OFFICIAL GUIDE TO SOUTH AFRICA 2017/18

Communications

Department of Communications (DoC)

The DoC is responsible for the national communications policy and strategy; information dissemination and publicity; and the branding of South Africa.

Improved communication and marketing will promote an informed citizenry and assist the country in promoting investments, economic growth and job creation.

The department's mandate is derived from Section 192 of the Constitution of the Republic of South Africa of 1996, which provides for the independence of broadcasting regulation in the public interest, the International Telecommunications Union and the World Intellectual Property Organisation.

The National Development Plan (NDP) envisages an active citizenry that participates in the socio-economic and political life of the country. This is given expression by Outcome 14 (nation-building and social cohesion) of government's 2014-2019 Medium Term Strategic Framework (MTSF), which is closely aligned with the work of the DoC.

Over the medium term, the department was expected to continue focusing on transforming the communications sector through the roll-out of the Digital Terrestrial Television (DTT) project, developing responsive communications policies and regulatory frameworks, and effectively overseeing public entity within the communications sector.

The DoC comprises the following entities: Brand South Africa (Brand SA); Film and Publication Board (FPB); Independent Communications Authority of South Africa (ICASA), Media Development and Diversity Agency (MDDA) and the South African Broadcasting Corporation (SABC).

The DoC is spearheading the process of migrating broadcasting signals from analogue to digital. South Africa's national digital network coverage comprises DTT transmission coverage of 84% of the population with the remaining 16% to be covered by satellite network.

DTT is a reliable and cost-efficient means to distribute linear TV content and has many advantages over the analogue broadcasting system. One of its major advantages for communities is that it clears the analogue spectrum for the delivery of broadband mobile Internet and Wi-fi services.

To view digital TV signals on an ordinary analogue TV set, consumers will need a set-top box (STB). Government will provide about five million poor TV-owning households with free STBs. Once the migration is complete, high definition TV telecast facilities would be available, along with expanded community, FM and satellite radio services to the entire population.

South Africa was given until June 2015 to meet the International Telecommunications Union's deadline to switch off analogue transmitters as part of the broadcasting digital migration project. However, the project was delayed following a court ruling that declared part of the digital migration policy unlawful and invalid, and effectively placed the manufacture of digital terrestrial TV STBs on hold.

As a result of the delay, Sentech continued to maintain both the analogue and digital platforms until the issue was resolved. The Analogue Switch-Off Event took place in Carnarvon, Northern Cape in October 2016.

During the 2017/18 financial year, the DoC developed the *White Paper on Audio-Visual and Digital Content Policy for South Africa*, which provides enabling mechanisms to facilitate ownership of the new audio-visual digital content value chain by previously disadvantaged communities and small, medium and micro enterprises.

Brand South Africa

Brand South Africa develops and implements a proactive and coordinated international marketing and communication strategy for South Africa to contribute to job creation and poverty reduction; and to attract inward investment, trade and tourism.

Brand South Africa supports a number of initiatives to create a positive image of the country and the continent. It builds relationships, showcases South Africa's innovation, highlights its investment potential and engages with citizens on significant topics.

Film and Publication Board

The FPB regulates and controls the creation, production, possession, exhibition and distribution of certain films, interactive computer games and publications in terms of the Films and Publications Act of 1996. The board is also responsible for monitoring age restricted business premises for compliance with their licence and registration terms.

The Act recognises the right of adults to freedom of expression, except with respect to child pornography, and requires the board to intervene where there is a risk of harm to children.

The board spearheads a national anti-child-pornography campaign to educate learners about ways to avoid victimisation. Child-pornography websites can be reported by calling the board's toll-free number 0800 148 148.

To improve the ease of doing business as instructed by the NDP, the FPB successfully launched a first of its kind, Online Content Regulation (OCR) system in Africa. This system allows distributors to submit content online for classification from anywhere around the globe. It is envisaged the OCR system will result in improved turnaround times and improved service delivery to FPB's stakeholders. This system will also allow distributors to renew their licences.

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

Media Development and Diversity Agency

The MDDA promotes media development and diversity to ensure that all citizens can access information in a language of their choice; and to transform media access, ownership and control patterns in South Africa. Since 1994 the footprint of community media has grown significantly and has begun to emerge as an alternative voice to the mainstream media. Community media provide information to many South Africans who do not have access to the mainstream media.

South African Broadcasting Corporation

The SABC is by far the largest and most influential broadcaster in South Africa in terms of reach, size, overall audience figures, and share of the advertising market. Nearly 28 million radio listeners in South Africa tune into one of the SABC's 18 radio stations and the SABC's three free-to-air (FTA) TV channels attract more than 21 million adult viewers each day.

The stations cater for the country's 11 official languages, as well as the iXun and Khwe languages, and four TV channels, which include the 24-hour news channel.

The SABC has developed editorial policies which guide and give direction to the corporation's public broadcasting mandate and licence conditions, as set by ICASA and the provisions of the Broadcasting Act of 1999.

Government Communication and Information System

The mandate of the GCIS is derived from Section 195(g) of the Constitution, which stipulates

that the public should be provided with information that is timely, accurate and accessible.

This is in support of the constitutional principles of freedom of expression, transparency and openness of government.The department is responsible for providing strategic leadership and coordinating government communication to ensure that the public are informed and have access to government programmes and policies that benefit them.

Chapter 15 of the NDP emphasises the need to unite all South Africans around a common goal, ensure that citizens are active in their own development, and build a capable and developmental state.

This is given expression by Outcome 12 (an efficient, effective and development oriented public service) and Outcome 14 (nation building and social cohesion) of government's 2014-2019 MTSF, with which the work of the GCIS is closely aligned.

The department provides information about government policies, plans, programmes and activities to the public.

Among other things, the GCIS is responsible for maintaining government's website (www.gov.za), which provides general information about government.

Among other products, the GCIS publishes the *South Africa Yearbook*, *Official Guide to South Africa*, *Vuk'uzenzele* newspaper, Public Sector Manager magazine and My District Today newsletter. It is also responsible for the South African Government News Agency, SAnews.gov.za.

The Thusong Service Centre Programme enables communities to access government information and services.

Thusong Service Centres are one-stop centres providing integrated services and information from government and other civil society groups, to communities close to where they live as part of a comprehensive strategy to better their lives.

They also also enable communities to access opportunities offered by other civil-society groups such as businesses, non-governmental organisations and parastatals.

The GCIS also gathers public opinion, research and analysis of media coverage to understand the communications environment and to inform government messages.

The department provides media bulk-buying services, which are designed to reduce the cost to government on advertising; facilitate a rapid response mechanism to hasten government's response to issues arising in the media; and provide media production services to support other government departments.

The GCIS was expected to assist the Independent Electoral Commission in driving campaigns around voter registration and Department of Home Affairs on ensuring that citizens have the correct documents to vote in the 2019 General Elections.

In August 2018, Cabinet approved the Government Communication Policy, which seeks to establish norms and standards to professionalise and strengthen the government communication system. This applies to communication coordination and use of alternative media across the three spheres of government and across government departments at a national level.

Department of Telecommunications and Postal Services (DTPS)

The DTPS is mandated to develop Information and Communications Technology (ICT) policies and to ensure the development of robust, reliable, secure and affordable ICT infrastructure. The department also contributes to building an ICT skills base in the country to ensure equitable prosperity and global competitiveness.

The NDP envisages that by 2030, the ICT sector will underpin the development of a dynamic and connected information society, and a vibrant knowledge economy that is inclusive and prosperous. Drawing from this vision, the DTPS contributes to Outcome 6 (an efficient,

competitive and responsive economic infrastructure network) of government's 2014-2019 MTSF by ensuring that ICT infrastructure and services are accessible, affordable, robust, reliable and secure. Over the medium term, the department will expand and modernise ICT infrastructure by implementing the South Africa Connect broadband policy, coordinating the migration to digital broadcasting, and implementing the legislative framework stemming from the 2016 *National Integrated ICT Policy White Paper*.

In 2018, the DTPS, through Broadband Infraco and State Information Technology Agency (SITA), started connecting government facilities in the eight districts which have been identified for the rollout of SA Connect, the country's broadband plan and strategy.

In 2017, the department gazetted the Electronic Communications Amendment Act for public comment, which among other things, creates the legislative environment for the establishment of the Wireless Open Access Network (WOAN). It also established the National Rapid Deployment Coordinating Centre to assist network providers by reducing time and costs for deploying their telecommunication infrastructure.

Cabinet approved the National e-Strategy, the e-Government Strategy and the ICT SMME Development Strategy, which aims to accelerate the development, growth, and sustainability of small and medium enterprises in the ICT sector. This is meant to stimulate the creation of jobs and for greater economic inclusion, while also aiming to enhance entrepreneurship, increase the usage of ICT tools for all small businesses, and to improve their profitability and competitiveness.

Cabinet approved the framework for the establishment of a State ICT Infrastructure Company and the State IT Company. The State ICT Infrastructure Company will be formed through the merger of Sentech and Broadband Infraco.

The State IT Company will be formed through the reconfiguration of SITA. The department will also facilitate and coordinate the implementation of the national e-strategy to realise the eservices programme. Finalising a national e-strategy will plan for the digital transformation of South Africa to achieve the ideals of the NDP by prioritising sectoral electronic services such as e-health, e-agriculture and e-education.

The six state-owned enterprises under the DTPS are the South African Post Office (SAPO), Sentech; National Electronic Media Institute of South Africa (NEMISA); Universal Service and Access Agency of South Africa (USAASA); .za.Domain Name Authority (ZADNA); Universal Service and Access Fund (USAF); Broadband Infraco and SITA.

South African Post Office

The SAPO provides postal and related services to the public. Post offices offer South Africans a convenient place to accept and deliver cash-on-delivery items, which is a very important service in rural communities where some people shop from catalogues.

In addition, more than a million South Africans walk through the doors of post offices near where they live to access their social grants.

Post offices also offer services that include enabling South Africans to renew their vehicle registration, and pay their municipal accounts and TV licences.

The Philatelic Services of the SAPO is responsible for producing South Africa's postage stamps and other stamp-related products. Over the years, many of them have become valuable collector's items.

The Postbank caters for the banking needs of the unbanked majority, thus facilitating their inclusion into the economic mainstream and expanding the existing range of banking services.

With effect from 30 September 2018, the SAPO took over the payment of social grants. The new gold card is safer and does not allow for illegal deductions and fraudulent transactions to take place. It is designed to protect social grants beneficiaries from illegal deductions for things

such as electricity, airtime and loans. The only deductions that are permitted on the new gold South African Social Security Agency card are for funeral policies on non-child grants, which should also not be more than 10% of the total grant.

Sentech

Sentech is mandated to provide common carrier broadcasting signal distribution services to licensed broadcasters in South Africa. The company's mandate has since been expanded to provide international voice services and common carrier multimedia services in accordance with government's imperative to liberalise the telecommunications sector.

National Electronic Media Institute of South Africa

NEMISA offers national certificates and short courses in the areas of television production, animation and radio production. The institute's programmes are structured to enhance the market readiness of students in a wide range of broadcasting disciplines.

Universal Service and Access Agency of South Africa

The sole mandate of USAASA is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services.

By mid-2018, USAASA intended to engage in a process of developing a national strategy on Universal Access and Universal Service that would ensure appropriate identification of consumer needs in rural, underdeveloped, under-serviced and un-serviced areas. It would also consider their levels of affordability and propose a suitable model to ensure that both basic and advanced ICT services are available, accessible and affordable to all the people of South Africa.

.za.Domain Name Authority

ZADNA is a non-profit company that manages and regulates the .za namespace. It is accountable to the DTPS, but does not receive government funding.

Universal Service and Access Fund

The USAF's sole mandate is to make payments for subsidies towards the provision of ICT equipment and services, and construct and extend electronic communication and broadcasting networks for needy persons in underserviced areas. The fund is managed by USAASA and is financed by contributions from all telecommunications licensees except community broadcasting service licensees.

Broadband Infraco

Broadband Infraco is intended to improve market efficiency in the long distance connectivity segment by increasing available long distance network infrastructure. It will also avail capacity to stimulate private sector innovation in telecommunications services and content offerings.

Broadband Infraco provides long distance national and international connectivity to licensed private sector partners, licence-exempt projects of national importance and to previously underserviced areas.

State Information Technology Agency

SITA consolidates and coordinates the State's information technology (IT) resources in order to achieve cost savings through scale, increase delivery capabilities and enhance interoperability.

SITA is committed to leveraging IT as a strategic resource for government, managing the IT procurement and delivery process to ensure that government gets value for money. The agency also uses IT to support the delivery of e-Government services to all citizens.

It serves as the IT business for the largest employer and consumer of IT products and services in South Africa – the Government.

Communication platforms

Radio

A significant number of South Africans still depend solely on radio as a source of information. The SABC's national radio network comprises 18 radio stations. Fifteen of these are dedicated specifically to public-service broadcasting and 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 of the Northern Cape. The radio stations reach 77,3% of the Adult population with 29,5 million listeners.

The SABC has three stations in its commercial portfolio – 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. SABC Radio has more than 26 million listeners weekly in South Africa.

Commercial radio stations

Commercial radio stations in South Africa include:
• Algoa FM
• Classic FM
• Kaya FM
• YFM
• 94.7 Highveld Stereo
• 702 Talk Radio
• Metro FM
• 5FM
• Good Hope FM
• Jacaranda 94.2
• OFM
• East Coast Radio
• 567 Cape Talk
• Radio 2000
• Capricorn FM
• Power FM
• Radio KFM.

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

Television

TV remains the medium of choice for most South Africans. The SABC's TV network comprises three FTA TV channels. SABC TV has a weekly audience of 30,248 million (86,6% of adults watch SABC TV in South Africa).

South African TV is broadcast in all 11 official languages and also in Sign Language. The SABC also broadcasts a 24-hour news channel on DStv (Channel 404).

The public broadcaster's three terrestrial TV channels attract an average 27.1 million South

Africans in a typical month. A total of 17 of the Top 20 terrestrial TV programmes in South Africa are carried on SABC channels.

Community TV
Soweto TV was the first community TV station to obtain a seven-year broadcasting licence from ICASA.
There are five stations operational in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay.

FTA TV
e.tv is South Africa's first private FTA TV channel. It is the largest English-medium channel in the country and the second 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.

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).
The 24-hour news service is broadcast live in the UK to over 10,5 million subscribers on the Sky digital satellite platform.
eNCA provides live news bulletins to nearly three million South African viewers each night on e.tv (in English, isiZulu and Sesotho) and to more than 200 000 Afrikaans viewers on kykNET. The SABC's also has its own 24-hour news channel on DStv (Channel 404).

Internet
The South African Internet user population passed the 20-million mark for the first time in 2016, reaching 21 million, and was expected to grow to at least 22.5 million in 2017.
This is the main finding of of the Internet Access in South Africa 2017 study, released in July 2017 by World Wide Worx.
The report reveals that the single most common use of the Internet among South African adults is communication, reported by almost a third (31%) of respondents, followed by social networking (24,9%) and information (23,7%), both reported by almost a quarter of respondents. Only then comes entertainment at 22,1%.
According to Statistics South Africa's (Stats SA) General Household Survey (GHS) 2017, just over six-tenths of South African households (61,8%) had at least one member who used the Internet either at home, their places of work or study or at Internet cafés.
Access to the Internet at home was highest among households in Western Cape (25,7%) and Gauteng (16,5%), and lowest in Limpopo (2,2%) and Eastern Cape (3,5%).

Social media
The SA Social Media Landscape 2019 report, released on 15 October 2018 by Ornico, the Brand Intelligence organisation, and World Wide Worx, shows that across age groups, the racial divide and lifestyle measures, there is little difference in Facebook penetration.
The data highlights the impact of the launch in South Africa of Facebook Lite in 2015, and some network operators allowing it to be used without data charges being incurred.
This meant a massive uptake of Facebook Messenger as a cheap or free means of sending instant messages, and led to Facebook spreading evenly among all population segments.
The Social Media Landscape report shows that there are now 21-million Facebook users in South Africa, representing 28% of the population. This is up from 19-million users a year ago.
The study reveals that Instagram grew a massive 73% , from 3.8 million to 6.6 million in 2017.

This is largely thanks to the intense usage of the photo-sharing platform by media, music and fashion personalities.

The top 25 most followed South Africans on Instagram include only one individual from outside these ranks: cricketer AB de Villiers, who enjoys a massive fan base in India, takes the number one position of South Africans on Instagram, with no less than 6.4-million followers.

The rapid growth brings Instagram into the Big Five of social networks in South Africa, behind Facebook, YouTube, Twitter and LinkedIn. Although Twitter growth has flattened – both globally and in South Africa – it still picked up another 300 000 new followers in 2017 to take it to 8.3-milion users.

By mid-2018, it was estimated that there were over nine million YouTube users in South Africa. The most popular YouTube channel in the country, for the fifth year running, remains Kruger Sightings, the wildlife video-sharing community started by then schoolboy Nadav Ossendryver when he was 15. It has passed the million subscriber mark and has had around 800-million views.

LinkedIn, which is intended for business and career networking, now has 6.8-million users in South Africa, up 11 % from 2017.

Cybercrime and cybersecurity

Identity fraud, stalking, online child pornography and terrorism have become daily occurrences that threaten communities' ability to enjoy the benefits of new technologies.

The Cybersecurity Hub, pooling public and private sector threat information is responsible for processing and disseminating information to relevant stakeholders in the industry and civil society.

Telecommunications

South Africa has five major mobile operators, namely CellC, MTN, Vodacom, Telkom Mobile and Virgin Mobile.

According to Stats SA's GHS 2017, nationally, only 3,5% of households did not have access to either landlines or cellular phones in 2017. Inadequate access to telephones was most common in Northern Cape (10,0%) and Eastern Cape (7,1%).

Nationally, 88,2% of households had access to at least one cellular phone, while 8,2% of households had access to both a landline and a cellular phone.

Only 0,1% of households had only a landline. However, access to these means of communication differed by province. Households in historically rural provinces such as Mpumalanga (95,0%) and Limpopo (94,4%) were very reliant on the more accessible cellular telephones than landlines.

By contrast, a combination of both cellular phones and landlines in households were most prevalent in the more affluent provinces, namely Western Cape (19,6%) and Gauteng (10,2%).

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, the largest media group in Africa), the Irish-based Independent News & Media (Pty) Ltd group, Caxton Publishers & Printers Ltd and Tiso Blackstar Group. Other important media players include M&G Media Ltd; the Natal Witness

Printing & Publishing Company (Pty) Ltd; Primedia Publishing Ltd; RamsayMedia, 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 over the past months, with only a handful of commercial magazines achieving a steady increase in circulation.

Media organisations and role players
The non-profit-making Print and Digital Media South Africa (PDMSA) was originally formed to bring together under one roof publishers of diverse print genres.

The PDMSA recognised the advantages of extending its footprint online by extending its membership to include digital media publications. By the end of 2018, the PDMSA membership included more than 700 newspaper and magazine titles that cater for four different language groups.

The members include Caxton and CTP; Independent Newspapers; Media24; *Mail & Guardian*, and the Association of Independent Publishers, the latter which represents the interests of more than 250 independent publishers in southern Africa.

Tiso Blackstar Group – whose stable includes the *Sunday Times*, *Sowetan*, *Financial Mail and The Herald* – is the largest, national English-language publishing group in South Africa and the country's second-largest digital publisher.

It also owns the largest music and independent film catalogue in Africa; TV channels, TV production facilities and radio stations in Ghana, Kenya, Nigeria and South Africa.

The **South African National Editors' Forum** (SANEF) was formed at a meeting of the Black Editors' Forum, the Conference of Editors and senior journalism educators and trainers.

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 section 16 of the South African Constitution.

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** is an independent self-regulatory body that serves as a voluntary watchdog to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct.

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
• SANEF's Nat Nakasa Award
• Local Media Excellence Awards
• Liberty Radio Awards
• Isu Elihle Awards
• Standard Bank Sikuvile Awards
• New Generation Social & Digital Media Awards.

Advertising awards

South Africa has a vibrant and dynamic advertising industry. The Loeries® are Africa and the Middle East's premiere initiative that recognises, rewards, inspires and fosters creative excellence in the brand communication industry.

The 40th Annual Loerie Awards ceremony was held at the Inkosi Albert Luthuli International Convention Centre in August 2018.

A total to 287 Loeries were awarded across 14 categories, including six Grands Prix, 31 Golds, 69 Silvers, 113 Bronzes, 18 Craft Golds and 50 Craft Certificates.

More than 2 500 entries were received, with 15% of entries from outside South Africa. A total of 700 brands were represented by 265 agencies from 15 countries across Africa and the Middle East.