SA YEARBOOK 2009/10

COMMUNICATIONS

Telecommunications

Telecommunications is one of the fastest growing sectors of South Africa's economy.

The Department of Communications' policies are enabling the development of a robust, vibrant and competitive information and commnications technology (ICT) sector that has seen the emergence of strong mobile technology companies, the roll-out of wireless broadband service offerings and an increased diversity in ownership.

With a network that is 99,9% digital and includes the latest in fixed-line, wireless and satellite communications, the country has the most developed telecommunications network in Africa.

By July 2009, the Government was contributing more than R28 billion to 2010 FIFA World Cup™-related projects. Of this, R300 million was being spent on broadcasting and telecommunications.

Policy and initiatives

The Department of Communications' mandate is to create a favourable ICT environment, ensuring that South Africa has the capacity to advance its socio-economic development goals and support the renewal of Africa and the building of a better world. This mandate puts the department at the forefront of government initiatives to bridge the digital divide and provide universal access to ICTs for all South Africans.

The core functions of the department are to:
- develop ICT policies and legislation that stimulate and enhance sustainable economic development and positively impact on the social well-being of all South Africans
- evaluate the economic, social and political effects of implementing relevant policies
- exercise oversight of state-owned enterprises (SOEs)
- fulfil South Africa's continental and international responsibilities in the ICT field.

The department's strategic direction is based on five key focus areas:
- achieving higher rates of investment in the economy
- increasing the competitiveness of the South African economy
- broadening participation in the economy
- improving the State's capacity to deliver
- contributing to creating a better world.

The Broadcasting Digital Migration (BDM) Policy for South Africa was approved in July 2008 and on 30 October 2008, the digital signal was switched on. The official switch-over to digital is expected to take place in November 2011.

BDM holds many advantages, including better video and sound quality, a wider selection of channels, enhanced features and interactive services. The Department of Communications is developing a strategy for the disposal of existing television sets in preparation for the analogue switch-off.

In 2008, the Scheme-for-Ownership-Support of set-top boxes (STBs) for poor households was approved and by June 2009, the department was finalising the details regarding the implementation of the scheme for submission to Cabinet.

In terms of the proposed scheme, government will provide a 70% incentive for STBs to the five million poorest TV-owning households at a cost of R2,45 billion during the three years of dual illumination.

The National Information Society and Development Plan, as adopted by the Department of Communications' National E-Strategy in 2007, remains one of the blueprints that guide the engagement in the building of an advanced information society.

The continued implementation of this plan will bring opportunities for creating decent and sustainable jobs, especially targeting the youth through the Youth Information Society and Development Programme.

By June 2009, the Department of Communications was working on the development of an Integrated National ICT Policy Framework to be ready by the end of the 2009/10 financial year.

The policy framework will seek to promote the convergence of technologies and stimulate the growth of the economy in line with the objec-

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The Digital Dzonga is an advisory council appointed by the Department of Communications and launched in July 2009, to assist with South Africa's migration to digital television. Consisting of representatives from government, consumer groups, broadcasters, manufacturers and the regulator, the Independent Communications Authority of South Africa, the Digital Dzonga will oversee and coordinate the country's preparation and readiness for full switch-over to digital television by November 2011.

The Digital Dzonga was nominated for the best digital switch-over plan at the Digital Switch-Over Strategies in London in 2009.

tives of the National Industrial Policy. It aims to encourage e-commerce activities and expand ICT infrastructure, linking rural and urban communities as well as uplifting the poor.

Key strategies

The Department of Communications has identified the following key strategies to achieve its mandate:

- Broadband Strategy: Pivotal to achieving the aims of the department is the availability of a reliable, cost-effective and easily accessible ICT broadband infrastructure. To this end, the department participated in the New Partnership for Africa's Development (Nepad) ICT Broadband Infrastructure Network for Africa, which includes the Eastern Africa Submarine Cable System (EASSy) Project. The EASSy cable will link South Africa to Sudan, and provide for landing stations in countries along the coast of eastern Africa. The cable will be connected to adjacent landlocked countries through terrestrial fibre-optic links. The EASSy cable will be 9 900 km long with an expected lifespan of 25 years. The National Broadband Policy was expected to be finalised by March 2010. The policy will provide a holistic, co-ordinated national approach to the provision of affordable, reliable and secure broadband infrastructure and services.
- STB Manufacturing Sector Development Strategy: By June 2009, the Department of Communications was at an advanced stage to finalise the strategy, which will promote collaboration between government and the industry in the local manufacturing of STBs. It is envisaged that the migration programme will assist in re-skilling, job creation and the transformation of the sector.
- The Universal Service and Access Policy and Strategy: The Universal Service and Access Agency of South Africa (Usaasa) was established in terms of Section 58 of the Telecommunications Act, 1996 (Act 103 of 1996). The agency promotes universal service and access to ICTs and services for all South Africans. By June 2009, Usaasa was concluding a 10-month consultative process, in terms of its mandate, on the definitions of universal service and universal access, together with suggested targets for the achievement of these goals. The targets, to be reviewed every two years, will establish goals and priorities for the achievement of universal service and access in South Africa. The recommendations were tabled in July 2009. The policy framework aims to assist in the full utilisation of the Universal Service and Access Fund in support of the deployment of ICT infrastructure and connectivity to needy people in underserviced areas.
- The ICT Black Economic Empowerment (BEE) Charter: In terms of the charter, several BEE and job-creation initiatives are planned by companies in the sector.
- Through the Community Radio Support Programme, the department has invested in the youth, enhancing their level of employability and entrepreneurship. By June 2009, there were more than 100 community radio stations with a listenership of 376 000, according to the South African Advertising Research Foundation (Saarf).
- The department has set up a 112 public emergency centre to provide a single access number for emergency service-providers, 24-hours a day, to all people in South Africa. It is accessible to disabled persons, including the sight and hearing impaired. The roll-out plan of the emergency number was expected to be completed by December 2009.
- Active participation in international organisations and events: South Africa participates in international organisations such as the International Telecommunications Union (ITU), African Telecommunications Union, African Union, Universal Postal Union (UPU), the Pan-African Postal Union and the World Radio Communication Conference.

The undersea telecommunications cable, Seacom, went live on 23 July 2009. Mooted two years ago, the $600-million (R4,5-billion) cable linking Johannesburg, Nairobi and Kampala with India and Europe aims to make bandwidth up to 50% cheaper. Until recently, Africa was solely dependent on Telkom's SAT3 cable, resulting in congestion and high international bandwidth tariffs.

The launch of Seacom opened up unprecedented opportunities, at a fraction of the existing cost, as government, businesses and citizens can now use the network to compete globally, drive economic growth and enhance the quality of life across the continent.

Seacom will enable services such as fast movie downloads and video-conferencing transmission, high-definition video and Internet television.

The 17 000-km fibre-optic cable system has a capacity of 1,28 terabits per second.

- The High-Level Expert Group (HLEG) under the ITU umbrella is one of the international initiatives aimed at developing strategies and giving guidance to countries in dealing with cyber crime. The HLEG has adopted the following focus areas:
  - legal measures
  - technical and procedural measures
  - capacity-building
  - international cooperation
  - organisational structures.

  South Africa is using the preliminary output of the HLEG towards the development of the national Cyber Security Framework.

  Initiatives such as the International Multilateral Partnership against Cyber Terrorism (Impact) also contribute to a great extent to forging partnerships and collaborations geared towards combating cyber crime.
- Nepad projects: The Department of Communications has positioned itself as a strategic partner on the continent, taking part in various forums in support of the African Agenda. The department has an engagement model for strengthening relations with countries in the region. The department continues to be involved in various Nepad ICT projects, such as the E-Schools Initiative, as well as implementing policies aimed at building an Africa that is part of an inclusive global information society.

  The Nepad E-Schools Initiative was adopted as a high-priority Nepad ICT project by the Nepad Heads of State and Government Implementation Committee in March 2003.The aim of the initiative is to harness ICT for the improvement of the quality of teaching and learning in African primary and secondary schools, whereby young Africans who graduate from these schools will have ICT skills that will enable them to participate as equals in the global information society and knowledge economy.

  The Nepad E-Africa Commission is spearheading the implementation of the Nepad E-Schools Initiative, which has the following components running in parallel: the Nepad E-Schools Demonstration Project; the Nepad E-Schools Satellite Network; the establishment of the national implementing agencies; the development of teacher training, content and curriculums; and the Nepad E-Schools Business Plan. At a separate meeting, the E-Schools Business Plan was endorsed as a framework for the development of the initiative. The participants agreed to take advantage of lessons learnt from the 51 schools in the countries that participated in the Nepad E-Schools Demonstration Project, and to use the business plan as a broad framework for the further development of the project to transform 50% of all secondary schools in the participating countries into Nepad e-schools by 2015.

  The Nepad Broadband Project is a continental initiative that aims to connect African countries to one another and to the rest of the world through a fibre-optic cable network that will result in the provision of affordable broadband capacity.

In March 2009, the then Minister of Communications, Dr Ivy Matsepe-Casaburri, launched the National E-Skills Dialogue Initiative (NeSDI). The launch was held at The Innovation Hub, Pretoria.

The NeSDI is a first step in realising the objective of a fully operational Meraka E-Skills Institute by 2010.

The NeSDI will collaborate and engage with the spectrum of relevant role players from government, industry, social partners and academia in multistakeholder dialogue and partnerships for action.

Public entities and agencies reporting to the Minister of Communications

The following public entities and agencies report to the Minister of Communications. These include the following companies in which government has a major shareholding: Independent Communications Authority of South Africa (Icasa), the South African Post Office (Sapo), Sentech, the South African Broadcasting Corporation (SABC), the National Electronic Media Institute of South Africa (Nemisa), Usaasa, .za Domain Name Authority and Telkom South Africa Limited.

Independent Communications Authority of South Africa

Icasa is responsible for regulating the telecommunications, broadcasting and postal industries to ensure affordable services of a high quality for all South Africans.

Icasa's main functions are to:

- make regulations and policies that govern broadcasting, telecommunications and postal services
- issue licences to providers of telecommunications, broadcasting and postal services
- monitor the environment and enforce compliance with rules, regulations and policies
- hear and decide on disputes and complaints brought by industry or members of the public against licensees

- plan, control and manage the frequency spectrum
- protect consumers from unfair business practices, poor quality services and harmful or inferior products.

Early in 2009, Icasa hosted consumer rights roadshows across the country to create awareness among consumers about their right to access communication services relating to electronic communications, broadcasting and postal services.

The roadshows provided a platform for the authority, licensees and stakeholders to interface with the public and disseminate information and enabled the authority to receive consumer complaints from remote areas of the country.

Universal Services and Access Agency of South Africa

Usaasa operates under the regulatory and policy framework enshrined in the Telecommunications Act, 1996 as amended in 2001, and the ministerial policy directions issued in the same year.

These mandate Usaasa to promote, facilitate and monitor the achievement of universal service and access in underserviced areas. In addition, the agency is required to:

- manage the Universal Service Fund and use it to implement the mandates as stipulated in the Act
- survey and evaluate the impact of the various initiatives undertaken by all stakeholders, and the extent to which universal service and access have been achieved
- create an enabling environment by stimulating public awareness of the benefits of ICT services and building capacity to access these services
- encourage, facilitate and offer guidance in respect of any scheme to provide universal access or universal service
- make the necessary interventions to enable underserviced communities to access ICT services
- conduct research into and keep abreast of developments in telecommunications services and information technology (IT).

Presidential National Commission on Information Society and Development (PNC on ISAD)

In an effort to establish a more systematic and consistent approach across different traditionally disparate areas of policy-making and implementation, the PNC on ISAD was formed in 2001.

The commission comprises government, industry and civil-society leaders. During its deliberations, important recommendations are made regarding the need for planning and foresight; coordination and integration; and evaluation and impact assessment in the building of the information society.

The ISAD Plan and the institutional mechanisms followed from these recommendations.

A corresponding body is the Presidential International Advisory Council on ISAD.

The Youth E-Cooperative Programme, aimed at forging ahead ICT in South Africa's remote areas, is driven by the PNC on ISAD. This has resulted in the mobilisation of 40 youths into 20 e-cooperatives to assist municipalities in web development and management. These will also be developed to become enterprises in Internet cafés and other ICT-related activities in their areas.

This intervention will change the development landscape in remote areas by providing citizens with access to ICT facilities.

Internet

According to the *Internet Access in South Africa 2008* study released in March 2009, there will be nine million Internet users in South Africa by 2014.

Commercial Internet access has been available in South Africa for only 15 years and during that time some 5,3 million users have gone online.

Telkom

Telkom has operated as a commercial company since October 1991 and has become the largest provider of communications services in Africa, based on operating revenue and assets.

Highlights of the group's financial key performance areas for the year ended 31 March 2009 included that:

- the group's operating revenue from continuing operations increased by 6,9% to R35,9 billion
- cash generated from operations increased by 3,6% to R21,3 billion

In November 2009, government secured a saving for consumers from cellphone operators, which agreed to an initial 36c cut in the peak mobile termination rate, from R1,25 to 89c a minute.

Vodacom and Cell C implemented the cut from February 2010 and MTN on 1 March 2010, but all agreed to introduce new, affordable retail products based on reduced rates from 1 December.

- cash flows from operating activities increased by 7,8% to R11,43 million
- cash flow used in investing activities increased by 20,6% to R17 million
- cash flows from financing activities increased from R2,94 million to R7,9 million.

In March 2009, Telkom's strategic focus on growth in the area of mobile capability received a major boost when Telkom shareholders approved the sale of 15% of Telkom's stake in Vodacom to the United Kingdom's Vodafone Group and the unbundling of its remaining 35% to shareholders.

This transaction enabled Telkom to execute its strategies in the areas of mobile services, integrated solutions and the provision of converged fixed-line, mobile and data solutions.

The deal also freed the company from the geographic limitations previously imposed by the shareholder's agreement with Vodafone.

Telkom embarked on a process of renewal in 2009. As part of this transformation drive, three major business units came into being in April 2009, namely Telkom South Africa, Telkom International and Telkom Data Centre Operations.

Telkom Foundation

Established in 2002, the Telkom Foundation provides ICT, education, infrastructure and community projects and support in underresourced areas.

In 2008, the foundation continued with its flagship projects, the 12 ICT villages across South Africa, the Beacon of Hope initiative and the Giving from the Heart Programme. The foundation has added a new project – the Train-the-Trainer Programme – to ensure that IT skills are developed and retained within communities.

The foundation continued their sponsorship of Childline and Lifeline in 2009. It also hosted the annual Telkom Teacher of the Year Award that recognises and rewards outstanding teachers.

Centres of excellence (CoEs)

This is a collaborative programme between Telkom, the telecommunications industry and government to promote postgraduate research in ICT and allied social sciences.

It also provides facilities that encourage young scientists and engineers to pursue their interests in South Africa.

Launched in 1997, the programme improves local telecommunications and IT skills, yielding substantial benefits for the academic institutions involved. It has helped Telkom and its local technology partners to solve technical problems and cut costs.

> With the aim of combating cellphone-related crime, the Regulation of Interception of Communications and Provision of Communication-Related Information Act, 2008 (Act 48 of 2008), compels all cellphone users to register their subscriber identity module (SIM) cards.
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> Service-providers have to register and verify the details of new SIM card users before the SIM card is activated, while existing cellphone subscribers need to have their details registered and verified by the end of 2010.

Telkom's corporate partners are also reaping rewards, as the work undertaken at the CoEs is relevant to their areas of business.

By 2009, there were 16 CoEs in South Africa, each with a unique research focus. About 250 students were pursuing postgraduate degrees through the programme in 2008/09, and since its inception, more than 1 800 postgraduate degrees had been awarded. The profile of the 2008/09 CoE students was: 84 doctoral students, 166 master's students, 20 women, 150 BEE candidates and 38% non-South African students. In 2009, there were 27 industry partners involved in the CoE programme.

Mobile communications

Over the years, South Africa has witnessed tremendous growth in the cellphone industry. South Africa has four operators, Vodacom, MTN, Cell C and Virgin Mobile.

In December 2008, there were an estimated 34,1 million cellphone users in South Africa.

The results for the year ending 31 December 2008 indicated that Cell C had achieved increases in customers and revenue.

Cell C generated R8,6 billion in revenue in 2008/09, an increase of 14% from 2007, and achieved Earnings Before Interest, Tax, Depreciation and Amortisation (EBITDA) of R812 million.

Highlights in the Vodacom Group's financial results for the year ended 31 March 2009 included:

- 14,5% growth in revenue to R55,2 billion
- 16,5% growth in customers to 39,6 million
- 10,5% growth in EBITDA to R18,2 billion
- 28,8% growth in data revenue to R6,4 billion
- 80% growth in Vodacom South Africa broadband customers.

In 2009, Vodacom listed independently on the JSE Limited, with some 200 000 new shareholders.

MTN focuses on the African continent and Middle East. In 2009, MTN celebrated its 15th anniversary. Highlights included:

The Post Bank Bill, tabled before Cabinet in 2009, aims to provide for the establishment of a stand-alone public company to be known as the South African Post Bank.

- group subscribers went up by 48% to 90,7 million
- revenue increased by 40% to R102,5 billion
- EBITDA went up 36% to R43,2 billion.

The arrival of Virgin Mobile in 2006, a virtual network service-provider that operates in partnership with Cell C, helped to enhance competition.

In August 2009, Icasa launched the End-User and Subscriber Service Charter Regulations, 2009.

According to the regulations, cellphone companies had to ensure that they achieved an average of 95% network service availability, over a period of six months.

Liberalisation

The creation of an enabling policy and regulatory environment is important for increasing competition in the ICT sector, and reducing the cost of communications.

Following the signing of the Telecommunications Amendment Act, 2001 (Act 64 of 2001), the Department of Communications has focused on policies that grow the economy, attract foreign direct investment, increase competition, encourage Broad-Based BEE and develop and sustain small, medium and micro-enterprises.

The department also aims to improve service delivery and expand the provision of telecommunications services. The introduction of underserviced area licences (USALs) addresses this need.

The cost of communications will be brought down by increased competition in the sector and the removal of constraints to growth.

Section 40 of the Telecommunications Amendment Act, 2001 requires that USALs provide telecommunications services, including voice-over Internet protocol, fixed mobile services and public pay telephones. Policies have also been implemented to, among other things, allow mobile operators to use fixed lines to provide both voice- and data-transmission services.

The liberalisation of the sector saw the emergence of Neotel, South Africa's first converged communications network operator.

The postal sector

The cornerstone of national policy for the postal sector is the provision of a universal service at an affordable price and an acceptable standard of service for all citizens. To ensure this, a universal service obligation (USO) has been placed on Sapo. To offset the cost of providing a basic service in low-density, rural or unviable areas, it has also been common practice to confer exclusive rights and privileges, i.e. a monopoly on the provision of the basic letter service.

A USO provides 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 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 that reasonably meets the needs of the population.

According to the Postal Services Act, 1998 (Act 124 of 1998), Sapo enjoys certain exclusive rights and privileges, including a monopoly on letter mail up to one kilogram. In addition, Sapo 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.

South African Post Office

Sapo delivers almost six million letters per day to 11 million addresses in South Africa. It has more than 2 500 outlets in the country.

The first post office in South Africa was opened at the Castle in Cape Town in 1792.

Sapo is committed to meeting the USOs of providing a universal postal service at an affordable cost and offering a countrywide service.

Sapo's USO requires it to roll out 100 post-office outlets every year. The company's continued growth will ensure greater access for communities to many important services, especially in rural areas, and will enable it to increase the range of services it makes available.

Sapo's subsidy from government is earmarked for targeted programmes such as growing its retail footprint. However, its strategy focuses on achieving self-sustainability.

This will involve enhancing current revenue streams and exploring new opportunities to leverage its vast network.

Sapo is focusing on growing its financial services and logistics businesses, while maintaining the performance of the mail business. It will also continue servicing the private sector by providing opportunities for companies to connect with the broader South African public.

Financial services

Postbank has grown over the past few years, specifically through the Mzansi accounts, but its financial services offerings to customers have been limited.

Plans have been initiated to restructure Postbank from a division of Sapo to a separate company within the Post Office group. Postbank will also be initiating an automated teller machine infrastructure, aiming to bring the convenience of electronic banking to citizens countrywide.

Re-establishing the Post Office as a community hub

Sapo is leveraging its infrastructure to introduce new and improved products and services for the benefit of all South Africans.

An example is the establishment of the Thusong Service Centres, where the Post Office forms an integral part of the services offered.

These centres, built in underserviced areas, offer a range of government services.

At these centres, and at almost 700 small and isolated villages, the population has access to the Internet through the public Internet terminals provided in the local Post Office. Access to government websites is free of charge from these terminals.

Authenticating electronic signatures

It was a world-first for the Sapo when the Electronic Communications and Transactions (ECT) Bill was signed into law – the first Bill in the world to be signed into law by an electronic signature.

The signing was enabled through the Post Office's authentication service.

In capitalising on this opportunity, Sapo has developed world-class authentication services.

These services are designed to assure the identity of people who are communicating and transacting on the Internet as well as to protect such communications with state-of-the-art encryption. This authentication service will be accredited under the ECT Act, 2002 (Act 25 of 2002), and therefore have clear legal status and carry evidentiary weight in court.

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> Postbank services are available at more than 2 000 Post Office outlets countrywide and 7 200 automated teller machines of other financial institutions. Postbank focuses on the many South Africans who do not have access to other banking services.

Specialised Post Office products

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

International and regional co-operation

South Africa is a member of the UPU. The country participates in 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, the 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 cooperates and works in partnership with other postal administrations, through either bilateral or multilateral agreements relating to letters, parcels and financial postal services.

The media

Media freedom

In 1994, with South Africa becoming a democracy, the media was freed from all restrictions.

According to the Bill of Rights, as contained in the Constitution of the Republic of South Africa, 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.

South Africa moved up three places on the Reporters without Borders Press Freedom Index, 2009. This places the country at 33rd position, ahead of European countries such as Greece, Spain, France and Italy.

Broadcasting

Policy and legislation

The Electronic Communications Act, 2005 (Act 36 of 2005), was passed followed by the Icasa Amendment Act, 2006 (Act 3 of 2006), to regulate and control all broadcasting and telecommunications activities in the country.

The Acts:

- 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 Broadcasting Act, 1999 (Act 4 of 1999), defined the objectives of the South African broadcasting system, the structure of the SABC at the time and the role of the various sectors in meeting those objectives.

It also guaranteed the independence of the SABC as a public broadcaster. Within the present Act, the SABC has been corporatised and restructured to better fulfil its mandate.

These include:

- broadcasting accurate and credible news and current affairs programmes
- South African content programming in languages that reflect the country's cultural diversity
- educational programming to advance lifelong learning
- programming targeted at children, women and people with disabilities.

The Department of Communications is prioritising the development of a new vision and mandate for public broadcasting services in line with South Africa's developmental agenda and strengthening the governance of the SABC.

The department aims to amend the Broadcasting Act, 1999 in consultation with all relevant stakeholders. The amendment will bring it in line with international best practice and ensure that the public broadcaster is best suited to South Africa's democracy. It will also introduce an appropriate funding model for the public broadcaster.

The department has set up a task team comprising the Department of Communications, National Treasury and business turnaround strategists to effect the successful functioning of the public broadcaster.

In accordance with Section 3(1) (a) of the Electronic Communications Act, 2005, the department was expected to finalise the Radio Frequency Spectrum Usage Policy by March 2010.

Broadcasting role players

Radio

The first radio broadcasts in South Africa took place under the auspices of a broadcasting committee of 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, all radio transmission and reception were placed under the control of the Postmaster-General, under the Radio Act, 1926 (Act 20 of 1926).

Following the contribution made by Sir John Reith, 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.

In 2009, the SABC's national radio network comprised 18 radio stations. Fifteen of these were dedicated specifically to public-service broadcasting and included 11 full spectrum stations, one in each of the official languages of South Africa; a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English; and a community station broadcasting in the !Xu and Khwe languages of the Khoisan people of the Northern Cape. The SABC has three stations in its commercial portfolio. These are 5FM, Metro FM and Good Hope FM.

Copy supplied to radio news amounts to almost a million words a day, and is compiled around the clock into a weekly total of 300 bulletins and 27 current affairs programmes. Programmes are produced weekly in 11 languages on the SABC's radio services.

There is a public broadcasting-service radio station for each language group.

Channel Africa broadcasts live on three platforms: shortwave, satellite and the Internet. Its broadcasts are in Chinyanja, Silozi, Kiswahili, English, French and Portuguese. The shortwave broadcast covers south, east, central and west Africa.

The satellite broadcast covers the sub-Saharan region, although it can be picked up as far as London. The Internet broadcast is accessible from anywhere in the world.

Commercial radio stations

Commercial radio stations in South Africa include:

- Algoa FM
- Classic FM
- Kaya FM
- YFM
- 94,7 Highveld Stereo
- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda FM
- OFM
- East Coast Radio
- 567 Cape Talk
- Radio 2000
- Radio KFM.

Stations such as Jacaranda FM, Highveld Stereo, Radio Oranje, Radio Algoa and East Coast Radio were initially SABC stations, but were sold to private owners to diversify radio ownership in South Africa as part of the transformation of the public broadcaster.

Many of South Africa's radio stations are available online.

Television

South African Broadcasting Corporation

South African television is broadcast in all 11 official languages and in sign language.

Although the country was one of the last in Africa to have a television service, South Africans now have access to a wide spectrum of local and international drama, comedy, sports and news.

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

Between 50% and 60% 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. News bulletins are broadcast in all 11 official languages.

The SABC's online news service, *SABCNews.com*, attracts about 600 000 visits a month.

The SABC's terrestrial television channels devote between 18% and 20% of their airtime during prime time to news and news-related programmes.

Test transmission for migration from analogue to digital terrestrial transmission of the SABC television signals were taking place by mid-2009, to comply with the requirements of switching off analogue in the southern African region by 2015, as prescribed by the ITU.

M-Net

M-Net, South Africa's first private subscription television service, was launched in 1986. M-Net broadcasts its array of general entertainment and niche channels to more than 50 countries across Africa and the adjacent Indian Ocean islands.

M-Net's television channels are delivered to subscribers through analogue terrestrial and digital satellite distribution.

The main M-Net channel, which is available as a terrestrial and satellite service, offers movies, sport, children's programmes, international and local series, and local reality shows.

The second terrestrial channel, CSN (Community Services Network), offers sport and programming aimed at a variety of South African communities. M-Net is also well represented on the DStv bouquet of satellite TV channels.

Development of the local film and TV industries is a priority for M-Net and is supported by various projects such as EDiT, which gives final-year film and television students the opportunity to produce programmes for broadcast on M-Net.

M-Net produces an array of channels for MultiChoice's DStv bouquets. Early in 2009, the Afrikaans kids channel, *Koowee,* started on DStv and in July 2009, M-Net launched the new youth channel *Vuzu*, featuring a significant amount of local content.

Satellite broadcasting

MultiChoice provides digital media entertainment, content and services to multiple devices, which include pay-TV subscriber services to more than 1,5 million customers.

DStv broadcasts more than 80 video, over 40 audio and more than 30 radio channels and three interactive channels, 24 hours a day on its platform.

MultiChoice owns M-Net/SuperSport, which delivers thematic channels to a growing number of subscribers.

By mid-2009, MultiChoice's newest company, DStv Mobile, was investigating and trialing digital video broadcast, Handheld, which is a mobile broadcast technology that allows for the digital terrestrial broadcast of live television channels to a mobile phone.

By mid-2009, there were more than 2,4 million DStv subscribers in South Africa.

Free-to-air television

Launched in 1998, e.tv is South Africa's first private free-to-air television channel, which broadcasts a full-spectrum programming service to 80,5% of South Africa's population.

The station is owned by BEE group, Hosken Consolidated Investments Limited (Ltd) and Venfin Ltd, and employs some 500 people countrywide. e.tv has offices in Johannesburg, Cape Town, Durban, Port Elizabeth and Bloemfontein. As a free-to-air channel, e.tv's only source of income is advertising revenue.

The 2008 All Media and Products Survey figures put its viewership at 17,9 million.

Signal distribution

Sentech was established in terms of the Sentech Act, 1996 (Act 63 of 1996), and the Sentech Amendment Act, 1999 (Act 44 of 1999).

Sentech is an SOE, tasked with providing broadcasting signal distribution for broadcasting licences.

In the context of the convergence of technologies, Sentech was awarded multimedia and carrier-of-carrier licences, thus positioning it to offer fully converged ICT services.

Sentech is Africa's largest broadcasting signal distributor and operates a number of terrestrial broadcasting transmitter sites.

In line with the Cabinet's approval that Sentech becomes the core national wireless broadband service-provider, the organisation aims to provide core broadcasting infrastructure.

As a wholesale broadband network-provider, the organisation is mandated to provide connectivity to schools, hospitals, clinics, Thusong Service Centres and government offices in all spheres and within rural areas.

The Department of Communications and Sentech have signed an agreement for the installation of the satellite back-up for the 2010 World Cup. The National Treasury allocated R200 million for the back-up.

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> In June 2009, e.tv and the eNews Channel were recognised for their innovative advertisements at the prestigious World Promax/BDA Promotion and Marketing Awards, taking a bronze certificate in Best News Information Multiple Spot Campaign at the awards ceremony in New York.

Broadband Infraco

In March 2007, government approved the establishment of a new SOE that will provide long-distance connectivity to the country's telecommunications market on a cost basis. Broadband Infraco, which became a stand-alone SOE in January 2008, provides wholesale long-distance access services to third-party electronic communications services.

Print

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

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, 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. It was banned 18 months later and reappeared only after various representations had been made to the authorities in London.

The country's vibrant economy, the introduction of regional tabloid newspapers and the glut of new magazine titles have helped to feed the popularity of newspapers and magazines in Africa's largest economy. High consumer spending has coincided with strong circulation in specific newspaper genres, particularly tabloids and free-sheets. The adoption of more efficient delivery and distribution systems have boosted the growth of tabloids, community newspapers and free-sheets, in particular.

Most South African newspapers and magazines are organised into several major publishing houses: Media24 (part of Naspers, the largest media group in Africa), the Irish-based Independent News & Media (Pty) Ltd group, Caxton Publishers & Printers Ltd and Avusa Ltd. Other important media players include M & G Media Ltd; the Natal Witness Printing & Publishing Company (Pty) Ltd; Primedia Publishing Ltd; Ramsay, Son and Parker (Pty) Ltd; and Kagiso Media. The issue of BEE is being addressed by all companies, some of which have progressed further than others.

Newspapers

South Africa's daily newspapers

Daily Sun is the first South African tabloid aimed at the black working class. In the few years since its launch by Media24, the *Daily Sun* has become the largest daily newspaper in South Africa.

With over 500 000 sales in Gauteng, Limpopo, Mpumalanga and North West, the national expansion of the paper to KwaZulu-Natal, Free State and the Eastern Cape will add to the existing circulation.

The Star is published in Johannesburg and distributed throughout South Africa, with most sales in Gauteng. It is owned by Independent Newspapers. Launched in Grahamstown in the Eastern Cape in 1887 as the *Eastern Star*, the paper moved to Johannesburg in 1889.

Sowetan is *Daily Sun's* main competition, also aimed at an English black readership. Initially distributed as a weekly free-sheet in Soweto, the paper was transformed into a daily in 1981 to fill the void left by the *Post*, which was deregistered by the apartheid government. *Sowetan* is owned by Avusa Ltd.

Afrikaans daily *Die Burger*, first published in 1915, is distributed in the Western Cape. The paper is owned by Media24.

Beeld is an Afrikaans daily newspaper that was launched on 16 September 1974. It is distributed in Gauteng, Mpumalanga, Limpopo, North West and KwaZulu-Natal. It is the largest Afrikaans newspaper in South Africa and is owned by Media24.

The Citizen is published six days a week and distributed mainly in Gauteng. The newspaper is published by Caxton.

Independent Newspapers' *Cape Argus* is an afternoon daily aimed at middle- to upper-income readers in Cape Town.

Isolezwe is the premier isiZulu newspaper, published Mondays to Fridays. The paper has also launched the first Zulu-language website in the world. It is owned by Independent Newspapers.

Independent Newspapers' *Daily News,* first published in 1878 as the *Natal Mercantile Advertiser,* is targeted at the middle market of Durban and the rest of KwaZulu-Natal.

Independent Newspapers' *Cape Times*, a daily published since 1876, aims at the middle class of Cape Town.

When *Business Day* was launched in 1986, it was the country's first mainstream business daily. The paper covers corporate reporting, BEE, economic policy, corporate governance and financial markets. It is published by BDFM Publishers (Pty) Ltd.

The Mercury, published since 1852, is Durban's morning newspaper. It is owned by Independent Newspapers.

The first issue of the East London *Daily Dispatch* was published in 1898. The newspaper is the Eastern Cape's biggest selling daily, with an isiXhosa and English supplement published on Wednesdays. *The Dispatch* was edited by Donald Woods from 1965 until his arrest and banning in 1977 for exposing government responsibility for the death of Steve Biko. It is owned by Avusa Ltd.

Founded in 1845 as the *Eastern Province Herald*, *The Herald* is one of South Africa's oldest newspapers. Its first edition – four pages – came out in May 1845 and cost one penny. *The Herald* is owned by Avusa Ltd and distributed in the Eastern Cape, with its main base in Port Elizabeth.

First published in 1904, *Volksblad* is the oldest Afrikaans daily in the country and the largest in the Free State and Northern Cape. It is owned by Media24.

Pretoria News, first published in 1898, is Independent Newspapers' daily in the capital city. Mainly sold in Gauteng, it is also distributed in Mpumalanga and North West.

South Africa's oldest newspaper, *The Witness*, serves English readers throughout KwaZulu-Natal, with most of its readers in greater Pieter-

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By March 2009, South Africa had 21 daily newspapers, 27 major weeklies, 660 consumer magazines, 735 business-to-business publications, 470 community newspapers and magazines, 92 television stations, 137 radio stations and over 65 DStv audio channels.

International news agencies Bloomberg and Reuters have bureaux in Johannesburg, while the British Broadcasting Corporation has correspondents in the country. The CNBC Africa was launched in South Africa in 2007. Local news services include the South African Press Association and African Eye News.

maritzburg and inland KwaZulu-Natal. Owned by Media24, it was formerly known as *Natal Witness*.

Established in 1878, Independent Newspapers' *Diamond Fields Advertiser* is based in Kimberley and targets the communities of the sparsely populated Northern Cape.

Launched in 1995, *Business Report* is inserted in all Independent Newspapers' morning titles in Johannesburg, Cape Town, Durban and Pretoria.

Son is the first tabloid to be published in Afrikaans. It is distributed Mondays to Thursdays in the Western Cape and publishes four weekend editions in the Western Cape, Eastern Cape, Northern Cape and Central.

The Times is a daily newspaper with both sold and free circulation.

The *Daily News* concentrates on news that is local, with over 90% of its readers coming from the greater Durban area. It is owned by Independent Newspapers.

South Africa's weekly newspapers

Avusa Ltd's *Sunday Times* is South Africa's biggest national newspaper, read by over three million people. The paper includes the *Sunday Times Magazine, Lifestyle, Business Times* and *Metro* sections. Established in 1906, the *Sunday Times* is distributed all over South Africa and in neighbouring countries such as Lesotho, Botswana and Swaziland.

Rapport, South Africa's national Afrikaans Sunday newspaper, is distributed countrywide and also in Namibia. *Rapport* is the Afrikaans newspaper with the biggest market penetration in South Africa.

A specialist soccer newspaper published on Wednesdays, *Soccer Laduma,* is aimed primarily at men – 87% of its readership is male. It is published by Media24.

First published in 1982 as *Golden City Press*, *City Press* is aimed at the black market. Media24 acquired the paper in 1984. It is published on Sundays.

Established at the beginning of 2002 and aimed at black readers, *Sunday Sun* is the fastest growing newspaper in the country. Its content is largely of a tabloid nature. Owned by Media24 and published by RCP Media, *Sunday Sun* is sold countrywide as well as in Botswana, Lesotho and Swaziland.

The *Sunday World*, launched in 1999, is a tabloid aimed mainly at black readers. Owned by Avusa Ltd, it is distributed in Gauteng, Mpumalanga, Limpopo and North West.

The *Sunday Tribune* caters for KwaZulu-Natal readers. Its is published by Independent Newspapers.

The Independent on Saturday caters for the KwaZulu-Natal market. It is published by Independent Newspapers.

Post was launched in the mid-1950s. Targeted at the Indian communities of KwaZulu-Natal and Gauteng, it is owned by Independent Newspapers. *Post* is published on Wednesdays, with the leisure and sport edition, *Postweekend,* appearing on Fridays.

The *Sunday Independent* was established in 1995 and aims at readers in the higher-income bracket. The *Sunday Independent* is a weekly English language newspaper owned by Independent Newspapers.

Mail & Guardian, formerly the *Weekly Mail*, was established in 1985 at the height of resistance to apartheid. When foreign donor funding started drying up for anti-apartheid organisations in the late 1980s, many of the country's alternative newspapers – notably *Grassroots*, *South*, *New African* and *New Nation* – folded. *The Weekly Mail*, however, struck up a partnership with the *Guardian* of London, ensuring the paper's continued existence.

Free and community newspapers

In June 2009, there were 165 free newspapers registered with the Audit Bureau of Circulations (ABC), and the amount of registered community newspapers stood at 61.

Magazine circulation and readership

The magazine industry in South Africa is a fiercely competitive environment in which new titles appear all the time, despite the worldwide competition from electronic and interactive media. Considering the proliferation of titles on the shelves in supermarkets and bookstores, it seems that many readers are still attracted to print.

The trend to target certain niche markets with specialised publications is popular in the magazine industry and has led this section to grow by 40% more titles during the last 10 years.

The ABC reported a title growth of 11,7% between December 2007 and September 2008.

A positive development has been the segmentation of the market into niched publications that provide opportunities for advertisers to reach their target audiences. Another new thriving trend is twinned titles – titles produced in two languages.

According to the ABC figures for December 2007 to September 2008, consumer magazines were still the biggest category with 187 titles, 17 new titles came on board in 2008 and there were 23 eliminations.

The business-to-business sector had 174 titles. Twenty-six new titles came on board in 2008 with 13 eliminations.

Custom magazines had 66 registered ABC titles with 19 new titles coming on board in 2008, and five eliminations.

Free magazines had 53 registered ABC titles with 11 new admissions and 29 eliminations in 2008.

Magazines

Weekly magazines *Huisgenoot* and *You* are the two biggest magazines in South Africa. Among the monthlies, women's magazines are still the most widely distributed, despite declining sales. *Sarie*, *Rooi Rose*, *Cosmopolitan*, *Drum* and *Move!* are all in the top 10.

Women's magazines

Overall, there was a decrease in circulation in the women's magazine category. Between March and December 2008, *Essentials'* figures decreased from 44 069 to 39 830.

Glamour also decreased from 98 948 to 94 973. *Oprah* reflected a significant drop in circulation from 74 961 to 50 994.

Real Magazine and *Real Simple* also reflected drops in circulation from 66 188 to 64 166 and 36 022 to 20 447.

Rooi Rose reflected a decrease from 111 828 to 109 482

Cleo, the new magazine on the block, reflected a 0 to 24 918 circulation from March to December 2008.

Family interest

Between March and December 2008, *Move!* recorded the largest area in both percentage and numerical, with a 48% growth equalling 64 000 average issue copies. Decreased figures of 34% came from *Big Issue*. Yet, the largest numerical drops came from *You/Huisgenoot,* collectively dropping with 17 424 copies year-on-year.

Health

Health magazines showed a slight decrease in 2008 with figures at 70 247.

Longevity decreased from 27 332 to 20 033. *Shape*'s circulation decreased from 51 782 to 41 511.

Parenting

This category remained fairly constant in both growth and average issue readership.

Youth

There has been a proliferation of magazines in the youth sector in the last few years. This market reflected a decrease in all areas. *Barbie* decreased from 16 000 to 11 663, with *National Geographic Kids* showing a slight decrease from 44 367 to 43 226.

Male interest

The largest circulating title in the category was *FHM*, totalling circulation figures of 71 408.

Popular Mechanics increased figures by 5% and total circulation stood at 46 282.

Men's Health declined by 9%, bringing total circulation to 69 718.

Motoring

This category, in general, dropped circulation from 354 810 to 305 187. *Bike SA* and *Auto Trader* remained stable while *Car*, *Cars in Action*, *Speed and Sound* and *Wiel* all showed a slight drop in figures.

Travel

This category was down another 5% year-on-year, although showing strong individual title growth. The largest title, *Weg/Go*, reflected a decline in circulation. Circulation figures at the end of 2008 stood at 85 505.

Caravan and *Outdoor Life* recorded the biggest growth in both percentage and numerical circulation figures.

Sport and hobbies

SA Rugby showed impressive growth of 34% and total circulation figures stood at 18 956.

Golf Digest experienced a drop in both percentage terms at 31% and numerically at 11 113 copies. Total circulation figures at the end of 2008 were 24 339.

Business and news

Finweek showed a decrease, dropping from 66 566 to 30 802. Although *Financial Mail* was stable, it showed a drop from 32 761 to 29 158 year-on-year.

Online media

By June 2009, statistics showed that online readership was growing at over 25%, from 4,8 million in 2008 to more than six million for the same period in 2009.

According to the *Nielsen Online Ranking Report*, which revealed online readership figures for the first quarter of 2009, there was a 28,5% growth in total visitors from 8,6 million in the first quarter of 2008 to more than 11 million in the first quarter of 2009; and a 25,2% increase in local visitors, from 4,8 million in 2008 to more than six million visitors in 2009.

Total visitors increased over 11% in the fourth quarter of 2008 alone. That's a substantial increase, representing steady growth and acceptance of the online environment as a mainstream medium.

The percentage of domestic versus international traffic remained consistent over the period.

According to the Website Association of South Africa, by June 2009, the most popular South African websites were:

- News24
- IOL News
- MSN
- Hotmail
- CompleatGolfer
- Webmail
- The Times
- bidorbuy
- Mybroadband
- MWEB.

Media organisations and role players

Print Media South Africa (PMSA), established in 1996, administers individual bodies, namely the Newspaper Association of South Africa (the oldest communication organisation in South Africa, established in 1882), Magazine Publishers Association of South Africa and the Association of Independent Publishers (AIP). The purpose of the PMSA is to represent, promote, interact with and intervene in all matters concerning the collective industry and of common interest. It represents more than 700 newspaper and magazine titles in South Africa.

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

The AIP was formed in September 2004 after the major publishing groups withdrew from the Community Press Association (CPA) to give independent publishers an opportunity to transform the CPA into an association that would serve their own specific needs. The AIP represents the interests of more than 250 independent publishers in southern Africa.

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 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.

Sanef 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 are held around media freedom and transformation, especially in relation to gender and technology. Sanef is involved in training initiatives and in setting practical standards in journalism education.

Against the backdrop of positive political developments on the African continent, Sanef spearheaded the formation of the All Africa Editor's Conference. The Southern African Editors' Forum was subsequently formed in 2003.

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

Members of the public who have complaints or concerns about reports in newspapers and magazines can submit their grievances to the Office of the Press Ombudsman.

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

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> In March 2009, South African cameraman Garwin McLuckie was named Camera Operator of the Year at the 2008 Royal Television Society (RTS) Television Journalism Awards.
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> The awards are presented annually in London and are aimed at recognising creative and excellent journalism among United Kingdom (UK) news broadcasters.
>
> McLuckie, who works for Sky News in the UK, was honoured by the RTS for his work in Africa between 2007 and 2008.

independent 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.

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

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

The FXI undertakes a wide range of activities in support of its objectives, including lobbying, educating, monitoring, research, publicity, litigation and the funding of legal cases that advance these rights. In the process, it networks and collaborates with a wide range of local and international organisations. Another body that protects freedom of speech is the Freedom of Commercial Speech Trust. Backed by the marketing communication industry and supported by organised business and consumer organisations, the trust focuses on transparent negotiations with legislators.

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

The FCJ's launch as an independent body allows it to represent all journalists, including independent community-press journalists. It also assists in meeting its objective of becoming a more diverse and representative body for the community-press industry.

The Broadcasting Complaints Commission of South Africa is an independent self-regulatory body that serves as a voluntary watchdog, to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct.

Members include, among others, the SABC, M-Net, Radio 702 and Trinity Broadcasting Network. However, the commission does not deal with X-rated material; the broadcast of which is prohibited under criminal law.

The Broadcasting Monitoring Complaints Committee (BMCC) was established under sections 21 and 22 of the Independent Broadcasting Authority Act, 1993 (Act 153 of 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 regarding licence conditions, and is also entitled to initiate its own investigations 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.

Material that could be considered X-rated must be submitted to the Film and Publication Board prior to being shown. (See Chapter 4: *Arts and culture*.)

The mission of the National Association of Broadcasters is to protect the interests of broadcasting as a whole, and to liaise 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.

The mission of the Online Publishers' Association is to provide a non-profit forum in which South African online publishers can address issues of common interest, and which can represent these publishers to advertising agencies and the advertising community, the press, government and the public.

The National Community Radio Forum (NCRF), launched in December 1993, lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

The NCRF is a national, member-driven association of community-owned and -run radio stations and support-service organisations. Radio-station members are independent, non-profit community-based organisations.

News agencies

The South African Press Association (Sapa), a national news agency, is a cooperative, non-profit news-gathering and news-distribution organisation operating in the interests of its members

Major daily and weekly newspapers					
Name and website	**Publisher**	**Contact information**	**Frequency**	**Language**	**ABC circulation (Jan – Mar 2009)**
Beeld www.beeld.com	Media 24	PO Box 333, Auckland Park, 2006 T. 011 713-9000 / F. 011 713-9956 E-mail: nuus@beeld.com	MD, Mo-Fr	Afr	95 914
Die Burger (Daily)	Media 24	PO Box 692, Cape Town, 8000	MD. Mo-Fr	Afr	80 220
Die Burger (Weekly) www.dieburger.com	Media 24	T. 021 406-2121 / F. 021 406-3965 E-mail: dbnred@dieburger.co.za	MD. Mo-Fr	Afr	84 976
Business Day www.businessday.co.za	BDFM Publishers (Pty) Ltd	PO Box 1746, Saxonwold, 2132 T. 011 280-5548 / F. 011 280-5505 E-mail: busday@bdfm.co.za	MD, Mo-Fr	Eng	39 516
Cape Argus, The www.capeargus.co.za	Independent Newspapers	PO Box 56, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4156 E-mail: argusnews@ctn.independent.co.za	MD, Mo-Fr	Eng	60 552
Cape Times www.iol.co.za	Cape Ltd Independent Newspapers	PO Box 11, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4717 E-mail: chriswh@independent.co.za	MD, Mo-Fr	Eng	47 514
Citizen, The (Daily) www.citizen.co.za	Caxton	PO Box 43069, Industria, 2042 T. 011 248-6000 / F. 011 248-6213 E-mail: citizen@citizen.co.za	MD, Mo-Fr	Eng	52 242
Citizen, The (Weekly)	Caxton Publishers & Printers Ltd	PO Box 43069, Industria, 2042	Weekly, Sat	Eng	67 872
City Press www.citypress.co.za	Media 24	PO Box 3413, Johannesburg, 2000 T. 011 713-9001/ F. 011 713-9966 E-mail: news@citypress.co.za	Sun	Eng	181 816
Daily Dispatch www.dispatch.co.za	Dispatch Media (Pty) Ltd	PO Box 131, East London, 5200 T. 043 702-2000 / F. 043 743-5155 E-mail: news@dispatch.co.za	MD, Mo-Fr	Eng	32 919
Daily News www.dailynews.co.za	Independent Newspapers	PO Box 46915, Greyville, 4023 T. 031 308-2911 / F. 013 308-2111 E-mail: dennis.pather@inl.co.za	MD, Mo-Fr	Eng	42 274
Daily Sun	KZN Media 24	PO Box 121, Auckland Park, 2006 T. 011 877-6000 / F. 011 877-6046 E-mail: news@dailysun.co.za	Mo-Fr	Eng	507 328
Diamond Fields Advertiser	Independent Newspapers	PO Box 610, Kimberley, 8300 T. 053 832-6261 / F. 053 832-8902 E-mail: pbe@independent.co.za	MD, Mo-Fr	Eng	10 178
Herald, The www.theherald.co.za	Avusa Ltd	P/Bag X6071, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-4966 E-mail: theherald@johnnicec.co.za	MD, Mo-Fr	Eng	25 502
Ilanga Langesonto www.ilanganews.co.za	Mandla Matla Publishing Co	PO Box 2159, Durban, 4000 T. 031 337-4000 / F. 031 337-9785 E-mail: newsroom@ilanganews.co.za	Wknd	Zulu	90 158
Isolezwe	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308 2911	MD, Mo-Fr	Zulu	102 454
Independent on Saturday www.iol.co.za	Independent Newspapers	PO Box 4759, Greyville, 4023 E-mail: trevor.bruce@inl.co.za T. 031 308-2934 / F. 013 308-2111	Weekly	Eng	50 895
Mail and Guardian www.mg.co.za	M&G Media	PO Box 91667, Auckland Park, 2006 T. 011 250-7300 / F. 011 250-7502 E-mail: newsdesk@mg.co.za	Weekly	Eng	52 485
The Mercury www.themercury.co.za	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2911 / F. 031 308-2333 E-mail: mercnews@inl.co.za	MD, Mo-Fr	Eng	37 080
Post	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2529 / F. 031 308-2555 E-mail: khalil.aniff@inl.co.za	Weekly Wed	Eng	45 454

Major daily and weekly newspapers

Name and website	Publisher	Contact information	Frequency	Language	ABC Circulation (Jan – Mar 2009)
Pretoria News (Daily) www.ptanews.co.za	Independent Newspapers	PO Box 439, Pretoria, 0001 E-mail: pta.news@inl.co.za	MD, Mo-Fr	Eng	26 918
Rapport www.rapport.co.za	Media 24	PO Box 8422, Johannesburg, 2000 T. 011 713-9537 / F. 012 713-9977 E-mail: rapport@rapport.co.za	Weekly	Afr	282 260
Saturday Star	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-2792 / F. 011 633-2794 E-mail: star@inl.co.za	Weekly	Eng	130 435
Soccer-Laduma www.soccerladuma.co.za	Media 24	PO Box 787, Sea Point, 8060 T. 021 425-1200 / F. 021 425-1247	Weekly	Eng	317 571
Sowetan www.sowetan.co.za	Avusa Ltd	PO Box 6663, Johannesburg, 2000 E-mail: editor@sowetan.co.za	Mo-Fr	Eng	130 060
Sunday World www.sundayworld.co.za	Avusa Ltd	PO Box 6663, Johannesburg, 2000 T. 011 471-4200 / F. 011 471-4164 E-mail: newsed@sundayworld.co.za	Sun	Eng	180 255
The Star www.iol.co.za	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 836-6186 E-mail: starnews@star.co.za	MD, Mo-Fr	Eng	167 214
The Sunday Independent www.iol.co.za	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 834-7520 E-mail: jovial.rantao@inl.co.za	Weekly	Eng	38 284
Sunday Sun	Media 24	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9731	Wknd	Eng	214 357
Sunday Times www.sundaytimes.co.za	Avusa Ltd	P/Bag X57, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: suntimes@tml.co.za	Wknd	Eng	504 163
Sunday Tribune	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2711 / F. 011 308-2357 E-mail: tribunenews@inl.co.za	Sun	Eng	101 105
Volksblad www.volksblad.com	KZN Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7600 / F. 051 430-6949 E-mail: nuus@volksblad.com	Mo-Fr	Afr	26 574
Volksblad (weekly)	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7600 / F. 051 430-7034	Wknd	Afr	23 475
Weekend Argus	Independent Newspapers	PO Box 56, Cape Town, 8000 T. 021 488-4528 / F. 021 488-4597 E-mail: ryan.cresswell@inl.co.za	Wknd	Eng	95 022
Weekend Post	Avusa Ltd	P/Bag X6071, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-4966 E-mail: weekend@johnnicec.co.za	Wknd	Eng	26 445
Witness www.witness.co.za	Media 24	PO Box 362, Pietermaritzburg, 3200 T. 033 355-1111 / F. 033 355-1122 E-mail: newsed@witness.co.za	Mo-Fr	Eng	22 187
The Times www.thetimes.co.za	Avusa Ltd	P/Bag X57, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: suntimes@tml.co.za	Mo-Fr	Eng	140 895
Son www.dieson.co.za	Media 24	PO Box 692,Cape Town, 8000 T. 021 406 2075 / F. 021 406 3221	MD, Mo-Fr	Afr	107 899

The abbreviations used are the following: Wknd (Weekend), MD (Morning daily),
Mo-Fr (Monday to Friday) Sun (Sunday), Afr (Afrikaans), Eng (English), Zulu (isiZulu).

Source: Audit Bureau of Circulations

The country's journalism standard was honoured when South Africa won four awards at the prestigious CNN MultiChoice African Journalist Awards, held in Durban in July 2009.

The South African winners were:

- HIV/AIDS Reporting in Africa Award - Anna-Maria Lombard, Health-e-News Service for *3rd Degree* on e.tv
- MSD Health and Medical Award - Paul McNally, *Men's Health*
- Mohamed Amin Photographic Award - Halden Krog, *The Times*
- Print General News Award - Beauregard Tromp, *The Star.*

and the public. Sapa's foreign news is received from Associated Press and its representatives in London.

The main foreign news agencies operating in South Africa are Bloomberg and Reuters. Other agencies are the Eastern Cape News Agency and African Eye News Service in Mpumalanga.

Training centres

Over 40 institutions offer media training in South Africa. Tertiary institutions include various universities of technology such as Tshwane, Walter Sisulu, Nelson Mandela, the Cape Peninsula and Durban; and Rhodes, North-West, Stellenbosch and Witwatersrand universities.

Other 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; the Cross Media Training Centre; and Nemisa, a government-funded training institute, specialise in broadcasting, news-media and multimedia skills.

Nemisa is a non-profit organisation established in terms of the Companies Act, 1973 (Act 61 of 1973), which provides much-needed advanced skills training for the broadcasting industry. It has Council for Higher Education accreditation and offers diploma courses, short courses and internships in TV and radio production and creative multimedia. It has forged valuable international linkages with training institutions in Canada, France, India and Malaysia. It has also established links with the Commonwealth Broadcasting Association.

In the 2008/09 financial year, Nemisa surpassed its target of 350 learners by training 648 people through full-time programmes, learnerships and skills programmes delivered as part of strategic alliances.

The institute secured accreditation for five of the six programmes on offer in the areas of graphic design, television and radio production, broadcast engineering and end-user computing.

The Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority (Mappp-Seta) was gazetted on 15 March 2000. In 2008, the Mappp-Seta's sectoral categories were revised as follows:

- advertising and visual arts
- publishing
- printing
- packaging
- film and electronic media
- performing arts
- cultural heritage.

The Mappp-Seta coordinates 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 standard-generating bodies for the media industry.

Similar bodies have been implemented for journalism training and communication studies. These bodies are substructures of the National Standards Body (language and communication) that coordinates standard-setting in the communication and language sectors.

Journalism awards

The most important awards include the:

- Mondi Shanduka Newspaper Awards.
- Nat Nakasa Award for Courageous Journalism. In 2009, it was awarded to photographer Greg Marinovich.
- Sappi Magazine Publishers Association of South Africa PICA Awards.
- Sanlam Community Press Awards.
- Vodacom Awards for Journalism Across All Mediums.
- South African Breweries (SAB) Journalism Awards.
- Sanlam's Financial Journalist of the Year Award.
- CNN MultiChoice Africa Awards.

In 2009, the Sanef-Wrottesley Award, a peer-recognition award, was presented to Mathatha Tsedu, former editor of *City Press* and head of Media24's journalism academy, for extraordinary commitment to the achievement of Sanef's goals.

Winners of major annual press trophies

	Frewin*	McCall**	Cronwright***	Hultzer****	Joel Mervis*****
2006	Die Burger	The Witness	District Mail	Eikestadnuus	Mail & Guardian
2007	Beeld	Mercury and Business Day (shared)	Paarl Post	Potchefstroom Herald	Mail & Guardian
2008	Beeld	The Witness	Springs Advertiser	Paarl Post	Weekend Witness
2009	Beeld	Business Day	Lowvelder	Polokwane Observer	Rapport

* Best daily newspaper with a circulation above 50 000
** Best daily with a circulation under 50 000
*** Best community newspaper with a circulation exceeding 15 000
**** Best community newspaper with a circulation below 15 000
***** Best urban weekly

Source: Print Media South Africa

Above-the-line adspend in R millions

Category	1998 R'm	%	2007 R'm	%	2008 R'm	%
Daily newspapers	1 104,5	15,2	3 533,4	15,1	3 485,8	14,2
Weekend newspapers	448,0	6,2	1 413,8	6,0	1 554,0	6,3
Black/coloured/Asian papers	151,15	2,1	included in other categories			
Community newspapers	422,8	5,8	1 547,9	6,6	1 520,6	6,2
Consumer magazines	732,7	10,1	2 114,1	9,0	2 202,9	9,0
Trade, technical, financial	366,9	5,1	512,4	2,2	531,4	2,2
Total print	3 226,4	44,5	9 121,6	39,0	9 294,7	37,8
TV	2 938,8	40,5	9 379,4	40,1	9 961,6	40,6
Radio	795,3	11,0	2 964,8	12,7	3 345,2	13,6
Cinema	76,8	1,1	359,5	1,5	358,1	1,5
Outdoor	210,9	2,9	1 161,1	5,0	1 079,9	4,4
Direct mail (unaddressed)	not monitored		139,9	0,6	150,5	0,8
Internet	not monitored		272,0	1,2	375,9	1,5
Total	**7 248,2**	**100**	**23 398,3**	**100**	**-24 565,9**	**100**

Rounding off occurs. Important note: 2007 revised upward from original data published in *2008 Media Facts*. Excludes self-promotion by TV stations on TV. This table reads: According to Multimedia, TV accounted for R2 938,8 million (40,5%) of the R7 248,2 million spent on the media in 1998. This rose to R9 379,4 million (40,1%) in 2007 and R9 961,6 (40,6%) in 2008.

Source: Nielsen Media Research's Multimedia

Media diversity

Media diversity in any country is regarded as a measure of the depth of its democracy. Every citizen should have access to a diverse range of media. South Africa is on its way towards achieving this mission.

The Constitution provides for freedom of expression and access to information. To deepen media diversity, government, together with commercial media entities, have partnered to assist the Media Development and Diversity Agency (MDDA), which is tasked with providing financial and other support to community and small commercial media projects.

Media Development and Diversity Agency

The MDDA was established in terms of the MDDA Act, 2002 (Act 14 of 2002), which provides for the establishment of an independent, statutory body, jointly funded by government, the media industry and other donors. The Electronic Communications

In February 2009, Discovery Health launched the Health Journalism Excellence Awards in South Africa, with R275 000 in prize money to journalists for outstanding health reporting.

The award was presented to Anso Thom of Health-e News at a gala awards ceremony in Sandton, Gauteng, in May 2009. There were six other category winners.

Act, 2005 provides for a sustainable mechanism for funding the objects of the MDDA Act, 2002 through contributions from broadcasting service licensees.

The MDDA is tasked with creating an enabling environment for media diversity and development by providing support to media projects, and facilitating research into media development and diversity issues. The agency functions independently from and at arm's length of its funders, political-party and commercial interests. This arrangement enables government, the media industry and donors to work together in addressing the legacy of imbalances in media access.

The MDDA provides support to existing grassroots media projects, and assists in establishing new media projects targeting neglected audiences. The purpose is to strengthen the sector though the provision of resources, knowledge and skills in pursuit of promoting media development and diversity.

By January 2009, the MDDA had expenditure plans of about R73 million for 229 media projects. Those ranged from community radio, TV and newspapers, magazines and small commercial newspapers throughout the country.

Advertising

The Loerie Awards are the best-known South African awards recognising excellence in advertising. The Association of Marketers established these awards in 1978 to coincide with the advent of commercial television in South Africa. The first ceremony took place in 1979.

The Loerie Awards ceremony sees excess monies being ploughed back into the industry in the form of bursaries for underprivileged advertising and marketing students via the Loerie Education Trust Fund, and as a donation to the Advertising Benevolent Fund. The main objective of the Loerie Awards is to encourage creative advertising. Other important annual awards are the Eagles and the Pendoring Awards.

The 31st annual Loerie Awards ceremony was held in September 2009 in Cape Town. More than 2 640 entries were received.

In April 2009, DDB South Africa won the seventh annual *AdReview* Awards' Ad Agency of the Year Award.

Two South African advertising companies won 2009 Cannes Lions International Advertising Festival Awards and received the coveted Grand Prix awards in the outdoor advertising and radio categories. TBWA\Hunt\Lascaris won the premier award in the Outdoor Advertising Category for their billboard campaign commissioned by *The Zimbabwean*.

The agency beat 4 498 entrants in the category to claim the top award.

From a total of 1 153 entries in the radio category, Net#work BBDO Johannesburg claimed the Radio Grand Prix for their *Dancer, Dog and Ferret* Campaign for Virgin Atlantic Airline. This is the first time that a South African agency has won a Grand Prix in the radio category.

In 2009, the festival attracted more than 10 000 delegates from 94 countries and culminated in the competitive showcase of over 28 000 ads from all over the world.

In November 2009, Ogilvy Johannesburg won the *AdFocus* 2009 Advertising Agency of the Year Award.

Advertising Standards Authority (ASA)

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

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

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

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AdFocus, Financial Mail
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