



Official Guide to **SOUTH AFRICA** 2021/22

COMMUNICATIONS



Department of Communications and Digital Technologies (DCDT)

The DCDT is mandated to enable South Africa's digital transformation 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 Information and Communications Technology (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. The department derives its mandate from several acts and policies, including the:

- **Films and Publications Act of 1996**, as amended, which provides for the classification of certain films and publications, and establishes the Film and Publication Board and the appeals tribunal;
- **Postal Services Act of 1998**, as amended, which provides for the regulation of postal services
- **Broadcasting Act of 1999**, as amended, which establishes broadcasting policy in South Africa
- **Independent Communications Authority of South Africa (ICASA) Act of 2000**, which establishes the regulator in the sector
- **Electronic Communications Act 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 licences and social obligations; the control of the radio frequency spectrum; and the regulation of electronic communication network services, electronic communication services, and broadcasting services.

Over the medium term, the department planned to focus mainly on implementing the broadcasting digital migration policy to release high-demand spectrum, which would aid socio-economic development and bridge the digital divide; rolling out broadband to government facilities through the South Africa Connect project; and implementing the legislative programme to support the 2016 *National Integrated ICT Policy White Paper*.

Digital migration

To fast-track the Broadcast Digital Migration (BDM) project, the department has revised its delivery model. All analogue transmitters were expected to have been shut down by the end of 2021/22. The bulk of funding for this project had been transferred to the Universal Service and Access Fund and the South African Post

Office (SAPO) in previous financial years and had been retained by the entities with approval from National Treasury where required.

The BDM process is a critical digital transformations step that redefines the ICT path for South Africa.

By March 2022, the BDM programme had achieved the following critical milestones:

- Switched off 100% or 84 M-Net analogue sites; 52% or 163 (of 314) SABC analogue sites and 9% or eight (of 93) eTV analogue sites.
- Concluded analogue switch-off in five provinces – Free State, Northern Cape, North West, Mpumalanga and Limpopo.
- Started installing set-top boxes (STBs) in all nine provinces, scheduled to be completed by end of September 2022.

To compliment the work of the Department of Trade, Industry and Competition on the directives to prohibit the importation and distribution of analogue TV sets in South Africa, the DCDT was expected to gazette a framework for IDTVs (digital TV sets) and STBs to qualify to carry the Go Digital logo in a quest to protect South Africans to identify correct digital TVs in the retail market.

The Analogue Switch-Off programme is supporting more than 987 installer companies and has created more than 14 800 jobs for locals, predominantly young installers.

Spectrum Auction

The completion of analogue switch-off by 30 June 2022 was of national importance because the Communications Regulator (ICASA) had successfully completed the auction for the high-demand spectrum and committed to the licensee that they would have access to the relevant spectrum from 1 July 2022. ICASA concluded the high frequency communication spectrum auction in March 2022.

The 1 July 2022 date for the availability of the high-demand spectrum to the licensee was also important for National Treasury to have access to the much-needed R14.4 billion that was raised during the spectrum auction.

The release of the high-demand spectrum will improve the ability of mobile telecommunications operators to build robust telecommunications with better penetration and reach as the DCDT chases the goal of ensuring that all South Africans have access to the internet by 2024. To this end, the mobile telecommunications operators are starting to upgrade the telecommunications network and to build robust 5G telecommunication networks.

Through ICASA, the DCDT has installed social obligations that will see the telecommunications operators connecting schools, clinics and hospitals, traditional authority offices, libraries and Thusong Service Centres over the next few months. The availability of spectrum was expected to also result in the reduction of the cost of communication.

The department planned to progressively work on policy instruments to drive the reduction of cost to communicate in South Africa, including the classification of data as a new basic utility at the same level as water and electricity.

The department published for public comment a revised Spectrum Policy by July 2022, which included proposals of spectrum for small, medium and micro enterprises (SMMEs), and network and data services in a manner that drives meaningful SMME participation in the telecommunications sector.

South Africa (SA) Connect

The department will continue to provide broadband connectivity to government facilities through the SA Connect project, which will be supported by relevant state-owned entities.

The most fundamental requirement for a digital South Africa is access to connectivity networks by all, irrespective of geographic location and economic standing. To ensure access to broadband connectivity by all, Cabinet approved revised model and implementation plan for the SA Connect Phase 2 programme that will ensure South Africa achieves a goal of universal access to internet by all 2024.

In terms of the revised SA Connect model, Sentech and Broadband InfraCo and (BBI) – working with the SMMEs that are access network service providers, internet service providers and mobile virtual network operators – will roll out 33 539 community Wi-Fi hotspots to cater for 5 830 208 households over a three-year period.

The partnership with SMMEs in the telecommunications sector is part of government's commitment to the transformation of the telecommunications industry by supporting emerging telecommunications players. The SA Connect drive will expand from the core network-owned BBI, other state-owned entities and telecommunications infrastructure operators as well as the satellite service of Sentech.

The SA Connect project is estimated to provide opportunities to approximately 120 SMMEs for core network build, and create employment opportunities of more than 3 700 people, both skilled professionals and semi-skilled labour force. By mid-2022, work had commenced to connect 412 sites in the Eastern Cape and Northern Cape. with work in both provinces.

SITA was expected to provide and maintain connectivity to 15 691 government sites over the next three years. The funding for connecting government sites is provided for in the ICT budgets of respective government departments including provincial governments.

Digitization of Broadcasting

The completion of the BDM further gives South Africa an opportunity to trigger growth of the broadcasting and entertainment sector, commonly known as the creatives industry through the licensing of new broadcasters and creating platforms of the future to deliver content to South Africans.

In this regard, SENTECH has developing a cloud-based Hybrid streaming platform for content distribution. This platform will support distribution of content

through broadband, satellite, and terrestrial distribution networks. The platform enables access to commercial, community and public broadcast services (Radio and TV channels) and has the capability to provide information to the public as and when required. Access to the platform will also support mobile applications for both iOS, Android and Harmony devices.

In March 2022, the DCDT announced plans to issue policy directives for the availability of additional multiplexes for both DTT and DTH to avail additional TV channels, capacity for 102 TV channels by 2025, to boost the growth of the creatives industry. Engagements with the SABC were underway about additional channels it requires to support its competitiveness and profitability, and with community broadcasters and other emerging and new broadcasters to utilise available and additional channels.

The department was expected to finalise the Draft Audio and Audio-Visual Content Services Policy and Bill to protect the competitiveness and growth of the South African broadcasting and creative industry, and amend the requirements for entry to advance media diversity whilst enabling the participation of South Africans.

In addition, technological convergence has created regulatory overlaps and duplications where they did not exist before. To deal with this fragmentation, a single content regulatory system that is tech- and platform neutral, that includes a single content rating system, was needed to create a harmonised system. The Films and Publication Amendment Act of 2019 has significantly extended the scope of the Films and Publication Board towards this objective.

Digitizing government

By digitizing processes, government can enhance services, save money and improve citizens' quality of life. By digitizing, governments can also provide services that meet the evolving expectations of citizens and businesses, even in a period of tight budgets.

SITA in consultation with the Departments of Public Service and Administration (DPSA) and DCDT, planned to finalise a Government Digitization Plan. Some of the programmes to digitize the South African Government include:

Single View of the Indigent project

This system is built on the database created by SITA to enable SAPO to receive applications for government STBs for the BDM project. The system has now been expanded for use to manage housing subsidy beneficiaries by the Department of Human Settlements (DHS), with back-end integration to the Housing Subsidy System (HSS). Other government departments were expected to expand the system to their environments in the future.

Towards e-Learning

To expand the work of bridging the digital divide through digitizing South Africa, zaDNA is partnering with the Department of Basic Education to deploy domain

names in public schools through the provision of websites and email addresses to learners and educators.

Paperless government

The COVID-19 pandemic has propelled government to embrace electronic communications. The department, in collaboration with SITA and the DPSA, planned to ensure that, at a minimum, all national departments go-paperless by using electronic workflow by the end of the 2022/23 financial year. This will improve the efficiency of government and maintain the integrity of government records.

e-Government

The DCDT and SITA, in consultation with the DPSA and The Presidency, planned to revise the National e-Government Strategy to align the government digitisation plan. The focus of the roll-out of e-services will remain on prioritising high impact public services that meet the evolving expectations of citizens and businesses. Citizens must be able to access bulk of government services without the need to travel or braving the long queues.

Digitech Platform

In May 2022, the DCDT unveiled the DigiTech platform (www.digitech.gov.za) for digital products/applications (apps) developed by SMMEs in South Africa. DigiTech serves as a digital distribution service developed, maintained and operated by the South African Government.

The platform allows users to browse and download apps developed across operating systems. It promotes South African developed digital products/apps for purposes of expand their adoption and use.

Entities

Sentech

Sentech was established in terms of the Sentech Act of 1996, and is responsible for providing broadcasting signal distribution services to licensed TV and radio broadcasters.

The entity derives its revenue through TV, radio and streaming services rendered to customers, and the remainder through transfers from the department through project-specific funding for dual illumination, which is the operation of analogue and digital signals.

South African Broadcasting Corporation

The SABC derives its mandate from the Broadcasting Act of 1999. It 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, for example.

Among these are the repeal of legislation that mandates pay-TV networks to carry the corporation's channels for which adequate compensation has not been finalised; and policy and regulatory support that makes it obligatory for pay-TV service providers to oblige their subscribers to have valid TV licences. The corporation is enacting other commercial strategies to increase revenue, audience share and operational efficiencies. As such, the corporation will enhance its focus on new and compelling content.

South African Post Office

The SAPO is a government business enterprise established to provide postal and related services to the public, and derives its mandate from the Postal Services Act of 1998 and the SAPO SOC Ltd Act of 2011.

The Postal Services Act of 1998 grants the post office an exclusive mandate to conduct postal services in the reserved sector for items such as letters, postcards and parcels less than one kilogram. This Act provides for the regulation of postal services and the operational functions of the postal company, including universal service obligations. The SAPO generates revenue through the provision of postal and courier services.

State Information Technology Agency

The SITA was established through the SITA Act of 1998 and 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.

Broadband Infraco

Broadband Infraco's legislative mandate, as set out in the Broadband Infraco Act 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 underserved areas; ensure that the bandwidth requirements for specific projects of national interests are met; and enable the State to provide affordable access to electronic communications networks and services.

Over the medium term, the entity aimed to focus on implementing the South Africa Connect broadband policy, and on expanding and maintaining its long-haul network to support client needs. This will also include monitoring the performance of the undersea West Africa cable system, which enables connectivity between Europe and Africa. The entity facilitates the connection of 713 government sites to broadband, and aims to maintain the time taken to restore faults on the core network at 7.5 hours.

Film and Publication Board (FPB)

The FPB was established in terms of the Films and Publications Act 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.

Independent Communications Authority of South Africa

ICASA was established by the ICASA Act of 2000 to regulate the South African communications, broadcasting and postal services sectors. As a Chapter 9 institution in terms of the Constitution of the Republic of South Africa of 1996, it derives its mandate from the Electronic Communications Act 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 for the three sectors, plan and manage the radio frequency spectrum, and protect consumers in relation to these services.

National Electronic Media Institute of South Africa (NEMISA)

NEMISA was established as a non-profit institute for education in terms of the Companies Act of 2008. 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 South Africans' e-skills capacity.

The institute is also responsible for the implementation of e-skills programmes in collaboration with its partners.

Universal Service and Access Agency of South Africa (USAASA)

USAASA was established in terms of Section 80 of the Electronic Communications Act of 2005. Its sole mandate is to promote universal service and access to electronic communications and broadcasting services.

Communication platforms

Radio

The SABC's national radio network of 19 radio stations reach over 28 million South Africans. The top five most listened to radio stations in the country are Ukhozi FM, Umhlobo Wenene FM, Lesedi FM, Thobela FM and Metro FM.

Commercial radio stations

Commercial radio stations in South Africa include:

- Algoa FM
- Classic FM
- Kaya FM
- YFM

- Highveld Stereo
- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda FM
- OFM
- East Coast Radio
- Cape Talk 567
- Radio 2000
- Capricorn FM
- Power FM
- Radio KFM
- Tru FM.

Community radio

In terms of Section 7 of the Electronic Communications Act of 2005, it is unlawful to provide or operate a broadcasting service without a licence. There are more than 165 licensed community stations in South Africa, which broadcast in a number of languages.

Television

Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2021 shows that 87,7% of households owned TVs. SABC TV consists of three free-to-air (FTA) channels namely, SABC1, SABC2 and SABC3 as well as two channels carried on a subscription digital satellite network, SABC Encore and the 24-hour news channel (Channel 404), SABC News.

SABC News offers breaking news and continuous news updates in 51 African countries. SABC1, SABC2 and SABC3 attract on average 28 million South African viewers a month, as they deliver top quality local and international content. SABC Encore, a retro channel which showcases programming from the 1980s, is an integral part of the SABC's strategy moving into a multichannel environment.

Community TV

There are at least 12 community TV stations operational in different parts of South Africa, including Soweto TV; GauTV; 1KZN; Cape Town TV; Tshwane TV; Mpuma Kapa TV and Onse TV.

FTA TV

e.tv is South Africa's first private and largest English-medium channel. The channel 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.

Satellite broadcasting

eNews Channel Africa (eNCA) is South Africa's first and most watched independent 24-hour TV news channel on the DStv platform (Channel 403). eNCA's digital division provides an audience of 1.5 million monthly users with an immersive experience, combining the power of text, image and video with the accessibility and portability of online news. By end of 2021, eNCA had 3.2m followers on Twitter, 2.6m followers on Facebook, 1.1m YouTube subscribers and over a quarter of a million Instagram followers.

The SABC has a 24-hour news channel on DStv (Channel 404). Newzroom Afrika is a 24-hour TV news station on DStv (Channel 405).

Internet

Stats SA's GHS of 2021 shows that 77,5% of South African households had at least one member who had access to, or used the Internet at locations such as their homes, work, place of study, internet cafés, or at public hot spots. Access to the Internet using all available means was highest in Western Cape (89,1%) and Gauteng (86,7%), and lowest in Limpopo (63,7%) and Eastern Cape (64,7%).

About one-tenth (10,4%) of South African households had access to fixed Internet at home. Access to the Internet at home was highest among households in Western Cape (25,9%) and Gauteng (16,4%), and lowest in Mpumalanga (1,7%) and Limpopo (1,9%).

Household access to the Internet at home was highest in Western Cape (25,9%) and Gauteng (16,4%) and lowest in Mpumalanga (1,7%) and Limpopo (1,9%). While 17,2% of households in metropolitan areas had access to the Internet at home, this was true for only 1,2% of rural households in general and less than one per cent of rural households in Eastern Cape (0,2%), North West (0,3%) and KwaZulu-Natal (0,2%).

A larger percentage of households access the Internet at work (17,6%), Internet cafés or at educational institutions (13,6%) than at home (10,4%). Households in Gauteng (27,8%) and Western Cape (22,2%) were most likely to access the Internet at work, while those in North West (6,6%) were least likely to do so.

Using mobile devices to access the Internet includes access on cellular telephones or using mobile access devices such as 3G cards. It is clear from Table 13.1 that mobile access to the Internet has made it much more accessible to households in rural areas. Nationally, Internet access using mobile devices (69,4%) was the most common form of access to the Internet.

Although the use of mobile Internet access devices in rural areas (59,2%) still lags behind its use in urban (73,7%) and metro areas (73,4%), it is much more common in rural areas than any of the alternative methods.

Social media

About 40% of South Africa's population, some 22.89 million people out of an estimated population of over 57 million, are active social media users.

Telecommunications

South Africa has four major mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile.

According to Stats SA's 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 the 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 the Western Cape (9,7%) and KwaZulu-Natal (9,6%).

The media

South Africa has a vibrant and independent media, with print, broadcast and online offerings.

Print

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include Media24 (part of Naspers), Independent Media, Caxton Publishers & Printers and Tiso Blackstar Group. Other important media players include M&G Media; the Natal Witness Printing & Publishing Company; Primedia Publishing; Highbury Media and Kagiso Media.

Magazines

According to figures released by the Audit Bureau of Circulations of South Africa, there has been a steady decline in magazine circulation in South Africa, with only a handful of commercial magazines achieving a steady increase in circulation.

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 an independent co-regulatory mechanism 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** 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)** is a voluntary association that was formed in 1993 to foster and promote the development of a sustainable and robust broadcasting system in South Africa. It established the BCCSA and supports the principles of democracy, freedom of expression and the diversity of voices. As the leading representative of South Africa's regulated broadcasting industry, the NAB has over the last 25 years responded to policy and regulatory processes toward an enabling environment that strengthens the industry.

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 Typographical Union; 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.

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.

Media awards

Some of South Africa's media awards include the:

- Mondi Shanduka Newspaper Awards
- Vodacom Journalist of the Year Awards
- South African Breweries (SAB) Environmental Media and Environmentalist of the Year Awards
- SAB Sports Media Awards
- Sanlam Financial Journalist of the Year Award
- CNN MultiChoice African Journalist Awards
- Discovery Health Journalism Awards
- Nat Nakasa Award
- Local Media Excellence Awards
- Liberty Radio Awards
- Isu Elihle Awards
- Sikuville Journalism Awards
- South African Social Media Awards
- African Digital 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.