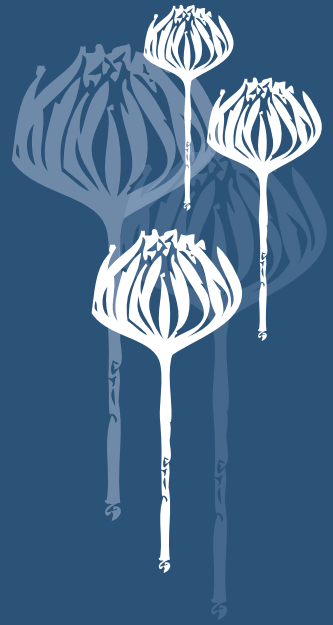


# Communications



**SOUTH  
AFRICA**  
YEARBOOK  
2011/12

Since 2007, the information and communications technology (ICT) market has grown by over R131 billion to R179 billion in 2010. It was estimated that the sector would grow to R187 billion in 2011, with an estimated figure of R250 billion by 2020. This growth will be driven by the rapid uptake and use of data and applications-driven mobile communications.

The Department of Communications' policies are enabling the development of a robust, vibrant and competitive 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.

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 department's core functions are to:

- develop ICT policies and legislation that create conditions for the accelerated and shared growth of the South African economy, which positively impacts on the well-being of the people and is sustainable
- ensure the development of robust, reliable and affordable ICT infrastructure that supports and enables the provision of a multiplicity of applications and services to meet the needs of the country and its people
- strengthen the ICT regulator, the Independent Communications Authority of South Africa (Icasa), to enable it to regulate the sector in the public interest and ensure growth and stability in the sector
- fulfil South Africa's continental and international responsibilities in the ICT field.

## Policy and initiatives

In March 2010, the Radio Frequency Spectrum Policy was approved. It seeks, among other things, to:

- ensure the efficient use and management of the radio frequency spectrum

- facilitate the achievement of key socio-economic objectives, such as increasing access to ICT
- create an information society via wireless technologies
- ensure access to broadband services and public-service broadcasting content.

The National Broadband Policy for South Africa was gazetted in July 2010. The policy seeks to address the availability, accessibility and affordability of broadband; the building of an information society; and promoting the uptake and usage of broadband.

The department, together with the ICT industry, has committed to delivering a 100% broadband penetration by 2020. It signed a compact with the ICT industry in August 2011.

ICT infrastructure is a basic foundation for economic competitiveness. During the last few years, government has increased investment in infrastructure to create jobs and stimulate the economy, and will accelerate broadband infrastructure spending.

In this regard, an initial R450 million has been allocated for the provision of broadband services over the Medium Term Expenditure Framework (MTEF) period.

In 2011, the department was finalising the ICT Rural Development Strategy to determine priority underserved areas and accelerate the provision of universal service and access through integrated government interventions.

As per the target set out in the New Growth Path, the department, together with the ICT sector, aims to facilitate the creation of over 150 000 direct and indirect jobs by 2020.

An industry-wide committee will be established to identify opportunities, using a collective database to ensure effective monitoring and evaluation.

Jobs will be created across various subsectors of the industry through:

- providing broadband infrastructure
- establishing content hubs for radio and TV

The Department of Communications launched the first-ever *South African e-Barometer Report* on 4 August 2011.

The department has embarked on a project that will assist the industry to measure the progress of South Africa's uptake and use of information and communications technology (ICT) tools using an e-barometer. This measuring tool will assist in analysing the country's e-readiness, primarily because government needs to be informed of the impact of ICT initiatives across multiple sectors within the country.

- animation
- e-cooperatives
- using ICTs in further education and training colleges
- tailor-made solutions for small, medium and micro-enterprises (SMMEs)
- digital broadcasting and distributing set-top boxes (STBs)
- rolling out Postbank.

The department participates 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 9 900-km long EASSy cable links South Africa with Sudan and provides for landing stations in countries along the coast of eastern Africa. The cable is connected to adjacent landlocked countries and will have a lifespan of 25 years. The EASSy cable landing in South Africa is at Mtunzini, in KwaZulu-Natal.

Other Nepad projects include the E-Schools Initiative, the Uhuruset submarine cable, the Umojanet terrestrial cable and the e-Africa cable.

The Broadcasting Digital Migration Policy for South Africa was approved in July 2008.

By January 2012, the department had finalised amendments to the 2008 Broadcasting Digital Migration Policy and these were expected to be gazetted in February 2012.

The department had also finalised the STB Manufacturing Sector Development Strategy and the Scheme for Ownership Support Roll-Out Framework, which were scheduled to be presented to Cabinet in February 2012.

With regard to signal distribution, Sentech was making significant progress in the roll-out of DVB-T2 transmitters. By March 2012, the digital signal was expected to cover more than 60% of the population.

By January 2012, the finalisation of the national Digital Terrestrial Television Standard for South Africa by the South African Bureau of Standards was at an advanced stage. The department aims to achieve about 23 500 direct and indirect jobs through the manufacturing value chain.

Other strategies and initiatives include:

- 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 Electronic Communications Act, 2005 (Act 36 of 2005). The agency promotes universal service and

access to ICTs and services for all South Africans.

- 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.
- Active participation in international organisations and events: South Africa participates in international organisations such as the International Telecommunications Union, African Telecommunications Union, African Union, Universal Postal Union (UPU), the Pan-African Postal Union (PAPU) and the World Radio Communication Conference. In 2011, government worked with other African countries through PAPU to ensure it contributes meaningfully to preparations for and debates at the UPU plenipotentiary conference to be held in Qatar in 2012.
- 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 dealing with cybercrime. The HLEG has adopted the following focus areas:
  - legal measures
  - technical and procedural measures
  - capacity-building
  - international cooperation
  - organisational structures.

South Africa used the preliminary output of the HLEG towards the development of the national Cybersecurity Policy Framework.

Initiatives such as the International Multilateral Partnership against Cyber Terrorism also contribute to forging partnerships and collaborations geared towards combating cybercrime.

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

The PNC on ISAD provides timely and informed advice to the President on matters related to the development of an inclusive information society. It also facilitates the coordinated development of an inclusive information society in South Africa and achievement of the country's information society vision: "To establish South Africa as an advanced information-based society in which information and ICT tools are key drivers of economic and societal development."

The commission comprises leaders in government, industry and civil society. During its delib-

erations, 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.

## Public entities and agencies reporting to the Minister of Communications

The following public entities and agencies report to the Minister of Communications: Icasa, the South African Post Office (Sapo), Sentech, the South African Broadcasting Corporation (SABC), the National Electronic Media Institute of South Africa (Nemisa), Usaasa and the .za Domain Name Authority (DNA).

## Independent Communications Authority of South Africa

Icasa is the regulator for the South African communications, broadcasting and postal services sector. Its mandate is spelt out in the Electronic Communications Act, 2005 for the licensing and regulation of electronic communications and broadcasting services, and by the Postal Services Act, 1998 (Act 124 of 1998), for the regulation of the postal sector.

Enabling legislation also empowers Icasa to monitor licensee compliance with licence terms and conditions, develop regulations for the three sectors, plan and manage the radio frequency spectrum, and protect consumers of these and services.

Icasa's functions are to:

- license broadcasters, signal distributors, and providers of telecommunications services and postal services
- make regulations
- impose licence conditions
- plan, assign, control, enforce and manage the frequency spectrum
- ensure international and regional cooperation
- ensure the efficient allocation of numbers
- ensure interoperability of networks
- receive and resolve complaints.

In 2011/12, R313 million was allocated to Icasa to cater for operational and project expenses. Icasa will pursue further liberalisation of the pay-TV market by issuing new television licences.

## Universal Services and Access Agency of South Africa

Usaasa promotes the goals of universal access and service in the underserved areas of South Africa.

The agency is mandated to:

- make recommendations to the Minister of Communications to determine what constitutes universal access by all areas and communities in South Africa
- foster the adoption and use of new methods of attaining universal access and service
- encourage, facilitate and offer guidance in respect of any scheme to provide universal access and service
- encourage any scheme to provide telecommunications services as part of reconstruction and development projects
- stimulate public awareness of the benefits of telecommunications services.

Government has tasked Usaasa with establishing a targeted 400 ICT access centres in underserved areas, linked to rural priority nodes, by 2015. This ideally means that the agency will have to establish at least 100 centres per year.

It was announced in 2011 that a review of Usaasa's strategic direction in the provision of universal access and service was to be undertaken. This repositioning seeks to transform Usaasa into a digital opportunity foundation and to remove the bottlenecks that have made it difficult to exploit the Universal Service and Access Fund.

The new strategic direction will be presented to Parliament in 2012/13. Usaasa will also play a role in the delivery of digital broadcasting. An initial R690 million over the MTEF period is allocated for the subsidisation of STBs to poor households that own televisions.

## Internet

Many South Africans still rely on broadband services at their place of work to access the Internet, hence broadband penetration stands at approximately 5% of the population.

Current research indicates that under conditions characterised by high cost of services, saturation in urban markets and limited access in rural areas, the Internet's rate of expansion in South Africa will decline from above 15% to 10% per year by 2015. This projection envisages 11,3 million Internet users by 2015, which is approximately 22% of the population.

To address this, the Department of Communications is working with key stakeholders, including organised labour, civil society and academia, towards the development of a shared Vision 2020 for the country.

### Cybercrime and cybersecurity

Work has begun on a comprehensive cybersecurity policy framework for the country, which was expected to be finalised in 2011/12. It aims to create a secure, dependable, reliable and trustworthy cyber environment.

In September 2011, it was announced that South Africa was teaming up with Nepad and the Southern African Development Community to launch the Southern African Internet Governance Forum (SAIGF). Issues that the SAIGF will address include local content, access and diversity, cybersecurity and its impact on vulnerable groups, managing critical resources, cross-border Internet governance, openness and privacy, domain names, cloud computing and mobile Internet access.

These issues were discussed at a three-day conference in the beginning of September 2011. The outcomes were taken to the sixth annual meeting of the Internet Governance Forum later that month in Nairobi, Kenya.

### .za Domain Name Authority

The .za DNA was established for the purpose of assuming responsibility for the .za domain name space.

The .za DNA was established in 2002 in terms of Chapter 10 of the Electronic Communications and Transactions Act, 2002 (Act 25 of 2002).

The Department of Communications provides funding for the .za DNA and will continue its support and participation until the .za DNA is fully operational and sustainable.

A 2011 study revealed that more than half of participants accessed the Internet on their cellphones daily.

Of the 8 000 people who were surveyed, 57% engaged in some form of banking or financial activity on their cellphones, including balance checks and transfer of funds, while about 21% had paid a bill via their mobile service.

Eighty-nine per cent used their cellphones to research or purchase a digital or physical product.

Globally, 72% of participants use mobile Internet daily, while 18% no longer use fixed-line access to the Internet. Twenty-seven per cent of consumers said they would make purchases via their cellphones if security issues were better addressed.

Funding will then be sourced through a funding model developed in accordance with Section 66(3) of the Electronic Communications and Transactions Act, 2002. The DNA will also oversee the implementation of the alternative resolution mechanism.

### South African Accreditation Authority

The office of the South African Accreditation Authority is established in terms of Chapter Six of the Electronic Communications and Transactions Act, 2002. The authority is responsible for the accreditation of authentication and certification products and services used in support of electronic signatures. It is also concerned with monitoring the activities of authentication and certification service-providers whose products or services have been accredited.

### Mobile communications

South Africa is one of the fastest-growing mobile communications markets in the world. According to the All Media Products Survey (AMPS) 2010, 79,5% of all South Africans older than 15 years own or rent a cellphone, totalling more than 27 million people.

South Africa has five operators: Vodacom, MTN, Cell C, Virgin Mobile and Telkom (8ta).

The Regulation of Interception of Communications and Provision of Communication-Related Information Amendment Act, 2008 (Act 48 of 2008), aims to help law-enforcement agencies investigate and combat serious crime. It gives law enforcement access to the identity and whereabouts of SIM-card owners who use cellphones in planning and executing serious crimes.

As of July 2011, cellphone service-providers are prohibited from activating a new SIM card unless they have recorded the customer's cell number, full names, identity number and address, and verified the information.

### Telkom

Telkom is Africa's largest integrated communications company, providing integrated communications solutions to a range of customers.

The organisational structure comprises three major business units: Telkom South Africa, Telkom International and Telkom Data Centre Operations.

In October 2010, Telkom launched its mobile operator, 8ta. In September 2011, it launched Tel-

kom Business Mobile, which focuses exclusively on the business market.

In 2011, Telkom received the Black Management Forum's Progressive Company of the Year Award in recognition of the strides the company has taken in the area of Broad-Based Black Economic Empowerment (BBBEE).

### Telkom Foundation

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

### 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 information technology 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.

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

### 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.

Since 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 BBBEE and develop and sustain SMMEs.

The department also aims to improve service delivery and expand the provision of telecommunications services. The introduction of underserved area licences (USALs) addressed 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, among other things, to allow mobile operators to use fixed lines to provide both voice- and data-transmission services.

According to the Department of Communications' Strategic Plan for 2010 – 2013, the department will focus on implementing the ICT Rural Development Strategy with focused interventions in priority nodes. It will also review the business models for USALs and community radio and television stations.

### 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 24 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

In August 2011, undersea cable company Seacom and United States-based Infinera achieved a global first by successfully trialling a 500 gigabits-per-second (Gb/s) transmission over Seacom's newly built network between KwaZulu-Natal and Gauteng.

The trial used five 100 Gb/s channels of coherent optical transmission over a distance of 1 732 km.

and conditions. The monopoly and compliance with the terms and conditions of the licence will be reviewed and monitored.

### South African Post Office

Mail Business boasts 26 mail sorting centres for domestic mail and parcels, and three international sorting centres for international mail and parcels. Between these centres, approximately six million mail items are handled daily and 50 tons of parcels are processed a year. Mail is transported to and from these sorting centres domestically to 7 188 delivery offices (delivery depot centres, lobby boxes and 2 443 Post Office branches). In 2010/11, over 1,7 million new addresses were rolled out, of which 65% were in rural and under-serviced areas.

Technological changes and advances in communications such as e-mail and social networking are placing increasing pressure on traditional forms of communications worldwide, especially postal services. The Post Office is expanding the use of this infrastructure to make it available to the wider South African community. In particular, focus areas include:

- education: delivery of textbook and stationery consignments to all schools in the country
- health: movement of antiretroviral and other medicine to clinics and hospitals across the country
- home affairs: delivery of identity documents and passports to the wider South African community
- security forces (South African Police Service and the South African National Defence Force): delivery of uniform consignments
- transport: renewal of vehicle licences.

Some R180 million has been allocated for Sapo's distribution network to be expanded to ensure the inclusion of rural communities into the mainstream of the country's activities and economy. Sapo will further be setting up new outlets in needy communities.

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

The Postbank Limited Act, 2010 (Act 9 of 2010), was signed into law in December 2010 and took

effect in July 2011. This allows Sapo, through the Postbank, to prioritise the banking needs of the unbanked majority, thus facilitating their inclusion into the economic mainstream.

The Act established the Postbank division of the Post Office as a separate legal entity, whose principal aim will be to expand the existing range of banking services to, among other things:

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

In doing so, the Postbank will use the existing Post Office infrastructure but it is not bound by the Act to do so exclusively.

The Postbank's vision is to provide a national banking system that delivers stable, accessible and dependable services to the public and small businesses. It stands to be one of the best guarantees underpinning economic resilience, promoting financial inclusion and allowing people and businesses to invest and save with confidence and security.

### Specialised Post Office products

These 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 cooperation

South Africa is a member of the UPU, a department of the United Nations, that coordinates worldwide postal services. 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 PAPU, 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 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.

## Broadcasting

### 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, all radio transmission and reception was 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, the SABC was established on 1 August 1936. The SABC celebrated its 75th anniversary on 1 August 2011.

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 2010/11, 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.

Channel Africa broadcasts live on three platforms: shortwave, satellite and the Internet. Its broadcasts are in Chinyanja, Silozi, Kiswahili, English, French and Portuguese.

### Commercial radio stations

Commercial radio stations in South Africa include:

- Algoa FM
- Classic FM
- Kaya FM
- YFM
- 94.7 Highveld Stereo
- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda 94.2
- OFM
- East Coast Radio
- 567 Cape Talk
- Radio 2000
- Radio KFM.

Stations such as Jacaranda 94.2, Highveld Stereo, Radio Oranje, Radio Algoa and East Coast Radio were initially SABC stations, but were sold to private owners to diversify radio ownership in South Africa as part of the transformation of the public broadcaster.

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

### Community radio

Community broadcasting remains a critical project for the Department of Communications. Some R10 million has been allocated to support the development of content by community radio stations. During 2011/12, the department planned to provide broadcasting infrastructure to 15 community stations, and R6 million was allocated for this. The department plans to implement measures such as setting aside frequencies for community broadcasting, in particular community TV, aimed at promoting the growth of this sector.



By May 2011, 94% of the population had access to radio, while 84% had access to television.

A study was conducted to develop a sustainability model for community radio stations and TV.

By May 2012, there were 165 community radio stations in South Africa.

The department assists them with broadcast infrastructure, signal distribution costs and capacity-building (technical and human-resource development in the areas of management and marketing).

## Television

### South African Broadcasting Corporation

The SABC is South Africa's national public-service broadcaster. As such, it is obliged to provide a comprehensive range of distinctive programmes and services. It must inform, educate, entertain, support and develop culture and education and, as far as possible, secure fair and equal treatment for the various groupings in the country, while offering world-class programming on television and radio.

The SABC's television network comprises three television channels – all free-to-air. SABC Television reaches a weekly audience of 26,6 million adults aged 15 and older. South African television is broadcast in all 11 official languages and also in Sign Language.

SABC News and Current Affairs is responsible for:

- 1 255 radio news bulletins in 13 languages on 18 radio stations every week
- thirty-two daily current affairs radio shows
- six television news bulletins broadcast daily and 10 television current affairs shows on SABC 1, SABC 2 and SABC 3 every week.

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

In 2011/12, the SABC was allocated R84 million to improve its technological capabilities and educational programming. Another R41 million was allocated to Channel Africa, whose future role and social obligations were to be discussed as part of the Broadcasting Policy review process.

The SABC intends to launch a 24-hour news channel on the free-to-air space, which will contribute to the diversity of views in society.

In 2011, government was engaging the SABC on future funding required to facilitate the introduction of new digital channels, which will be broadcast to the population on a free-to-air platform. The number of television channels is expected to increase from three to about 10.

### Satellite broadcasting

MultiChoice started as the subscriber management arm of M-Net. It is the leading multichannel digital satellite television operator across the African continent.

MultiChoice provides its DStv services to different market segments. The DStv bouquets cater for different lifestyles and pockets, from entry level to premium. Its premium service provides more than 96 video channels, six HD video channels, 40 CD-quality audio channels, 33 radio stations and three interactive services.

### 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 country-wide, with offices in Johannesburg, Cape Town, Durban, Port Elizabeth and Bloemfontein.

In 2011, eNews started broadcasting Afrikaans news bulletins on M-Net's Afrikaans channel kykNET.

In October 2011, the 24-hour eNews Channel extended its broadcast footprint to include Namibia, Zimbabwe, Mozambique, Botswana, Lesotho, Swaziland, Zambia and Malawi on the DStv southern African bouquet on channel 403.

The West Africa Cable System (WACS), linking southern Africa and Europe, promises to double South Africa's broadband capacity. The 14 000-km long fibre cable system is expected to raise South Africa's broadband capacity by over 500 gigabits per second. The US\$650-million submarine cable, which has been under construction since 2009, is an initiative of the WACS Consortium, whose South African members are Broadband Infracore, MTN, Telkom, Neotel and Vodacom.

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

### Community television

By September 2010, Icasa had licensed community TV services in Soweto, Pretoria, Cape Town, Bojanala District, Nelson Mandela Metro and Richards Bay.

These stations will be allowed either to reapply or renew their licences when they expire, as a way of protecting community investment in these services. There is no legislative framework that provides for the Department of Communications to support community television broadcasting services. This means that stations need to secure sponsorships to sustain themselves.

The issuing of new community television licences is on hold until the migration from analogue to digital broadcasting is complete.

### 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 a state-owned, fully commercial enterprise. It was awarded multimedia and carrier-of-carrier licences in 2002. During the past few years, the company has evolved from the technical and broadcast arm of the SABC into a leader in converging communications technologies.

The company aims to provide communications solutions such as voice, data and video on one integrated digital Internet-protocol network.

Sentech's long-term growth depends on its success in markets traditionally served by telecommunications companies. While its core business remains broadcasting signal networks, the broadband business is envisaged as a major element of the product mix in future.

### Broadband Infraco

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

The state-owned enterprise is set to spend over half a billion rand on new broadband infrastructure in 2012/13.

It has a 13 600-kilometre network of long-distance fibre and five open-access points of presence in key metropolitan areas – with an additional seven open access points of presence expected over the next few years.

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

### 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.

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 a 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 has 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, it has become the largest daily newspaper in South Africa.

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

*Sowetan* is one of South Africa's most widely read daily newspapers aimed at an English black readership. Initially distributed as a weekly free-sheet in Soweto, the paper was transformed into a daily newspaper in 1981. This was to fill the void left by the *Post*, which was deregistered by the apartheid government. *Sowetan* is owned by Avusa Ltd.

Afrikaans daily newspaper *Die Burger*, first published in 1915, is distributed in the Western Cape. Media24 owns the paper.

*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, and recently as a Sunday version, *Isolezwe NgeSonto*. 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*, targets 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 the

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 the government's 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 – of 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. Sold mainly 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 the greater Pietermaritzburg area 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 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 from Monday to Thursday.

The Printing Industries Federation of South Africa (PIFSA) celebrated its 100th anniversary in 2011.

The R45-billion industry ranks sixth in South Africa, in terms of contribution to gross domestic product with more than 45 000 employees through six regional PIFSA chambers and more than 800 registered company members.

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

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

The *New Age* newspaper was launched in 2010. TNA Media publishes the paper daily.

According to figures released by the Audit Bureau of Circulations (ABC) in August 2011, daily newspapers sold 126 000 fewer copies in the second quarter of 2011, compared to 70 000 less in the first quarter of 2011. Digital growth increased significantly, albeit off a small base.

Among the top six dailies listed by the ABC in terms of year-on-year copy sales – *Daily Sun*, *Isolezwe*, *Son* (Afrikaans), *Sowetan*, *The Star*, *The Citizen* – only Zulu title *Isolezwe* showed creditable growth of 9,5%. Ten titles declined and eight remained static.

### South Africa's weekly newspapers

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

In November 2010, *Saturday Times* launched a Zulu edition in parts of KwaZulu-Natal.

*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, *Soccer Laduma*, published on Wednesdays, 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. The paper

is owned by Avusa Ltd and is distributed in Gauteng, Mpumalanga, Limpopo and North West.

The *Sunday Tribune* caters for KwaZulu-Natal readers. It 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 targets readers in the higher-income bracket. It is a weekly English language newspaper owned by Independent Newspapers.

Despite the total newspaper circulation in South Africa falling by 14 000 copies in the second quarter of 2011, weeklies have outcompeted their counterparts (daily and weekend), increasing their circulation by 15% – all in copy sales, according to figures released in August 2011 by the ABC, amid worsening media inflation.

Zulu publication *Ilanga* scored 34,3%, *Soccer Laduma* 20% and *Mail & Guardian* 8,6%, emerging as the frontrunners of the weekly newspapers and possibly of all newspapers, in an industry that continues to diminish as transportation costs soar by as much as 40%.

The weekend newspaper struggle continued – 14 titles declined and five remained static, while only four grew.

Zulu titles *Isolezwe ngeSonto* (9,5%) and *Ilanga Langesonto* (11%) performed well, while Afrikaans newspapers *Volksblad* (-19%) and *Rapport* (-12%) reflected the largest declines.

### Free and community newspapers and magazines

According to *Media Facts 2011*, in March 2011, there were 470 community newspapers and magazines in South Africa.

In August 2011, the then Minister of Communications, Mr Roy Padayachie, signed a statement of cooperation with his Lesotho counterpart, the Minister of Communications, Science and Technology, Mr Mothejoa Metsing.

Some of the areas of potential cooperation identified by the two ministers included digital migration, cybersecurity, home and away roaming, postal services and broadband.

### Major daily and weekly newspapers

Name and website	Publisher	Contact information	Frequency	Language	ABC circulation (July – Sept 2011)
<i>Beeld</i> (Daily)	Media 24	PO Box 333, Auckland Park, 2006	MD, Mo-Fr	Afr	76 951
<i>Beeld</i> (Saturday) <i>www.beeld.com</i>		T. 011 713-9000 / F. 011 713-9956 E-mail: <i>nuus@beeld.com</i>	Wknd		76 321
<i>Die Burger</i> (Daily)	Media 24	PO Box 692, Cape Town, 8000	MD, Mo-Fr	Afr	132 082
<i>Die Burger</i> (Weekly) <i>www.dieburger.com</i>		T. 021 406-2121 / F. 021 406-3965 E-mail: <i>dbnred@dieburger.co.za</i>	Wknd		167 802
<i>Business Day</i> <i>www.businessday.co.za</i>	BDFM Publishers (Pty) Ltd	PO Box 1746, Saxonwold, 2132 T. 011 280-5548 / F. 011 280-5505 E-mail: <i>busday@bdfm.co.za</i>	MD, Mo-Fr	Eng	36 103
<i>Cape Argus, The</i> <i>www.capeargus.co.za</i>	Independent Newspapers	PO Box 56, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4156 E-mail: <i>argusnews@ctn.independent.co.za</i>	MD, Mo-Fr	Eng	45 128
<i>Cape Times</i> <i>www.iol.co.za</i>	Cape Ltd Independent Newspapers	PO Box 11, Cape Town, 8000 T. 021 488-9111 / F. 021 488-4717 E-mail: <i>chriswh@independent.co.za</i>	MD, Mo-Fr	Eng	43 274
<i>Citizen, The</i> (Daily)	Caxton Publishers & Printers Ltd	PO Box 43069, Industria, 2042 T. 011 248-6000 / F. 011 248-6213 E-mail: <i>citizen@citizen.co.za</i>	MD, Mo-Fr	Eng	69 649
<i>Citizen, The</i> (Weekly) <i>www.citizen.co.za</i>			Weekly, Sat		42 342
<i>City Press</i> <i>www.citypress.co.za</i>	Media 24	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9966 E-mail: <i>news@citypress.co.za</i>	Sun	Eng	157 306
<i>Daily Dispatch</i> <i>www.dispatch.co.za</i>	Dispatch Media (Pty) Ltd	PO Box 131, East London, 5200 T. 043 702-2000 / F. 043 743-5155 E-mail: <i>news@dispatch.co.za</i>	MD, Mo-Fr	Eng	28 041
<i>Daily News</i> <i>www.dailynews.co.za</i>	Independent Newspapers	PO Box 46915, Greyville, 4023 T. 031 308-2911 / F. 013 308-2111 E-mail: <i>dennis.pather@inl.co.za</i>	MD, Mo-Fr	Eng	33 214
<i>Daily Sun</i>	KZN Media 24	PO Box 121, Auckland Park, 2006 T. 011 877-6000 / F. 011 877-6046 E-mail: <i>news@dailysun.co.za</i>	Mo-Fr	Eng	374 400
<i>Diamond Fields Advertiser</i>	Independent Newspapers	PO Box 610, Kimberley, 8300 T. 053 832-6261 / F. 053 832-8902 E-mail: <i>pbe@independent.co.za</i>	MD, Mo-Fr	Eng	9 495
<i>Herald, The</i> <i>www.theherald.co.za</i>	Avusa Ltd	P/Bag X6071, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-4966 E-mail: <i>theherald@johnniced.co.za</i>	MD, Mo-Fr	Eng	22 319
<i>Ilanga Langesonto</i> <i>www.ilanganews.co.za</i>	Mandla Matla Publishing Co	PO Box 2159, Durban, 4000 T. 031 337-4000 / F. 031 337-9785 E-mail: <i>newsroom@ilanganews.co.za</i>	Wknd	isiZulu	85 726
<i>Isolezwe</i>	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2911 / F. 031 308 2879 E-mail: <i>isolezwe@inl.co.za</i>	MD, Mo-Fr	isiZulu	106 734
<i>Independent on Saturday</i> <i>www.iol.co.za</i>	Independent Newspapers	PO Box 4759, Greyville, 4023 T. 031 308-2934 / F. 013 308-2111 E-mail: <i>trevor.bruce@inl.co.za</i>	Wknd	Eng	46 008
<i>Mail &amp; Guardian</i> <i>www.mg.co.za</i>	M&G Media	PO Box 91667, Auckland Park, 2006 T. 011 250-7300 / F. 011 250-7502 E-mail: <i>newsdesk@mg.co.za</i>	Weekly	Eng	45 692
<i>The Mercury</i> <i>www.themercury.co.za</i>	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2911 / F. 031 308-2333 E-mail: <i>mercnews@inl.co.za</i>	MD, Mo-Fr	Eng	31 474

### Major daily and weekly newspapers

Name and website	Publisher	Contact information	Frequency	Language	ABC Circulation (July – Sept 2011)
<i>Post</i>	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2529 / F. 031 308-2555 E-mail: <a href="mailto:khalil.aniff@inl.co.za">khalil.aniff@inl.co.za</a>	Weekly Wed	Eng	43 413
<i>Pretoria News</i> (Daily)	Independent Newspapers	PO Box 439, Pretoria, 0001 E-mail: <a href="mailto:pta.news@inl.co.za">pta.news@inl.co.za</a> T. 012 300 2000 / F. 012 328 7166	MD, Mo-Fr	Eng	23 148
<i>Pretoria News</i> (Saturday) <a href="http://www.ptanews.co.za">www.ptanews.co.za</a>			Wknd		14 248
<i>Rapport</i> <a href="http://www.rapport.co.za">www.rapport.co.za</a>	Media 24	PO Box 8422, Johannesburg, 2000 T. 011 713-9537 / F. 012 713-9977 E-mail: <a href="mailto:rapport@rapport.co.za">rapport@rapport.co.za</a>	Weekly	Afr	231 911
<i>Saturday Star</i>	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-2792 / F. 011 633-2794 E-mail: <a href="mailto:star@inl.co.za">star@inl.co.za</a>	Wknd	Eng	97 257
<i>Soccer Laduma</i> <a href="http://www.soccerladuma.o.za">www.soccerladuma.o.za</a>	Media 24	PO Box 787, Sea Point, 8060 T. 021 425-1200 / F. 021 425-1247 E-mail: <a href="mailto:clint@soccerladuma.co.za">clint@soccerladuma.co.za</a>	Weekly	Eng	345 088
<i>Son</i> <a href="http://www.dieson.co.za">www.dieson.co.za</a>	Media 24	PO Box 692, Cape Town, 8000 T. 021 406-2075 / F. 021 406-3221 E-mail: <a href="mailto:akoopman@kaapseson.com">akoopman@kaapseson.com</a>	MD, Mo-Fr	Afr	103 056
<i>Sowetan</i> <a href="http://www.sowetan.co.za">www.sowetan.co.za</a>	Avusa Ltd	PO Box 6663, Johannesburg, 2000 E-mail: <a href="mailto:editor@sowetan.co.za">editor@sowetan.co.za</a> T. 011 280 3000 / F. 011 340 9637	Mo-Fr	Eng	116 347
<i>The Star</i> <a href="http://www.iol.co.za">www.iol.co.za</a>	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 836-6186 E-mail: <a href="mailto:starnews@star.co.za">starnews@star.co.za</a>	MD, Mo-Fr	Eng	136 552
<i>The Sunday Independent</i> <a href="http://www.iol.co.za">www.iol.co.za</a>	Independent Newspapers	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 834-7520 E-mail: <a href="mailto:jovial.rantao@inl.co.za">jovial.rantao@inl.co.za</a>	Weekly	Eng	39 569
<i>Sunday Sun</i>	Media 24	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9731 <a href="mailto:prince.chauke@dailysun.co.za">prince.chauke@dailysun.co.za</a>	Wknd	Eng	221 002
<i>Sunday Times</i> <a href="http://www.sundaytimes.co.za">www.sundaytimes.co.za</a>	Avusa Ltd	P/Bag X57, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: <a href="mailto:suntimes@tml.co.za">suntimes@tml.co.za</a>	Wknd	Eng	451 361
<i>Sunday Tribune</i>	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308-2711 / F. 011 308-2357 E-mail: <a href="mailto:tribunenews@inl.co.za">tribunenews@inl.co.za</a>	Sun	Eng	82 477
<i>Sunday World</i> <a href="http://www.sundayworld.co.za">www.sundayworld.co.za</a>	Avusa Ltd	PO Box 6663, Johannesburg, 2000 T. 011 471-4200 / F. 011 471-4164 E-mail: <a href="mailto:newsed@sundayworld.co.za">newsed@sundayworld.co.za</a>	Sun	Eng	147 614
<i>Volksblad</i>	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7600 / F. 051 430-6949 E-mail: <a href="mailto:nuus@volksblad.com">nuus@volksblad.com</a>	Mo-Fr	Afr	23 473
<i>Volksblad</i> (Saturday) <a href="http://www.volksblad.com">www.volksblad.com</a>			Wknd		21 353
<i>Weekend Argus</i>	Independent Newspapers	PO Box 56, Cape Town, 8000 T. 021 488-4528 / F. 021 488-4597 E-mail: <a href="mailto:ryan.cresswell@inl.co.za">ryan.cresswell@inl.co.za</a>	Wknd	Eng	157 220
<i>Weekend Post</i>	Avusa Ltd	P/Bag X6071, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-4966 E-mail: <a href="mailto:weekend@johnnicec.co.za">weekend@johnnicec.co.za</a>	Wknd	Eng	23 656
<i>Witness</i> <a href="http://www.witness.co.za">www.witness.co.za</a>	Media 24	PO Box 362, Pietermaritzburg, 3200 T. 033 355-1111 / F. 033 355-1122 E-mail: <a href="mailto:newsed@witness.co.za">newsed@witness.co.za</a>	Mo-Fr	Eng	19 546
<i>The Times</i> <a href="http://www.thetimes.co.za">www.thetimes.co.za</a>	Avusa Ltd	P/Bag X57, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: <a href="mailto:suntimes@tml.co.za">suntimes@tml.co.za</a>	MD, Mo-Fr	Eng	142 024

## 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.

According to the figures for the second quarter of 2011, released in August 2011, media inflation dropped further (13,4%), meaning the return on investment derived from print had worsened.

Afrikaans title *Kuier* (consumer, women's general) scored 108% in a highly inconsistent and unstable environment, where circulation had declined dramatically again.

Other winners for the second quarter included *Club X* (72%), *Reality* (60%), *Mamas & Papas* (38,6%), *Foschini Sport* (38%), *Commercial Trader* (35%), *Stuff* (29%), *Fitness* (20%), *Amakhosi* (19%), *Elle* (17%), *Drum* (14%), *Baba & Kleuter* (14%), *Succeed* (12,2%) and *Move!* (11%).

## Online media

According to the February 2011 Nielsen Online total traffic ranking report, *News24* was the largest South African website, followed by *Howzit*, *MSN Live* and *SuperSport*.

When it comes to mobile websites, the tables are turned. *Supersport Mobile* reigns supreme, followed by *News24 Mobile* and *Junkmail*.

The Nielsen Online statistics only incorporated South African websites registered with the Digital Media and Marketing Association (DMMA); international sites such as *Google*, *Facebook* and *Youtube* do not feature on this list.

## 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), the 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 and 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.

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 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 and embrace the spirit of transformation in South Africa.

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

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 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 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 the SABC, M-Net, Radio 702 and the 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.

The mission of the DMMA is to provide a 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.

The Professional Journalists' Association was launched in March 2010. Its mission is to give a voice to working journalists and represent their interests in newsrooms across the country.

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, the Publishers' Association of South Africa and press clubs in major centres.

## News agencies

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

The press code governing print media was amended after its scheduled five-year review. The amended code came into effect on 15 October 2011.

One of the new clauses in the code relates to dignity and reputation and reads: "The press shall exercise exceptional care and consideration in matters involving dignity and reputation, bearing in mind that any right to privacy may be overridden only by a legitimate public interest."

The Press Council received a substantial number of public complaints regarding the reporting of children. Previously, the code stipulated only that child pornography could not be published. Under the new regulations, no child under 18 could be interviewed, photographed or filmed without the consent of a parent or guardian - if there was any chance coverage might cause harm of any kind. It also states that the media may not identify children who had been victims of, were charged with, or convicted of abuse or exploitation.

The two new clauses in the section dictate that journalists should use anonymous sources only if there is no other way to handle a story. The press may also not publish information that constitutes a breach of confidence, unless there is a legitimate public interest.

For the first time, plagiarism has been banned in the code. A further addition was reporting on the HIV/AIDS status of people without their consent.



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.

The Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority (Mapppp-Seta) was gazetted on 15 March 2000. Its sectoral categories were as follows:

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

From 1 April 2011, the publishing, printing and packaging subsectors of the Mapppp-Seta were included in a new Seta, the Fibre Processing and Manufacturing Seta.

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.

## National Electronic Media Institute of South Africa

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

### Winners of major annual press trophies, 2011

Frewin*	McCall**	Joel Mervis***
<i>Beeld</i>	<i>Volksblad</i>	<i>Naweek Beeld</i>

\* Best daily newspaper with a circulation above 50 000

\*\* Best daily with a circulation under 50 000

\*\*\* Best urban weekly

Source: Print Media South Africa

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.

It collaborates with other entities such as the SABC, the Media Development and Diversity Agency (MDDA), as well as industry and academia, contributing to reducing poverty and joblessness.

Nemisa partners youth formations, especially in rural communities, to ensure youth access its skills programme where they live. Government allocated R33 million to Nemisa in 2011/12.

## Journalism awards

South Africa's most important awards include the:

- Mondi Shanduka Newspaper Awards
- Sappi Magazine Publishers Association of South Africa PICA Awards
- Sanlam Community Press Awards
- Vodacom Awards for Journalism Across All Mediums
- South African Breweries Journalism Awards
- Sanlam's Financial Journalist of the Year Award
- CNN MultiChoice Africa Awards
- Discovery Health Journalism Awards
- Sanef's Nat Nakasa Award for Courageous Journalism. In 2011, the judges agreed not to give the award to anyone, but rather make special mention of the work of Anton Hammerl, a photojournalist who was killed while reporting on the war in Libya

## 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 has partnered with

commercial media entities to assist the 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 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 an entity of the Government Communication and Information System.

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, and political-party and commercial interests. This arrangement enables government, the media

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

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 mid-2011, the MDDA was providing support to more than 343 media projects across South Africa, focusing on historically disadvantaged communities, using indigenous languages.

By mid-2011, the agency had trained over 1 300 people, provided 143 bursaries to different radio and print media and created approximately 200 direct and indirect job opportunities and beneficiary projects.

## Advertising

South Africa has a vibrant and dynamic advertising industry. Local advertising agencies are often recognised internationally for their excellence.

### Advertising awards

The Loerie Awards are the best-known South

Above-the-line adspend in R millions

Category	2000 R'm	%	2009 R'm	%	2010 R'm	%
Daily newspapers	1 307,2	15,6	3 268,2	13,4	3 500,6	12,2
Weekend newspapers	583,3	7,0	1 573,4	6,4	1 644,3	5,7
Black/coloured/Asian papers	172,8	2,1	included in other categories			
Community newspapers	411,6	4,9	1 535,5	6,3	1 635,0	5,7
Consumer magazines	973,5	10,4	2 048,2	8,4	2 112,0	7,3
Trade, technical, financial	373,1	4,5	484,7	2,0	494,4	1,7
Total print	3 721,5	44,4	8 910,0	36,4	9 386,3	32,6
TV	2 977,1	35,5	10 487,2	42,9	13 408,3	46,6
Radio	1 224,6	14,6	3 041,0	12,4	3 687,8	12,8
Cinema	69,8	0,8	299,4	1,2	351,3	1,2
Outdoor	326,9	3,9	1 075,1	4,4	1 226,0	4,3
Direct mail (unaddressed)	not monitored		151,2	0,6	141,2	0,5
Internet	13,7+	0,2	469,3	1,9	557,4	1,9
<b>Total</b>	<b>8 383,5</b>	<b>100</b>	<b>24 433,2</b>	<b>100</b>	<b>28 778,3</b>	<b>100</b>

Rounding off occurs. Important note: 2009 revised upward from original data published in 2010 *Media Facts*. Excludes self-promotion by media. This table reads: According to Multimedica, TV accounted for R2 977,1 million (35,5%) of the R8 383,5 million spent on the media in 2000. This rose to R10 487,2 million (42,8%) in 2009 and R13 408,3 (46,6%) in 2010.

Source: Nielsen Media Research's *Multimedia, South Africa & SADC Media Facts, 2011*

African awards recognising distinction 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 Pendering Awards.

In 2011, the two Grand Prix winners were:

- Ogilvy Cape Town, Live Activations entry for Volkswagen, "Marching Band"
- Net#Work BBDO, Radio Commercial Campaign for Mercedes-Benz, "New Friends".

At the 2011 *AdReview* Awards, held in April 2011, Carat SA was named Media Agency of the Year for 2011. Carat, in partnership with Vizeum and Isobar, walked off with the coveted Grand Prix Roger Garlick Award for Best Use of Mixed Media with its Cell C Photo Code Campaign and a Roger

Garlick Gold Award for Best Use of New Media with its Adidas 2010 FIFA World Cup™ Campaign. The Jupiter Drawing Room and TBWA\Hunt\Lascares were jointly named AdReview Agencies of the Decade. The judges were unable to reach agreement on a single winner.

In June 2011, advertising agency Net#work BBDO won a Radio Grand Prix – its second since 2009 – at the 58th Cannes Lions International Advertising Festival in France.

## 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.

## Acknowledgements

AdFocus, Financial Mail  
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