



COMMUNICATIONS

OFFICIAL GUIDE TO
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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.

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

South Africa continues to play a pivotal role in the international community where we are a strong voice advocating the interests of developing countries in creating a stable and secure global ICT environment that supports inclusive development.

The country is a member of the International Telecommunications Union (ITU), a United Nations specialised agency dealing with the ICT sector globally. During the ITU plenipotentiary conference in 2022, South Africa was successfully re-elected onto the ITU Council.

Rolling out broadband in underserved areas

In his February 2023 State of the Nation Address, President Cyril Ramaphosa highlighted the country's vision of providing affordable, high-speed internet access to all. The DCDT is committed to realising this vision through various programmes and legislative interventions.

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

In the 2023/24 and 2024/25 financial years, the department planned to implement Phase 2 of the project for capital equipment and new fibre infrastructure, or to lease existing fibre, to expand ICT networks into underserved 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.

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 medium period, it was expected to finalise the Audio-Visual Bill, introduce the South African Broadcasting Corporation Bill to Parliament, submit the Digital Economy Framework and Strategy for approval to Cabinet, finalise the national cloud computing policy and develop the Postal Services Amendment Bill.

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 Equiano cable by Google, working with Telkom, will provide exponential capacity to the digital ecosystem and triple the internet speeds in the country and significantly reduce the cost of data.

Through our flagship programme, SA Connect, the department aimed to bridge the digital divide by providing Wi-Fi access to communities and ensuring universal access to the internet. In 2023, it planned to deploy 9 900 hotspots in 16 districts across the country, with the aim of reaching 80% connectivity by 2024.

In the 2021/22 financial year, the department successfully maintained its 970 connected sites. In addition, during that period, SITA connected 781 government sites in the Eastern Cape, while BBI connected 110 Universal Service and Access Agency of South Africa (USAASA) sites.

Furthermore, the department played an instrumental role in facilitating the development of the SA Connect draft Implementation Plan.

It 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.

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.

This project must also ensure that designated groups such as enterprises owned by women and youth are empowered with at least forty percent (40%) value of this project, whilst creating opportunities for innovative locally developed solutions to find traction in our market.

There have been significant investments in data centres and cloud services providers, which will contribute significantly to the economy by enabling efficient storage and dissemination of data, as well as access to digital solutions. The country has a total of 65 data centres, making us the leading African digital economy.

Next Generation Spectrum

In December 2023, Cabinet approved the publication of the final Next Generation Radio Frequency Spectrum Policy. The policy intends to support the spectrum allocation and licensing for fixed mobile; broadcasting; aeronautical and marine; research and development; community access, and other relevant industries.

The policy also seeks to promote equity and fair allocation to contribute towards the transformation of the sector and accessibility of digital connectivity even in outlying parts of the country.

The purpose of the policy is to address gaps and limitations that were identified in the 2016 *National Information and Communications Technology White Paper* and prepares for the amendment of relevant sections of the Electronic Communications Act of 2005, which include:

- unclear roles and responsibilities between Minister and ICASA which contributed to inefficiencies;
- gaps in the spectrum management regime;
- an exclusive spectrum regime that benefit a few and bigger player; and
- inefficiencies towards extending broadband access to rural, remote and underserved areas.

Broadcast Digital Migration (BDM)

During 2023, the DCDT was expected to migrate the remaining households to digital TV signal and complete the switch-off of analogue transmission. This will release valuable spectrum for the roll-out of 5G mobile networks and reduce the cost of data. At least five provinces – Free State, Northern Cape, North West, Limpopo and Mpumalanga – had successfully switched off and were receiving

TV broadcast on digital platform. In December 2022, it was proposed 31 March 2023 should be the date for the analogue switch off. As part of the BDM project, the remaining 151 transmitters in the Eastern Cape, Western Cape, KwaZulu-Natal and Gauteng were expected to be switched off in 2023.

Digitalisation of the State

Some government departments, including Home Affairs and the South African Police Service, are digitising their paper-based records into digital format. By mid-2023, there were 120 Batho Pele e-services on the e-government portal ranging from agro-processing, exam queries, licensing and permit platforms, and SARS e-filing. The DCDT, working in conjunction with SITA, was expected to prioritise the scaling up of e-services and ensuring their full use by citizens.

Entities:

Sentech

Sentech was established in terms of the Sentech Act of 1996 and it derives its mandate from the Electronic Communications Act of 2005. It is responsible for providing broadcasting signal distribution services to licensed 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. Over the medium-term period, the entity will focus on achieving the objectives of its public service mandate while ensuring its financial sustainability.

It aimed to continue operating 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 TV, which were expected to be completed in 2023/24. The entity planned to ensure that it provides digital TV coverage to 99% of households each year over the medium term.

South African Broadcasting Corporation (SABC)

The SABC derives its mandate from the Broadcasting Act of 1999 and 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 analyses; advance national and public interests in general; and include national sports programming.

Over the medium-term period, the SABC planned to focus on implementing the growth phase of its turnaround plan, which involves initiatives to improve performance by offering new content on multiple platforms and optimising operations in an effort to generate revenue and ensure financial recovery.

Initiatives include a new streaming platform, which will include a variety of local and international content; revising content acquisition models for video

entertainment, which is expected to improve turnaround times for commissioning and broadcasting; increasing its share of the industry radio advertising revenue; and rolling out radio brand campaigns to improve the corporation's image.

South African Post Office (SAPO)

The South African Post Office is a government business enterprise established to provide postal and related services to the public. It 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 1 kilogram.

Over the medium term, the post office aimed to 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.

The SAPOI was expected to continue pursuing 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 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 planned to 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.

Broadband Infraco

BBI's legislative mandate, as set out in the BBI 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 phase two 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.

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.

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.

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 a chapter 9 institution in terms of the Constitution.

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, plan and manage the radio frequency spectrum, and protect consumers in relation to these services.

Over the medium term, the ICASA aimed to 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 TV 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.

National Electronic Media Institute of South Africa (NEMISA)

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 aimed to provide 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.

Universal Service and Access Agency of South Africa

The 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. The agency is set to be disestablished by the end of 2023/24 as part of recommendations emanating from the 2016 *National Integrated ICT Policy White Paper*.

The disestablishment is intended to streamline roles and responsibilities of different entities and increase efficiency to support universal service and access. The legislative process to complete this is expected to conclude by 2025/26. The agency will, however, continue to manage the Universal Service and Access Fund until it is disestablished to ensure that disbursed funds reach the intended deserving beneficiaries.

Communication platforms

Radio

The SABC's national radio network of 19 radio stations reach over 28 million South Africans.

Commercial radio stations

Commercial radio stations in South Africa include:

- Algoa FM
- Classic FM
- YFM 99.2
- Kaya FM
- 947 (previously 947 Highveld Stereo)
- 702
- 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
- Thobela FM
- Ukhosi FM
- Umhlobo Wenene FM
- Ukhosi FM
- Munghana Lonene FM
- Lesedi FM
- Motswedding FM
- Radiokansel/Radio Pulpit
- Phalaphala FM
- Ikwewezi FM
- Ligwalagwala FM
- Lotus FM
- Gagasi 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

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; 1KZN; Cape Town TV; Tshwane TV; Mpuma Kapa 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

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.

Telecommunications

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

According to Stats SA's Census 2022, the ownership of cellphones was universal in most provinces, with the exception of Eastern Cape (87,9%) and Northern Cape (85,4%), according to Stats SA's Census 2022.

Ownership of cellphones at household level is universal. The overwhelming majority (92,1%) of households in the country owned a cellphone in working order, a notable increase from the 32,3% in 2001. Conversely, a landline telephone has become the least owned good. There is a downward trend in households that owned a landline telephone over the period 2001 to 2022.

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 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 flouted 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
- 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.