



Communications

Department of Communications (DoC)

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 vision of the DoC of providing vibrant and sustainable communication services for an informed citizenry and a positive image of South Africa supports its mission of creating an enabling environment for the provision of inclusive communication services to all South Africans in a manner that promotes socio-economic development and investment through broadcasting, new media, print media and new technologies, and brand the country locally and internationally.

The DoC is spearheading the process of migrating broadcasting signals from analogue to digital. South Africa's national digital network coverage comprises Digital Terrestrial Television (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.

In October 2015, the Minister of Communications, Ms Faith Muthambi, took the first households registration process for STBs to the Square Kilometre Array community of Keimoes, Kai !Garib Municipality, in the Northern Cape.

The Analogue Switch-Off Event was scheduled to take place in Carnarvon, Northern Cape in October 2016.

Brand SA

Brand SA 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.

The new slogan, "South Africa: Inspiring New Ways," is set to represent the next phase of the country's development, where South Africa has moved from possibility to

delivery, and is now an important regional power.

Internationally, Brand SA lobbies and networks extensively among global opinion leaders to shift perceptions about the country and the continent.

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.

Independent Communications Authority of South Africa

ICASA makes regulations and issues communication licences. In addition, it enforces compliance with rules and regulations, protects consumers from unfair business practices and poor quality services, hears and decides on disputes and complaints brought against licences, and controls and manages the frequency spectrum.

ICASA is responsible for regulating the telecommunications, broadcasting and postal industries in the public interest and ensure affordable services of a high quality for all South Africans.

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. Its mandate, among others, is to:

- Create an enabling environment for media development and diversity which reflects the needs and aspirations of all South Africans.
- Redress exclusion and marginalisation of disadvantaged

communities and persons from access to the media and the media industry.

- Promote media development and diversity by providing support primarily to community and small commercial media projects.
- Encourage ownership and control of, and access to, media by historically disadvantaged communities as well as by historically diminished indigenous language and cultural groups.
- Encourage the development of human resources and training, and capacity building, within the media industry, especially amongst historically disadvantaged groups.
- Encourage the channelling of resources to the community media and small commercial media sectors.
- Raise public awareness with regard to media development and diversity issues.

South African Broadcasting Corporation

The SABC is the country's only public service broadcaster. The SABC is made up of 18 radio stations, which 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 GCIS was established in 1998 in terms of Section 239 of the Constitution as an organisation that ensures the dissemination of government information and messages to the public in a coherent manner and in line with constitutional imperatives of the country.

The GCIS is mandated to coordinate, guide and advise on government communications, including media liaison, development communication and marketing. Its goal is to achieve integrated, coordinated and clear communication between government and South African citizens, which enables the public to be involved in the country's transformation.

The main service of the GCIS is to provide accurate and timely government information to the citizens of South Africa through mediated and unmediated communication methods.

This is in support of the constitutional principles of freedom of expression, transparency and openness of government.

The GCIS uses different products and platforms to meet the information needs of various target audiences.

The department provides this service as a constitutional right to the citizens of South Africa wherein Section 195(g) of the Constitution stipulates that to foster transparency, the public should be provided with information that is timely, accurate and accessible.

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*, *Pocket 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 year 2015 marked the 16th anniversary of the Thusong Service Centre Programme, which 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 enable communities to access opportunities offered by other civil society groups, such as businesses, non-governmental organisations and parastatals.

By the end of 2015/16, there were 197 centres across South Africa.

Department of Telecommunications and Postal Services (DTPS)

The DTPS is mandated to develop information and communications technology (ICT) policies that create conditions for accelerated and sustained shared growth of the South African economy, and to ensure the development of robust, reliable, secure and affordable ICT infrastructure. This is to contribute to the development of an inclusive information society in which information and ICT tools are key drivers of economic and societal development.

The key focus for the department is the roll-out of South Africa Connect, the department's broadband policy, which ensures connectivity in under-served areas by prioritising schools, health facilities and other government institutions.

As South Africa migrates to digital broadcasting, the DTPS is expected to continue support the DoC in the roll-out of broadcasting digital migration.

The six state-owned enterprises under the DTSPS 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); Telkom; Broadband Infraco and State Information Technology Agency (SITA).

South African Post Office

The SAPO provides postal and related services to the public. Post offices have become important service-delivery centres, offering 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, including:

- improving access to affordable services, including loans, especially in rural and lower-income communities
- promoting a culture of saving.

Sentech

Sentech is mandated to provide broadcasting signal distribution for broadcasting licensees, with a particular focus on accelerating the implementation of government ICT interventions within the framework of the NDP and the strategic integrated project for expanding access to communication technology.

National Electronic Media Institute of South Africa

By mid-2016, NEMISA, a state-owned entity, was in the process of being incorporated into the Ikamva National e-Skills Institute (INeSI). The new organisation involves the

integration of three entities: NEMISA, INeSI and the Institute for Satellite and Software Applications.

The merger was initiated to address the overlap, duplication and gaps in e-skills development within and between government departments, the education sector, business and civil society. The INeSI is aimed at developing the local e-skills required by South Africa's ICT sector, and it will also develop ICT-user skills by training people how to use electronic devices, how to use the Internet, and how to access public services online.

NEMISA began as a non-profit institution of education and learning for skills in TV, radio and broadcasting.

Universal Service and Access Agency of South Africa

The mandate of USAASA is to promote the goal of universal access and universal services by ensuring that ICTs are available, accessible and affordable to all citizens of South Africa.

The agency is charged with managing the Universal Service and Access Fund (USAF), which is used to fulfil universal access obligations in under-serviced areas.

Through USAF, the agency has played a pivotal role in the deployment of broadband infrastructure and access services with broadband projects having been successfully rolled out in the following underserved areas:

USAASA continues to support, amongst others, the South Africa Connect goals by facilitating the deployment of broadband and connecting educational institutions, primary healthcare (PHC) facilities and other government institutions through USAF.

By facilitating the roll-out of broadband connections in underserved areas and connecting educational and PHC institutions, the agency is bringing South Africa one-step closer to achieving its national targets of 100% broadband penetration by 2020; and deployment of a full range of government, educational and informational services by 2030.

.za.Domain Name Authority (ZADNA)

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

Telkom

Telkom is Africa's largest integrated communications company, providing integrated communications solutions to nine different countries across Africa. The organisational structure comprises three major business units: Telkom South Africa, Telkom International and Telkom Data Centre Operations.

Broadband Infraco

Broadband Infraco provides long distance national and international connectivity to licensed private sector partners, licence-exempt project of national importance and to previously underserved areas. The company's critical success factors are to enable 100% high-speed broadband connectivity for all provinces, districts and municipalities in South Africa; connect to all six neighbouring countries of South Africa and connect countries on the west coast of Africa to the West Africa Cable System (WACS).

The WACS is the fifth submarine cable system linking South Africa to the world. Broadband Infraco's investment in the WACS entitled it to 11,4% of the system's total capacity, which would help South Africa meet its target of providing broadband connectivity to all who need it by 2020.

The cable system has 15 established terminal stations en route, and will reduce the cost to connect Africa's west coast with the high-speed global telecommunications network for years to come.

The South Africa Connect Broadband Policy of the DTPS dictates that targets of 100% broadband penetration must be achieved by 2020. The transformation of 70% of all frontline services to e-Service is expected to be achieved by 2019.

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 the government gets value for money, and using 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

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: short-wave, satellite and the Internet. Its broadcasts are in Chin-yanja, 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

The SABC's TV network comprises three free-to-air 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).

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.

Free-to-air TV

e.tv is South Africa's first private free-to-air TV channel, launched in 1998. 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. In addition, 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.

Internet

Statistics South Africa's (Stats SA) General Household Survey (GHS) 2015 showed that half of South African households (53,5%) had at least one member who used the Internet either at home, workplace, place of study or Internet cafés.

Access to the Internet using all available means was highest in Gauteng (65,7%), Western Cape (63,3%) and Mpumalanga (55,7%). The lowest was in Limpopo (39,6%) and KwaZulu-Natal (42,3%).

Nearly one-tenth of South African households had access to the Internet at home. Access to the Internet at home was highest among households in the Western Cape (21,4%) and



Gauteng (15,6%), and lowest in Limpopo (1,3%) and North West (3,6%).

Social media

By mid-2016, Facebook was being used by a quarter of all South Africans, while Instagram saw the fastest growth of any social network in South Africa over the past year.

These are two of the key findings from the South African Social Media Landscape 2016 study, conducted by World Wide Worx and Fuseware.

The study was based on access to consumer data from seven major social networks and a corporate survey conducted among more than a 100 of South Africa's leading brands.

It showed that Facebook had grown by 8%, from 12 million to 13 million, and Twitter by 12%, from 6,6 million to 7,4-million users. Video sharing platform YouTube increased its user base marginally more, with a 15% rise from 7,2 million to 8,28-million users. The biggest growth came from Instagram, which rose a massive 133%, from 1,1 million to 2,68 million.

The study showed 10 million or 77% of South Africans on Facebook used it on their mobile devices. Smartphones were used by 7,9 million South Africans to access Facebook, while 1,6-million people were using basic feature phones to do so. Tablets were being used to access Facebook by 1,4-million people.

Online retail

For the first time since the dawn of e-commerce in South Africa, online retail in South Africa was expected to reach 1% of overall retail during 2016. This was the most significant finding of the Online Retail in South Africa 2016 report released by World Wide Worx.

According to the report, online retail continues to grow at a high rate in South Africa, having maintained a growth rate of above 20% since the turn of the century. In 2015, the rate of growth was 26%, taking online retail to the R7,5-billion mark. While the rate was expected to fall a little in 2016, to 20%, growth in Rand terms was expected to remain the same as in 2015, taking the total to above R9 billion.

Much of this growth has been attributed to an increase in the number of experienced Internet users in South Africa who are ready to transact online.

Forecasts by World Wide Worx for the next five years, from 2016 to 2020, show online retail sales almost exactly doubling over this period.

According to the report, the total number of online shoppers in South Africa at the beginning of 2015 was 3 225-million. This represents 60,8% of the Internet user base that World Wide Worx has established is ready to shop online.

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.

It is estimated that cyber-related offences are escalating and exceed a value in excess of R1 billion annually. 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 one of the largest telecommunications markets on the continent. It has five major mobile operators, namely CellC, MTN, Vodacom, Telkom Mobile and Virgin Mobile.

Mobile phones are the dominant technology for voice and data communication among base of pyramid users and for informal businesses.

People in this group access the internet mostly via their mobile phones and smart phones have taken over functions that used to be done with a computer. Users are also finding innovative ways to bypass expensive cellphone networks' SMS rates using Facebook Zero or other instant message services such as WhatsApp.

Stats SA's GHS has revealed that in 2015, there was high access to telecommunications for households nationally, as only 3,5% of households did not have access to either landlines or cellular phones. By comparison, 85,5% of households had access to at least one cellular phone, while 10,9% 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 (94,4%) and Limpopo (94,1%) 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 (26,2%) and Gauteng (14,1%).

The media

South Africa is fortunate in having a vibrant and independent media.

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 Avusa Ltd. Other important media players include M&G Media Ltd; the Natal Witness Printing & Publishing Company (Pty) Ltd; Primedia Publishing Ltd; RamsayMedia, and Kagiso Media.

Between January and March 2016, daily newspaper circulation declines were experienced by *The Times* (-43%), the *Daily Sun* (-26%) and *The Witness* (-22%). The *Sunday Times* had a less than 2% while the *Sunday World* was down by 20% and the broadsheet *City Press* by 22%.

Magazines

Between January and March 2016, there was a 8.3% decline in total magazine circulation, more than twice that of newspapers, according to the Audit Bureau of Circulations of South Africa.

Consumer titles dropped 4,4%, business titles by 2,7% and custom magazines by 10,6%.

However, *The Big Issue* grew 14% and *GQ* by 9% while *Men's Health* dropped 8%. *Car Magazine*, the largest circulating motoring title in the country, grew by 7%.

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 2015, the PDMSA membership included more than 700 newspaper and magazine titles that cater for four different language groups.

The members include Times Media Group; Caxton and CTP; Independent Newspapers; Media24; Mail & Guardian, and the Association of Independent Publishers (AIP).

The AIP represents the interests of more than 250 independent publishers in southern 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 Black Journalists** addresses issues that directly affect its members.

Members of the public who have complaints or concerns about reports in newspapers and magazines can submit their grievances to the **Office of the Press Ombudsman**.

The **Freedom of Expression Institute** protects and fosters the rights to freedom of expression and access to information, and to oppose censorship.

The **Forum of Community Journalists** is an independent body that represents, promotes and serves the interests of all community-newspaper journalists in southern 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 (formerly Media Monitoring Project) 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

The non-profit national news agency, the South African Press Association, which has been in existence since 1938, terminated its services in March 2015.

The African News Agency, Africa's first syndicated multimedia content service, began publishing South African and international news stories in March 2015.

International news agencies based in South Africa include:

- Reuters
- Agence France-Presse
- Associated Press
- Deutsche Presse Agentur
- United Press International.

Journalism awards

South Africa's most important awards include the:

- Mondi Shanduka Newspaper Awards
- Vodacom Journalist of the Year Awards
- South African Breweries Environmental Media and Environmentalist of the Year 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.

Advertising awards

South Africa has a vibrant and dynamic advertising industry.

The Loerie Awards are the best-known South African awards recognising distinction in advertising. The 37th Annual Loerie Awards, took place on 16 August 2015 at the Durban ICC.

A total of 166 awards were handed out, including 17 Gold Awards, and six Craft Golds. Two Grand Prix were awarded in 2015.