SOUTH AFRICA YEARBOOK 2022/23

Communications and Digital Technologies

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The Department of Communications and Digital Technologies (DCDT) is mandated to enable South Africa's digital transformation in an effort to achieve digital inclusion and economic growth by creating an enabling policy and regulatory environment.

This is done through the implementation of the 2016 *National Integrated ICT Policy White Paper*, which provides for the participation of multiple stakeholders for inclusive digital transformation; interventions to reinforce competition and facilitate innovation across the value chain; measures to address issues raised by ICT and convergence; and the establishment of a new national postal policy framework.

It also provides for policies to address the digital divide and affordable access, supply-side issues and infrastructure rollout, and demand-side issues to facilitate inclusivity.

Over the medium-term period, the department aimed to focus on coordinating the rollout of broadband into underserviced areas through the South Africa Connect project, and enabling digital transformation and inclusion through legislative and regulatory interventions.

An estimated 52.7% (R5.1 billion) of the department's budget of R10.5 billion over the MTEF period is allocated to transfers to entities for their operations, and for project-specific funding. Of this amount, R1.6 billion is allocated to the South African Post Office (SAPO) for its universal service obligations to provide postal services in underserviced areas, and R720.8 million to the South African Broadcasting Corporation (SABC) for various activities, including R35 million for the coverage of the national and provincial elections in 2023/24.

Total expenditure is expected to decrease at an average annual rate of 3.9%, from R2.9 billion in 2022/23 to R2.6 billion in 2025/26, as additional allocations to the Independent Communications Authority of South Africa (ICASA) for regulatory activities and the Universal Service and Access Fund for broadcasting digital migration come to an end.

Compensation of employees is the department's second-largest cost driver, accounting for 9.4% of total spending and increasing at an average annual rate of 1.6%, from R313.5 million in 2022/23 to R329.1 million in 2025/26.

Connecting South Africa

South Africa is widely recognised as having one of the most advanced digital ecosystems in the continent. Its key features include over 300 000 kilometres of fibre distributed across the country, which is the result of significant investment by both the public and private sectors.

This country has the advantage of being connected to eight undersea cables that physically connect this continent to neighbouring continents. The 2Africa submarine cable by Vodacom landed in the Eastern Cape in 2023. The Equiano cable by Google, working with Telkom, which is located in the Western Cape, is aimed at providing exponential capacity to the digital ecosystem. This cable alone is expected to triple the internet speeds in the country and significantly reduce the cost of data. Through the flagship programme, SA Connect, the department is dedicated to bridging the digital divide by providing Wi-Fi access to communities and ensuring universal access to the internet. This year, we plan to deploy 9,900 hotspots in 16 districts across the country. It aims to reach 80% connectivity by 2024. To fund this project, the department has allocated R1,3 billion.

In the 2021/22 financial year, the department was successful in maintaining its 970 connected sites. In addition, during that period, SITA connected 781 government sites in Eastern Cape, while BBI connected 110 USAASA sites. Furthermore, the Department played an instrumental role in facilitating the development of the SA Connect draft Implementation Plan.

The department aimed to enhance connectivity to government facilities such as schools, health facilities, and government offices with high-speed internet access, which enable them to serve as connectivity hubs for their users and surrounding communities.

Complementing the SA Connect programme, SITA was expected to launch a National Broadband Project worth at least R6 billion, that will be awarded per region and ensure that government reduces the cost and duplication of connectivity infrastructure from municipalities up to national government level.

Rolling out broadband in underserviced areas

The department, supported by relevant state-owned entities such as Broadband Infraco, Sentech, and the State Information Technology Agency (SITA), will continue to provide broadband connectivity to 970 government facilities over the MTEF period through phase 1 of the South Africa Connect project.

An additional R3 billion in 2023/24 and 2024/25 is allocated to the department to implement phase 2 of the project for capital equipment and new fibre infrastructure, or to lease existing fibre, to expand ICT networks into underserviced areas. Phase 2 also involves the SITA upgrading and connecting government sites from existing budgets, and the ICASA imposing universal service obligations on mobile network operators to connect 18 036 schools, 3 873 health facilities and 8 241 tribal authority sites. Phases 1 and 2 are allocated R3.8 billion over the next three years in the Broadband subprogramme in the ICT Infrastructure Development and Support programme.

By mid-2023, a total of five of the nine provinces (Free State, Northern Cape, Northwest, Limpopo and Mpumalanga) have already successfully switched off and are currently receiving television broadcast on digital platform.

Despite the successful switch-off of the five provinces, the Minister of the DCDT faced legal action from stakeholders who argued that the switch off process should not be concluded without greater engagement with stakeholders. The court ruled that further consultation with stakeholders was necessary before proceeding with the analogue switch off.

In December 2022, the Minister proposed 31 March 2023, as the date for the analogue switch off, and stakeholders who would be affected by this were invited to provide their feedback and suggestions. On 9 December, 2022, a *Government Gazette* was published, which notified and invited the industry, affected parties and members of the public to make substantive submissions.

The department had been extensively engaging with the various stakeholders and role-players to ensure broad and substantive consultations regarding the transition from analogue to digital broadcasting. In the meantime, we are continuing to install set-top boxes for outstanding households.

Enabling digital transformation and inclusion

The department continues to provide a supporting and enabling legislative environment through the development of relevant policies, strategies and legislation.

Over the MTEF period, this will include finalising the Audio-Visual Bill, introducing the South African Broadcasting Corporation Bill to Parliament, submitting the digital economy framework and strategy for approval to Cabinet, finalising the national cloud computing policy and developing the Postal Services Amendment Bill.

As a result, expenditure in the ICT Policy Development and Research programme was set to increase at an average annual rate of 1.4%, from R45.3 million in 2022/23 to R47.2 million in 2025/26.

Legislation

The DCDT derives its mandate from the following legislation:

- Broadcasting Act, 1999 (Act 4 of 1999), as amended, which establishes a broadcasting policy in South Africa;
- Electronic Communications Act (ECA), 2005 (Act 36 of 2005), as amended, which provides the legal framework for convergence in the broadcasting, broadcasting signal distribution, and telecommunications sectors. It also allows for the granting of new licensees and social obligations; the control of the radio frequency spectrum; and the regulation of electronic communication network services, electronic communication services, and broadcasting services;
- Film and Publications Act, 1996 (Act 65 of 1996), as amended, which provides for the classification of certain films and publications, and establishes the Film and Publication Board (FPB) and Tribunal;
- ICASA Act, 2000 (Act 13 of 2000), which establishes the regulator in the sector; and
- Postal Services Act, 1998 (Act 124 of 1998), as amended, which makes provision for the regulation of postal services.

Telecommunications sector

The telecommunications sector is a critical part of modern lifestyles and has significant influence on the growth of the country's economy as it strengthens productivity levels. South Africa's telecommunications sector has continued to grow despite the economic challenges faced by the nation. Mobile subscriptions and Internet penetration, and other related services continue to grow. South Africa's fibre network and data centre markets are expanding rapidly. The ICASA continues to work on regulatory initiatives aimed at reducing the cost to communication and engaged with the Competition Commission on its final findings and recommendations report for the data services market inquiry. The purpose of the inquiry was to investigate the cause and reason for alleged high prices for data services in South Africa, and to make recommendations that would lead to lower prices for data services.

Mobile subscriptions, device ownership, and Internet penetration continues to grow, and the majority of service revenue growth is due to double-digit increases in the value of data. South Africa's fibre and data centre markets are expanding rapidly.

Telecommunications companies are having to adapt to widespread disruption; the structural shift from voice to data is impacting traditional margins and increases in data traffic are being offset by a proportional decline in effective data prices. The market is maturing, and operators are having to compete to grow their share of the prepaid and lower-income markets, from which the majority of future growth is expected to come. Investment in the sector is highly influenced by South Africa's poor economic growth, regulatory changes and technological developments.

Broadcasting sector

The broadcasting sector plays a very important role in education, entertainment and informing the public through radio and TV (both public and commercial broadcasting). The sector has been affected by the rapid changes in technology, which are changing the broadcasting landscape. The process of migrating broadcasting signals from analogue to digital is expected to clear the radio frequency spectrum currently occupied by broadcasters to enable the provision of wireless mobile broadband services and other innovative applications.

While broadcasting revenues continue to grow annually, on-demand audio and video online streaming services are causing significant disruptions in the broadcasting sector globally and will offer serious competition to South African broadcasters in the near future. The digital revolution sweeping video entertainment is affecting community TV stations, free-to-air and public broadcasters, while subscription TV services are having to adapt to keep up with these developments.

Local broadcasters are planning or implementing new business models to integrate their offerings with digital platforms. The sector was undermined by sustainability concerns and numerous issues at the SABC. The delays in digital migration also had an impact. Meanwhile, the DCDT is prioritizing interventions towards final analogue switch-off.

While TV and radio revenues continue to grow, streaming services such as DStv's Showmax, Netflix and Amazon Prime Video are disrupting traditional broadcasting. The dramatic digital revolution sweeping video entertainment is affecting community TV stations, free-to-air, public broadcasters and subscription TV services. Traditional TV and pay-TV are facing a threat of survival. The radio sector is faced with an increase in audio content created for online delivery and via mobile phones and an increase in non-traditional players entering the market.

Postal Services sector

The postal services sector contributes 3.16% to the country's gross domestic product. This includes the courier and express parcel services. Letter post is declining both in terms of volumes and its percentage contribution to revenue that is generated in the sector. The trend for the decline in letter mail volumes is attributed to the electronic substitution effects. Through identification and review of legislative gaps in the postal sector, there is an emphasis for the sector to ensure that postal outlets offer connectivity through Internet services.

Although the courier, express and parcel services sector faces weak economic conditions, it is benefitting from the growth in e-commerce sales, increasing demand for just-in-time deliveries and from the service provided by the post office. Increasing customer demand for speedy and flexible deliveries and the growth of disruptive start-ups and innovative delivery options are forcing traditional operators to review their distribution strategies and in some cases partner with or invest in new disruptive on-demand delivery organisations to provide innovative and alternative delivery options.

While the poor economy, low business and consumer confidence are affecting the volume of goods requiring express delivery, the development of the on-demand economy is providing growth drivers for the industry. These include the need for speedy deliveries created by the rise in online shopping, service delivery levels from the Post Office, the need for just-in-time delivery of parts and components to minimise stock levels and save costs and delivery demands for medical products. The continuous development of drones, robots and autonomous vehicles are driving ongoing change in the industry.

Entities

Broadband Infraco (BBI)

The BBI's legislative mandate, which is set out in the BBI Act, 2007 (Act 33 of 2007), is to provide ICT infrastructure and broadband capacity in South Africa. Its main objectives are to expand the availability and affordability of access to electronic communications, including but not limited to, underdeveloped and underserviced areas; to ensure that the bandwidth requirements for specific projects of national interest are met; and to enable the State to provide affordable access to electronic communications networks and services.

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Over the medium term, the entity planned to focus on implementing phase 2 of the South Africa Connect project, and maintaining broadband connectivity to 713 government sites and the time taken to restore faults on the core network at seven hours. Expenditure is expected to increase at an average annual rate of 9.4%, from R770.2 million in 2022/23 to R1 billion in 2025/26. This is mainly due to an increase in spending on goods and services, which accounts for an estimated 60.3% (R1.7 billion) of the company's total expenditure over the MTEF period; and depreciation, which accounts for an estimated 19.2% (R564.2 million), mostly as a result of an increase in expenditure on capital investments for phase 2 of the South Africa Connect project and other investments in infrastructure.

Film and Publication Board

The FPB was established in terms of the Films and Publications Act, 1996 (Act 65 of 1996), as amended. Its mandate is to regulate the creation, production, possession and distribution of certain publications and films by classifying them; imposing age restrictions on content; and rendering the exploitative use of children in pornographic publications, films or online material punishable. The FPB is also mandated to issue, renew and revoke licences; impose fines and make recommendations for criminal prosecution to the National Director of Public Prosecutions; search and inspect premises; and take down illegal online activities.

Expenditure is expected to increase at an average annual rate of 5.3%, from R125.1 million in 2022/23 to R146.1 million in 2025/26. The board plans to update its regulatory frameworks and procedures to ensure the efficient management of its regulatory environment, and provide training opportunities to its personnel to ensure they are adequately skilled.

Due to the labour-intensive nature of the board's work, compensation of employees is its main cost driver, accounting for an estimated 55.5% (R234.7 million) of expenditure over the MTEF period. Expenditure on compensation of employees was set to increase at an average annual rate of 7.8% in line with the expected increase in the number of personnel from 115 in 2022/23 to 129 in 2025/26 as the board implements its revised mandate.

The board expects to derive 79.2% (R325.8 million) of its revenue over the period ahead through transfers from the department and the remainder through fees for classification and registration. Revenue is expected to increase in line with expenditure.

Independent Communications Authority of South Africa

The ICASA was established by the ICASA Act of 2000 to regulate the South African communications, broadcasting and postal services sectors. The authority is listed as a schedule 1 public entity in terms of the PFMA of 1999 and is a chapter 9 institution in terms of the Constitution.

It derives its mandate from the ECA of 2005 to license and regulate electronic communications and broadcasting services, and the Postal Services Act of 1998 to license and regulate the postal services sector.

The authority is empowered to monitor licensee compliance with licence terms and conditions, develop regulations, plan and manage the radio frequency spectrum, and protect consumers in relation to these services. Over the medium term, the authority will impose universal service obligations on mobile network operators as part of licensing the high-demand spectrum. As part of its ongoing regulatory activities, it plans to issue 42 community television licences over the medium term and monitor 255 broadcasting licences. In its efforts to protect consumers against unfair practices by service providers over the period ahead, the authority plans to develop six tariff analysis reports and resolve an average of 89% of consumer complaints.

Expenditure is expected to decrease at an average annual rate of 12%, from R786.2 million in 2022/23 to R536.5 million in 2025/26, due to one-off funding of R300 million in 2022/23 for strengthening regulatory capacity and licensing spectrum for mobile telecommunications, specifically wireless broadband services.

As the authority requires specialised personnel to conduct its work, compensation of employees accounts for an estimated 65.2% (R1.1 billion) of expenditure over the MTEF period. The moratorium on the filling of vacant posts is expected to be maintained over the period ahead to remain within the expenditure ceiling for compensation of employees.

These measures are aimed at ensuring that the authority continues to operate as a going concern. The authority expects to receive 96.8% (R1.5 billion) of its revenue over the medium term through transfers from the department. Revenue is expected to decrease in line with expenditure.

National Electronic Media Institute of South Africa (NEMISA)

The NEMISA was established as a non-profit institution for education. Its programmes were initially structured to enhance the market readiness of students in broadcasting, but its mandate has been expanded to include the development of e-skills capacity in South Africa and the implementation of e-skills programmes in collaboration with its partners.

Over the medium term, the institute will focus on providing digital skills in collaboration with government, education, business and civil society. The institute aims to train 9 900 citizens in digital technologies, 650 citizens in ICT skills-based programmes and 440 000 citizens in digital literacy over the MTEF period.

Expenditure is expected to increase at an average annual rate of 9%, from R102.7 million in 2022/23 to R133.2 million in 2025/26. Goods and services – mainly rental costs for office space and in-house training – account for an estimated 34.8% (R124.3 million) of expenditure over the medium term, while transfers and subsidies to higher education institutions to fund e-skills projects account for an estimated 28.2% (R105.9 million).

The institute is set to derive 89.7% (R323.4 million) of its revenue over the medium term through transfers from the department and the balance through fees for training and development. Revenue is expected to increase in line with expenditure.

Sentech

Sentech was established in terms of the Sentech Act, 1996 (Act 63 of 1996) is listed as a schedule 3B public entity in the PFMA of 1999 and derives its mandate from the ECA of 2005. It is responsible for providing broadcasting signal distribution services to licensed television and radio broadcasters.

In 2002, following the deregulation of the telecommunications sector, Sentech was licensed to provide international voice-based telecommunications and multimedia services.

Over the MTEF period, the entity will focus on achieving the objectives of its public service mandate while ensuring its financial sustainability. It will continue to operate an estimated 330 terrestrial distribution sites and satellite platforms to provide customers with content, multimedia and connectivity services. However, these operations will cease as all analogue transmitters are shut down in the migration to digital terrestrial television, which is expected to be completed in 2023/24. The entity plans to ensure that it provides digital television coverage to 99% of households each year over the medium term.

To ensure a high-quality, stable network and replace obsolete equipment, the entity plans to spend R923.6 million on the acquisition of property, plant and equipment over the MTEF period. As such, spending on goods and services accounts for an estimated 34.3% (R1.6 billion) of expenditure over the period ahead, mostly for service expenses such as satellite costs, which have increased in recent years due to exchange rate fluctuations. This trend is expected to persist. Compensation of employees accounts for an estimated 29.4% (R1.4 billion) of the entity's budget, spending on which is expected to increase at an average annual rate of 4.2%, from R433.6 million in 2022/23 to R490.9 million in 2025/26.

The entity expects to derive 95.7% (R4.8 billion) of its revenue over the MTEF period through fees for television, radio and streaming services, and the remainder through other sources such as rental income. Revenue is expected to increase at an average annual rate of 3.2%, from R1.6 billion in 2022/23 to R1.7 billion in 2025/26.

South African Broadcasting Corporation

The SABC derives its mandate from the Broadcasting Act of 1999 and is listed as a Schedule 2 public entity in the PFMA of 1999. The corporation is mandated to provide broadcasting and information services through a wide range of programming that displays South African talent in educational and entertainment programmes; offer diverse views through a variety of news, information and analysis; and advance national and public interests through popular sports.

Over the medium term, the corporation will continue to transform its programming, operations and management. It will also explore other revenue opportunities through the introduction of its own streaming and satellite services and seek to increase revenue generated from advertising. The corporation will work with the department on legislative and regulatory interventions to assist with its long-term sustainability and will continue to focus on implementing its turnaround plan to ensure financial sustainability.

Expenditure is expected to increase at an average annual rate of 6.4%, from R7 billion in 2021/22 to R8.5 billion in 2024/25, driven by increased investment in content, audience research and broadcasting costs. Compensation of the corporation's estimated 2 699 employees accounts for 33% (R7.7 billion) of its projected spending over the medium term. As the corporation is mostly self-funding, transfers from the department account for an estimated 2.9% (R663.2 million) of revenue over the medium term, while proceeds from television licence fees account for an estimated 15.9% (R3.8 billion). The remaining 81.2% (R20.2 billion) is expected to be generated by advertising and other commercial activities. Total revenue is expected to increase at an average annual rate of 10.9%, from R6.4 billion in 2021/22 to R8.8 billion in 2024/25.

South African Post Office

The SAPO is a government business enterprise established to provide postal and related services to the public. It is a schedule 2 public entity in terms of the Public Finance Management Act of 1999 and derives its mandate from the Postal Services Act of 1998 and the South African Post Office SOC Ltd Act of 2011.

The Postal Services Act of 1998 makes provision for the regulation of postal services and the operational functions of the post office, including universal service obligations, and grants it an exclusive mandate to conduct postal services in the reserved sector for items such as letters, postcards and parcels weighing less than 1 kilogram.

Over the medium term, the post office will focus on providing universal access to postal and related services, and implementing the Post Office of Tomorrow strategy to improve its financial position. The strategy deals with improving the company's logistics business through partnering with various service and technology providers; modernising postal services through digital postal services and new payment channels; relaunching the post office trust centre; providing government authentication services such as secure digital certificates, secure digital signature apps, and a digital commissioner of oaths; establishing digital business hubs; and modernising the post office through new equipment, processes and capabilities. These interventions are expected to increase revenue while reducing costs due to improved efficiencies.

An amount of R1.6 billion is allocated over the MTEF period for the company to maintain 1 919 points of presence, including post offices and retail postal agencies, and provide postal services in areas that have been historically neglected. The main cost drivers are compensation of employees, accounting for an estimated 54.1% (R8 billion) of total spending. Expenditure is expected to decrease at an average annual rate of 14.4%, from R6.8 billion in 2022/23 to R4.3 billion in 2025/26, driven mainly by reduced spending on compensation of employees and goods and services as a result of the staff optimisation project and other restructuring. This is expected to result in a decrease in the number of personnel from 14 155 in 2022/23 to a projected 8 383 in 2025/26.

The company generates revenue through postal and courier services, and fees for financial transactions. The post office has projected a net loss of R2.1 billion in 2023/24, improving to a profit of R206.7 million in 2025/26 due to the implementation of the Post Office of Tomorrow strategy. Accordingly, revenue is expected to decrease at an average annual rate of 6.2% over the medium term. The company will continue to pursue potential revenue-generating opportunities in the government, courier and financial services sectors over the period ahead as it seeks to improve its financial position.

State Information Technology Agency

The SITA was established through the SITA Act, 1998 (Act 88 of 1998). The agency is mandated to provide IT, information systems and related services to and on behalf of government departments and organs of state. This includes the provision and maintenance of transversal information and data processing systems and their associated services, the maintenance of secure information systems, and the execution of its functions according to approved policies and standards.

Over the medium term, the agency will focus on strategic projects such as South Africa Connect, cloud infrastructure investments and the Gauteng broadband network; and the implementation of its financial sustainability plan to ensure its viability. This will entail, among other things, negotiating partnerships with industry and local research institutions, and reviewing and modernising costing and recovery models. These interventions are expected to enable the agency to fund its infrastructure requirements more efficiently to better serve its customers.

Spending on goods and services accounts for an estimated 58.3% (R11.3 billion) of expenditure over the medium term, mainly for the provision of IT services, and spending on compensation of employees accounts for an estimated 36.6% (R7.1 billion). As the implementation of strategic projects requires substantial capital investment, an estimated R1.5 billion is allocated for the acquisition of assets over the MTEF period, with deprecation set to amount to R986.8 million as a result. Total expenditure is expected to increase at an average annual rate of 4.5%, from R5.9 billion in 2022/23 to R6.7 billion in 2025/26.

The agency generates revenue by providing ICT infrastructure and services to government departments and organs of state. Revenue is expected to increase at an average annual rate of 4.5%, from R5.9 billion in 2022/23 to R6.8 billion in 2025/26.

Universal Service and Access Agency of South Africa (USAASA)

The USAASA was established in terms of Section 80 of the ECA of 2005 as a statutory body and is listed as a Schedule 3A public entity in terms of the PFMA of 1999. Its sole mandate is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services.

The agency is allocated a total budget of R263.7 million over the MTEF period, which is derived through transfers from the department. These funds will mostly be used to manage the implementation of the broadcasting digital migration project. Total expenditure is expected to decrease at an average annual rate of 20%, from R177.1 million in 2021/22 to R90.8 million in 2024/25, because of additional funding for the broadcasting digital migration project, which was earmarked for the SAPO to cover distribution costs, coming to an end in 2021/22.

Universal Service and Access Fund

The USAF was established in terms of Section 89 (1) of the ECA of 2005, and is listed as a Schedule 3A public entity in the PFMA of 1999. The fund's sole mandate is to subsidise ICT equipment and services, and electronic communications and broadcasting networks for needy people in underserviced areas. The fund is managed by the USAASA. Over the medium term, the fund will focus on concluding the broadcasting digital migration project, which will ensure the release of much-needed spectrum.

In line with the president's 2021 State of the Nation Address, analogue transmission is set to be shut down and switched to digital on 31 March 2022. As such, the fund will focus on providing aftermarket support for the installation of set-top boxes, supporting the objectives of the revised analogue switch-off plan adopted by Cabinet in September 2021, and funding the operational costs and the maintenance of the national call centre established to support broadcasting digital migration. The fund will also provide 850 sites in underserviced areas with internet connectivity and maintain these connections over the period ahead.

The fund is allocated R386.7 million over the medium term, mostly for implementing activities related to broadcasting digital migration. These funds will be supplemented with transfers that have been made to the fund in previous financial years and retained with the approval of National Treasury in terms of section 53(3) of the PFMA of 1999. Total expenditure is expected to decrease at an average annual rate of 10.2%, from R183.5 million in 2021/22 to R133.1 million in 2024/25, as the one-off allocations for broadcasting digital migration conclude in 2021/22. The fund derives all its revenue through transfers from the department and has no personnel.

Programmes and projects

National e-Government Strategy and Roadmap

The e-government or digital government concept is the innovative use of communications technologies (including mobile devices), websites, apps and other ICT services and platforms to link citizens and the public sector, and facilitate collaborative and efficient governance. ICT is perceived as a key enabler to governments globally, in efforts to deliver better services and efficiency while enhancing their relationship with citizens and business.

The National Development Plan stipulates that by 2030, government will make extensive use of ICT to engage with and provide services to citizens. This will be achieved through an enabling coordinated and integrated e-Strategy that cuts across government departments and sectors.

The purpose of the National e-Government Strategy and Roadmap is to guide the digital transformation of South Africa into an inclusive digital society where all citizens can benefit from the opportunities offered by digital technologies to improve their quality of life. This strategy defines a renewed approach and programme of action that will radically improve the electronic government situation in South Africa.

Fourth Industrial Revolution (4IR)

The 4IR has necessitated that countries develop new policies, strategies and innovation plans to enable an inclusive developmental approach that will comprise of the representatives of a cross section of stakeholders, including the public sector, business, academia and research institutions, experts, labour, SMMEs, youth, women and non-governmental organisations. In essence, South African policies, strategies and plans should seek to advance the goals of inclusivity and shared growth. A core short-term focus of South Africa's national response will be on the impact of the changing technological landscape on the economy and employment.

The country needs a more broad-based approach that looks at threats and opportunities that technological change and convergence will have on South Africa's other development imperatives. This includes economic infrastructure, environmental sustainability and transitioning to a low-carbon economy, an integrated and inclusive rural economy, human settlements, education, training and innovation, health, social protection, safer communities, and building a capable and developmental state.

The DCDT's priorities are anchored in an endeavour to prepare South Africa for the 4IR. Key initiatives in this regard included coordinating the establishment of the Presidential Advisory Commission on the 4IR to ensure that the country is in a position to seize opportunities and manage the challenges of rapid advances in ICT. The commission acts as an advisory body that ensures that South Africa leverages on the benefits of the latest technology by coordinating and planning across the industries and sectors that will underpin the drive towards the 4IR.

Its work is centred on eight work streams dealing with the impact of technological advancement on human capital and the future of work as well as social and economic development. The 30-member commission, chaired by President Cyril Ramaphosa, comprises eminent persons from different sectors of society and reflects a balance in gender, youth, labour and business, including digital start-ups as well as digital entrepreneurships.

The commission's objectives are to:

- develop an integrated country strategy and plan to respond to 4IR, including detailed interventions to be carried out achieving global competitiveness of the key economic sectors (agriculture, finance, mining, manufacturing, ICT, and science, technology and innovation);
- advise on a technology research and development programme to advance 4IR;
- advise on strategies for skills development and future of work;
- make recommendations on enabling relevant infrastructure for the country to participate in the digital economy; and
- make recommendations on an institutional framework and mechanism to coordinate 4IR programmes.

The commission also serves as a platform to address challenges identified through research and consultation, and ensures that ICTs are regarded as drivers in creating jobs, through innovations and development of ICT SMMEs. The 4IR Commission Report, published in 2020, has identified eight key priorities that are important for the country to focus on, both for government and the private sector, as well as civil society.

Among the areas of focus highlighted in the report is investment in human capital, establishing an AI institute and the establishment of a platform for advanced manufacturing. The report also highlighted the importance of government to secure data for it to be used commercially for, among others, innovation by small businesses. The commission recommended that government incentivise future industries, platforms and application technologies.

4IR ICT Skills Programme

The DCDT, through the Media, Information and Communication Technology Sector Education and Training Authority, has launched the 4IR Skills Programme as part of its efforts to create one million new jobs by 2030. The programme, which provides skills in key 4IR domains namely; data science, 3D printing, cloud computing, drone piloting, software development, cyber security and digital content production, is in partnership with Deviare, Microsoft, Cisco and Leaders in Motion Academy. Deviare has developed an online platform 4IRSkills.Africa to initiate recruitment of learners for the programme. 4IRSkills.Africa is an active platform for building the capability and capacity for future digital skills that can be applied across sectors in African.

The learning methodology promotes blended, high touch and outcome-oriented learning, giving learners the opportunity to access training anywhere anytime through virtual classrooms, access to global teaching assistants and mentorship programmes.

National Digital and Future Skills Strategy

The combined impact of digital technology trends, such as the Internet of Things (IoT), big data, robotics, and AI, is changing the ways in which people, economies and societies operate. The ability of countries, organisations and individuals to participate in the growing social and economic revolution, to benefit from and to be enriched by it, increasingly depends on the acquisition and deployment of digital skills.

Globally and locally, the mining, manufacturing and services sectors are in the process of being transformed by digital automation, AI and a range of other digital technologies. Furthermore, government entities, private sector firms and development institutions increasingly rely on digital technologies to drive economic growth, promote social development and provide cultural enrichment.

Legacy skills, and even existing ICT skills, are becoming obsolete, while new digital skills are in short supply. This means that countries seeking to advance the competitiveness of their key economic sectors and public services need to adopt a continual skills upgrade approach, where both ordinary citizens and research specialists acquire and advance their digital skills as part of a broad spectrum of 21st century skills. The whole of society must become digitally adoptive and digitally adaptive to ensure digital inclusivity for future generations.

The challenges implied by these ongoing developments, therefore, requires that South Africa adopts a clear and comprehensive digital and future skills strategy in order to foster the country's ability to engage with, compete within, and benefit from the emergent digital revolution, also referred to as the 4IR.

The National Digital and Future Skills Strategy envisages a society of digitally skilled South Africans. It sets out a structured series of initiatives intended to contribute to the capacities of South Africans to meet the challenges arising from the increasing deployment and adoption of digital technologies in economy and society, understanding that the digital revolution (using cloud technologies that enable big data; bringing virtual and augmented reality into a real world environment; introducing autonomous vehicles and drones; making IoT, AI, robotics and 3D printing part of everyday life) occurs within the context of the broader 4IR (working with advanced materials, biotechnology innovations, and the wider landscape of scientific innovation).

The combined impact of these technology trends is having a substantial impact on the world of work, on schooling, education and research, individuals and communities. The strategy presents a vision of a South Africa in which all its people are able to benefit from enhanced digital skills, thereby contributing to a significantly enhanced quality of life, improved education and higher economic growth. Digital skills are one of the key skills sets required for the creation of new kinds of 21st century jobs. Originality, agility, critical thinking and problem-solving are important 21st century skills that must be interwoven with digital skills.

The strategy elements needed to realise that the digital skills vision will need to be undertaken by a range of stakeholders, including government, private sector, and educational institutions, who should engage in continuous, structured consultation, collaboration and coordination involving all stakeholders. The strategy is underpinned by current research and its implementation will be assessed through ongoing monitoring and evaluation.

Positioning South Africa as a global ICT leader

The DCDT's international programme is focused on positioning South Africa as a global ICT leader; influencing the debates and decisions of multilateral organisations in favour of national interest and development agenda; increasing investment in the economy; and promoting South African business and technological capabilities.

South Africa was elected to the International Telecommunications Union (ITU) Council for the period 2019 – 2022. The ICASA Radio Communications Manager Mandla Mchunu, representing South Africa, was elected to the Radio Regulations Board of the ITU for the period 2019 – 2022. South Africa was also elected to the African Telecommunications Union Council for the same period.

As a legacy of the ITU Telecom World, the DCDT has launched a Digital Transformation Centre whose objective is to incubate enterprise talent and harness innovation. With the support from the ITU, the World Economic Forum and other partners, the centre will assist the entry and growth of SMMEs in various aspects of these future communication systems and networks, focusing on management of intellectual property rights, standardisation, conformance testing, and SMME innovation. It will further support the production and usage of ICT technologies and break the current monopolies in the electronic manufacturing industry.

The international branch of the DCDT continues to be the primary vehicle through which the department pursues government's priority of contributing to a better South Africa and safer Africa in a better world. The country also served as a member of the Universal Postal Union (UPU) Council of Administration for a second term, 2017 – 2020. It was also responsible for chairing a new committee dealing with strategy. South Africa has contributed significantly to the UPU's work in developing national address systems. The country's use of global positioning systems to allocate addresses to people in rural and undeveloped areas has proved critical.

Internet

According to Stats SA's Census 2022, generally, there has been upward trend in access to internet services over the period 2011–2022. This is attributed to rapid advancement in communication services, such as cellphone ownership.

Overall, households with no access to internet decreased threefold (from 64,8% in 2011 to 21,1% in 2022). A substantial percentage of households reported accessing internet mainly through a cellphone or other mobile device (60,5%) compared to 16,3% recorded in 2011.

There was an increase in the percentage of households accessing internet mainly at home, from 8,6% in 2011 to 13,3% in 2022. It is also noted that households accessing internet mainly using other methods decreased significantly. Households accessing internet mainly at work decreased by four percentage points (from 4,7% in 2011 to 0,3% in 2022).

About one-third (34,3%) of households in the Eastern Cape and 31,9% in Limpopo reported to have no access to the internet in 2022 compared to Gauteng, where only 13,6% had no internet access.

Households that did not have access to the internet decreased significantly between 2011 and 2022 in all provinces, with only 21,1% of households reporting that they had no access to the internet compared to 64,8% in 2011. Internet access via cellphone was the most common source of internet for most households.

Social media

South Africa has 43.5 million internet users, of these, 35.15 million are social media users. According to World Wide Worx, South Africa's leading independent technology research and strategy organisation, with a focus on technology in business strategy, the country's social media landscape continues to be dominated by Facebook (56,7%).

TikTok (30,6%) has experienced tremendous growth and has replaced Instagram in the second position. Slightly behind TikTok, Instagram remains relatively high (27,6%). X, formerly Twitter (22,5%), still has a significant following despite the fall-out of Elon Musk's takeover. LinkedIn (14,7%) places fifth with a strong presence, given the fact that it is a network for professional contact and communication.

Online retail

According to World Wide Worx, online retail in South Africa more than doubled in just two years, due to the explosion in demand for home deliveries brought about by the COVID-19 pandemic. Online Retail in South Africa 2021, a study conducted by World Wide Worx with the support of Mastercard, Standard Bank and Platinum Seed, shows that the total growth for online retail in South Africa in 2020 came to 66%, bringing the total of online retail in the country to R30.2 billion. According to the study, the categories experiencing the highest growth, aside from data and airtime top-up, were clothing, at 56%, and groceries, at 54%.

Cybercrime and cybersecurity

Cyberspace comes with new types of challenges to governments of the world and it, therefore, introduces a further dimension to national security. The cyberworld is a borderless platform that enables more sophisticated threats such as cybercrime, cyberterrorism, cyberwar and cyber-espionage. For this reason, cyberthreats need to be addressed at both the global and national levels.

The National Cybersecurity Hub is South Africa's National Computer Security Incident Response Team, and strives to make cyberspace an environment where all South Africans can safely communicate, socialise, and transact in confidence. It offers alerts and warnings, announcements, security-related information dissemination, incident-handling and incident response support as services to its constituents.

These services can be categorised as proactive, reactive and social services. Incidents are logged via the National Cybersecurity Hub website and depending on their evaluation, they are timeously resolved or escalated to other agencies for further investigation.

Mobile communications

South Africa has one of the largest telecommunications markets on the continent. It has four mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile. Mobile phones are the dominant technology for voice and data communication among base of pyramid (BoP) users and for informal businesses.

People in this group access the Internet mostly via their mobile phones and smartphones because they have taken over functions that used to be performed by computers. Users are also finding innovative ways to bypass expensive cellphone SMS rates by using Facebook Zero or other instant message services such as WhatsApp.

Although half of the South African population lives below the poverty line, more than 75% of those in low-income groups, who are 15 years or older, own a mobile phone. In terms of mobile ownership at the BoP, households with an income of less than R432 per month, per household member, is relatively high, compared to other African countries.

This is according to research commissioned by infoDev, a global partnership programme within the World Bank Group, about the use of mobile phones amongst BoP users. About 98.5% low-income groups who own mobile phones in South Africa have a prepaid SIM card, but there is a small percentage (1.5%) of BoP mobile owners who have post-paid contracts. According to the GHS of 2021, nationally, only 2,2% of households did not have access to either landlines or cellular phones while only 0,5% of South African households only used landlines. By comparison, 90,8% of South African households exclusively use cellular phones. The exclusive use of cellular phones was most common in Eastern Cape (94,2%) and lowest in KwaZulu-Natal (86,3%). Households that had higher usage of both cellular phones and landlines were most common in Western Cape (9,7%) and KwaZulu- Natal (9,6%).

PostNet

PostNet is South Africa's largest privately-owned counter network in the document and parcel industry, trading across more than 400 owner-managed retail stores. It serves in excess of 70 000 walk-in customers per day, countrywide.There are five product types within PostNet: courier, copy and print, digital, stationery and mailboxes.

The media

South Africa has vibrant and independent media. According to the Bill of Rights, 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; and
- academic freedom and freedom of scientific research.

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

Radio

Radio is a great communications medium and still enjoys the broadest reach of any media category in South Africa. The diversity of stations, formats, voices and offerings ensures that most of the public's needs are catered for. It also fulfils a vital need for information and entertainment, with relatively low costs to the distributors and the listeners. As a communication medium, radio has very few barriers to access. SABC radio has more than 25 million listeners weekly in South Africa.

The fact that radio cuts across boundaries of illiteracy strengthens the importance of the medium to the consumer and the advertiser. The SABC's national radio network comprises 18 radio stations, of which 15 are dedicated specifically to public service broadcasting.

These include 11 full-spectrum stations, one in each of the official languages of South Africa: a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English; and a community station broadcasting in the !Xu and Khwe languages of the Khoisan people of the Northern Cape.

The SABC has three stations in its commercial portfolio. These are 5FM, Metro FM and Good Hope FM. Channel Africa broadcasts live on three platforms: shortwave, satellite and the Internet. Its broadcasts are in Chinyanja, Silozi, Kiswahili, English, French and Portuguese.

Commercial radio stations

Commercial radio stations in South Africa include:

- YFM
- 702 Talk Radio
- Metro FM
- 5FM
- Channel Africa
- Good Hope FM
- 567 Cape Talk
- Radio 2000
- Capricorn FM
- Radio KFM
- Lotus FM
- X-K FM
- TruFM
- RSG
- Power 98.7.

Radio platforms such as 94.2 Jacaranda FM, 94.7 Highveld Stereo, OFM, Algoa FM, Classic FM, Kaya FM and East Coast Radio were initially SABC stations, but were sold to private owners to diversify radio ownership in South Africa as part of the transformation of the public broadcaster. Many of South Africa's radio stations are also available online.

Community radio

Community broadcasting remains an important project for the South African Government. From the early days of Cape Town's Bush Radio, Africa's oldest community radio station project, to today's broadcasting landscape which boasts more than 200 stations across the country's nine provinces, community radio has provided communities with an indispensable platform from which to raise awareness of their grassroots issues, irrespective of race, gender, disability or economic class.

Still a relatively youthful sector, community radio can trace its origins back to Bush Radio, the idea for which started in the 1980s when community activists and alternative media producers explored ways in which media could be used for social upliftment.

The radio was officially formed in 1992, broadcasting illegally, following numerous attempts to apply for a broadcast license from the apartheid government. It was however only after the first democratic elections of 1994 that South Africa saw the liberalisation of the airwaves with the establishment of an independent regulator, the Independent Broadcasting Authority, now the ICASA.

Television

The SABC's TV network comprises of three free-to-air channels and two other channels carried on a subscription digital satellite network. South African TV is broadcast in all 11 official languages and in sign language. According to the GHS of 2021, about 27,3% of households owned one or more computers while 87,7% owned televisions and 87,3% owned refrigerators. Households in urban and metropolitan areas were much more likely to own any of these assets than households in rural areas.

Community TV

Soweto TV was the first community TV station to obtain a seven-year broadcasting licence from ICASA in 2007. Since then, more seven-year licences have been issued to stations operating in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay. The issuing of new community TV licences is on hold until the migration from analogue to digital broadcasting is complete.

Free-to-air TV

eMedia Holdings owns e.tv – South Africa's first private, free-to-air TV channel, launched in 1998. It is the largest English-medium channel in the country and third-largest overall.

e.tv also has a pan-African presence through e.tv Africa, which is distributed on the DStv Africa bouquet and by local affiliates in African countries. The company launched a 24-hour news channel on the DStv platform, eNews Channel Africa (eNCA) in 2008.

Satellite broadcasting

MultiChoice started as the subscriber management arm of M-Net. It is the leading multichannel digital satellite TV 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.

StarSat offers three main packages and multiple add-on packages that viewers can use to customise their experience. eSat.tv (branded eNCA) supplies TV, mobile and online news to various channels in South Africa, including the 24-hour eNCA (Channel 403). The company provides live news bulletins to viewers each night on e.tv in English, on eKasi+ in IsiZulu (available on OpenView HD) and on kykNET through eNuus in Afrikaans (available on DStv). Newzroom Afrika is a premier South African 24-hour TV news channel on the DStv Platform (Channel 405).

Print

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

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include:

- Media24 (part of Naspers, the largest media group in Africa);
- Independent News & Media (Pty) Ltd group;
- Caxton Publishers & Printers Ltd; and
- Arena Holdings.

Other important media players include:

- M&G Media Ltd;
- The Natal Witness Printing & Publishing Company (Pty) Ltd;
- Primedia Publishing Ltd;
- Ramsay Media; and
- Kagiso Media.

Some of the prominent daily and weekly newspapers in South Africa include *The Sunday Times; Citizen; Sowetan; The Daily Sun; The Witness; Sunday World; City Press; The Weekly Mail and Guardian; Beeld; Pretoria News; The Star; Die Burger; The Cape Argus; Cape Times; Son; Daily Dispatch; The Herald; The Daily News; The Mercury; The Witness; Business Day; Die Volksblad; Diamond Fields Advertiser; Isolezwe; Rapport; Sunday Tribune; Ilanga; The Post, and Soccer Laduma.*

Magazines

Some of the prominent magazines in South Africa are: *The Financial Mail; Finweek; Entrepreneur; Forbes Africa; Noseweek; BusinessBrief, Leadership; Farmer's Weekly; Landbouweekblad; Plaastoe; Veeplaas; Personal Finance; TV Plus; Drum; Huisgenoot; YOU; The Big Issue; Taalgenoot; Leisure; Easy DYI; Sarie Kos; Elle, Decoration; SA Home Owner; Tuis Home; VISI; Woolworths' Taste; Fresh Living / Kook en Kuier; Braintainment; Destiny Man; Blaque Magazine; GQ; Men's Health; Popular Mechanics; Stuff; Tjop & Dop; Amakhosi; Kick Off; Golf Digest; Compleat Golfer; Magnum's Game; Hunt / Wild; Jag; SA Hunter; Zigzag; Modern Athlete; CAR; Leisure Wheels; Drive Out / WegRy; Auto Trader; Bike SA; SA 4×4; Speed and Sound; Getaway; Weg / Go; Glamour; Elle; Fair Lady; Finesse; Destiny Magazine; Ideas / Idees; Leef; Move!; True Love; Fitness Magazine; Kuier; Marie Claire; Sarie; Women's Health and Longevity.*

Media organisations and role players

The Publishers Support Services (PSS) is an umbrella body incorporating print and digital media. It is a natural progression from the long-established Print Media South Africa and illustrates its commitment as an interactive organisation to keeping pace with the fast-changing media world of the 21st Century.

An evolving and vibrant association, its express purpose is to represent and promote all aspects concerning the industry and its members. PSS is a non- profit, voluntary association. Its membership includes more than 500 newspapers and magazine titles that cater for four different language groups.

The South African National Editors' Forum promotes excellence in journalism through fighting for media freedom, writing policy submissions, research, education and training programmes. The Forum of Journalists for Transformation addresses issues that directly affect its members.

The Press Council, the Press Ombud and the Appeals Panel are independent co-regulatory mechanisms set up by the print and online media to provide impartial, expeditious and cost-effective adjudication to settle disputes between newspapers, magazines and online publications, on the one hand, and members of the public, on the other, over the editorial content of publications.

The Freedom of Expression Institute (FXI) was formed to defend freedom of expression, to oppose censorship, to promote access to information and knowledge, and to promote media diversity. The FXI is the leading organisation on issues of freedom of expression and access to information as enshrined in the Bill of Rights in Section 16 of the Constitution of the Republic of South Africa of 1996.

The Forum of Community Journalists (FCJ) is an independent, non-profit, non- racial and voluntary organisation striving to promote and express the interests of all journalists employed on a permanent or freelance basis at regional community newspapers, magazines and online community publications in South Africa.

The Broadcasting Complaints Commission of South Africa (BCCSA) serves as a voluntary watchdog to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct.

The National Association of Broadcasters (NAB) was established in 1993 as a membership-based voluntary association to foster and promote the development of a sustainable and robust broadcasting system in South Africa. It is the only industry association in the country that represents all three tiers of the regulated broadcasting industry.

Its members include the public broadcaster (SABC), commercial broadcasters (Multichoice, e.tv, StarSat, Primedia, Kagiso Media, AME, amongst others) and community broadcasters (Bush Radio, Jozi FM, Radio Pulpit, Voice of Wits, Radio Tygerberg, Tshwane FM and others). The NAB's mission is to engage with policymakers and regulators to advocate for a level playing field and an industry that is grounded in the principles of democracy, diversity and freedom of expression.

The NAB established the BCCSA that has been recognised by the ICASA since 1995. The commercial members of the NAB are funders of the Media Development and Diversity Agency and the NAB collaborates with NEMISA on training for the sector.

Media Monitoring Africa is a non-profit organisation that acts in a watchdog role to promote ethical and fair journalism that supports human rights. The National Community Radio Forum lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

Other press organisations operating in the country are the Foreign Correspondents' Association of Southern Africa; Printing Industries Federation of South Africa; South African TypographicalmUnion; Specialist Press Association; South African Guild of Motoring Journalists; Professional Photographers of South Africa; Media Institute of Southern Africa; Publishers' Association of South Africa, and various press clubs in major centres." Other press organisations operating in the country include the:

- Foreign Correspondents' Association of Southern Africa
- Printing Industries Federation of South Africa
- South African Typographical Union
- South African Guild of Motoring Journalists

- Professional Photographers of South Africa
- Media Institute of Southern Africa
- Publishers' Association of South Africa.

News agencies

Local and international news agencies based in South Africa include:
- African News Agency
- Reuters
- Agence France-Presse
- Associated Press
- Deutsche Presse Agentur
- United Press International.

Journalism and media awards

Some of South Africa's media awards include the:
- Vodacom Journalist of the Year Awards
- South African Breweries Environmental Media and Environmentalist of the Year Awards
- Sanlam Group Awards for Excellence in Financial Journalism
- CNN MultiChoice African Journalist Awards
- Discovery Health Journalism Awards
- Nat Nakasa Award
- FCJ Excellence Awards
- Isu Elihle Awards
- Sikuvile Journalism Awards
- South African Social Media Awards
- SADC Media Awards
- New Generation (Social & Digital Media) Awards.

Marketing and advertising awards

South Africa has a vibrant and dynamic marketing and advertising industry. Some of the awards include: Loeries; Assegai Awards; Creative Circle Annual Awards; Effie Awards; FM AdFocus Awards and Marketing Achievement Awards.

Advertising

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

Marketing, Advertising and Communications SA (MAC SA) Charter Sector Council. In March 2022, government launched the MAC SA Charter Sector Council to redress economic imbalances. The council has been tasked with broadening the meaningful participation of blacks, women, youth and people with disabilities in the marketing, advertising and communications (MAC) sector – not just as consumers but also as entrepreneurs.

It will monitor transformation of the sector by facilitating the implementation of the Broad-Based Black Economic Empowerment (B-BBEE) Sector Code. The council is also tasked with building progressive partnerships that will unleash the creative abilities of professionals and technically skilled people in this sector and change MAC and society for the better.

The council has representatives from academia, government, the regulator, marketers, women, youth, and people with disability, public relations institutes, organised labour, outdoor media, industry associations and interactive marketers. The council will ensure that transformation in the sector is promoted, monitored and reported on annually in line with the provisions of the B-BBEE Act of 2003, as amended.

The council is responsible for, amongst others:
- oversight over the implementation of the MAC Charter Sector Code; monitor compliance with the MAC Charter Sector Code;
- providing guidance on matters relating to B-BBEE in the MAC sector; and
- engaging and advising the sector Minister, the Government Communication and Information System and other relevant regulatory entities regarding the MAC Charter Sector Code.

Advertising Standards Authority (ASA)

The ASA is the protector of the ethical standards of advertising in South Africa, and protects consumers against manipulative advertising and unfair claims. It is an independent body established and funded by the marketing communication industry to manage advertising in the public interest by means of self-regulation. The ASA cooperates with government, statutory bodies, consumer organisations and industry to ensure that advertising content complies with the Code of Advertising Practice.

The code is the ASA's guiding document based on the International Code of Advertising Practice, prepared by the International Chamber of Commerce. Drawn up by the ASA with the participation of representatives of the marketing communication industry, the code is amended from time to time to meet the changing needs of the industry and the South African society.

Public relations

Public Relations Institute of Southern Africa (PRISA)

Established in 1957, the PRISA represents professionals in public relations and communication management throughout the southern African region and has registered practitioners in Botswana, Namibia, Lesotho, Eswatini and South Africa.

It is a founding member of the Global Alliance for Public Relations and Communication Management, and initiated the formation of the Council for Communication Management in South Africa. The council is the coordinating body representing various groupings of professionals in South Africa.

PRISA plays a leading role in uniting professionals and driving transformation. As the recognised leader of the public relations and communication management profession in southern Africa and beyond, PRISA provides the southern African industry with the local professional advantage.