and, cultural studies.

[21] Insofar as this chapter seeks to highlight broad trends, the various forms of media are spoken of in general terms, except where specific examples are given. It is understood that there are clear exceptions to general terms, and more often than not the exceptions serve to highlight the general rule.

[22] Sadly, however, the same is not necessarily true when it comes to other non-South African Africans where their nationality is referred to in media reports. These often tend to be in brief reports about crime in which it may be noted, for example, that 10 people were arrested, including five illegal Zimbabweans. Indeed in cases of illegal mining the nationality of the miners is often highlighted even when this is not necessary or relevant. Although more common than identifying race, it is an area that has seen considerable improvement since democracy.

[17] www.unesco.org/new/en/culture/themes/endangered-languages/faq.

[23] Transformation Task Team (September 2013) *Report on the Transformation of Print and Digital Media*. Available at: http://webcache.googleusercontent.com/search?q=cache:IZKmZ6_zGfYJ:www.pdmedia.org.za/pressreleases/2013/PDMTTT%2520FINAL%2520PRINTED%2520REPORT.PDF+&cd=1&hl=en&ct=clnk&gl=uk

[24] Media Monitoring Africa, (2004) *Children Dying to Make the News* Available at: http://www.mediamonitoringafrica.org/images/uploads/ECM_FinalReport.pdf

[25] See: Rikhotso, M., Morwe, K, Namumba, L., Kalu, G., Singh,. R. (2013), *Children in the News Seen but Still not Heard*, Media Monitoring Africa.

[26] It should be noted that the Media Monitoring Africa (MMA) together with its partner, Consortium for Refugees and Migrants in South Africa (CoRMSA), lodged a complaint with the press ombudsman. On appeal the parties reached mutual agreement and the case was settled. The *Daily Sun* published a front page explanation which included a commitment to never refer to non-South Africans as aliens.

[27] As it turned out, the man was identified and the media paid for him to be returned to his home in Mozambique and also covered the costs to give him a dignified burial.

[28] It is precisely because of the importance of media at this time that the MMA was started in 1993. MMA has monitored the media's coverage of all democratic elections in South Africa. This means that we have monitored over 67 000 elections stories across more than 70 different media, including print, community, commercial and public service radio, as well as television.

[29] Regulations on party election broadcasts, political adverts, the equitable treatment of political parties by broadcast licensees and related matters. Government Gazette Vol 584 No. 37350 (17 Feb 2014). Page: 13 2. Editorial Matters 2. Available at: https://www.Icasa.org.za/Portals/0/Regulations/Regulations/Party%20Elections%20Broadcasts%20Political%20Advertisements/RegsPartyElectionBroadcasts2014.pdf.

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40 See *Sunday World* article, 'Hands of stone' socks baby mama' (23/05/2010), as an example where gender-based violence is trivialised.

41 Journalists from three different major news organisations noted at the time that it was the story of the year. This was a bold claim in South Africa where just a few months prior in 2012 we managed to hit international news because of the death of 44 people at Marikana.

42 In stark contrast, the coverage given to the Marikana miners in the ongoing Farlam Commission of Enquiry is much reduced and they are often portrayed as a group not as individuals.

43 The upside of these reports (if we can term it that) is that at least the issue of gender-based violence is highlighted and some people humanised. It hasn't always been this way. For example in the 2000's, stories were still reported through a heterosexual male perspective. In one story, for example, the rape of a woman in a home robbery was acknowledged as horrific. Perhaps more disturbing however was that it was portrayed as even more horrific that the husband was forced to watch his wife being raped - as if somehow his trauma was worse than that of his wife. So we do indeed have a long way to go but gender-based violence is more frequently reported and more accurately portrayed.

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Chapter 6:

Journalism in the new world of social media

45 Trending is when a lot of people speak about the same topic at the same time on Twitter. There is daily a new list of trending topics which vary by region. Increasingly, brand managers are excited by reports that a product in their portfolio is 'trending' as this is an informal barometer of popularity. The flipside of course can be devastating. Recently a young woman of South African descent, Justine Sacco, living and working in the US, boarded a flight from London to Cape Town. Before she switched off her mobile she tweeted 'Going to Africa, hope I don't get AIDS. Kidding, I'm white'. With that she settled in for a good night's sleep over a long haul. Upon landing 12 hours later she discovered that she was the topic of worldwide conversations and condemnation, and the subject of a trending topic #HasJustineLandedYet. Trending topics on Twitter were initially the domain of hashtags – key words with which users can search conversations – but now any noun in any conversation that generates a significant amount of mentions in any particular geographical location can trend there.

46 US online trends, which tend to set the bar, have seen the percentage of people who see their news headlines online more than double in the past two years. Over the same period, the number of regular users of online news sites has tripled, whilst 33 per cent of under 30s get their news from social media and 34 per cent from TV, in contrast to 13 per cent who read traditional or even digital newspapers. Undoubtedly, social media influence is rising.

47 Not only did the Superbowl shatter two records for tweets per second in 2012 – peaking at 12,233 TPS, this year, pre-game marketing has incoporated a light show in on New York's Empire State Building. Responses to the hashtag #WhosGonnaWin either swathe the building in green and silver or orange and blue. These colour combinations represent the two competing teams, Seahawks and Broncos. Whichever team has the most support gets their colours posted on the tallest building in America.

Chapter 7:

Mind the perception gap

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Chapter 8

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Chapter 10:

Government communications: 20 Years of empowerment and development

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Fact Sheet 1:

South Africa and the ICT Revolution

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