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Communications

The Department of Communications is the centre of policy-making and policy review for the posts, telecommunications and broadcasting sectors in the country. This includes policy-making that affects State-owned enterprises (SOEs) such as Telkom SA Ltd, the South African Post Office (Pty) Ltd, Sentech, the South African Broadcasting Corporation (SABC), National Electronic Media Institute of South Africa (NEMISA), as well as the regulators – the Independent Communications Authority of South Africa (ICASA) and the Universal Services Agency (USA). All these, including the Department, fall under the Cabinet portfolio of the Ministry of Communications.

The Department aims to enable ordinary people to have access to information and communication technologies (ICTs). This includes the following services:

- telemedicine – enabling rural clinics to get diagnoses from specialists at urban medical centres.
- tele-education – enabling the country to reverse the illiteracy rate through distance education.
- convenience measures such as teleshop-

ping and telebanking (which improve the way people work, live and play).

The development of policies includes, among other things, the following domains:

- assessment of technological changes and trends, and their business and public impacts.
- research, development and dissemination of specific policies, including the extension of services.
- research and development of telecommunications, postal and broadcasting legislation required by the Ministry, regulatory authorities and SOEs.
- high-level skills development through the Institute for Satellite and Software Applications (ISSA). It is a partnership programme on virtual reality research with Miralab at the University of Geneva. The research focuses on the development of different scientific tools for diagnostic and educational purposes.
- analysis and development of competition policies and encouraging business development.
- analysis of tariffs, licence fees and other sources of funding.
- encouragement of local content and the local manufacturing industry.

Other role-players in these fields include the Government Communication and Information System (GCIS) and the Department of Science and Technology.

◀ During the course of 2001/02, an additional 1,5 million South Africans gained access either to radio services for the first time or to improved radio services in accordance with the Government's commitment to advance universal service in broadcasting.

Policy

The Department's policy-making objectives are to ensure that the development of the information and communication sectors is well-regulated and that the services provided are accessible to all. In addition, policy development since 1998/99 has sought to restructure SOEs, introduce competition, accelerate the penetration of services into underserved communities and streamline the regulatory framework.

Developing a stable and predictable regulatory regime on e-commerce is central to the Department's vision of moving South Africa into the knowledge economy.

On 31 July 2002, President Thabo Mbeki electronically signed the Electronic Communications and Transactions Bill. The finalisation of this legislation will pave the way for a secure environment for e-commerce transactions. It provides for the:

- facilitation and regulation of electronic communications and transactions
- development of a national e-strategy
- promotion of universal access to electronic commerce and the use of e-commerce by small, medium and micro enterprises (SMMEs)
- human resource development in electronic transactions
- prevention of abuse of information systems and encouraging the use of e-government services.

The legislation also provides for the appointment of:

- a panel to facilitate the establishment of the board of the Section 21 Domain Name Authority
- cyber-inspectors.

The Telecommunications Amendment Act, 2001 (Act 64 of 2001), was passed in November 2001 to give effect to the policy of managed liberalisation of the South African telecommunications market.

The amendments paved the way for the introduction of the Second National Operator (SNO), in which a 30% stake is reserved

for Esi-tel and Transtel and a 19% stake is reserved for black and women economic empowerment. By August 2002, ICASA had received 10 applications for the empowerment stake, three of which were disqualified.

At the end of October 2002, Goldleaf and Opti were the only parties to submit bids for the 51% strategic equity stake in the SNO.

The amendments have also paved the way for the awarding of an international and multimedia licence to Sentech. By August 2002, draft Sentech licences were issued for public comment.

It also provides for the licensing of operators in underserved areas, with a teledensity of less than 5%. The majority of these are in the Integrated Sustainable Rural Development Programme nodal points. The Department held provincial workshops to raise awareness among the relevant communities of opportunities for telecommunications licences in these areas. This process will bring about the most significant ownership and involvement in the communication sector by black people and women in South Africa.

The amendments provide for a new public emergency telephone service and an emergency number, 112. A pilot project has been established in Klerksdorp, North West.

Telecommunications

Government recognises the centrality of the telecommunications and information technology (IT) sectors in economic development. The sector contributes about 4% to 5% of gross domestic product and is estimated to generate about R4 billion in annual turnover. It remains the fastest growing industry. The Government's telecommunications policy has played a cardinal role in revolutionising the industry. The introduction of cellular telephony, the end to Telkom's exclusivity period and subsequent introduction of the SNO and the envisaged licensing of operators in underserved areas constitute changes of immense proportion.



South Africa ranks 23rd in telecommunications development and 17th in Internet use in the world.

Regulators and licencing

Independent Communications Authority of South Africa

The proclamation of the ICASA Act, 2000 (Act 13 of 2000), in May 2000, paved the way for the merger of the South African Telecommunications Regulatory Authority (SATRA) and the Independent Broadcasting Authority (IBA) into ICASA.

The core responsibilities of ICASA include the regulation of South Africa's communications industry as stipulated in the telecommunication and broadcasting laws. ICASA's main goal is to create regulatory certainty in an environment where technological developments are growing at a rapid pace. ICASA promotes:

- growth in telecommunications and broadcasting
- economic growth and development of society
- national and international investment
- universal service and access
- participation of previously disadvantaged groups
- levelling the playing fields by ensuring fair competition
- protecting public interest and consumer rights.

Radio and television broadcasters are licensed by ICASA, as well as all telecommunications service-providers. In addition, ICASA plans frequency spectrum and type and approves telecommunications equipment.

Policies and regulations are developed for, among other things, interconnection, licence fees and tariffs. Monitoring is an integral part of the Authority's regulatory function. ICASA monitors the use of numbering, frequency spectrum, use of equipment, consumer monitoring and broadcasters' compliance with their licence conditions.

To ensure that the Authority remains accountable, a number of provisions have been amended by the Parliamentary Portfolio Committee on Communications to ensure that it functions in line with the provisions of the Public Finance Management Act, 1999 (Act 1 of 1999).

Universal Service Agency

The USA was launched in May 1997. It is a statutory body created in terms of the Telecommunications Act, 1996 (Act 103 of 1996), and its objectives include advising the Minister of Communications, Dr Ivy Matsepe-Casaburri, on ways to bring about universal access and service, co-ordinating initiatives by service-providers such as Telkom, Vodacom and Mobile Telephone Network (MTN). It extends access to telecommunications by working with community-based organisations (CBOs), non-governmental organisations (NGOs), donor organisations and businesses.

The Telecommunications Amendment Act, 2001 also provides for increasing the mandate of the USA through its management of the Universal Service Fund. The Fund is used to reinforce the development of infrastructure in underserved communities. In addition, support is given to schools procuring IT equipment to access the Internet, for establishing telecentres. During 2001, 100 Public Internet Terminals (PITs), seven citizen post offices, eight Multi-purpose Community Centres (MPCCs) and nine community radio production hubs were installed. A total of 1,5 million South Africans gained access to SABC radio services for the first time.

Information technology

State Information Technology Agency (SITA)

On 29 January 1999, SITA was incorporated as a private company with the State as sole shareholder to provide IT-related services exclusively for the Public Service. It officially opened its doors on 1 April 1999.

arivia.com

The State-owned IT company, arivia.com, which became fully operational on 8 January 2001, is the product of a merger between ITS (the IT division of Eskom), Datavia (the IT division of Transnet) and Ariel Technologies (the IT division of Denel). The sum of the values of the three entities is estimated at R644 million, whereas the value of the merged model for the three entities is about R846 million with Eskom, Transnet and Denel as direct shareholders.

Its key focus is to deliver IT infrastructure solutions, focused business solutions and to engage further in e-ventures to exploit opportunities in e-commerce.

Presidential International Advisory Council on Information Society and Development

The aim of the Presidential International Advisory Council on Information Society and Development is to assist government in narrowing the digital divide with the rest of the world. The Council consists of Chief Executive Officers (CEOs) from major international ICT corporations and industry experts. The second meeting of the Advisory Council was held at Lake Pleasant in George in September 2002. The Council meets once a year to exchange ideas.

Presidential National Commission on Information Society and Development

In the same context, and to mobilise national know-how and build common approaches, President Thabo Mbeki also established the Presidential National Commission on Information Society and Development. This body recommends strategies to bridge the digital divide and helps develop an ICT policy framework.

Institute for Satellite and Software Applications

The Institute is another intervention in bringing about human capital that will position South Africa as a player in the science and space technology area.

In 2001, ISSA produced 25 Masters graduates, 14 of whom were studying engineering sciences through Stellenbosch University and 11 who graduated with a Masters degree in software engineering through Carnegie Mellon University in the United States of America (US).

During 2001/02, the Software Evaluation Centre, operated by ISSA software engineering graduates, was established. The process to establish a Computer Virus Monitoring Centre has also been completed.

During 2002/03, the Department of Communications will collaborate with local universities for the presentation of a Masters degree in IT-software engineering programming with the Carnegie Mellon University.

The possibility of a multimedia software degree programme with the Multimedia University of Malaysia will also be investigated.

Students of ISSA will be involved in a research programme at Miralab at the University of Geneva on virtual reality research. This will enable the development of different scientific tools for diagnostic and educational purposes. ISSA will also implement the schools' mentorship programme.

Internet

According to a study by World Wide Worx, some 2,89 million South Africans (one out of every 15) had access to the Internet by the end of 2001. The number was expected to grow to around 3,1 million by the end of 2002. This makes South Africa the largest Internet consumer in Africa.

The Directorate: Internet established by the Department of Communications has as its primary role increasing access and use of the Internet by all South Africans. This is with a specific focus on historically disadvantaged communities and the youth.

The Directorate aims to realise the social and economic benefits of the Internet. The focus is on expanding participation and facilitating access to the Internet.



Public Internet Terminals

In order to facilitate the development of e-government, the Department of Communications is engaged in a process of rolling-out PITs that provide electronic addresses to citizens.

PITs entail the installation of Internet kiosks in post offices around the country. Access to the public terminals is obtained through smart-card technology.

The PIT project received an award from the World Information Technology Services Association as the best technology for providing ordinary people access to the Internet and e-mail. It also provides a platform for e-commerce to empower the growth of SMMEs.

By September 2001, 100 PITs had been installed in post offices country-wide of which 91 were online.

A further 200 are planned for 2002/03.

International co-operation

South Africa is a member of the Council of the International Telecommunications Union, an arm of the United Nations. Several governments, international organisations and donor agencies have pledged financial and technical support to help strengthen the South African IT industry.

The money will mainly fund research projects to identify sustainable ways of enlarging the industry. This could include seed capital to fund research or manufacturing projects, and assessing how rural hospitals could benefit from telemedicine or how effective computer-

based education is for schools.

The African Telecommunications Union has launched the African Connection Project, which provides for sector restructuring through new policy and regulatory frameworks that will facilitate much-needed investment.

The plan has the backing of 44 member states of the Pan African Telecommunications Union. The World Bank and other institutions are funding the projects. Six key African telecommunications projects have been prioritised: telemedicine, telehealth, tele-education, tele-agriculture, infrastructure development, telecentre/Internet access, and centres of excellence. South Africa chairs the Ministerial Oversight Committee.

The Ministry of Communications remains dedicated to the advancement of telecommunications in Africa. The majority of the continent's 53 communications Ministers have committed themselves to this goal.

Over the next few years, modern policy and legislative frameworks will have to be considered by the participating governments, regulatory systems established, and a pool of African expertise harnessed for co-ordinated spectrum management and frequency planning.

The plan will require the setting of priorities that will include developing the industry to advance the objective of universal access and service. This entails the development of telecentres (or common-use public access terminals) in rural areas to ensure that larger numbers of people have access to telephones.

The first telecentre in South Africa was opened in March 1998 at GaSeleka, near Ellisras in Limpopo (formerly the Northern Province).

Information

In September 2002, the official South African portal (www.safrika.info) was launched. It is part of the International Marketing Council's campaign to change perceptions about the country and is the first of its kind in the world. It features links to, among others, the Department of Trade and Industry, Proudly South African and South African Airways and presents an entry point to all government online services, all parastatals and South African businesses.

A team of journalists daily updates the portal with news about South Africa and other important issues.

Telkom

In May 1997, 30% of Telkom was sold to a strategic equity partner, Thintana Communications, a consortium comprising US-based SBC Communications Inc. and Telekom Malaysia Berhad. At the same time, as part of its commitment to economic empowerment and developing a shareholder culture, the

Government also set aside a 3% holding in Telkom for a qualified black empowerment group. Ucingo Investments (Pty) Ltd became the new shareholder. It is a broad-based investment company representing more than 20 empowerment groups nation-wide.

Telkom's fixed-line exclusivity period came to an end on 7 May 2002, paving the way for the introduction of competition in the fixed-line environment, and allowing the company to shift its focus from fulfilling licence obligations to strategic and operational initiatives based on margin improvement and earnings growth.

To prepare for this challenge, Telkom has, for the past five years, been pursuing a multi-faceted process of business transformation to improve efficiencies and increase productivity and cost-effectiveness by focusing on the company's core business.

Significant achievements made in the last five years include:

- a world-class communications network capable of supporting the most modern technologies, and value-adding products and services has been put in place
- customer service has greatly improved in terms of quality, speed, efficiency, reliability and convenience
- telecommunications services are within reach of the majority of South Africans
- Telkom's technical and management skills base has improved significantly through skills transfer by the strategic equity partner, Thintana, and Telkom's own human resource development programmes.

In a strategic drive to reinforce its position as the leading integrated communications company in the country, the group continues to invest significant amounts of capital in the expansion and modernisation of its network.

The group's capital investment of R48 billion over the past five years has allowed Telkom to connect a significantly greater number of customers. In 2002, Telkom invested R9 billion primarily in its fixed and mobile networks and operational support systems, which resulted in further enhancing network capability.

The establishment of Telkom Business Integration Services (TBIS) in September 2001, and the integration of Intekom, South Africa's third-largest Internet service-provider into TBIS, consolidated the Group's Internet and e-business operations into a single portfolio. The TBIS portfolio of services includes hosting, security, Local Area Network services, Internet access and e-commerce. These services are fully supported by the new data centre in Centurion, Gauteng.

By the end of March 2002:

- Telkom had installed 2,8 million lines, bringing the total number of lines to 4,92 million (this decreased by 1% from 4,96 million)
- Telkom had installed 195 399 payphones (10% increase)
- Telkom had installed fixed-line prepaid lines totalling 707 881 (47% increase)
- Integrated Services Digital Network channels saw a 25% increase from 374 062 in 2001 to 467 518
- Telkom had digitised 653 switches.

Operating in the global space, Telkom is:

- one of the 200 investing entities in Intelsat, the commercial satellite communication service-provider with 22 geo-stationary satellites in operation. Able to access 14 of these satellites, Telkom can reach all countries in Africa, Europe, Asia and the US.
- one of the share-holding companies of the International Mobile Satellite Organisation, Inmarsat. In addition to maritime customers, typical users of the system include journalists and broadcasters, health-care and disaster relief teams, land transport fleet operators and the airline industry.
- connected to its main markets in Europe and the US by the SAT-2 cable. International connectivity received an unprecedented boost when the SAT-3/WASC/SAFE cable system was recently launched in Dakar, Senegal. Thirty-five telecommunications operators have joined Telkom in this undersea cable project to link Africa with Asia and Europe. This initiative is a technological breakthrough of great significance to Africa, offering faster, more efficient trading channels between the



continent and international markets. The SAT-3/WASC segment links South Africa with Europe, with 10 landings in nine western and southern African countries.

The SAFE (South Africa Far East) segment continues the connection to Malaysia, with a landing that brings India into the system. The system, which spans 27 850 km, will ultimately have the capacity to handle a total of 120G/bits per second of information between terminals. This is equal to 5,8 million simultaneous telephone calls or to transfer the contents of 35 DVD disks in one second, offering customers a huge increase in bandwidth access between these regions along with unparalleled quality of service to a number of new destinations with untapped market potential.

Land-locked and neighbouring states in Africa can link into the cable system via satellite and terrestrial connections, resulting in this project benefiting the continent as a whole.

Telkom was awarded an international IT contract to develop and manage the record-keeping and planning of the entire SAT-3/WASC/SAFE network.

The SAT-3/WASC/SAFE project closes a long-existing gap in the international submarine cable market-place and should cater for the continent's burgeoning telecommunications needs for 25 years.

To connect the Southern African Development Community, Telkom has played a decisive role in:

- upgrading the microwave, optical fibre and transmission systems to Synchronous Digital Hierarchy technology between South Africa, Swaziland, Lesotho, Mozambique, Botswana and Namibia
- the digitisation of the Zimbabwe telecommunications microwave route linking the two countries
- the digitisation of Lesotho's domestic network for managed data services
- the installation and management of the Angolan National Very Small Aperture Terminal (VSAT) network

- expanding and improving VSAT connectivity. Telkom has availed its satellite hub facility for utilisation by African telecommunications operators for their national and international VSAT-based networks. More than 20 African operators are currently using the hub.

Telkom is also focused on the implementation of Voice-over Internet Protocol (VoIP) in conjunction with several carriers. The company has already implemented VoIP in its international network – several US and European carriers have been connected via a telehouse in London where VoIP gateways are installed. In addition, Telkom has procured additional VoIP gateway equipment that it intends to deploy within the network for a number of African operators, focusing on both established operators and new and emerging second-tier Global Systems for Mobile Communication (GSM) operations connecting to the Telkom SA VoIP clearing house.

Business efficiency

Telkom has focused strongly on raising all-round efficiencies, improving internal control and sharpening its focus on core activities.

Steps taken include:

- organisational restructuring, involving an evolutionary migration from a regionally-based structure to a functionally-based one geared for customer service.
- eliminating internal inefficiencies and duplication of functions by managing staff numbers, resulting in a more streamlined workforce. This was achieved without the loss of crucial technical skills. The number of lines per employee ratio has improved from 82:1 in 1998, to 113:1 in 2001 and 125:1 in 2002.
- accelerating training and development of staff.
- outsourcing non-core businesses, including the guarding component of security services, catering, printing, electronic workshops, light engineering, and property and fleet management.
- implementing a company-wide internal cultural exchange programme.

Customer service

In the business fixed-line market, the average installation time has been reduced from 11 days in 2001 to five days in 2002. Some 95% of residential lines are installed within 28 days, while the average installation time has been reduced from 18 days in 2001 to eight days in 2002.

An average of 91% of faults are cleared within 48 hours, compared to 65% in 1998. This improved efficiency has coincided with a shift towards a larger and more disparate rural customer base.

Telkom is the first communications company in the world to provide prepaid services on a fixed line. The PrepaidFone service has been converted to an intelligent network and has since been expanded by incorporating value-added services.

New value-added products for the single digital line market have also been added to the existing portfolio.

Other service offerings include:

- broadband multimedia, such as video-conferencing
- business systems, ranging from large PBXs to cordless telephones
- travel services, such as post and prepaid international calling services
- Internet, including wholesale bandwidth provision and value-added services
- specialised international services, such as maritime services and broadcasting links.

Combating cable theft and network fraud

The impact of network fraud, including subscription and clip-on fraud, has successfully been reduced to R174 million as a result of enhanced systems and proactive management.

Corporate social responsibility

The Telkom Foundation focuses primarily on promoting mathematics, science and technology at different levels of the education system to help grow South Africa's skills base. The Foundation is also committed to develop-

ing a culture of empowerment and sustainable economic growth.

The Foundation committed R100 million over five years, while Thintana committed an additional R120 million over the exclusivity period to support education and training in the areas of ICT, science and mathematics.

People development

Telkom's Centre for Learning (CFL) was established to gain international standards among the Telkom workforce. CFL was mandated with improving both productivity and the quality of business acumen. Performance improvement and lifelong learning are considered important strategic business imperatives.

In 1997, Telkom committed R2,3 billion for training and development during the period of exclusivity. As a result, Telkom employees underwent a total of 2,9 million training days over the four-year period up to 2001, at a cost of R1,9 billion. By September 2002, CFL had delivered more than 3,3 million training days to Telkom employees.

Mobile communications

South Africa, with the operators Vodacom, MTN and Cell C, is the fourth-fastest growing GSM market in the world. By January 2002, there were 11,2 million cellular users in the country and the figure was expected to grow to 21 million by 2006.

The country's third cellular licence was granted to Cell C in June 2001. It started operating on 17 November 2001. Cell C is backed by Saudi Oger. It also brought in Verizon Communications, the biggest cellular operator in the US, as operating partner. Cell C started operating on an 084 prefix number range. It signed a 15-year roaming agreement with Vodacom in July 2001.

After only six months of operations, Cell C broke the 500 000 subscriber mark in May 2002. It was on track to meet its revised target of one million-plus subscribers by the end of 2002.



Cell C aims to achieve 20% of the market share by 2007.

Cell C has six active roaming agreements in Namibia, Mozambique, Spain, the Ivory Coast, Mauritius and Swaziland, and has entered into roaming agreements with an additional 49 international operators.

In the interim, Cell C has entered into an agreement with Comfone, a division of Swisscom, which will allow Cell C subscribers access.

Vodacom is South Africa's leading cellular network with a 60% share of the market, and more than 90% of all new connections are prepaid customers. Telkom is the majority shareholder of Vodacom, with a 50% interest. Other stakeholders are Vodafone (31,5%), Rembrandt Group Ltd (13,5%) and Hosken's Consolidated Investments (5%).

Vodacom Group (Pty) Ltd's estimated value is between R50 billion and R70 billion.

By April 2002, Vodacom provided a GSM service to almost seven million customers in South Africa, Tanzania, Lesotho and the Democratic Republic of the Congo.

MTN was the first cellular provider in the world to have GSM coverage of 60 000km², obtain a cellular licence in Africa and to launch prepaid cellular packages in South Africa, as well as a special package for the deaf community.

MTN's network coverage in South Africa embraces almost 880 000km² (including sea) and provides telecommunications access to 92% of the population. MTN's other African operations include Uganda, Swaziland, Rwanda, Cameroon and Nigeria.

MTN was the first African network to be awarded the international quality certifications ISO 9001 for its Network and IT divisions, ISO 9002 for its Customer Services Department and ISO 14001 for its Environmental Management System.

Educational initiatives are a primary focus of MTN's extensive social responsibility programme. The SUNSTEP project in partnership with the University of Stellenbosch has involved over 320 000 pupils and their teach-

ers to date. Another partnership with Peninsula Technikon is training electrical engineers through the PENTECH programme, while the SciTech Centre opening in Cape Town in October 2002 will introduce young people to hands-on experience of scientific principles.

The postal sector

Policy and legislation

The corner-stone of national policy for the postal sector is the provision of a universal service at an affordable price and acceptable standard of service for all citizens. In order to ensure this, a universal service obligation (USO) is placed on the South African Post Office.

In order to offset the cost of providing a basic service in low-density, rural or uneconomical 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.

A USO is an obligation to provide specified services to the whole community, even though these services may not be commercially viable in their own right. The universal postal service implies that all citizens will have equal access to a basic letter service

- that is reasonably accessible to all people
- at a single uniform rate of postage
- at the lowest price consistent with meeting all its obligations, financial and otherwise
- to places outside the country
- at a standard of performance which reasonably meets the needs of the population.

The adoption of the *White Paper on Postal Policy* in May 1998 paved the way for legislative reform, which resulted in the enactment of the Postal Services Act, 1998 (Act 124 of 1998), which repealed certain sections of the Post Office Act, 1958 (Act 44 of 1958). The Postal Services Act, 1998, came into operation in January 1999.

In terms of the Post Office Act, 1958, the Post Office enjoyed exclusive rights and privileges, including a monopoly on letter mail up

to 2 kg. According to the Postal Services Act, 1998, the Post Office continues to enjoy certain exclusive rights and privileges. However, the monopoly was reduced to 1kg.

In addition, the Post Office is obliged to operate under a 25-year licence with explicit universal service targets and other terms and conditions. The monopoly and compliance with the terms and conditions of the licence will be reviewed and monitored by the regulator.

New projects of the postal policy section include the establishment of a Postal Training Institute for the postal industry and postal security improvements both locally and regionally.

Postal services regulatory framework

The Directorate: Postal Regulation was established within the Department of Communications to:

- ensure that the provisions of the Act and the terms and conditions contained in the licence are complied with
- promote the interests of users of postal services in respect of the cost of reserved services, the continuity of postal services and the quality thereof
- ensure that all reasonable requests for postal services are satisfied
- promote and encourage the expansion of postal services
- promote universal postal service provision
- regulate the issue of postage stamps.

The Postal Services Amendment Act, 2001 (Act 33 of 2001), was promulgated in November 2001 to clarify the mandate of the Postal Regulator.

South African Post Office

The principal function of the Post Office is to supply postal services within and outside of South Africa. The Post Office may also conduct subsidiary and incidental businesses and activities relating to postal services.

Cabinet has approved the reintroduction of

the postal subsidy, following operational and financial difficulties encountered while the South African Post Office was restructuring to eliminate its reliance on public funding. However, contrary to the historical practice of making up for the operational losses, the new subsidy is targeted towards the Post Office meeting its social responsibilities. These include expanding the postal outlet network, particularly in underserved areas, refurbishing outlets and bridging the digital divide with the roll-out plan of Citizens' Post Offices and PITs to previously disadvantaged communities. The reintroduction of the subsidy is an interim measure to put the Post Office on a sound financial footing, pending the restructuring.

Principal activities

Capital expenditure of the Post Office group totalled R315,6 million in 2000/01, while total expenditure amounted to some R3,8 billion. The group's total income, including the subsidy, was approximately R3,7 billion and its fixed assets R1 040 million. By July 2002, the Post Office employed a total of 20 247 staff, excluding part-time employees and contract workers. The Post Office's core business is postal services, which account for 70% of its total revenue. Responsibilities include the provision of a postal distribution network with postal addresses as end nodes.

The main areas of business are the delivery of domestic and international letters, and courier and parcel services.

Products and services

The Post Office handles an average of six million letters a day, 70% of which are prepaid mass-mailed letters sent out by companies using franking machines. All franking machine systems in operation in South Africa operate on remote meter-settings. The system enables the user to frank, date and seal an article, print a return address and count the items in the same time as it takes to have a stamp affixed, thus saving time and money. The exact postage due can be franked onto an envelope or label, as opposed to affixing a number of



postage stamps to make up the postage due. Machine inspections are done on the clients' premises.

Counter service

In addition to letter mail and parcel services, the Post Office offers a range of other mail services, such as courier services, agency services such as pension payments and the collection of third-party payments on behalf of organisations such as Telkom, the SABC and local governments. It also offers savings and money transfer services through the Postbank.

Securemail

Securemail is a business unit aimed at handling security-sensitive items such as credit cards. It handles more than 2,5 million credit cards a year.

It was established with the full co-operation of major financial institutions to minimise postal theft and fraud. Since its inception, there has been a significant decrease in credit card theft. Over 99% of cards handled are now successfully delivered.

Freight and courier services

The Courier and Freight Group (Pty) Ltd of the South African Post Office became the biggest distribution company in southern Africa when it took over the customer base of Fast Forward. Services available are:

- parcel distribution, express and courier services
- mini-container services
- parcel and mini-container services to neighbouring countries
- document exchange
- Speed Services Couriers.

Philatelic services

The sale of postage stamps is traditionally associated with the Post Office. Annually, the Post Office prints more than 384 million of these tiny works of art. Stamps do not only play an important role in the daily postal delivery system, but also serve the interests of a great many stamp collectors and philatelists

by keeping pace with historic events and parading the country's rich culture and diverse artistic splendour. The Post Office's philatelic division serves stamp collectors and dealers throughout the world. Apart from counter sales at all the Post Office's points of sale and mail orders, the Division operates a deposit account system whereby new issues are automatically mailed to stamp collectors anywhere in the world.

Stamps for 2002 included two issues to celebrate the World Summit on Sustainable Development in Johannesburg and an issue to celebrate the founding of the African Union in Durban.

Mail volumes

The Post Office services over 40 million South Africans and numerous public and private institutions. It delivers mail items to over 7,5 million delivery points.

Postal network

By March 2001, the Post Office had 2 762 postal outlets country-wide and 30 mail processing centres. The management of the post offices, agencies, local hubs and delivery depots in the provinces is done through postal regions. The network is being rebalanced for access and more equitable services, especially in historically disadvantaged areas. South Africa has a network of postal routes across which mail is conveyed to and from cities, towns, villages and hamlets.

The Post Office uses road transport on most of the major routes in the country for the dispatch of domestic surface mail. Sea mail is carried to all parts of the world as and when ships are available. Closed surface-mail dispatches are forwarded to more than 90 countries and received from more than 75, while closed airmail dispatches are forwarded to more than 65 and received from more than 100 countries. Some 45 airlines transport mail to South Africa and about 33 from the country. The international air and surface parcel service of the Post Office is available to some 220 countries.

Delivery standards and service performance

National delivery performance has been improving over the years. By December 2000, the Post Office claimed to consistently deliver 91% of mail on time. This equals western Europe standards and is above the Universal Postal Union's (UPU) standard of 90%.

Standards at the time allowed three days for delivery across the same town and four or five days between mail centres. This has changed to two days across town and three to four days between mail centres. Obviously, this impacts on delivery performance. The Post Office currently performs nationally at 88%, the target being 92%.

The Post Office uses various systems to measure service performance. Each of the systems is in operation nationally and provides the operational and management information that is monitored weekly at the video conference at the National Control Centre.

To ensure quick and accurate mail delivery, the use of correct postal codes is essential. The postal codes may be obtained from the Internet at <http://www.sapo.co.za>, or through the PostCoder software package (toll-free number 0800 110 980).

Address provision

The Post Office is committed to provide every household in South Africa with a postal address. By September 2000, mail was delivered to 8,3 million postal addresses. This included delivery to more than 4,2 million street addresses, more than 4,1 million post-box addresses and some 17 000 private bags.

Postbank

Postbank is aiming at remaining a profitable entity within the South African Post Office infrastructure. It services its target market through a carefully defined and expanded mix of innovative and traditional products, using cost-effective distribution channels, including the Post Office network.

New legislation provides for the separation of Postbank from the Post Office to position itself to respond to the needs of the poor who do not have access to the current banking system. Postbank will soon have its own CEO and will then have the flexibility to respond quickly to the needs of the market.

Postbank is in the process of refining and expanding its product range to cater for the needs of the 'unbanked' part of the South African population. This will include loan facilities and other basic banking products.

As part of the restructuring process, Postbank is in the process of being corporatised to ensure that it plays a greater role in development activities. These would include addressing the financial service needs of low-income communities and improving access to credit for small businesses. The Department is currently investigating an appropriate governance and regulatory framework for Postbank. Its aim is to ensure adequate protection of public deposits and the associated contingent liability to government, while also ensuring the Bank's ability to meet its mandate.

International and regional co-operation

South Africa is a member of the UPU. The country participates in the technical assistance programmes within the UPU, and uses its international accounting facility. It also participates in other international bodies such as the Pan African Postal Union, Council of Commonwealth Postal Administrations and the Southern African Transport and Communications Commission.

South Africa, through the Department of Communications, is a signatory to international treaties, conventions and agreements. It co-operates and works in partnership with other postal administrations through either bilateral or multilateral agreements relating to letters, parcels and postal financial services.



The media

Media freedom

According to the Bill of Rights, as contained in South Africa's Constitution, 1996 (Act 108 of 1996), 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.

The first Press Freedom Index by Reporters Without Borders, released late in 2002, ranked South Africa as 26th in the world.

Finland, Iceland, Norway and the Netherlands share the first place on the Index. South Africa shares its place with Austria and Japan.

Broadcasting

Policy and legislation

The Broadcasting Act, 1999 (Act 4 of 1999), and the IBA Act, 1993 (Act 153 of 1993), is aimed at establishing and developing a broadcasting policy to regulate and control all broadcasting, among other things, to:

- contribute to democracy, nation-building, the provision of education and strengthening the moral fibre of society
- encourage ownership and control of broadcasting services by people from historically disadvantaged communities
- ensure fair competition in the sector
- provide for a three-tier system of public, commercial and community broadcasting services
- establish a strong and committed public broadcaster to service the needs of all South Africans.

The Act defines the objectives of the South African broadcasting system, the structure of the SABC and the roles of the various sectors

in meeting these objectives. It also guarantees the independence of the SABC as public broadcaster. Section 8 of the Broadcasting Act, 1999 sets out the objectives of the SABC. In terms of the Act, the Government will hold 100% of the shares in the SABC as a limited liability company. A new SABC Board was appointed, which comprises a new CEO, Chief Financial Officer and Chief Operating Officer. The Memorandum and Articles of Association were drafted, and Articles were lodged with the Registrar of Companies for the registration of SABC Ltd. All SABC assets will be transferred to the new SABC Ltd., which will submit an application to ICASA for the transfer of licences.

The Broadcasting Amendment Bill deals with the restructuring of the SABC to fit into the changing broadcasting environment. The Bill requires that the SABC Board establishes two management boards to focus on the public and public commercial services. Under the new dispensation, the public broadcasting wing will execute and meet its public service mandate free from commercial interests. The commercial wing will be allowed to generate profit to be self-sustainable.

The Bill also provides for the establishment of two regional television services – one for the inland and the other to cover the coastal part of the country. The Department of Communications believes that these initiatives will increase diversity and promote local content, as it will focus on issues pertaining to the specific needs of the regions such as language and local content. While government will initiate these services, there is no intention to establish State broadcasters. The Department believes that free and diverse media are important ingredients of any democracy. While the law will provide for the establishment of the two services, it will be the responsibility of the regulator to manage the licensing process including the USOs. The services will thus have the responsibility to develop their own editorial policies free from any other influence including commercial interests.

The Bill was intensively debated during the second half of 2002.

The *White Paper on Broadcasting* provided for the establishment of the Digital Broadcasting Advisory Body. Early in 2001, the Minister jointly launched the Digital Advisory Body and the Broadcast Production Advisory Body, consisting of representatives from all broadcasting stakeholders, to promote the production of local content, the production of materials that will meet the needs of the community sector, and the foreign sale of local products. The Digital Broadcast Advisory Body works very closely with the Department of Communications. The Body advises the Minister on technology issues with particular reference to digital broadcasting and the economic and other implications of converting from analogue to digital transmission techniques.

Cross-media control and local content

The schedule to the Broadcasting Act, 1999 provides for certain amendments to Section 50 of the IBA Act, 1993. It states the specific parameters for cross-media ownership pending the investigation called for in the White Paper to review the limitations on cross-media control.

ICASA also has to investigate the level of foreign ownership. The level of ownership of private radio and television stations permitted for a foreigner is currently 20%.

The Government believes that this should be raised in order to increase investment.

ICASA has released a position paper requiring local radio and television stations to increase their quotas of locally produced content as of August 2003. New quotas for public and community radio stations are doubled to 40% while private and public commercial stations are raised to 25%. New quotas for television are increased to 55% for public broadcasters, 30% for commercial private and public free-to-air stations and 8% for pay stations.

Independent Communications Authority of South Africa

In May 2000, the Independent Communications Authority Act, 2000 was proclaimed, paving the way for the merger of SATRA and the IBA and the establishment of ICASA. The ICASA Act, 2000 will be amended to strengthen the regulator.

Broadcasting role-players

Radio

The first radio broadcasts in South Africa took place under the auspices of a broadcasting committee of the South African Railways. The first experimental broadcast was undertaken in Johannesburg on 18 December 1923 by the Western Electric Company.

During 1924, the Associated Scientific and Technical Association of South Africa began regular broadcasts in Johannesburg. The Cape Peninsula Publicity Broadcasting Association began a similar service, and the Durban Municipality followed suit with its own regular broadcasts.

The first radio station, JB Calling, went on air in July 1924.

By 1926, legislation became necessary. Under the Radio Act, 1926 (Act 20 of 1926), all radio transmission and reception were placed under the control of the Postmaster-General.

Following the contribution made by Sir John Reith, the then Director-General of the British Broadcasting Corporation (BBC), the SABC was established on 1 August 1936.

The SABC is the country's public broadcaster. It introduced its own national news service on 17 July 1950, with daily news bulletins on the English service, the Afrikaans service and Springbok Radio.

Radio Zulu, Radio Xhosa and Radio Sesotho were established on 1 June 1960.

The SABC's national radio network comprises 19 stations which, combined, reach an average daily adult audience of 20 834 million.

The SABC Radio News staff generate some 2 000 news programmes per week with a



combined airtime of almost 300 hours. For its coverage, Radio News has editorial offices in all major cities of South Africa, a wide network of local and international correspondents, and access to Reuters, Agence France Presse (AFP) and the South African Press Association (SAPA).

The SABC also started an external service along the lines of the BBC World Service and the Voice of America in 1966. Called Radio South Africa, the channel was funded by the Department of Foreign Affairs.

In the early nineties, the name was changed to Channel Africa as part of the transformation of the image and the role of the public broadcaster. It is targeted at audiences in Africa and the Indian Ocean islands, and offers an all-African radio service. As a broadcaster from Africa to Africa, it concentrates on providing programmes with a specific African content.

Channel Africa comprises four language services reaching millions of listeners throughout Africa. Broadcasts are in English, French, Kiswahili and Portuguese.

A process of commercialising Channel Africa and extending its services and programming has started. The station will be restructured and turned into a viable commercial enterprise. The process is ongoing.

Private radio stations

The following private radio stations have been granted licences by ICASA: Classic FM in Gauteng; Cape Talk MW in the Western Cape; P4, a jazz station in Cape Town with a sister station in Durban; Kaya FM in Gauteng, a multilingual youth radio station; Y-FM, broadcasting in Johannesburg in isiZulu, Sesotho and English; Radio KFM; Radio Algoa; Radio Oranje; Highveld Stereo; Radio 702 in Gauteng; East Coast Radio, and Radio Jacaranda. Stations such as Radio Jacaranda, Highveld Stereo, Radio Oranje, Radio Algoa and East Coast Radio were initially SABC stations, but were sold to private owners to diversify radio ownership in South Africa as part of the transformation of the public broadcaster.

In August 2002, ICASA revoked the licences of both Punt Geselsradio Johannesburg and Cape Town after having considered and applied a recommendation by the Broadcasting Monitoring Complaints Committee (BMCC).

Community radio stations

During 2001/02, about 1,5 million South Africans gained access to either radio services for the first time or to improved radio services.

Programmes aimed at supporting the community radio sector entailed installing seven community radio stations, while 13 stations were upgraded and provided with ICT tools to make their work more efficient. However, licensing has been slow because of staff losses at ICASA.

At the same time, in order to enhance the contribution of broadcasting services towards improving the daily lives of ordinary South Africans, the Department worked together with the community broadcasting sector to ensure the production of content that is relevant to the people and to specific situations.

More than 1 000 programmes were produced at the production hubs and aired by more than 50 community radio stations throughout South Africa.

During 2002, the Department hosted the Community Electronic Multimedia *Indaba*. Some 250 participants from rural-based community radio stations, MPCCs and telecentres, together with the Department, converged to initiate a process to address the needs of rural communities in the changing technological environment.

In August 2002, a co-operative agreement on training communities in radio technical and journalism skills was signed. The *Khuluma* Radio Project will ensure that the community radio sector meets the needs of communities.

Television

SABC

A one-channel television service was introduced on 5 January 1976.

Today, the SABC's national television network comprises three full-spectrum free-to-air channels, two pay-TV channels aimed at audiences in Africa, and Bop-TV, which the SABC runs on behalf of the State. Combined, the free-to-air channels broadcast in 11 languages and reach a daily adult audience of almost 17 million people via the terrestrial signal distribution network and a satellite signal.

There are more than four million licensed television households in South Africa. South Africa is the country with by far the largest television audience in Africa.

About 50% of all programmes transmitted are produced in South Africa. Locally produced television programmes are augmented by programmes purchased abroad and by co-productions undertaken with other television programming organisations. Television news is fed by SABC news teams reporting from all parts of the country, using modern portable electronic cameras and line-feed equipment via more than 220 television transmitters. *Ad hoc* satellite feeds are arranged from wherever news events occur.

Some 98 news bulletins are broadcast in all 11 official languages weekly.

Eight percent of broadcast time on all services is allocated to advertising.

M-Net

M-Net, South Africa's first private subscription television service, was launched in 1986. Today, it has over 1,23 million subscribers in 41 countries across the African continent.

M-Net, which is listed on the JSE Securities Exchange, features broad-ranging programme scheduling on its two terrestrial channels in South Africa.

In November 1999, it also made its debut on the Nigerian Stock Exchange, making it the first South African company to list in Nigeria.

The main M-Net channel focuses on movies and sport, but also offers a general entertainment line-up of children's programmes, series and magazine programmes.

It has a daily two-hour open window when

unencoded programmes (available to viewers without decoders), including the country's longest-running local soap opera, *Egoli – Place of Gold*, are screened.

The second channel, Community Services Network, offers niche sports programming and specialised community channels for the local Indian, Portuguese, Italian, Jewish and Christian communities.

Development of the local film and television industries is a priority, and is supported by the New Directions project, which identifies and mentors emerging film-makers, and the M-Net All Africa Awards, which recognise excellence in films made across the African continent. These projects, which play a dynamic role in nurturing and investing in the film and television industry, are among a number of initiatives and co-productions funded by M-Net's commissioning and productions department, MagicWorks.

M-Net's licence has been renewed until 2010.

Satellite broadcasting

MultiChoice Africa (MCA), formed in 1995, was the first African company on the continent to offer digital satellite broadcasting. It was formed initially to manage the subscriber services of its sister company, M-Net.

This innovation has been the hallmark of MCA, culminating in its presence in over 50 countries throughout Africa and a subscriber base of more than 1,4 million. This is done through franchises and joint ventures. MCA has introduced new technologies, offering over 54 video and 48 music channels.

MCA's technological roll-out has included the launch of data channels and the launch of the W4 satellite over west Africa, which has made digital satellite television acquisition cheaper. An added benefit has been the Africanisation of channels where local stations and languages are accommodated in the countries where MCA is broadcasting.

MCA is 100% owned by the MIH Group, which is listed on the JSE, NASDAQ in New York and AEX in Amsterdam.



Free-to-air television

The *White Paper on Broadcasting Policy*, released in June 1998, provided for the extension of free-to-air, pay and regional television services. On 30 March 1998, the consortium Midi Television was awarded the first privately owned free-to-air television licence.

The station they operate, e.tv, is a commercial service dependent on advertising. It does not charge subscription fees. The e.tv channel started broadcasting on 1 October 1998. News broadcasts and a 24-hour service were introduced early in 1999.

Signal distribution

The signal distributor Sentech will be developed into a multimedia company, which will provide infrastructure for digital broadcasting in South Africa as well as international gateway telecommunications.

Sentech, the official signal carrier of the SABC, launched its new business initiatives in June 2002. Until then, Sentech's mandate entailed the provision of its network for use by other operators, and the provision of telecommunications services direct to customers or end users.

As part of its new business initiatives, Sentech will add to the launch of the submarine cable, which links Africa with Europe and the Far East by entering the international telecommunications market and providing the necessary infrastructure for African inter-connectivity.

Print

Technical handling of the print media in South Africa rates among the best in the world. As for the editorial side, concerns have been raised about the general quality of content from a journalism point of view. Research has shown that journalists lack certain basic skills and abilities to do their job professionally.

The roots of the print media in South Africa can be traced back to the 19th century, when the first issue of a government newspaper, the

Cape Town Gazette and African Advertiser/Kaapsche Stads Courant en Afrikaansche Berigter, was published in 1800.

The first independent publication, *The South African Commercial Advertiser*, was published in 1824 by Thomas Pringle and John Fairbairn. Eighteen issues later it was banned, and reappeared only after various representations had been made to the authorities in London.

South African newspapers and magazines are mainly organised into press groups, which have burgeoned over the years as a result of take-overs.

The major press groups are Independent Newspapers (most newspaper titles), Media24, CTP/Caxton and Johnnic Publishing.

Other important media players include Primedia, Nail (New Africa Investments Limited) and Kagiso Media. Nail has unbundled into a commercial company (New Africa Capital) and a media company (New Africa Media). The flagship of New Africa Media, *Sowetan*, is the biggest daily in South Africa.

Newspapers

South African newspapers are based mainly on the British model. The management and editorial departments are controlled separately.

The size of the country – 1 500 km separating the main centres of Cape Town and Johannesburg – still precludes national dailies in the true sense of the word. Some of the bigger titles and specialist newspapers like *Business Day* distribute in metropolitan areas. The only truly national newspapers are the four Sunday newspapers, *Sunday Times*, *Rapport*, *Sunday Independent* and *Sunday Sun*, and the weekly newspaper *City Press*. All are published simultaneously in various cities, using the printing facilities of related dailies. A number of newspapers have introduced separate weekend editions of their daily newspapers, e.g. *Saturday Dispatch* and *Post Weekend*.

The *Sunday World*, launched in March 1999, soon lost its initial popularity and was

relaunched in 2000 as the *Sowetan Sunday World*. The relaunched version is now the success story of the South African newspaper world as it has almost doubled its circulation over the previous year. It is distributed in Gauteng, Mpumalanga, Limpopo and North West.

There are 17 dailies, seven Sunday papers and 21 weeklies in South Africa. Almost 158 Print Media SA (PMSA) community press members or country newspapers, most of which are weekly tabloids, serve particular towns or districts in the country by covering local affairs and carrying local advertising. Most are published in English and Afrikaans. The most popular publication day is Friday.

Newspapers appearing only in certain neighbourhoods are also part of this section. They are known as 'knock-and-drops' or 'freebies' and distributed free of charge. They have a guaranteed readership with advertising being their only source of income. More than 3,2 million newspapers of this sector are distributed weekly.

In 2001, the Audit Bureau of Circulation (ABC) listed more than 92 such papers. They are distributed mainly in urban areas, and number in the hundreds when unlisted ones are considered. Press groups such as Media24 and CTP/Caxton are major players in this field.

Since 1996, local newspapers, freebies and corporate newspapers have ventured into reporting in indigenous languages as well. With 11 official languages, it can be expected that more home-language publications will emerge. In April 2002, an isiZulu newspaper, *Isolezwe*, was launched by Independent Newspapers in KwaZulu-Natal.

Separate newspapers for different cultural groups are still preferred, with English as the popular language of choice.

Circulation

Newspapers

In 2001, newspaper circulation for urban daily and weekly newspapers displayed an increase

overall. This was largely on account of the relaunch of the *Sunday World* and a new Sunday newspaper from Media24 called the *Sunday Sun*. These two papers saw the market increase by almost 7%. The dailies' share was stable compared to figures in 2000.

The growth in the Sunday market may be an indication that black readership is picking up. Both new papers showed healthy figures while dailies traditionally read by black people, *Sowetan*, *Star* and *Citizen*, did not show any increase in circulation. Their figures even showed a slight drop.

Although the literacy of the South African population increased by more than 20% from 1991 to 1995, this has not been reflected in the circulation figures of English newspapers.

This is attributed to aliteracy among South Africans (aliteracy refers to people who can read, but choose not to).

Sowetan (193 358) is the largest English daily, *Die Burger* with a Saturday circulation of 121 210, and the *Sunday Times* (506 474) are the publications with the biggest circulation of all newspapers.

Almost all circulations improved in the period July to December 2001. Remarkably only *Beeld* and *Die Burger* increased their circulation significantly in September, taking the terror attack on America on 11 September 2001 into consideration. Some dailies even sold less in September than in October 2001.

The soccer newspaper, *Laduma*, steadily drew more and more readers during 2001.

The Cape Town newspapers did especially well with their weekend editions. *Die Burger* and especially the *Weekend Argus* outsold their daily editions by far.

Magazines

Magazines saw an increase of 2% in comparison with the last half of 2000. There were circulation gains in the niche titles, especially in the magazines for men, where competition increased with titles like *FHM* and *GQ* making an impression.

According to the *Media Yearbook of South*



African Rates and Data, there are about 300 consumer magazines and more than 500 trade, technical and professional publications.

The two TV magazines, *Radio & TV Talk* and *Magic* are the magazines with the largest circulation. The Afrikaans version of *Woman's Value, Dit*, recorded a healthy 64 000 circulation in the first half of 2001. *You* and *Huisgenoot* were again the biggest consumer magazines in South Africa. Oprah Winfrey's magazine, *O*, has also entered the arena in 2002.

ABC figures showed that magazine sales were down by 15% on average for the first quarter of 2002 compared to 2001.

Distribution

In cities, newspapers rely heavily on street sales and door-to-door delivery. Cafés and general stores provide additional selling points. In rural areas, newspapers are distributed mainly by special truck deliveries, often covering hundreds of kilometres in a single run. The cost of bulk transport by air is very high.

Newspaper Circulation Services and Magazine Circulation Services handle all Johnnic publications' circulation. The Afrikaans press group, Media24 (*Nasionale Nuusdistribueerders*), handles most of its distribution itself.

Online media

Most of the bigger publications have websites on the Internet. There are more than 600 'net-zines' listed as online publications in South Africa, with at least 16 of them specialising in daily news. The *Daily Mail and Guardian* has received world-wide praise as the best in Africa.

Media organisations and role-players

Several organisations and associations play an important role in the media field.

PMSA, formed in 1995, is an umbrella organisation administering individual bodies, namely the Newspaper Association of Southern Africa (the oldest communication organisation, established in 1882), Magazine Publishers Association SA, and the Community Press Association. Allied to PMSA, but not a constituent member, is the ABC, responsible for auditing and verifying print media circulation figures.

PMSA has established an interim Print Development Unit (PDU) to facilitate the growth of economically sustainable emerging print media enterprises.

The PDU identifies appropriate print media projects and assists in their development to

Sold magazines with the largest circulation, July – December 2001

Name	Frequency	Language	Audited circulation
Huisgenoot	W	A	366 063
You	W	E	239 108
Reader's Digest	M	E	124 437
Rooi Rose	M	A	161 402
Bona	M	E, X, S and Z	126 745
Woman's Value	M	E	127 897
Sarie	M	A	132 534
TV Plus	M	B	115 284
True Love & Family	M	E	136 450
Drum	W	Z and E	107 139

The abbreviations used are the following: W (weekly), M (monthly), E (English), A (Afrikaans), X (isiXhosa), S (Sesotho), Z (Zulu) and B (Bilingual).

Source: ABC

full viability by establishing support mechanisms, and training and development of working relationships in the areas of media management, funding, advertising, printing and distribution.

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

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

It has facilitated the mobilisation of the media in the Partnership Against AIDS Campaign and in campaigns to end violence against women and children.

Various seminars and debates have been held on media freedom and transformation, especially in relation to gender and technology. It is involved in training initiatives and in setting practical standards in journalism education.

A skills audit among journalists with two to five years' experience and an audit of journalism educators were commissioned by SANEF in 2002. Concern about the juniorisation of newsrooms was expressed.

Tertiary institutions, especially technikons, were identified as presenting effective specialised journalism training. Three centres of excellence in this field, Rhodes and Stellenbosch universities, and Technikon Pretoria, were identified.

In January 1997, the Forum of Black Journalists, consisting only of black journalists, was launched to tackle issues which directly affect black journalists.

On 1 July 1997, the office of the independent Press Ombudsman was opened in Johannesburg. Members of the public who have complaints or concerns about reports in newspapers and magazines can submit their grievances to the Ombudsman.

Should they not be satisfied with the ruling, they can lodge an appeal with an independ-

ent appeal panel. The office of the Press Ombudsman was set up by the PMSA, SANEF, the Media Workers' Association of South Africa, and the South African Union of Journalists (SAUJ).

As self-regulating mechanisms of the media industry, the Press Ombudsman and the appeal panel are in step with the Constitution, 1996 and the spirit of transformation in South Africa.

The Freedom of Expression Institute (FXI) was formed in January 1994 following the merger of two organisations involved in campaigning for freedom of expression during the apartheid years, namely the Campaign for Open Media and the Anti-censorship Action Group.

The FXI also established the Media Defence Fund to sponsor freedom of expression court cases on behalf of media representatives who are not able to afford the legal costs.

Another body which protects freedom of speech is the Freedom of Commercial Speech Trust, which was instituted in 1997. Backed by the marketing communication industry and supported by organised business and consumer organisations, the Trust focuses on transparent negotiation with legislators.

The SAUJ has fought consistently and primarily for a free and independent media and acceptable working conditions for its members. To this end, the SAUJ has signed formal agreements with most employer groupings, and participates in structures aimed at fostering and enhancing media freedom.

The BMCC was established under sections 21 and 22 of the IBA Act, 1993.

It monitors broadcasting licensees for their compliance with or adherence to the terms, conditions and obligations of:

- their broadcasting licences
- the Code of Conduct for Broadcasting Services
- the Code of Advertising Practice.

The BMCC receives and adjudicates complaints from the public with regard to licence conditions, and is also entitled to initiate its own investigation into suspected non-compliance by a broadcaster.



If a member of the public is concerned that a broadcaster is not observing its licence conditions, that person may lodge a complaint with ICASA. If a broadcaster is found to be guilty of contravening its licence conditions, the BMCC makes recommendations to ICASA about action that should be taken.

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

Material that could be considered X-rated must be submitted to the Film and Publication Board prior to being shown. (See chapter: *Arts and Culture*)

The mission of the National Association of Broadcasters is to protect the interests of broadcasting as a whole, at the same time interfacing with ICASA on matters such as freedom of speech.

Other press organisations operating in the country are the Foreign Correspondents' Association of South Africa, the Printing Industries Federation of South Africa, the South African Typographical Union, the Specialist Press Association, the South African Guild of Motoring Journalists, Professional Photographers of South Africa, the Media Institute of Southern Africa and press clubs in major centres.

News agencies

SAPA, which is a national news agency, is a co-operative, non-profit news-gathering and distribution organisation operating in the interests of the public and its members. SAPA's foreign news is received from Associated Press and its representatives in London.

The main foreign news agencies operating in South Africa are AFP, Associated Press,

Deutsche Presse Agentur, Reuters and United Press International.

Other agencies are Eastern Cape News Agency, African Eye News Service (AENS) in Mpumalanga and Network Radio News.

Training centres

Over 40 institutions offer media training in South Africa.

Tertiary institutions include various technikons and universities such as Pretoria Technikon; Rhodes, Potchefstroom, Stellenbosch and Witwatersrand universities; and organisations such as the Cape Town Film and Television School, the SABC's Television Training Centre, the Radio Freedom Institute, the Institute for the Advancement of Journalism, and NEMISA, a government-funded training institute specialising in broadcasting, news media and multimedia skills.

In 2001, 30 students graduated from NEMISA in the areas of television and radio production. NEMISA successfully introduced the multimedia course in partnership with the Multimedia University of Malaysia. During the course of 2002, 70 more students, the majority of whom are women, were expected to graduate.

The focus in training during 2002/03 will be on delivering web-based Internet language services for the 11 South African official languages. Working together with the Department of Education, NEMISA will also embark on the training of teachers and school administrators in the use of ICT tools for education. This partnership, which includes Sentech, will also see the implementation of Edu-net and the E-learning Centre, an education network and service that will link all public schools.

The Media, Advertising, Publishing, Printing, and Packaging Sector Education and Training Authority (MAPPP SETA) was gazetted on 15 March 2000.

It has six advisory committees, with representatives from labour, business and government:

- print media
- advertising

Daily and weekly papers

Name	Publisher	Contact information	Frequency	Language	Audited circulation Jan-Dec 2001
Beeld (Daily)	Media 24	PO Box 333, Auckland Park, 2006 T. 011 713-9000 / F. 011 713-9956 E-mail: beeld@beeld.com	MD, M-F	A	100 295
Beeld (Saturday)	Media 24	PO Box 333, Auckland Park, 2006	W, Sat	A	85 897
Burger, Die (Daily)	Media 24	PO Box 692, Cape Town, 8000	MD, M-F	A	109 876
Burger, Die (Saturday)	Media 24	PO Box 692, Cape Town, 8000 T. 021 406-2222 / F. 021 406-2911/3	W, Sat	A	121 210
Business Day	BDFM Publishers (Pty) Ltd	PO Box 1742, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5600 E-mail: bday@tml.co.za	MD, M-F	E	43 127
Cape Argus, The	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000 T. 021 488-404911 / F. 021 488-4075 E-mail: josepha@ctn.independent.co.za	AD, M-F	E	78 423
Cape Times (Daily)	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4762 E-mail: chriswh@independent.co.za	MD, M-F	E	49 970
Citizen, The (Daily)	Caxton Publishers & Printers Ltd	PO Box 7712, Johannesburg, 2000 T. 011 713-2901 / F. 011 713-9985 E-mail: news@citizen.co.za	MD, M-F	E	100 179
Citizen, The (Saturday)	Caxton Publishers & Printers Ltd	PO Box 7712, Johannesburg, 2000	W, Sat	E	83 271
City Press	RCP Media Bpk	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9985 E-mail: news@citypress.co.za	W, Sun	E	210 634
Daily Dispatch	Dispatch Media (Pty) Ltd	PO Box 131, East London, 5200 T. 031 308-2381 / F. 011 308-2111	AD, M-F	E	35 627
Daily News	Independent Newspapers KZN	PO Box 47549, Greyville, 4023 T. 031 308-2381 / F. 013 308-2111 E-mail: tbruce@nn.independent.co.za	AD, M-F	E	61 027
Diamond Fields Advertiser	Independent Newspapers Gauteng Ltd	PO Box 610, Kimberley, 8300 T. 053 832-6261 / F. 053 832-1141 E-mail: pbe@independent.co.za	MD, M-F	E	8 361
East Cape Weekend	Johnnic Publications Eastern Cape	PO Box 1121, Port Elizabeth, 6000	W, Sat	E	33 236
Herald (Daily)	Johnnic Publications Eastern Cape	PO Box 1117, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 554-966 E-mail: epherald@tmecl.co.za	MD, M-F	E	35 162
Herald (Saturday)	Johnnic Publications Eastern Cape	PO Box 1117, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 554-966 E-mail: epherald@tmecl.co.za	W, Sat	E	26 100
Ilanga	Mandla Matla Publishing Co (Pty) Ltd	PO Box 2159, Durban, 4000 T. 031 309-4350 / F. 031 309-3489	BW, Th	Z	10 948
Independent on Saturday, The	Independent Newspapers KZN	PO Box 47549, Greyville, 4023 T. 031 308-2381 / F. 013 308-2111	W, Sat	E	61 705
Mail and Guardian	M & G Media Pty Ltd	PO Box 91667, Auckland Park, 2000 T. 011 727-7000 / F. 011 727-7111 E-mail: newsroom@mg.co.za	W, Fr	E	42 197
Mercury, The	Independent Newspapers KZN	PO Box 950, Durban, 4000 T. 031 308-2300 / F. 031 308-2333 E-mail: knight@independent.co.za	MD, M-F	E	39 689
Natal Witness	Natal Witness Pr & Pub Co (Pty) Ltd	PO Box 362, Pietermaritzburg, 3200 T. 033 355-2127 / F. 033 355-1122 E-mail: news@witness.co.za	MD, M-S	E	24 506
Post	Independent Newspapers KZN	PO Box 47549, Greyville, 4023 T. 031 308-2424 / F. 031 308-2427 E-mail: khalil@independent.co.za	W, Wed	E	45 046



Name	Publisher	Contact information	Frequency	Language	Audited circulation Jan-Dec 2001
Pretoria News (Daily)	Independent Newspapers Gauteng Ltd	PO Box 439, Pretoria, 0001 T. 012 325-5382 / F. 012 325-7300 E-mail: tle@pretorianews.co.za	MD, M-F	E	26 451
Pretoria News (Saturday)	Independent Newspapers Gauteng Ltd	PO Box 439, Pretoria, 0001	W, Sat	E	15 476
Rapport	RCP Media	PO Box 8422, Johannesburg, 2000 T. 011 713-9628 / F. 011 713-9980 E-mail: aleroux@rapport.co.za	W, Sun	A	335 467
Saturday Dispatch	Dispatch Media (Pty) Ltd	PO Box 131, Johannesburg, 2000 T. 031 308-2381 / F. 011 308-2111	W, Sat	E	29 944
Saturday Star, The	Independent Newspapers Gauteng Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 834-7520 E-mail: starnews@star.co.za	W, Sat	E	139 129
Soccer-Laduma	CT Media (Proprietor)	PO Box 787, Sea Point, 8060 T. 021 685-3838 / F. 021 685-3852	W, Thu	E	196 094
Sowetan	New Africa Publications (NAP) Ltd	PO Box 6663, Johannesburg, 2000 T. 011 471-4000 / F. 011 474-8834 E-mail: editor@sowetan.co.za	MD, M-F	E	193 358
Sowetan Sunday World	NAP	PO Box 30315, Wibsey, 1717 T. 011 471-4200 / F. (011)471-4164 E-mail: newsed@sundayworld.co.za	W, Sun	E	108 294
Star, The	Independent Newspapers Gauteng Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 836-6186 E-mail: starnews@star.co.za	MD, M-F	E	166 251
Sunday Independent, The	Independent Newspapers Gauteng, Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 834-7520 E-mail: newstips@independent.co.za	W, Sun	E	38 522
Sunday Sun	Media24	PO Box 333, Auckland Park, 2006 T. 011 713-9000 / F. 011 713-9956	W, Sun	E	104 287 (July-Dec)
Sunday Times	Johnnic Publications	PO Box 1742, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: suntimes@tml.co.za	W, Sun	E	506 474
Sunday Tribune	Independent Newspapers KZN	PO Box 47549, Greyville, 4023 T. 031 308-2385 / F. 011 308-2715 E-mail: clarke@independent.co.za	W, Sun	E	111 114
Volksblad, Die (Daily)	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7876 / F. 051 430-6949 E-mail: mvanrooyen@volksblad.com	MD, M-F	A	29 687
Volksblad, Die (Saturday)	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7876 / F. 430-6949	W, Sat	A	26 102
Weekend Argus	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000	W, Sat	E and Sun	105 278

The abbreviations used are the following: MD (morning daily) Mo-Fr (Monday to Friday), AD (afternoon daily), W (Wednesday), Fri (Friday), Sat (Saturday), Sun (Sunday), Tu (Tuesday), Wk (weekly), E (English), A (Afrikaans), n/a (not available), BW (bi-weekly), Th (Thursday), Mo (Monday), Z (Zulu)
Audit Bureau of Circulations (ABC)

Winners of major annual press trophies

	Frewin*	McCall**	Cronwright***	Hultzer****	Joel Mervis*****
1998		Beeld	The Mercury Record	Western Transvaal	Streeknuus Naweeek-Beeld
1999	Beeld	The Mercury	Western Transvaal Record	Vaal Weekly	Naweeek-Beeld
2000	Beeld	Business Day	District Mail	Vaal Weekly	Naweeek-Beeld
2001	The Star	The Mercury	Sandton Chronicle	Potchefstroom Herald	Rapport

- * Best urban daily newspaper with a circulation exceeding 50 000
- ** Best daily with a circulation under 50 000
- *** Best community newspaper with a circulation exceeding 8 000
- **** Best community newspaper with a circulation below 8 000
- ***** Best urban weekly

Source: PMSA

- publishing
- printing
- packaging
- film and electronic media.

MAPPP SETA is responsible for co-ordinating a sector training plan across the media industry, and assesses the quality of training courses that are run by the industry.

Parallel to this, the South African Qualifications Authority has approved the establishment of several standards-generating bodies for the media industry.

Similar bodies were implemented for journalism training and communication studies. These bodies are substructures of the National Standards Body 04 (language and communication), which co-ordinates standard-setting in the communication and language sectors.

Journalism awards

The winners of the inaugural Mondi Paper Newspaper Awards were announced in March 2002.

The *Sunday Times* Investigations Team – André Jurgens, Leonard Ndzhukula (a.k.a. Mzilikazi wa Afrika) and Jessica Bezuidenhout – scooped the first place in both the News-writing category and the South African Story of the Year with their series of reports on Tony Yengeni.

The Magazines SA/SAPPI/Pica Awards is an annual event, open to all Magazine

Publisher Association member publications that hold current ABC certificates. The Awards acknowledge standards of excellence and professionalism in South African publishing. Editorial and presentation quality of publications in selected categories is recognised.

The Mondi Paper Magazine Awards encourage and recognise work by individuals in the various disciplines of magazine journalism and related fields.

The Nat Nakasa Award is open to any media practitioner (journalist, editor, manager or owner) who has:

- shown integrity and reported fearlessly
- displayed a commitment to serve South Africans
- tenaciously striven to maintain a publication or other medium despite insurmountable obstacles
- resisted any censorship
- shown courage in making information available to the public
- any combination of the above.

The sponsors of the Award are PMSA, SANEF and the Nieman Society of southern Africa.

Justin Arenstein, founding editor of the African Eye News Service won the Award in 2002. Arenstein started the AENS in 1994. The AENS is financially independent and operates in 12 African countries.

Elise Tempelhoff of *Beeld* and Martin Welz of *Noseweek* each received a special mention from the judges.



The Sanlam Community Press Awards is aimed at encouraging excellence and rewarding meritorious work. Full-time editors, journalists, photographers and advertising representatives from all southern African community newspapers, which do not appear more than twice a week qualify for the Awards.

Awards for photographers are also very popular, like the Fuji Awards dominated in 2001 by Siphwe Sibeko of *The Star*.

Media diversity

Media diversity in any country is regarded as a sign of the status of its democracy. South Africa is on its way to achieving as much diversity as possible.

Media Development and Diversity Agency (MDDA)

The MDDA Act, 2002 (Act 14 of 2002), provides for the establishment of an independent, statutory body, which is to be jointly funded by government, the media industry and other donors, and which must act in terms of the Public Finance Management Act, 1999 (Act 1 of 1999).

The responsibility of the Agency will be to support, facilitate, research and help create an enabling environment for media diversity in South Africa. Comments from a wide range of stakeholders were taken into account in drafting the legislation and finalising the position paper. Further consultation with the media industry resulted in a Draft Memorandum of

Understanding between GCIS and key print and broadcast media houses. Among other things, it is based on a commitment by the media industry to contribute to the funding of the MDDA.

It will be governed by a nine-person Board of which six will be appointed through an open process by Parliament and the President. Three seats will be reserved for nominees from commercial print, commercial broadcast and one other.

It was expected that the MDDA would become operational early in 2003.

Advertising

The top advertising agencies in 2002, as recognised in the *AdFocus* supplement in *Financial Mail* of May 2002 were: TBWA SA (Ad Agency and Large Agency), Net#Work (Midsize Agency), HarrisonHuman Bates (Small Agency), M&C Saatchi (Emerging Agency) and Octagon (Specialist Agency).

Tso Modise received the Achiever Award in Advertising, Dulux was named Advertiser of the Year, while the Tony Koenderman Award went to Peter Vundla. CIA Nota Bene received the Media Agency Award.

South African agencies are also active in Africa. The top five are: McCann-Erickson Africa (in 33 countries), FCB Africa (32), Ogilvy Africa (29), Saatchi Africa (17) and Grey (15).

Advertising awards

The Loerie Awards are the best-known South African awards that recognise excellence in advertising. These Awards cover 16 mutually exclusive media categories. These are: television, international television, cinema, radio, newspaper, magazine, international print and poster, outdoor advertising (above-the-line) and design (below-the-line) campaigns, graphic design, promotional marketing, audio-visual, corporate events, digital interactive media and student.

The VUKA! Awards encourage the making of Public Service Announcements (PSAs) in southern Africa, and is open to both newcomer and

Information

In May 2002, South African television journalist Susan Puren won the CNN African Journalist of the Year Award for her documentary on a Ugandan soldier, a girl known as 'China'.

Puren works for an independent television company in South Africa. Four other South Africans were also awarded: Sara Blecher of the SABC for her *Special Assignment* documentary on racial tension at Vryburg High School; Angie Kapelianis, also of the SABC, for her radio documentary on the Museum of Apartheid; and print media journalist Khadija Magardie for her article on the rape of a seven-month-old baby.

professional film-makers. A PSA is a commercial produced for a registered charity, non-government organisation or a worthy cause. These worthy causes need media exposure in order to generate awareness and raise funds for social, economic or environmental issues.

The annual Pendering Awards reward excellence in Afrikaans advertising and has developed into an awareness-builder of the importance of advertising in Afrikaans. Above-the-line categories consist of radio, television, cinema, magazines, newspapers, outdoor advertising and campaigns. Other categories are below-the-line, new media and student.

Other marketing communication awards

Two of the fastest growing areas in marketing communication are direct marketing and sponsorship.

The Assegai Awards were established in 1998 to honour excellence in direct marketing strategic prowess and innovation, with an emphasis on results. The Association of Marketers established the Raptor Awards in 1999. These Awards recognise excellence in different South African sponsorship categories, namely sport, arts, environment and broadcast. In sponsorship campaigns, various advertising and promotional activities are integrated to leverage the overall effectiveness of the campaign.

International exposure

South African agencies are very visible at international events such as the Cannes International Advertising Festival. This Festival is widely accepted as the leading global advertising event. Thousands of delegates, representing the global advertising fraternity, spend days and nights viewing and screening more than 10 000 entries.

The Jupiter Drawing Room won two Golden Lions at Cannes, while O&MRST-M (Cape) and Lowe Bull Calvert Pace won one each. The Jupiter Drawing Room's performance in print advertising at Cannes and at leading US events earned it the accolade as the world's leading print advertising agency in 2001.

At global advertising events certified by the Creative Directors' Forum (CDF), Jupiter Drawing Room and TBWA Hunt Lascaris outshone the rest by achieving 10 859 and 10 500 points respectively. Net#Work BBDO attained 5 050 points. The events certified by the CDF are the Ad of the Year, Loeries, Cannes, D&AD, Art Director's Club, The One Club and The Eagles.

The individual creative champion was Graham Warsop of The Jupiter Drawing Room. The runner-up was Tony Granger of TBWA Hunt Lascaris. Other individual achievers were: Eric Vervroegen of TBWA Hunt Lascaris (Art Director), Wendy Moorcroft of TBWA Hunt Lascaris (Copywriter), Garth Walker of Orange Juice Design (Design Creative Director), Janet Kinghorn of The Jupiter Drawing Room (Designer) and Ahmed Tilly of The Jupiter Drawing Room (Design Copywriter).

Online and offline advertising

The collapse of the dot-com world has led to a substantial slump in online advertising.

The Internet is still used as an entertainment medium and information source but the biggest growth in Internet usage seems to be in business-to-business communication.

At the 2001 Loerie Awards, winners were recognised in the following categories: CD Rom/DVD, corporate website, digital interactive design, e-mail, kiosks, online banners, online rich media banners, website self-promotion, website publishing and website non-profit organisations.

Advertising ethics and the Advertising Standards Authority (ASA)

The ASA is an independent body set up and paid for by the marketing communication industry to regulate advertising in the public interest through a system of self-regulation. The ASA works closely with government, statutory bodies, consumer organisations and the industry to ensure that the content of advertising meets the requirements of the Code of Advertising Practice, the guiding document of the ASA. The Code is based on the International Code of Advertising Practice,



prepared by the International Chamber of Commerce. This is internationally accepted as the basis for domestic systems of self-regulation. The Code is drawn up by the ASA in collaboration with representatives of the marketing communication industry, and is amended from time to time to meet the changing needs of both the industry and of society.

This Code is supplemented by individual codes, which are determined by the various member organisations or negotiated with government institutions.

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

Acknowledgements

Audit Bureau of Circulations
Department of Communications
Dr Neels van Heerden, University of Pretoria
Government Communication and Information System
Mr P Diederichs, Department of Journalism, Pretoria Technikon
Print Media SA
South African Broadcasting Corporation
South African Post Office
South African National Editors' Forum
Telkom Ltd

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