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OFFICIAL GUIDE TO SOUTH AFRICA



COMMUNICATIONS AND DIGITAL TECHNOLOGIES

The Department of Communications and Digital Technologies (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. Its goal is to enable the digital sector to grow to its full potential while guaranteeing that everyone has access to reliable, affordable, and high-speed connectivity.

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 (FPB) 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.
- South African Post Bank SOC Ltd Act of 2010, as amended, provides for the corporatisation of Postbank and its shareholding arrangements as well as the existence of the Post Office and its subsidiaries.

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

Rolling out broadband in underserved areas

The department aimed to continue rolling out the South Africa Connect project, supported by relevant state-owned entities such as Broadband Infraco (BBI), Sentech and the State Information Technology Agency (SITA). As a result, 970 government facilities will continue to be provided with connectivity over the medium-term period through Phase 1 of the South Africa Connect project, and 5.1 million households will be connected through Phase 2.

Enabling digital transformation and inclusion

The department will continue to provide a supporting and enabling legislative environment through the development of relevant policies, strategies and legislation. Over the medium-term period, this will include submitting the Audio and Audiovisual Content Services and Online Safety Bill to the Minster for approval, and monitoring the implementation of the national data and cloud policy.

Broadcast Digital Migration (BDM)

The deadline for the analogue switch-off was moved from 31 December 2024 to 31 March 2025. This extension aimed to ensure that as many indigent households as possible will enjoy their right to access broadcast services.

Entities:

Sentech

Sentech was established in terms of the Sentech Act of 1996 and derives its mandate from the Electronic Communications Act of 2005. It is responsible for providing broadcasting signal distribution services to licensed television (TV) and radio broadcasters. In 2002, following the deregulation of the telecommunications sector, Sentech was licensed to provide international voice-based telecommunications and multimedia services.

Sentech will continue to operate an estimated 330 terrestrial distribution sites and satellite platforms over the medium-term period to provide customers with content and multimedia connectivity services, and managed infrastructure services and satellite platforms to achieve its public service mandate while ensuring financial sustainability. These operations will continue until all analogue transmitters are shut down after migration to digital terrestrial TV, which was moved from 31 December 2024 to 31 March 2025.

The entity planned to continue investing in core infrastructure to ensure the provision of digital TV coverage to 99.8% of households in each year over the medium term. It will also focus on various technology enhancement programmes and innovations to maintain infrastructure and service integrity. These include over-the-top services and the provision of infrastructure services through its data centre.

By mid-2024, the national satellite strategy had been developed and due process was being followed to obtain a national satellite for South Africa through partnership arrangements with interested parties.

South African Broadcasting Corporation (SABC)

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.

The SABC is charged with upholding the democratic values of the Constitution of the Republic of South Africa of 1996, and enhancing and protecting the fundamental rights of South Africa's people. Over the medium term, the corporation aimed to focus on implementing its turnaround plan to alleviate its financial challenges, mainly due to poor revenue collection.

This includes implementing a revenue improvement plan to increase revenue from sources such as digital platforms, increasing compliance with TV licence collections and acquiring new content. The corporation will continue to discuss alternative funding models with the department and implement its cost-deferment plan to spend more efficiently.

South African Post Office (SAPO)

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 PFMA Act of 1999 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 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 one kilogram.

Over the medium term, the entity aimed to focus on providing universal access to postal and related services, particularly courier services, postal services, financial services and e-commerce.

The post office was placed under business rescue on 10 July 2023 and business rescue practitioners were appointed later that month. The business rescue plan sought to reduce the branch network to approximately 600 branches with an equitable spread of geographic locations across South Africa. The entity generates revenue by providing postal and courier services, and through fees for financial transactions.

State Information Technology Agency

The SITA was established through the SITA Act of 1998 and is listed as a schedule 3A public entity. 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, 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 SITA aimed to continue focusing on strategic projects related to digitisation, digitalisation and modernisation. This will include projects such as creating a collaborative and shared digital services platform for government departments, modernising legacy systems in government departments, the South Africa Connect project and the provision of cloud services for government. The agency generates revenue by providing ICT infrastructure and services to government departments and organs of state.

Broadband Infraco

BBI'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 in underdeveloped and underserved areas; ensure that 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 Phase 2 of the South Africa Connect project, maintaining broadband connectivity to the 713 government sites it is responsible for and the time taken to restore faults on the core network at 7.5 hours.

Film and Publication Board

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.

Since the operationalisation of the Films and Publications Amendment Act of 2019 in 2022, the board 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 stop illegal online activities.

Over the medium-term period, the FPB is expected to focus on implementing its Digital Roadmap Strategy and enforcing industry compliance by continuing to monitor online platforms.

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 regulator's mandate is defined in the Electronic Communications Act of 2005 as licensing and regulating electronic communications and broadcasting services, and in the Postal Services Act of 1998 as regulating the postal services sector.

Enabling legislation also empowers the regulator to monitor licensee compliance with licence terms and conditions, develop regulations for the 3 sectors, plan and manage the radio frequency spectrum, and protect consumers in relation to these services.

Over the medium term, the regulator aimed to continue focusing on its regulatory activities in the communications, broadcasting and postal services sectors. It was expected to proceed with the next phase of licensing high-demand spectrum in 2024/25 and monitor 255 broadcast licences.

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 1973. The institute's programmes are structured to enhance the market readiness of students in a wide range of broadcasting disciplines. NEMISA is responsible for the implementation of digital programmes, including the development of South Africans' digital skills capacity.

The entity's expanded mandate includes providing digital skills and training through identified partnerships with government, education, business and civil society. Identified digital skills priority areas include government enablement, creative new media industries, e-inclusion and social innovation. As such, NEMISA aimed to train a total of 310 000 learners in digital literacy and 42 000 small, medium and micro enterprises in digital entrepreneurship between 2024/25 and 2026/27.

Universal Service and Access Agency of South Africa (USAASA)

USAASA was established in terms of Section 80 of the Electronic Communications Act of 2005, as amended. Its sole mandate is to promote universal service and access to electronic communications and broadcasting services. Over the medium-term period, the agency aimed to continue managing the Universal Service and Access Fund to ensure that it reaches intended qualifying beneficiaries in line with its legislative mandate.

To ensure that the fund is managed effectively and efficiently, the agency plans to set up tools and mechanisms to improve internal control systems and processes. USAASA was set to be disestablished towards the end of the medium-term period, in line with the Electronic Communications Act of 2005 and directives from the department.

Communication platforms

Radio

The SABC's national radio network of 18 radio stations reach over 28 million South Africans.

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 several languages.

Television

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.

According to Statistics South Africa's (Stats SA) Census of 2022, just under four-fifths (79%) of households owned TVs compared to the 52,6% in 2001. Over four-fifths of households in the Western Cape (83,8%), Gauteng (81,1%) and the Free State (81%) owned a TV compared to 30,2% in the Northern Cape.

Community TV

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

Free-to-Air (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. Other FTA channels include eMovies; eMovies Extra; eExtra; eReality; ePlesier; eToonz; eSERIES.

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.

Internet

The Internet is a vital resource to access information and to communicate with others. Having access to the Internet has become so ubiquitous that it is difficult to imagine how access have expanded over the years.

According to Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2023, the percentage of households who could access the Internet through a fixed connection (be it dial-up, ADSL or, more recently, fibre) has remained relatively stable between 2010 and 2021, before increasing slightly to 14,5% in 2023. By contrast, mobile broadband – connecting to the Internet through a cell phone – increased by 50,6 percentage points over the same period, growing from 28,0% in 2010 to 78,6% in 2023.

More than three-quarters (78,6%) of South African households had at least one member who had access to or used the Internet at one or more locations such as their homes, work, place of study, internet cafés, or at public hot spots. Internet access using all available means was highest in Western Cape (88,1%) and Gauteng (81,9%), and lowest in Limpopo (69,7%) and Eastern Cape (70,2%).

About 14,5% of South African households had access to fixed Internet at home. Access to the Internet at home was highest among households in Western Cape (40,1%) and Gauteng (21,5%), and lowest in Mpumalanga (3,1%) and Limpopo (4,5%). Just over seven-tenths (72,6%) of households could access the Internet using mobile technology. Access to Public Wi-Fi spots was highest in Western Cape (14,9%) and Gauteng (11,3%) and lowest in Eastern Cape (1,6%) and Limpopo (1,9%).

A larger percentage of households in metropolitan areas (84,7%) could access the Internet than South African households in general (78,6%). Almost three-quarters (74,6%) of metro residents had access to mobile internet (compared to 72,6% of South African households in general), while 23,8% of metropolitan households had a fixed internet connection at home (compared to 14,5% of South African households in general). It is notable that 44,2% of households had fixed internet at home in Cape Town, compared to 25,8% in Nelson Mandela Bay, 23,5% in Tshwane and 22,9% in Johannesburg.

Household access to the Internet at home was highest in Western Cape (40,1%) and Gauteng (21,5%) and lowest in Mpumalanga (3,1%) and Limpopo (4,5%). While 23,8% of households in metropolitan areas had access to the Internet at home, this was true for only 1,7% of rural households in general and less than 1% of rural households in KwaZulu-Natal (0,4%), Eastern Cape (0,5%) and North West (0,7%). A large percentage of households accessed the Internet at work (14,0%) and Internet cafés or at educational institutions (11,6%).

Households in Western Cape (22,3%) and Gauteng (18,3%) were most likely to access the Internet at work, while only 5,4% of households in Limpopo and North West accessed the internet at work.

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 14.3 that mobile access to the Internet has made it much more accessible to households in rural areas. Nationally, Internet access using mobile devices (72,6%) was the most common form of access to the Internet. Although the use of mobile Internet devices in rural areas (66,3%) still lags behind its use in urban (76,1%) and metro areas (74,6%), it is much more common in rural areas than any of the alternative methods.

Mail

According to Stats SA's GHS of 2023, the volume of mail that is handled by the SAPO has declined precipitously over the past few decades as demand for physical post declined and electronic alternatives such as email became more common. Despite the undeniable decrease in the volume of post, the percentage of households that mainly received their mail at home increased from 37,3% in 2002 to 46,0% in 2019.

The increase is, however, more than offset by a decline in the percentage of households that still used a post box or private bag (declining from 23,5% to 8,5% over the corresponding period), and households that received their mail through other means (declining from 30,2% in 2002 to 12,9% in 2019). During this period, the percentage of households that did not receive any mail increased from 9,0% to almost one-third (32,7%) of all households. The percentage of households that did not receive any mail increased from 32,7% in 2019 to 47,3% in 2022 and 56,6% in 2023.

Households in rural areas have poorer access to mail services than their counterparts in urban and metropolitan areas. While 54,2% of households in metros, and 51,6% of households in urban areas could access mail services, less than one-fifth (18,4%) of rural households enjoyed the same access. Only 3,8% of rural households had access to mail delivery at home compared to 42,5% of households in urban, and 46,7% of households in metro areas.

It is notable that a larger percentage of rural household used post boxes or private bags (8,0%) than households in urban areas (6,8%). The use of other arrangement to get post (i.e. getting it through a school, community leader or at work) was also more common in rural areas (8,9%) than in metro (5,8%) or urban (3,2%) areas.

Social media

The growth of social media in South Africa is part of a greater rise in the adoption of the internet, with more South Africans establishing an online presence. According to DataReportal, there were 26.00 million active social media user identities in South Africa in January 2024. It reported that social media users in South Africa increased by 200 thousand (+0.8%) between early 2023 and the beginning of 2024. About 49.8% of South Africa's social media users were female, while 50.2 percent were male.

Telecommunications

South Africa has four major mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile. According to Stats SA's GHS of 2023, nationally, only 3.8% of households sampled in 2023 did not have access to either landlines or cellular phones while only 0.1% of South African households exclusively used landlines.

By comparison, 91.2% of South African households exclusively use cellular phones. The exclusive use of cellular phones was most common in Mpumalanga (95.1%) and Limpopo (94.1%) and least common in Northern Cape (86.3%). Households that used both cellular phones and landlines were most common in Western Cape (6.9%).

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 Arena Holdings. 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 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 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:

- Vodacom Journalist of the Year Awards
- South African Breweries (SAB) 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 Awards
- FCJ Excellence Awards
- Isu Elihle Awards
- Sikuville 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.