



6

Communications

Telecommunications

As the leader in information and communications technology (ICT) development in Africa, South Africa is the 20th-largest consumer of information technology (IT) products and services in the world.

With a network that is 99% digital and includes the latest in fixed-line, wireless and satellite communications, South Africa has the most developed telecommunications network on the continent.

South Africa's IT industry is characterised by technology leadership, particularly in the field of electronic banking services. South African companies are world leaders in pre-payment, revenue management and fraud-prevention systems, and in the manufacture of set-top boxes, which are all exported to the rest of the world.

Several international corporates, recognised as leaders in the IT sector, operate subsidiaries from South Africa.

South Africa's ICT and electronics sectors are expected to continue showing strong growth in the future, due to key competitive advantages specific to the country and the continent.

Testing and piloting systems and applications are growing businesses in South Africa, with the diversity of the local market, first-world know-how in business, and a developing-country environment making it an ideal test laboratory for new innovations.

Policy

The Department of Communications' mandate is to create a favourable environment that ensures that South Africa has the capacity to advance its socio-economic development goals and support the renewal of Africa and the building of a better world. This mandate puts the department at the forefront of government initiatives to bridge the digital divide and provide universal access to ICT for all South Africans.

The department fulfils its mandate by developing ICT policies and legislation that stimulate and enhance the sustainable economic development of the country's first and second economies, and that positively affect the social well-being of all South Africans. Through policy development, the department also seeks to restructure state-owned enterprises (SOEs), introduce competition in the



sector and accelerate the penetration of services in underserved communities. The department also strives to streamline the regulatory framework in its quest to achieve competitiveness in the sector.

The core functions of the department are to:

- evaluate the economic, social and political effect of implementing relevant policies
- exercise oversight of SOEs
- fulfil South Africa's continental and international responsibilities in the ICT field

The department's strategic direction is based on five key focus areas:

- achieving higher rates of investment in the economy
- increasing the competitiveness of the South African economy
- broadening participation in the economy
- improving the State's capacity to deliver
- contributing to creating a better world.

The department has identified the following strategic objectives to achieve its mandate:

- Broadband Strategy
- Digital Migration Strategy
- Universal Service and Access Policy and Strategy
- Department of Communications 2010 Strategy
- Stakeholder Management Policy Framework
- E-Cadres Strategy
- Spectrum Management Policy

- ICT Black Economic Empowerment (BEE) Charter
- funding model for regional televisions
- research and development of ICT products and services
- additional community radio stations
- National Emergency Communications Framework
- active participation in the World Radio Communication Conference
- National Space and Satellite Programme for Communications
- fulfilment of international obligations
- New Partnership for Africa's Development (Nepad) projects
- International ICT Strategy and programmes.

The department oversees Telkom, the South African Post Office (Sapo), Sentech, the South African Broadcasting Corporation (SABC), the National Electronic Media Institute of South Africa (Nemisa), as well as the regulator, the Independent Communications Authority of South Africa (Icasa).

The Electronic Communications Act, 2005 (Act 36 of 2005), seeks to remove policies that hinder the development of cross-sector applications, services and businesses. The Act enables the sector to reflect the integration of telecommunications with IT, broadcasting and broadcasting-signal distribution.

It also empowers citizens by means of better access to knowledge and information. The Tele-

communications Amendment Act, 2001 (Act 64 of 2001), has enabled the department to liberalise the South African telecommunications market, increase competition, and, as a by-product, stimulate the sector to bring down the costs of communications and remove constraints to growth.

The amendment also provided for the licensing of operators in underserved areas with a teledensity of less than 5%, the majority of which are in the Sustainable Rural Development Programme nodal points. It also contributed to an increase in ownership and involvement in the telecommunications sector by women and historically disadvantaged groups, and provided for a new public emergency telephone service and emergency number, 112.

The final draft of the ICT Empowerment Charter was presented to the Minister of Communications, Dr Ivy Matsepe-Casaburri, in May 2005, after two years of intensive consultation with the sector. Once adopted and published as a code of good practice, it is set to guide all BEE activities in the broadcasting, electronics, IT and telecommunications industries.

Liberalisation

Following the signing of the Telecommunications Amendment Act, 2001, the department was able to focus on policies that grow the economy; attract foreign direct investment; increase competition, encourage Broad-Based BEE; and develop and sustain small, medium and micro enterprises (SMMEs). The department also aims to improve service delivery and expand the provision of telecommunications services. The introduction of the underserved area licences (USALs) addresses this need.

The costs of communications will be brought down by increased competition in the sector and the removal of constraints to growth.

Section 40 of the Telecommunications Amendment Act, 2001 requires that underserved area licensees provide telecommunications services, including voice-over Internet protocol, fixed mobile services and public pay telephones. Policies have also been implemented that, among other things, allow mobile operators to use any fixed lines that may be required for providing both voice and data transmission services.

Digital Migration Policy Framework

The Digital Migration Policy Framework facilitates the introduction of diverse digital services that broadly integrate South Africa into the global community.

The department's strategy is to manage transformation from analogue to digital environments, and to ensure that digital migration processes and activities are negotiated and aligned with multilateral institutions such as the International Telecommunication Union, the World Trade Organisation and the African Union.

The department has allocated funding to the SABC and Sentech for a digital migration project that will open up broadcasting to more players, especially small regional broadcasters.

Independent Communications Authority of South Africa

Icasa was formed in terms of the Icasa Act, 2000 (Act 13 of 2000), which brought together two separate entities, the Independent Broadcasting Authority (IBA) and the South African Telecommunications Regulatory Authority. Icasa is now the sole telecommunications regulator in the country, and has been charged with creating and maintaining a competitive and socially responsive communications industry.

Icasa develops regulations and policies, and issues licences to telecommunications broadcasting service-providers, 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 licensees, and controls and manages the frequency spectrum.

Universal Services Agency (USA)

The USA was launched in 1997 as a statutory body that facilitates universal access to services, and co-

 South Africans spent R514 million shopping online in 2005, which was 20% more than in 2004, according to a report by technology researchers World Wide Worx.

The report predicted a further 20% increase in 2006.

ordinates initiatives towards this end by service-providers such as Telkom, Vodacom, MTN and Cell C.

The USA extends services to communities by working with community-based and non-governmental organisations to roll out ICT infrastructure to underserved communities.

By mid-2006, the USA had delivered more than 100 telecentres countrywide and was rolling out community digital hubs at the 21 identified developmental nodal points in the country.

In 2005, after the first phase of the licensing process, seven USALs were granted to private companies. The minister invited applications for the second phase for an additional 14 municipal districts. The successful applicants of the second phase were announced in August 2006. The USA funds each company at R5 million a year for three years from the USA Fund, and monitors its compliance with licence conditions.

Presidential National Commission on Information Society and Development (PNC on ISAD)

The PNC on ISAD was constituted to facilitate the co-ordinated development of an inclusive information society in South Africa.

African Agenda

The Department of Communications has placed itself as a strategic partner on the continent, taking part in various fora in support of the African Agenda. The department has an engagement model for strengthening relations with countries in the region.

It is also involved in and supports the Nepad e-Africa Commission and its ICT projects. The country has hosted meetings of the East Africa Submarine Cable System, which will greatly enhance the region's broadband capacity.

The department continues to be involved in various Nepad ICT projects, such as the e-Schools Project, as well as implementing policies aimed at building an Africa that is part of an inclusive global information society.

South Africa is participating in and co-initiating the Nepad-led effort to build an affordable broadband network. South Africa is working with 22 countries in southern and eastern Africa to build a terrestrial and submarine broadband network. The e-Africa Commission is leading the project, which involves 30 African companies.

Information technology

State Information Technology Agency (Sita)

Sita was established in 1999 to consolidate and co-ordinate the State's IT resources to achieve 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, and using IT to support the delivery of e-government services to all citizens. (See Chapter 12: *Government system*.)

arivia.com

arivia.com is a leading South African IT solutions company and service-provider. The group has offices in Nigeria, Ghana and Botswana.

Its shareholders are Denel (22,98%), Transnet Limited (31,96%) and Eskom Enterprises (45,06%).

It is rated one of the four largest IT professional service-providers in South Africa.

The group focuses on high-end business-technology solutions that support the public sector and large private-sector corporates, primarily within the Africa client base.



The roll-out of broadband infrastructure in South Africa has been prioritised in terms of the information superhighway, wireless broadband and international communications network access.

The Department of Communications recognises that the broadband infrastructure must be able to meet the country's socio-economic development, science and research, and business needs and is exploring ways in which state-owned enterprises can contribute to the provision of affordable access to broadband.

The department is expected to invest in rolling out less costly wireless broadband networks to encourage more players to follow suit.

As the country's core wireless broadband infrastructure network, Sentech will be used to advance South Africa's socio-economic development goals, and its wireless broadband infrastructure network will be expanded beyond the current footprint.

arivia.com supports BEE through shareholder equity, employment equity, procurement and corporate social investment.

Presidential International Advisory Council on Information Society and Development

The Presidential International Advisory Council on Information Society and Development aims to assist government in narrowing the digital divide between South Africa and the rest of the world. The council consists of chief executive officers (CEOs) from major international ICT corporations, and industry experts. The council meets once a year to exchange ideas.

Internet

According to the Online Publishers' Association (OPA) and international ratings company Nielsen//Netratings, South African websites are attracting increasing numbers of local and international consumers, and are becoming a valued source of business revenue. Some 60% of Internet users are the primary consumers and purchasing decision-makers in their homes. By June 2006, readership or unique browser figures had reached 4,6 million and page impressions had hit 115 million.

This included local and international traffic on OPA-member websites, which were the top 20 online publishers in South Africa. Traffic originating from South Africa comprised 37% of the total readership figure and 87% of total page impressions.

The Telecommunications Business Unit in the Department of Communications is required to fulfil the following obligations under the Electronic Communications and Transactions Act, 2002 (Act 25 of 2002):

- develop the National E-Strategy for submission to Cabinet

- co-ordinate and monitor the implementation of the National E-Strategy
- conduct research into and keep abreast of developments relevant to electronic communications and transactions.

The unit is responsible for establishing the foundations for the requisite technical regulatory structures, including the:

- Domain Name Authority
- authentication of service-providers
- cryptography-providers
- accreditation authority
- listing of critical databases
- establishment of the Cyber Inspectorate
- alternative dispute-resolution regulations.

Telkom

Telkom has operated as a commercial company since October 1991 and has become the largest provider of communications services in Africa, based on operating revenue and assets. The Telkom Group comprises the fixed-line company Telkom and a 50% shareholding in mobile telecommunications operator Vodacom. It was listed on the JSE Limited and the New York Stock Exchange in March 2003.

Telkom's listing created meaningful value for BEE shareholders. Over 100 000 South African retail investors subscribed during Telkom's initial public offering, specifically targeted at historically disadvantaged individuals. In its first year as a listed company, the estimated value created for retail shareholders amounted to about R560 million.

In 2005/06, the Telkom Group posted strong financial results due to continued growth in the fixed-line and mobile business, and cost reductions in the former. It declared a higher ordinary annual dividend of 500 cents (c) per share and a special dividend of 400 c per share.

Headline earnings per share rose 36,1% to 1 740,5 c per share. The fixed-line business performance grew because of revenue growth of 4,1% and a 3,2% drop in operating expenses. The number of mobile customers notched 11,8 million gross connections.

Operating revenue increased by 10,3% to R47,625 million and operating profit grew 30,3% to R14,677 million.

 The number of personal computers in use in South Africa was expected to pass the five-million mark for the first time in 2006. This was according to the study *PC Users in South Africa 2006*, done by World Wide Worx into the installed base of computers in South Africa, which showed that the 4,5-million mark was reached at the end of 2005. The number was expected to grow by 17% to 5,3 million by the end of 2006.

Telkom Foundation

The Telkom Foundation, founded in 1998, enables Telkom to play an active role in South Africa's socio-economic development.

The Telkom Foundation is a registered public benefit organisation with its own board of trustees and CEO. Its primary objective is to contribute to the transformation of disadvantaged communities through sustainable development programmes. The principles of the Telkom Foundation are:

- developing and advancing South African society in terms of ICT, and creating awareness of ICT
- a commitment to skills development and to working with stakeholders from previously disadvantaged communities and people with disabilities
- the involvement of Telkom staff in ongoing social-investment projects
- involvement in partnerships with credible organisations and corporations to maximise corporate social investment in community development programmes
- a commitment to involving previously disadvantaged individuals and BEE service-providers in Telkom Foundation initiatives.

Telkom Foundation targets the following areas:

- Education and training, especially in the fields of Mathematics, Science and Technology.
- ICT planning and infrastructure roll-out, especially planning and providing network computer laboratories with Internet connectivity.
- The empowerment of women, children and people with disabilities by building knowledge and skills that promote their independence and their sense of self-worth.
- General projects such as once-off interventions towards a charitable or developmental cause. These include ad hoc projects such as adopt-a-project, donations, sponsorships and disaster relief. The Telkom Foundation spent R45,4 million in 2004/05.

Economic empowerment

Telkom demonstrated its commitment to delivering meaningful and real BEE to the majority of South Africa's people by spending R6,4 billion on empowered or significantly empowered suppliers for the year ending 31 March 2006.

Training and development

For the year ending 31 March 2006, Telkom spent

R400,1 million on training and development. Employees participated in 160 274 facilitator-led training days.

Centres of excellence (CoEs)

This is a collaborative programme between Telkom, the telecommunications industry and the Department of Trade and Industry to promote postgraduate research in ICT and allied social sciences. It also provides facilities that encourage young scientists and engineers to pursue their interests in South Africa.

Launched in 1997, the programme improves local telecommunications and IT skills, yielding substantial benefits for the academic institutions involved. It has helped Telkom and its local technology partners to solve technical problems and cut costs. Telkom's corporate partners are also reaping rewards, as the work undertaken at the CoEs is relevant to their areas of business.

By mid-2006, there were 16 centres located at tertiary institutions around the country.

Mobile communications

Over the years, South Africa has witnessed tremendous growth in the cellular industry. South Africa has three operators, namely Vodacom, MTN and Cell C.

Cell C (Pty) Limited is wholly owned by 3C Telecommunications (Pty) Limited, which in turn is 60% owned by Oger; Telecom South Africa, a division of Saudi Oger; and 40% by CellSAF. It also brought in Verizon Communications, the biggest cellular operator in the United States of America (USA), as its operating partner.

Cell C has six active roaming agreements in Namibia, Mozambique, Spain, the Ivory Coast, Mauritius and Swaziland, and has entered into roaming agreements with an additional 49 international operators.

By November 2005, broadband Internet access had its first 147 000 users in South Africa. According to a research report released by Internet research company World Wide Worx titled *Broadband in South Africa 2005*, this figure was expected to rise to 277 000 users in 2006.

Vodacom is a Pan-African cellular communications company and provides a service to millions of customers in South Africa, Tanzania, Lesotho, the Democratic Republic of Congo and Mozambique.

Vodacom's commitment to rolling out subsidised community telephones in South Africa's under-served areas has significantly boosted the company's coverage in rural areas.

Vodacom's shareholders include Telkom SA Limited (50%), Venfin Limited (15%) and Vodafone Group plc (35%).

In May 2006, Vodacom connected its 20-millionth subscriber in South Africa. By that time, Vodacom had a 57% market share in South Africa. Outside of China, India and the USA, Vodacom South Africa was then the second-largest company by customers in the Vodafone Group, larger even than Vodafone UK.

MTN International offers cellular network access and associated services through its subsidiaries and joint ventures in Nigeria, Cameroon, Uganda, Rwanda and Swaziland.

By May 2006, MTN had recorded a 55% year-on-year growth in subscribers across all its operations, to 24 185 000. This represented a 4% increase since the last reported period ended 31 December 2005.

The Telecommunications Act, 1996 provides for 1 800 MHz spectrum (as well as 2,4 GHz – 3G spectrum) to be issued to existing operators, the Second National Operator and underserved area operators. A key element in this process is the determination of access fees and universal service obligations (USOs) for the allocation of the frequency spectrum.

The Department of Communications negotiated these issues, including new service fees and additional USOs, with the industry. The proposed obligations will include:

- the supply of 250 000 free phones and numbers to public emergency services over a period of five years
- the provision of Internet access, phone links and computers to schools
- public payphones in accessible places in rural areas and Thusang Service Centres
- the issue of some four million free SIM cards over five years.

The postal sector

Policy and legislation

The cornerstone of national policy for the postal sector is the provision of a universal service at an affordable price and an acceptable standard of service for all citizens. To ensure this, a USO is placed on Sapo. To offset the cost of providing a basic service in low-density, rural or unviable areas, it has also been common practice to confer exclusive rights and privileges, i.e. a monopoly, on the provision of the basic letter service.

A USO is an obligation to provide specified services to the whole community, even though these services may not be commercially viable in their own right. The universal postal service implies that all citizens have equal access to a basic letter service:

- that is reasonably accessible to all people
- at a single uniform rate of postage
- at the lowest price consistent with meeting all its obligations, financial and otherwise
- to places outside the country
- at a standard of performance that reasonably meets the needs of the population.

In terms of the Post Office Act, 1958 (Act 4 of 1958), Sapo enjoyed exclusive rights and privileges, including a monopoly on letter mail up to 2 kg. According to the Postal Services Act, 1998 (Act 124 of 1998), Sapo continues to enjoy certain exclusive rights and privileges, including a monopoly on letter mail up to 1 kg.

In addition, Sapo is obliged to operate under a 25-year licence, with explicit universal service targets, and other terms and conditions. The monopoly and compliance with the terms and conditions of the licence will be reviewed and monitored by the Postal Regulator.

New projects of the postal policy section include the establishment of a postal training institute for the industry, and postal-security improvements, both local and regional.

 South Africa's Second Network Operator, Neotel, was officially launched on 31 August 2006. The company planned to introduce initial services to consumers by March 2007 and to capture around 15% of the local market in the next three to four years.

Neotel has secured access to the relevant Eskom and Transnet infrastructure, including almost 10 000 kilometres of optical fibre backbone within metros and across the country, and will offer a variety of fixed and wireless services.

Postal services regulatory framework

The Postal Regulator, established in terms of the Postal Services Act, 1998, is responsible for exercising regulatory functions in relation to reserved and unreserved postal services. The regulator encourages the expansion of postal services, and promotes the interests of postal-service users in terms of the cost of reserved services. The regulator is also responsible for issuing postal licences and monitoring compliance with licence conditions by the operators.

South African Post Office

The first post office in South Africa was opened in the Castle in Cape Town in 1792. Today, the Post Office delivers almost six million letters a day, servicing 10 million addresses in South Africa. It has 2 550 outlets covering the length and breadth of the country.

The principal function of the Post Office is to provide postal services inside and outside South Africa. As a preferred partner to government, the Post Office also does pay-outs such as pension payments on behalf of the Department of Social Development. Its unequalled coverage of the country makes it particularly suited to this purpose. Motor-vehicle licences can be paid at selected post offices, and the Post Office delivers identity documents on behalf of the Department of Home Affairs.

Postage stamps

Postage stamps are traditionally associated with the Post Office. Annually, the Post Office prints more than 384 million of these tiny works of art.

Stamps released in 2006 included an award-winning issue to celebrate the Soccer World Cup, which will be hosted in South Africa in 2010; a commemorative issue for the 100th anniversary of the Bhambatha Rebellion; and a fresh issue of the Big Five animal stamps.

 The South African Post Office is committed to providing an additional 2,2 million addresses with access to the postal service by the end of 2007. By mid-2006, four million additional addresses had been provided access over a three-year period.

Business centres

The Post Office has established 25 business centres that provide a dedicated, specially designed one-stop shop inside an existing post office, mostly in rural areas.

They provide a bureau service with facilities such as photocopying, faxing and Internet access, for the convenience of South Africans living in rural areas.

Internet facilities

Many isolated villages already enjoy the benefits of the electronic age. The Post Office and the Department of Communications have installed public Internet terminals (PiTs) at almost 700 post offices. Most of them are in settlements without Internet cafés or other access to the Internet. PiTs also give users access to e-mail addresses.

Small businesses can advertise in a business directory and narrow the gap between the business and its customers to one interactive e-mail. A woodcarver, for instance, can advertise goods on the Internet, receive orders via e-mail and then post the goods to customers.

Specialised products

Securemail

Securemail provides a swift and safe delivery method for high-security items such as shares and credit cards. It handles the delivery of more than 2,5 million credit cards a year, has significantly reduced credit-card theft, and has won an award from the International Association of Financial Crime Investigators for its performance.

Parcelplus

Parcelplus is the most economical way to send a parcel. With the service available at any post office outlet, a parcel can be delivered to all post-office counters countrywide. Parcels are delivered within two to five days.

Insurance is available and the cash-on-delivery option provides for money to be collected for the contents of the parcel on behalf of mail-order businesses. All parcels can be tracked.

Postbank

Postbank services are available at more than 2 000 post office outlets countrywide, and through all Saswitch-enabled automated teller machines of other financial institutions. The Postbank focuses

on the many South Africans who do not have access to other banking services.

Options range from Flexicard, which requires a minimum balance of only R10, to Smart Save, with interest rates that rise as the balance in the account rises, and Maxi Save, which offers very competitive interest rates.

Since 2004, Postbank has been the leading provider of Mzansi accounts, which extend banking to low-income earners and those living beyond the reach of conventional banking services.

By 31 March 2006, Postbank had opened 848 784 Mzansi accounts, giving it a 40,1% lead in market share.

Courier Freight Group (CFG)

CFG is a subsidiary of the Post Office, made up of the following companies:

- Speed Services Couriers, which provides the most extensive domestic overnight express courier network in southern Africa. Options range from counter-to-counter delivery – the most cost-effective – to door-to-door delivery. Same-day delivery is also available.

An international courier service is available to over 200 international destinations.

All items are tracked to their destinations. Insurance and liability cover, as well as proof of delivery are available.

- XPS Courier Services, which reaches 3 200 destinations daily with parcel tracking at every stage.
- PX Courier Services, which focuses on loads of up to three tons between larger centres in southern Africa. PX provides service for loads in tailor-made containers to destinations in South Africa and in cross-border countries. The mini-container can carry loads of 1 400 kg to 3 000 kg. Options include containers for goods of a hazardous nature, and insulated containers for distributing frozen goods. PX also offers priority delivery.

The South African Post Office in the year to 31 March 2006 increased its number of new addresses by 2,3 million, exceeding its target of 1,5 million new addresses. It expanded its retail network by 28 new stores, started construction on another 27 sites, and commissioned 20 mobile post offices.

- Document Exchange (Docex), which moves mail between members and other relevant points. Docex members pay an entry fee and annual subscription for joining the system. This enables free mail movement for the entire year.

Docex concentrates on the legal and medical professions, as well as the travel industry.

International and regional co-operation

South Africa is a member of the Universal Postal Union (UPU). The country participates in technical assistance programmes within the UPU, and uses its international accounting facility. It also participates in other international bodies such as the Pan-African Postal Union, Council of Commonwealth Postal Administrations, and the Southern African Transport and Communications Commission.

South Africa, through the Department of Communications, is a signatory to international treaties, conventions and agreements. It co-operates and works in partnership with other postal administrations, through either bilateral or multilateral agreements relating to letters, parcels and financial postal services.

The media

Media freedom

According to the Bill of Rights, as contained in the Constitution of the Republic of South Africa, 1996 (Act 108 of 1996), everyone has the right to freedom of expression, which includes:

- freedom of the press and other media
- freedom to receive or impart information or ideas
- freedom of artistic creativity
- academic freedom and freedom of scientific research.

Several laws, policies and organisations act to protect and promote press freedom in South Africa.

The fourth Press Freedom Index by Reporters Without Barriers, released on World Press Freedom Day in May 2006, ranked South Africa as the 31st most free in terms of press freedom in the world, sharing that position with Australia, and beating Japan (37th), Spain (40th), Italy (42nd), the United States of America (44th) and Brazil (63th).

The only developing countries to earn a better score than South Africa were the Caribbean states of Trinidad and Tobago (tied at 11th with Estonia, Germany and Sweden) and Jamaica (24th).

Broadcasting

South Africa has an extremely diverse broadcast media sector catering for the unique demands of the local market.

Policy and legislation

The Broadcasting Act, 1999 (Act 4 of 1999), and the IBA Act, 1993 (Act 153 of 1993), are aimed at establishing and developing a broadcasting policy to regulate and control all broadcasting, to:

- contribute to democracy, nation-building, the provision of education, and the strengthening of the moral fibre of society
- encourage ownership and control of broadcasting services by people from historically disadvantaged communities
- ensure fair competition in the sector
- provide for a three-tier system of public, commercial and community broadcasting services
- establish a strong and committed public broadcaster to service the needs of all South Africans.

The Broadcasting Act, 1999 defines the objectives of the South African broadcasting system, the structure of the SABC and the role of the various sectors in meeting these objectives. It also guarantees the independence of the SABC as a public broadcaster. Section 8 of the Act sets out the objectives of the SABC. The SABC is being corporatised and restructured to better fulfil its mandate of meeting its audiences' needs.

These include broadcasting accurate and credible news and current affairs programmes; South African content programming in languages reflecting the country's cultural diversity; educational programming to advance lifelong learning; and programming targeted at children, women and people with disabilities.

The Act deals with the restructuring of the SABC to fit into the changing broadcasting environment. It requires that the SABC Board establishes two management boards to focus on public and commercial services. Under the new dispensation, the public broadcasting wing will execute and meet its public-service mandate free from commercial interests. The commercial wing will be allowed to generate profit to be self-sustainable.

Editorial policy

The Broadcasting Amendment Act, 2002 (Act 64 of 2002), brings into effect, among other things, the

new Code of Conduct for Broadcasters. Implementation of the Act will result in a better definition of public and commercial broadcasting services.

The SABC has developed, for the first time, editorial policies for news and other programming that cover current affairs, including content accuracy and impartiality. These policies were finalised after an extensive public consultation process.

The Broadcasting Amendment Act, 2002 provides for the establishment of two regional television licences: the first for the northern region, to cater for those speaking the Sesotho, Xitsonga, Tshivenda and Sesotho sa Leboa languages; and the second for the southern region, to cater for those speaking the isiXhosa, Siswati, isiZulu and isiNdebele languages.

In March 2004, the SABC submitted an application for the amendment of its broadcasting licences, in terms of section 22 of the Broadcasting Act, 1999. These were granted and came into effect on 23 March 2006.

In March 2006, the SABC launched new additions and changes to its news and current affairs at a cost of R45 million. These included the extension of Siswati and Ndebele News; an online French News service; and weekend radio current affairs shows for people living in the rural areas and tuning into public broadcasting service radio stations.

Broadcasting role-players

Radio

The first radio broadcasts in South Africa took place under the auspices of a broadcasting committee of the South African Railways. The first experimental broadcast was undertaken in Johannesburg on 18 December 1923 by the Western Electric Company.

During 1924, the Associated Scientific and Technical Association of South Africa began regular broadcasts in Johannesburg. The Cape Peninsula Publicity Broadcasting Association began a similar service, and the Durban Municipality followed suit with its own regular broadcasts.

The first radio station, JB Calling, went on air in July 1924.

By 1926, all radio transmission and reception was placed under the control of the Postmaster-General, under the Radio Act, 1926 (Act 20 of 1926).

Following the contribution made by Sir John Reith, then Director-General of the British Broadcasting Corporation, the SABC was established on 1 August 1936.

The SABC is the country's public broadcaster. It introduced its own national news service on 17 July 1950, with daily news bulletins on the English service, the Afrikaans service and Springbok Radio.

Radio Zulu, Radio Xhosa and Radio Sesotho were established on 1 June 1960.

In 2006, the SABC's national radio network comprised 15 public broadcast service radio stations, and three commercial radio stations broadcasting in 11 languages, as well as an external radio service in four languages that reached an average daily adult audience of 19 million.

For its internal coverage, Radio News uses about 13 editorial offices, a countrywide network of 1 300 correspondents, and more than 2 000 news contacts.

World news is provided by international news agencies and strategically situated foreign correspondents.

Copy supplied to Radio News amounts to almost a million words a day, and is compiled around the clock into 300 news bulletins and 27 current affairs programmes broadcast daily on the SABC's radio services. There is a public broadcasting service radio station for each language group.

Channel Africa Network comprises four language services that reach millions of listeners throughout Africa. Broadcasts are in English, French, Kiswahili and Portuguese. The service station is targeted at audiences in Africa and the Indian Ocean islands, and concentrates on providing programmes with African content.

Commercial radio stations

Icasa has granted licences to the following private radio stations:

- Radio Algoa (ex-SABC)
- Classic FM (greenfield)
- Kaya FM (greenfield)
- YFM (greenfield)

 The SABC made a profit of R383 million for the 2005/06 financial year, which was almost double the profit of R194 million that it reported for the preceding year.

In 2005/06, the SABC generated over R3,9 billion in revenue, with radio and television showing good growth. Revenue from licence fees increased by 30% from R739 million.

- Highveld Stereo (ex-SABC)
- Radio 702
- Radio Jacaranda (ex-SABC)
- Radio Oranje (ex-SABC)
- East Coast Radio (ex-SABC)
- P4 (greenfield)
- Cape Talk MW (greenfield)
- Radio KFM (ex-SABC).

Stations such as Radio Jacaranda, 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.

Community radio stations

Community radio stations have a huge potential for the support of, among other things, cultural and educational information exchange. They use indigenous languages, thus ensuring that people receive information in languages they understand.

There are more than 90 community radio stations in South Africa.

Satellite Communications Network

The Satellite Communications Network makes it possible for grassroots communities, through their community radio stations, to access parliamentary proceedings, general news and government information and services.

The Department of Communications is responsible for rolling out infrastructure to radio stations.

Initially, 30 radio stations were linked up. The network will, on completion, link up 90 stations.

Low-power sound broadcasting licences

The Broadcasting Act, 1999 defines low-power sound broadcasting as a community, private or public sound broadcasting service that radiates power not exceeding one watt. In February 2005, Icasa published guidelines for low-power sound broadcasting licence applications.

Television

SABC

A one-channel television service was introduced on 5 January 1976.

Today, the SABC's national television network comprises three full-spectrum free-to-air channels and one satellite pay-TV channel aimed at audiences

in Africa. Combined, the free-to-air sound broadcasting stations broadcast in 11 languages and reach a daily adult audience of almost 18 million people via the terrestrial signal distribution network and a satellite signal.

South Africa has more than four million licensed television households and the largest television audience in Africa.

About 50% of all programmes transmitted are produced in South Africa. Locally produced television programmes are augmented by programmes purchased abroad, and by co-productions undertaken with other television programming organisations. Television news is fed by SABC news teams reporting from all parts of the country, using modern portable electronic cameras and line-feed equipment via more than 220 television transmitters. Ad hoc satellite feeds are arranged from wherever news events occur.

News bulletins are broadcast in all 11 official languages.

The SABC's terrestrial television channels devote roughly 18% of their airtime during prime time to news and news-related programmes.

NewsBreak 082 152, a news-by-telephone service, is one of the country's most popular audio news/information lines. This joint venture with Vodacom and Marketel gives the latest news in English and isiZulu, with regular sports and weather updates.

M-Net

M-Net, South Africa's first private subscription television service, was launched in 1986. The channel celebrated its 20th birthday in October 2006. Today, M-Net broadcasts its array of general entertainment and niche channels to more than 50 countries across Africa and the adjacent Indian Ocean islands.

M-Net's television channels are delivered to subscribers through analogue terrestrial and digital satellite distribution.

The main M-Net channel, which is available as a terrestrial and satellite service, offers movies, sport, children's programmes, international and local series, and local reality shows.

The second terrestrial channel, CSN (Community Services Network), offers sport as well as programming aimed at a variety of South African communities. M-Net is also well-represented on the DStv bouquet of satellite TV channels.

Development of the local film and television industries is a priority for M-Net, and is supported by various projects such as EDiT, which gives final-year film and television students the opportunity to produce programmes for broadcast on M-Net. In 2006, it featured an online entry component for the first time.

Satellite broadcasting

MultiChoice Africa (MCA) was formed in 1995 to manage the subscriber services of its sister company, M-Net. It became the first African company on the continent to offer digital satellite broadcasting.

Operations include subscriber-management services and digital satellite television platforms broadcasting 55 video and 48 audio channels, 24 hours a day. Included are six data channels, which were the first interactive television offerings on the continent.

MCA is owned by the MIH Group, which is listed on the JSE, the NASDAQ in New York, and AEX in Amsterdam.

In February 2006, Icasa announced that it would issue new licences for cable and satellite pay-TV broadcasting.

The new licences will effectively end the monopoly of media company Naspers, which owns

At the end of August 2006, the east and southern African ministers responsible for information and communications technology (ICT) signed the protocol for policy and regulatory framework to implement the New Partnership for Africa's Development (Nepad) ICT broadband infrastructure network in Kigali, Rwanda.

The protocol set in motion the roll-out of the Nepad ICT broadband network, including the Eastern Africa Submarine System (Eassy) cable. It also provides for the formation of the Special Purpose Vehicle, a consortium made up of the region's telecoms companies and other operators to own, manage and maintain the Eassy cable as well as the terrestrial network.

The framework further commits the African Union member countries to harmonising their national policy and regulatory instruments, to facilitate the speedy formation and operation of these open access networks, independent of who owns them. The fibre-optic cable will cover about 9 900 km, connecting Durban, South Africa, with Port Sudan in Sudan.

Multichoice, South Africa's only pay-television operator. Multichoice broadcasts MNet and DStv, a range of satellite TV channels.

Applications for new licences were due by July 2006, with Multichoice also required to apply in order to continue broadcasting.

Free-to-air television

Launched in 1998, e.tv is South Africa's first private free-to-air television channel, which broadcasts a full-spectrum programming service to 78% of South Africa's population. The station is owned by BEE group, Hosken Consolidated Investments Limited, and Venfin Limited, and employs some 400 people countrywide.

As a free-to-air channel, e.tv's only source of income is advertising revenue. The station's most popular programmes are wrestling, news, movies and South African drama, with South African content comprising 45% of e.tv's daily programming.

e.tv was the first channel in South Africa to secure the rights to the Union of European Football Association's Champions League.

Signal distribution

Sentech was established in terms of the Sentech Act, 1996 (Act 63 of 1996), as a common carrier to provide broadcasting signal distribution for broadcasting licences. In 2002, the Telecommunications Amendment Act, 2001 licensed Sentech to provide international carrier-to-carrier voice services as well as multimedia services.

Sentech intended to replace a substantial section of South Africa's ageing analogue television broadcasting infrastructure with digital technology in 2006 to improve the quality and coverage of television in the country. The coverage of the

broadband network will also be expanded to allow more South Africans to access broadband services.

Sentech is funded from its own resources and the debt market. It expects to use shareholder funds in future to replace broadcast infrastructure, increase broadband wireless coverage, and pursue other infrastructure projects such as the East Africa submarine system that will connect South Africa and countries in East Africa with the global optical fibre network.

By digitising broadcasting, maintenance costs will be reduced and the returns increased. Internet-capacity costs will increase to cater for greater demand. The Department of Communications will provide Sentech with R95 million in 2006/07, R60 million in 2007/08 and R50 million in 2008/09.

Print

Technical handling of the print media in South Africa rates among the best in the world. On the editorial side, concerns have been raised about the general quality of content from a journalistic point of view. Research has shown that journalists lack certain basic skills, and the juniorisation of newsrooms has affected most of the major publications negatively.

In recent years, the industry has held strategic planning sessions and implemented special training programmes in an attempt to improve the quality of newspapers' editorial content.

The roots of the print media in South Africa can be traced back to the 19th century, when the first issue of a government newspaper, the *Cape Town Gazette and African Advertiser/Kaapsche Stads Courant and Afrikaansche Berigter*, was published in 1800.

The first independent publication, *The South African Commercial Advertiser*, was published in 1824 by Thomas Pringle and John Fairbairn. It was banned 18 months later and reappeared only after various representations had been made to the authorities in London.

Official circulation figures issued by the Audit Bureau of Circulations (ABC) show that print media circulation grew from 19 million in 2000 to 26 million in 2005, indicating that South Africa's print media industry is flourishing.

The country's vibrant economy and the introduction of regional tabloid newspapers in recent years has helped feed the popularity of newspapers and magazines in Africa's largest economy.

 The Federation of International Football Association (Fifa) has awarded the official Fifa World Cup broadcaster status for the 2010 and 2014 World Cup tournaments to the South African Broadcasting Corporation. The deal, which includes free-to-air and pay-TV rights for all Fifa events during both periods, was signed and announced on 7 July 2006.

The two tournaments will be held in South Africa and in a South American country, still to be named.

High consumer spending has coincided with strong circulations in newspapers, particularly tabloids and free-sheets. The adoption of more efficient delivery and distribution systems has boosted the growth of tabloids, community newspapers and free-sheets, in particular.

Despite intense competition among both newspapers and magazines, circulation figures for July to December 2005 show readership growth across almost all consumer segments. However, this growth has been dampened by the closing of two newspapers in the past two years in the higher-end consumer market segment.

The challenges facing newspapers and magazines have remained much the same in the past decade: improving the quality of journalism in increasingly younger newsrooms, and the threat posed to circulation and market share by the electronic media.

South African newspapers and magazines are mainly organised into several major publishing houses: Johnnic Communications, the Irish-based Independent News & Media (Pty) Limited group; Associated Magazines; Media 24; and Caxton Publishers & Printers Limited. Other important media players include M & G Media Limited; the Natal Witness Printing & Publishing Company (Pty) Limited; Primedia Publishing Limited; Ramsay, Son and Parker (Pty) Limited; and Kagiso Media.

The issue of BEE is being addressed by all companies, some of which have progressed further than others. Larger listed companies have tended to make faster progress with BEE than smaller ones.

Globally competitive IT systems, especially among the large media houses, have helped improve the overall technical quality of print media, and have also positively affected distribution and circulation reach.

Late in August 2006, government scrapped the 5% tariff levied on imported paper and paperboard products with immediate effect. This was expected to reduce the input costs of printing and packaging.

The Department of Trade and Industry announced that it had asked the International Trade Administration Commission to conduct investigations into parity pricing in the paper industry.

Newspapers

Most South African newspapers are based on the British model. Management and editorial departments are controlled separately.

The size of the country – 1 400 km separate the main centres of Cape Town and Johannesburg – still precludes national dailies in the true sense of the word.

In the past few years, two newspapers, *Nova* and *ThisDay*, failed to break into the higher-income consumer segment. This has been ascribed to overtrading in this segment. Observers have also suggested that many higher-income readers are now turning to the Internet for news. Likewise, an Afrikaans independent Sunday paper *Die Wêreld* only existed for three months in 2005 before it had to close down because of lack of interest among readers and advertisers.

Advertising spend on newspaper advertising remained slightly higher than the spend on TV, as was the case the year before. The dramatic success of lower-end tabloids and the wide distribution of community newspapers and free-sheets have been largely responsible for the recent success of newspapers.

Although the tabloid market is thriving, circulation trends in dailies and weeklies remain largely static. By the end of 2005, urban dailies sold an average of 1 605 million copies a day, which was slightly higher than the 1 501 million a day in 2004. The most dramatic growth in circulation was reported by the tabloid *Daily Sun*, which went from 364 000 the year before to 440 000. Circulation figures of the country's oldest Sunday newspapers, *Sunday Times* and *Rapport*, remained static, while the *Sunday Sun* grew from 176 000 to 187 000 and *City Press* from 173 000 to 178 000.

Sunday papers such as the *Sunday Times*, *City Press*, *Rapport*, *Sunday World* and *Sunday Tribune* have wide, national distribution because electronic printing presses have enabled the simultaneous publication of these newspapers in several cities.

By mid-2006, there were 21 dailies and nine Sunday papers in South Africa. Almost 150 regional or country newspapers, most of which are weekly tabloids, serve particular towns or districts in the country by covering local affairs and carrying local advertising. Most are published in English or Afrikaans. The most popular publication day is Thursday, followed by Tuesday, and the bigger publications appear twice weekly.

Newspapers appearing only in certain neighbourhoods are also an important part of the newspaper scene and number in the hundreds. They are known as knock-and-drops, free-sheets or freebies, as they are distributed free of charge. They

have a guaranteed readership, with advertising being their only source of income. More than 4,5 million newspapers in this sector are distributed weekly. Press groups such as Media 24 and especially CTP/Caxton are major players in this field.

Since 1996, local newspapers, freebies and corporate newspapers have ventured into reporting in indigenous languages. In Durban, Independent Newspapers started the isiZulu newspaper *Isolezwe*, which is steadily growing.

With 11 official languages, it can be expected that more home-language publications will emerge. Separate newspapers for different cultural groups are still preferred, with English being the popular language of choice. The establishment of the Media Development and Diversity Agency (MDDA) has stimulated the growth of new community titles, focusing on specific communities in areas where community media have not been established.

Magazine circulation and readership

The magazine industry in South Africa is a fiercely competitive environment in which new titles appear all the time, despite the worldwide challenge from electronic and interactive media. Considering the proliferation of titles on the shelves in supermarkets and bookstores, it seems that many readers are still attracted to print. However, there is evidence to suggest that the overall magazine-reading population in South Africa is shrinking, which is a concern for the industry.

A positive development has been the segmentation of the market into niched publications that provide opportunities for advertisers to reach their target audiences.

Because of rising printing and paper costs, prices have increased accordingly and magazines have had to offer readers value for their money to retain their loyalty. Weeklies *Huisgenoot* and *You* are the two biggest money-making magazines in South Africa. Among the monthlies, women's magazines are still the most widely distributed despite declining sales. *Sarie*, *Rooi Rose*, *Cosmopolitan*, *Glamour* and *True Love* are all in the top 10.

Women's magazines

In the women's magazine sector, publications have had to market themselves aggressively to survive.

Overall, there was a decline in circulation in this sector although certain publications showed growth. For instance, *Cosmopolitan* dropped from 117 255 to 115 099 in the period July to December 2005. *Glamour's* circulation increased from 92 552 to 106 684. *Elle's* figures increased from 37 267 to 42 629, *Essentials* decreased from 76 295 to 66 293, and *Fairlady* decreased from 88 123 to 81 756. *Femina* dropped from 44 883 to 40 089, and *Marie Claire* increased slightly from 43 110 to 43 501, while *True Love* increased slightly from 114 793 to 115 009. *Oprah's* circulation remained more or less steady at 67 554.

Winners of major annual press trophies

	Frewin*	McCall**	Cronwright***	Hultzer****	Joel Mervis*****
2002	Beeld	Natal Witness	Paarl Post	Herald	Rapport
2003	Beeld	Business Day	Springs and South Coast Herald	Brakpan Advertiser	Mail & Guardian
2004	Beeld	Witness	Paarl Post	Eikestadnuus	Naweek-Beeld
2005	The Witness	The Witness	The Mirror	Eikestadnuus	Weekend Witness
2006	Die Burger	The Witness	District Mail	Potchefstroom Herald	Mail & Guardian

* Best daily newspaper with a circulation above 50 000

** Best daily with a circulation under 50 000

*** Best community newspaper with a circulation exceeding 10 000

**** Best community newspaper with a circulation below 10 000

***** Best urban weekly

Source: Print Media South Africa

In the Afrikaans market, a similar trend was apparent. While *Rooi Rose* increased from 119 994 to 122 296, the weekly *Vroue Keur* decreased from 100 121 to 99 304. *Sarie* remains a leader in the sector, but its figures also decreased. The circulation figures of *Dit* increased from 77 811 to 85 145.

General interest titles

Sales of the weeklies, *You* and *Huisgenoot*, at 225 976 and 352 389 respectively, increased by about 2 500 and 12 000 respectively. *Drum's* figures went down alarmingly, and those of *Bona* declined from 96 584 to 92 903. *People's* figures decreased too, but *TV Plus* gained about 30 000 readers.

Décor

Décor magazines, on the other hand, proved in general to be a growth area. *House and Garden*, *House & Leisure*, *Habitat* and *Elle Decoration's* figures remained stable. *Visi* continued to be popular and *SA Home Owner* increased its sales from 55 604 to 60 497.

Parenting

In general, this category is also a growing market. The titles *Baba en Kleuter* and *Your Baby* remained fairly stable. *Healthy Pregnancy* gained readership, and *Living and Loving's* figures also gained, while *Parents* declined by 6 546.

Youth

There has been a proliferation of magazines in the youth sector in the last few years and it clearly remains a significant growth area. *Saltwater Girl* at 42 620 maintained its position as the top-selling female teen magazine in South Africa. Relatively new contender *Blunt* grew from 18 329 to 19 126, and *Seventeen* from 30 741 to 38 301. *Teenzone's* sales declined slightly, as did the figures for *Barbie*.

Male interest

GQ's figures dropped from 35 020 to 33 490, as did *FHM*, from 118 428 to 112 809. *Men's Health* showed a slight decline.

Motoring

Car declined from 105 934 to 104 954, while *Speed and Sound* increased from 44 644 to 53 646. *Topcar's* figures also grew, while *Wiel's* figures declined to 4 766.

Lifestyle

Judging by recent circulation figures, *Weg* has cornered the Afrikaans outdoor lifestyle market while *Getaway's* figures declined by 12 062. Its publisher announced in 2006 that it would also start an Afrikaans version. *Style's* figures declined slightly, while *Woolworth's Taste* became increasingly popular, attaining sales of 27 456. *SA Country Life* and *Caravan and Outdoor Life* are extremely niched publications that have a consistent readership.

Sport

Amakhosi dropped from 37 772 to 32 265, while the figures of *Bicycling SA* increased slightly. *Bike SA* declined slightly. *Compleat Golfer* dropped to 19 670, while *Golf Digest* grew from 21 479 to 25 872. Football magazines, *Kick Off* (62 490) and *Full Time* continued to attract loyal readers, while

Top 20 magazines based on net sales, July to December 2005

1	Huisgenoot	352 389
2	You	225 976
3	TV Plus	155 129
4	Sarie	141 733
5	Rooi Rose	122 296
6	Cosmopolitan	115 099
7	True Love	115 009
8	FHM	112 809
9	People	108 361
10	Glamour	106 684
11	Car	104 594
12	Vroue Keur	99 304
13	Bona	92 903
14	Finesse	92 103
15	Men's Health	90 058
16	AA Traveller	88 245
17	Dit	85 145
18	Tuis/Home	83 439
19	Women & Home	82 822
20	SA Garden & Home	82 124

Soccer Life's sales figures increased from 17 163 to 27 304. *Runners' World* remained steady at 17 405, while *SA Sports Illustrated's* circulation decreased from 42 145 to 38 879.

Niche publications such as *SA Rugby*, *Complete Fly Fisherman* and *Stywe Lyne/Tight Lines* remained stable.

Circulation of the 30-year-old surfing magazine, *Zigzag*, increased by 1 993 readers.

Special interest

Finance Week/Finansies en Tegniek merged to become *Finweek*, which increased its figures by a significant 12 228, but the *Financial Mail* decreased slightly from 25 612 to 25 330. Targeted publications *Wine* remained steady, while sales of *Popular Mechanics* increased by 2 751, and that of *Threads and Crafts* decreased by 5 117.

Distribution

In cities, newspapers rely heavily on street sales and door-to-door delivery. Cafés, spaza shops and general stores provide additional selling points. In rural areas, newspapers are distributed mainly by special truck deliveries, often covering hundreds of kilometres in a single run. The cost of bulk transport by air is very high.

Newspaper Circulation Services and Magazine Circulation Services handle all Johnnic Communications' circulation. The Afrikaans press group, Media24 (Nasionale Nuusdistribueerders – NND 24), handles most of its distribution in-house. Allied Publishing handles the distribution for Independent Newspapers, and RNA Distributors handles distribution for Caxton/CTP.

Online media

South African websites attract more than 3,5 million highly educated users.

Johannesburg has the largest audience with 24% of users, followed by Cape Town (15%), Pretoria (10%) and Durban (6%).

Media organisations and role-players

Several organisations and associations play an important role in the media field. Print Media South Africa (PMSA), formed in 1996, is an umbrella organisation administering individual bodies, namely the Newspaper Association of South Africa (the oldest communication organisation, established in 1882), Magazine Publishers

Association of South Africa and the Association of Independent Publishers (AIP).

The AIP was formed in September 2004 after the major publishing groups withdrew from the Community Press Association (CPA) to give independent publishers an opportunity to transform the CPA into an association that would serve their own specific needs. The AIP represents the interests of more than 250 independent publishers in southern Africa.

The purpose of the PMSA is to represent, promote, interact with and intervene in all matters concerning the collective industry and of common interest. It represents some 650 newspaper and magazine titles in South Africa. PMSA is a member of a number of international bodies such as the World Association of Newspapers and the Federation of Periodical Press. Allied to PMSA, but not a constituent member, is the ABC, responsible for auditing and verifying print-media circulation figures.

The South African National Editors' Forum (SANEF) was conceived at a meeting of the Black Editors' Forum, the Conference of Editors, and senior journalism educators and trainers in October 1996.

Sanef membership includes editors and senior journalists from the print, broadcast and online/Internet media, as well as journalism educators from all the major training institutions in South Africa.

Sanef has facilitated the mobilisation of the media in the Partnership Against AIDS Campaign, and in campaigns to end violence against women and children.

Various seminars and debates are held around media freedom and transformation, especially in relation to gender and technology. Sanef is involved in training initiatives and in setting practical standards in journalism education.

Against the backdrop of positive political developments on the African continent, Sanef spearheaded the formation of the All Africa Editor's Conference.

The Southern African Editors' Forum was subsequently formed in 2003. South Africa is its first chairperson, while the secretariat is held by Swaziland. The Central, Eastern, Western and Northern African Forum bodies are in various stages of being formed.

The Forum of Black Journalists, consisting only of black journalists, tackles 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.

Should they not be satisfied with the resultant ruling, they can lodge an appeal with an independent appeal panel. The Office of the Press Ombudsman was set up by the PMSA, Sanef, the Media Workers' Association of South Africa, and the South African Union of Journalists (SAUJ).

As self-regulating mechanisms of the media industry, the Press Ombudsman and the appeal panel act in accordance with the South African Constitution, 1996 and embrace the spirit of transformation in South Africa.

The Freedom of Expression Institute (FXI) was established in 1994 to protect and foster the rights to freedom of expression and access to information, and to oppose censorship.

The FXI undertakes a wide range of activities in support of its objectives, including lobbying, educating, monitoring, research, publicity, litigation and the funding of legal cases that advance these rights.

In the process, it networks and collaborates with a wide range of local and international organisations.

Another body that protects freedom of speech is the Freedom of Commercial Speech Trust. Backed by the marketing communication industry and supported by organised business and consumer organisations, the trust focuses on transparent negotiations with legislators.

In September 2004, the Forum of Community Journalists (FCJ) relaunched the organisation as an independent body to serve the interests of all community newspaper journalists in southern Africa. The FCJ was originally set up as a substructure of the CPA, and only represented journalists employed at member organisations.

The decision to become an independent body followed the restructuring of the CPA into the AIP.

The FCJ's launch as an independent body allows it to represent all journalists, including independent community-press journalists, and assists in meeting its objective of becoming a more diverse and representative body for the community-press industry.

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. It is empowered by its members, which include, among others, the SABC, M-Net, Radio 702 and Trinity Broadcasting Network. However, the commission does not deal with X-rated material which, under criminal law, is prohibited.

The Broadcasting Monitoring Complaints Committee (BMCC) was established under sections 21 and 22 of the IBA Act, 1993.

It monitors broadcasting licensees for their compliance with, or adherence to, the terms, conditions and obligations of:

- their broadcasting licences
- the Code of Conduct for Broadcasting Services
- the Code of Advertising Practice.

The BMCC receives and adjudicates complaints from the public regarding licence conditions, and is also entitled to initiate its own investigations into suspected non-compliance by a broadcaster.

If a member of the public is concerned that a broadcaster is not observing its licence conditions, that person may lodge a complaint with Icasa. If a broadcaster is found to be guilty of contravening its licence conditions, then the BMCC makes recommendations to Icasa about action that should be taken.

Material that could be considered X-rated must be submitted to the Film and Publication Board prior to being shown. (See Chapter 5: *Arts and culture*.)

The mission of the National Association of Broadcasters is to protect the interests of broadcasting as a whole, and to liaise with Icasa on matters such as freedom of speech.

Other press organisations operating in the country are the Foreign Correspondents' Association of South Africa, the Printing Industries Federation of South Africa, the South African Typographical Union, the Specialist Press

For the first time, senior editors representing the world's most important media visited South Africa in September 2006 for the International Media Forum, to talk about an effective media strategy for the country. Representatives from the BBC, CNBC Europe, CNN International, al-Jazeera International, *The Wall Street Journal*, *Time Magazine* and other important media players attended the forum in Johannesburg.

Daily and weekly newspapers

Name and website	Publisher	Contact information	Frequency	Language	Total average net sales per publishing day
Beeld (Daily) www.beeld.com	Media 24	PO Box 333, Auckland Park, 2006 T. 011 713-9000 / F. 011 713-9956 E-mail: nuus@beeld.com	MD, M-F	A	101 425
Beeld (Saturday)	Media 24	PO Box 333, Auckland Park, 2006	W, Sat	A	83 092
Burger, Die (Daily)	Media 24	PO Box 692, Cape Town, 8000	MD, M-F	A	97 717
Burger, Die (Saturday) www.dieburger.com	Media 24	PO Box 692, Cape Town, 8000 T. 021 406-2121 / F. 021 406-3211 E-mail: dbnred@dieburger.com	W, Sat	A	112 183
Business Day www.businessday.co.za	BDFM Publishers (Pty) Ltd	PO Box 1742, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5505 E-mail: busday@bdfm.co.za	MD, M-F	E	41 139
Cape Argus, The www.capeargus.co.za	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4156 E-mail: argusnews@ctn.independent.co.za	AD, M-F	E	73 285
Cape Times www.iol.co.za	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000 T. 021 488-4911 / F. 021 488-4173 E-mail: chrishwh@independent.co.za	MD, M-F	E	49 604
Citizen, The (Daily) www.citizen.co.za	Caxton Publishers & Printers Ltd	PO Box 43069, Industria, 2042 T. 011 248-6000 / F. 011 248-6222 E-mail: citizen@citizen.co.za	MD, M-F	E	73 008
Citizen, The (Saturday)	Caxton Publishers & Printers Ltd	PO Box 43069, Industria, 2042	W, Sat	E	55 177
City Press www.citypress.co.za	RCP Media Bpk	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9966 E-mail: news@citypress.co.za	W, Sun	E	178 788
Daily Dispatch www.dispatch.co.za	Dispatch Media (Pty) Ltd	PO Box 131, East London, 5200 T. 043 702-2000 / F. 043 743-5155 E-mail: eledit@iafrica.com	AD, M-F	E	31 918
Daily News, The www.dailynews.co.za	Independent Newspapers KZN	PO Box 4695, Greyville, 4023 T. 031 308-2911 / F. 013 308-2111 E-mail: pather@ann.independent.co.za	AD, M-F	E	51 251
Daily Sun	Media 24	PO Box 121, Auckland Park, 2006 T. 011 877-6000 / F. 011 877-6046 E-mail: news@dailysun.co.za	MD, M-F	E	444 061
Diamond Fields Advertiser	Independent Newspapers Gauteng Ltd	PO Box 610, Kimberley, 8300 T. 053 832-6261 / F. 053 832-8902 E-mail: pbe@independent.co.za	MD, M-F	E	9 001
Herald, The www.theherald.co.za	Johnnic Pub. Eastern Cape	PO Box 1117, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-4966 E-mail: theherald@johnnicec.co.za	MD, M-F	E	27 761
Ilanga www.ilanganews.co.za	Mandla Matla Publishing Co (Pty) Ltd	PO Box 2159, Durban, 4000 T. 031 337-4000 / F. 031 337-9785 E-mail: newsroom@ilanganews.co.za	BW, Th, Mo	Z	110 845
Isolezwe	Independent Newspapers	PO Box 47549, Greyville, 4023 T. 031 308 2878 / F. 031 308 2885	MD, M-F	Z	86 232
Independent on Saturday, The www.iol.co.za	Independent Newspapers KZN	PO Box 4759, Greyville, 4023 T. 031 308-2943 / F. 013 308-2111 E-mail: trevor.bruce@inl.co.za	W, Sat	E	56 588
Mail and Guardian www.mg.co.za	M&G Media (Pty) Ltd	PO Box 91667, Auckland Park, 2006 T. 011 250-7300 / F. 011 250-7502 E-mail: newsdesk@mg.co.za	W, Fr	E	40 283
Mercury, The www.themercury.co.za	Independent Newspapers KZN	PO Box 47397, Greyville, 4023 T. 031 308-2911 / F. 031 308-2333 E-mail: mercnews@inl.co.za	MD, M-F	E	39 409
Witness www.witness.co.za	Natal Witness Pr & Pub Co (Pty) Ltd	PO Box 362, Pietermaritzburg, 3200 T. 033 355-1111 / F. 033 355-1122 E-mail: news@witness.co.za	MD, M-S	E	23 802
Post	Independent Newspapers KZN	PO Box 47397, Greyville, 4023 T. 031 308-2529 / F. 031 308-2555 E-mail: khalil@nn.independent.co.za	W, Wed	E	44 776

Daily and weekly newspapers

Name and website	Publisher	Contact information	Frequency	Language	Total average net sales per publishing day
Pretoria News www.pretorianews.co.za	Independent Newspapers Gauteng Ltd	PO Box 439, Pretoria, 0001 T. 012 300-2000 / F. 012 328-7166 E-mail: ptnews@pretorianews.co.za	MD, M-F	E	28 819
Pretoria News (Saturday)	Independent Newspapers Gauteng Ltd	PO Box 439, Pretoria, 0001 T. 012 300-2000 / F. 012 328-7166	W, Sat	E	18 203
Rapport www.rapport.co.za	RCP Media	PO Box 333, Auckland Park, 2006 T. 011 713-9537 / F. 012 713-9977 E-mail: aleroux@rapport.co.za	W, Sun	A	315 836
Saturday Dispatch	Dispatch Media (Pty) Ltd	PO Box 131, East London, 5200 T. 043 702-2000 / F. 043 743-2968	W, Sat	E	26 494
Saturday Star, The	Independent Newspapers Gauteng Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-2792 / F. 011 633-2794 E-mail: starnews@star.co.za	W, Sat	E	137 878
Soccer-Laduma	CT Media Proprietor	PO Box 787, Sea Point, 8060 T. 021 439-8080 / F. 021 439-7434	W, Thu	E	288 822
Son, Die	Media 24	PO Box 692, Cape Town, 8000 T. 021 406-2075 / F. 021 406-3221	W, Fri	A	186 107
Southern Cross, The	Catholic Newspapers & Pub Co Ltd	PO Box 2372, Cape Town, 8000 T. 021 465-5007 / F. 021 465-3850	W, Sun	E	10 676
Sowetan www.sowetan.co.za	New Africa Publications (NAP) Ltd	PO Box 6663, Johannesburg, 2000 T. 011 471-4000 / F. 011 474-8834 E-mail: editor@sowetan.co.za	MD, M-F	E	131 714
Sowetan Sunday World	NAP Ltd	PO Box 6663, Johannesburg, 2000 T. 011 471-4200 / F. 011 471-4164 E-mail: newsed@sundayworld.co.za	W, Sun	E	149 194
Star, The www.iol.co.za	Independent Newspapers Gauteng Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 836-6186 E-mail: starnews@star.co.za	MD, M-F	E	166 597
Sunday Independent The www.iol.co.za	Independent Newspapers Gauteng, Ltd	PO Box 1014, Johannesburg, 2000 T. 011 633-9111 / F. 011 834-7520 E-mail: jra@sunday.co.za	W, Sun	E	42 447
Sunday Sun	RCP Media Ltd	PO Box 3413, Johannesburg, 2000 T. 011 713-9001 / F. 011 713-9731	W, Sun	E	186 933
Sunday Times www.sundaytimes.co.za	Johnnic Pub.	PO Box 1742, Saxonwold, 2132 T. 011 280-3000 / F. 011 280-5150 E-mail: sundtimes@tml.co.za	W, Sun	E	504 424
Sunday Tribune	Independent Newspapers KZN	PO Box 47549, Greyville, 4023 T. 031 308-2911 / F. 011 308-2662 E-mail: clarke@independent.co.za	W, Sun	E	110 102
Volksblad, Die www.volksblad.com	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7600 / F. 051 447-7034 E-mail: nuus@volksblad.com	MD, M-F	A	28 062
Volksblad, Die (Saturday)	Media24	PO Box 267, Bloemfontein, 9300 T. 051 404-7600 / F. 051 430-7034	W, Sat	A	23 242
Weekend Argus	Independent Newspapers Cape Ltd	PO Box 56, Cape Town, 8000 T. 021 488-4528 / F. 021 488-4229	W, Sat & Sun	E	104 003
Weekend Post	Johnnic Pub. Eastern Cape	PO Box 1121, Port Elizabeth, 6000 T. 041 504-7911 / F. 041 585-3947	Sat	E	30 375
Weekend Witness	Natal Witness Pr & Pub Co Pty Ltd	PO Box 362, Pietermaritzburg, 3200 T. 033 355-1377 / F. 033 355-1377 E-mail: davidbr@ctn.independent.co.za	W, Sat	E	32 064

The abbreviations used are the following: MD (morning daily), AD (afternoon daily), BW (biweekly), M-F (Monday to Friday), Mo (Monday), Tu (Tuesday), W (Wednesday), Th (Thursday), Fri (Friday), Sat (Saturday), Sun (Sunday), A (Afrikaans), E (English), Z (Zulu), n/a (not available)

Association, the South African Guild of Motoring Journalists, Professional Photographers of South Africa, the Media Institute of Southern Africa, and press clubs in major centres.

The mission of the OPA is to provide a non-profit forum in which South African online publishers can address issues of common interest, and which can represent these publishers to advertising agencies and the advertising community, the press, government and the public.

Launched in December 1993, the National Community Radio Forum (NCRF) lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

The NCRF is a national, member-driven association of community-owned and -run radio stations and support-service organisations. Radio station members are independent non-profit community-based organisations.

News agencies

The South African Press Association (Sapa), which is a national news agency, is a co-operative, non-profit news-gathering and distribution organisation operating in the interests of its members and the public. Sapa's foreign news is received from Associated Press (AP) and its representatives in London.

The main foreign news agencies operating in South Africa are *Agence France-Presse*, AP, *Deutsche Presse Agentur*, Reuters and United Press International.

Other agencies are the Eastern Cape News Agency and African Eye News Service in Mpumalanga.

Training centres

Over 40 institutions offer media training in South Africa.

Tertiary institutions include various universities of technology such as Tshwane, Walter Sisulu, Nelson Mandela, the Cape Peninsula and Durban, Rhodes, Potchefstroom, Stellenbosch and Witwatersrand universities; and organisations such as the Cape Town Film and Television School; the SABC's Television Training Centre; the Radio Freedom Institute; the Institute for the Advancement of Journalism; the Cross Media Training Centre; and Nemisa, a government-funded training institute specialising in broadcasting, news media and multimedia skills.

Nemisa is a non-profit organisation established in terms of the Companies Act, 1973 (Act 61 of 1973), that provides much-needed advanced skills training for the broadcasting industry. It has Council for Higher Education accreditation and offers diploma courses, short courses and internships in TV production, radio production and creative multimedia. Government transferred R19,2 million to Nemisa in 2006/07 and has allocated R22,6 million for 2007/08 and R25,3 million for 2008/09.

The Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority (Mappp-Seta) was gazetted on 15 March 2000.

It has six advisory committees, comprising representatives from labour, business and government, which advise on:

- print media
- advertising
- publishing
- printing
- packaging
- film and electronic media.

The Mappp-Seta co-ordinates a sector-training plan across the media industry, and assesses the quality of training courses that are run by the industry.

Parallel to this, the South African Qualifications Authority has approved the establishment of several standards-generating bodies for the media industry.

Similar bodies were implemented for journalism training and communication studies. These bodies are substructures of the National Standards Body (language and communication), which co-ordinates standard-setting in the communication and language sectors.

The 2006 CNN Multichoice African Journalist Award ceremony was held on 15 July 2006 in Maputo, Mozambique.

Jacques Pauw, a *Special Assignment* executive producer, received the TV Features Award for *Room 6A*. This was Pauw's third CNN Award.

For her piece titled *Rape*, Sandy McCowen was presented with the TV General News Award.

Journalism awards

The most important awards include the:

- Mondi Shanduka Newspaper Awards
 - Nat Nakasa Award for Courageous Journalism
 - Sappi Magazine Publishers Association of South Africa PICA Awards
 - Sanlam Community Press Awards
 - Vodacom Awards for Journalism Across All Mediums
 - South African Breweries (SAB) Journalism Awards
 - Sanlam's Financial Journalist of the Year Award
- In March 2006, Charlene Clayton of Independent Newspapers was awarded the top prize in the seventh Citadel Words on Money Journalism Awards for Excellence in Reporting Personal Finance and Investment.

In April 2006, cartoonist Jonathan Shapiro, known as Zapiro, was awarded the title of Journalist of the Year at the fifth annual Mondi Shanduka Newspaper Awards.

The 2006 Mondi Shanduka Lifetime Achiever Award went to David Hazelhurst of *The Star*.

Overall category winners of the annual SAB Sports Journalists of the Year Awards 2006 were David Isaacson (*Sunday Times*), Andrew Skelton (M-Net's Supersport) and Helen Mittwoch (SAfm Radio), while Chris Hewitt (Highbury Safika Media) was voted Overall Sports Newcomer of the Year.

In July 2006, Prof. Guy Berger of Rhodes University won the Nat Nakasa Award.

Ferial Haffajee, editor-in-chief of the *Mail & Guardian*, was the 2006 recipient of the MTN Women in the Media Award.

The MTN Rising Star Award went to 28-year-old Nikiwe Bikitsha, co-presenter of *AM Live* on SAfm and host of SABC3's *Interface*. The Lifetime Achiever Award went to Barbara Cooke, founding director of Target Group Index.

Media diversity

Media diversity in any country is regarded as a measure of the depth of its democracy. South Africa is on its way to achieving wide diversity. The public broadcaster broadcasts on radio and television in all 11 official languages, and there is an array of commercial and non-profit newspapers and broadcasting services around the country. To deepen media diversity, government, together with commercial media entities, established the Media

Development and Diversity Agency (MDDA), which is tasked with providing financial and other support to community and small commercial media projects.

Media Development and Diversity Agency

The MDDA was established in terms of the MDDA Act, 2002 (Act 14 of 2002), which provides for the establishment of an independent, statutory body, jointly funded by government, the media industry and other donors.

The MDDA Act, 2002 was developed after extensive discussion with major media players who agreed to jointly fund such an agency with government to facilitate media diversity. The MDDA is tasked with creating an enabling environment for media diversity and development by providing support to media projects, and facilitating research into media development and diversity issues.

The agency functions independently from and at arm's length of its funders and political-party and commercial interests. This arrangement enables government, the media industry and donors to work together in addressing the legacy of imbalances in access to the media.

The MDDA awarded its first grants to community and small commercial media projects in January 2004.

By the end of March 2006, the MDDA had provided support to close to 100 different media and research projects around South Africa – and had set aside funds to assist the development of a further 10 community radio stations in rural areas around South Africa.

The MDDA provides support to existing grassroots media projects, and assists in establishing new media projects targeting neglected audiences. Over one-third of the projects supported are new projects.

In addition, the MDDA has organised workshops on resource mobilisation for media around the country, and has provided bursaries for 35 grassroots media managers to attend media-management training.

In 2005, the Jupiter Drawing Room (Johannesburg) became the only South African advertising agency to feature in the Top-20 list of the world's best agencies based on creative performance, in a list released by the United States' trade publication, *Advertising Age's Creativity*.

Apart from providing financial support, the MDDA is further working together with a range of media-sector and other related organisations to leverage resources for the sector to create an enabling environment for media development. For example, the agency has established partnerships with advertising and marketing organisations to run workshops and mentoring programmes with small media projects.

Advertising

The Loerie Awards are the best-known South African awards recognising excellence in advertising. The Association of Marketers established these awards in 1978 to coincide with the advent of commercial television in South Africa. The first ceremony took place in 1979.

The Loerie Awards ceremony is a self-liquidating event, with excess monies being ploughed directly back into the industry in the form of bursaries for underprivileged advertising and marketing students via the Loerie Education Trust Fund, and as a donation to the Advertising Benevolent Fund.

The main objective of the Loerie Awards is to encourage creative advertising. In 2006, the most awarded agency was Ogilvy SA, with 28 Loeries. In April 2006, The Jupiter Drawing Room (TJDR) (South Africa), the only 100% locally owned top 10 advertising agency, swept the boards at the Finweek AdReview Agency of the Year Awards.

The first of Jupiter's awards was in the Cape Agency of the Year category, with TJDR (Cape Town) taking the title. The Newcomer Agency of the Year category went to Black River FC, which triumphed over Ireland-Davenport and Grid. The Large Agency of the Year went to TJDR (South Africa), comprising TJDR (Johannesburg), TJDR (Cape Town) and Black River FC. The competition included Ogilvy and the TBWA Group.

The Overall Agency of the Year Award went to TJDR (South Africa), winning a record-breaking four Agency of the Year titles in one evening.

In May 2006, Ogilvy South Africa took top honours at the *Financial Mail AdFocus Awards*. Incorporating Brand Activation 141, Ogilvy Johannesburg was awarded Ad Agency of the Year 2005.

Of the six finalists, two Ogilvy South Africa companies, Ogilvy Johannesburg and Ogilvy Cape Town, were short-listed for the Ad Agency of the Year, with Ogilvy Johannesburg coming out tops.

The Vuka! Awards celebrate excellence in public-service announcements where budgets are substantially lighter than they are for product, service or image advertising.

The Pendoring Awards reward excellence in Afrikaans advertising in both verbal and non-verbal

In June 2006, FCB Johannesburg took the only Press Grand Prix awarded at the Cannes Lions International Advertising Festival for its Lego Periscope Campaign. It was a first for South Africa.

In addition to FCB's big win, South African agencies won a mass of gold medals across almost every category.

Ogilvy Johannesburg won a Gold Lion in the poster category for its Harley Davidson Abandoned Husbands Campaign.

Lowe Bull South Africa took home a Silver Press Lion, and a Bronze Press Lion went to Lowe Bull South Africa, TBWA\Hunt\Lascares, Ogilvy South Africa, FoxP2 and Grey Worldwide South Africa.

The Cannes Lions International Advertising Festival is the most prestigious international advertising festival. It draws thousands of entries in each award category including film, print, outdoor, cyber and media.

According to Nielsen Media Research, spending on advertising grew from R8,1 billion in 2001 to R17,1 billion in 2005 as the consumer spending boom continued to fuel advertising.

Cinema and Internet advertising showed the biggest growth rate, with spending on cinema increasing nine times from R61 million in 2001 to R591 million in 2005. Internet advertising almost tripled from R54 million in 2001 to R141 million in 2005.

The traditional forms of media – print, television and radio – received 91% of the total adspend in 2005, totalling R15,5 billion.

Outdoor advertising showed the slowest growth overall.

form. Categories consist of radio, television, magazines, newspapers, outdoor advertising and campaigns.

Other marketing communication awards

In academic circles, advertising is regarded as one of the core elements of any marketing communication strategy. Marketers are increasingly integrating other core marketing-communication elements, such as direct marketing and sponsorship – two of the fastest-growing areas in marketing communication – into their overall campaigns.

The Assegai Awards were introduced in 1998 to honour excellence in direct marketing, strategic prowess and innovation, with an emphasis on results. These are the only South African marketing communication awards that recognise return on investment – measurable and accountable – talking directly to targeted prospects and existing customers by way of various integrated and actionable media. The awards are recognised as the industry benchmark, with a mandate to promote growth, and to recognise and reward excellence in the direct marketing arena.

Online and offline advertising

Online advertising revenue in South Africa was

expected to reach R183 million in 2006, and to pass the R200-million mark in 2007, according to a survey by technology research firm World Wide Worx.

Online Media in South Africa 2005, a study conducted with the co-operation of the OPA, which represents South Africa's 25 major online publishers, was released in April 2006.

According to the study, it took South Africa's online publishing industry nine years, from 1994 to 2003, to grow to the R60-million revenue mark, yet it is set to treble that amount in the subsequent three years.

Advertising Standards Authority (ASA)

The ASA is the protector of the ethical standards of advertising in South Africa, and protects consumers against manipulative advertising and unfair claims.

The ASA is an independent body established and funded by the marketing-communications industry to regulate advertising in the public interest by means of self-regulation. The ASA co-operates with government, statutory bodies, consumer organisations and industry to ensure that advertising content complies with the *Code of Advertising Practice*.

Acknowledgements

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e.tv

Estimates of National Expenditure 2006, published by National Treasury

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M-Net

Print Media SA

South African Broadcasting Corporation

South African National Editors' Forum

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