



Communications

Technology is involved in almost every facet of South Africa's economy, from telecommunications to increasing productivity in manufacturing with robots and more efficient computer hardware and software.

However, the information and communication technology (ICT) sector is not a clearly defined industry, but rather a component of multiple industries throughout the economy, including manufacturing, business services, trade and telecommunications.

It is estimated that the ICT industry in South Africa contributes close to 7% to the national gross domestic product (GDP). The Department of Communications' mandate is to create a favourable ICT environment, ensuring that South Africa has the capacity to advance its socio-economic development goals and support development in Africa.

This mandate puts the department at the forefront of government initiatives to bridge the digital divide and provide universal access to ICTs for all South Africans. Currently, South Africa's ICT industry is the 20th largest in the world, accounting for 0,5% of worldwide ICT revenue.

The department has prioritised three flagship programmes that are at the core of building a digital information and knowledge society. This includes the acceleration of building a modern digital infrastructure, as well as the policy reforms that position the country for an advanced knowledge economy in 2030.

These programmes are:

- developing a national integrated ICT policy
- rolling out a national broadband network
- implementing the digital broadcasting migration policy.

On 17 May 2012, South Africa celebrated World Telecommunications and Information Society Day. To mark the occasion, a host of festivities took place in the Northern Cape from 17 to 20 May, under the theme *Women and Girls in ICT*. It also served as a precursor for the Women in ICT Conference in November 2012.

At the 25th Universal Postal Union (UPU) Congress, held in October 2012 in Doha, Qatar, the Department of Communications won two seats for South Africa – one as a first-time member of the Council of Administrators (CA) and the other as a member of the Council of Postal Operators, which will run the union from 2013 to 2016.

The CA comprises 41 countries and meets annually at the UPU headquarters in Berne, Switzerland, to ensure the continuity of the UPU's work between congresses.

Legislation

The legislative framework for the work of the Department of Communications is contained mainly in the:

- Broadcasting Act, 1999 (Act 4 of 1999)
- Electronic Communications and Transactions Act, 2002 (Act 25 of 2002)
- Electronic Communications Act, 2005 (Act 36 of 2005)
- Independent Communications Authority of South Africa (Icasa) Act, 2000 (Act 13 of 2000)
- Sentech Act, 1996 (Act 63 of 1996)
- Postal Services Act, 1998 (Act 124 of 1998)
- South African Post Office (Sapo) SOC Ltd. Act, 2011 (Act 22 of 2011)
- South African Postbank Limited Act, 2010 (Act 9 of 2010).

The department is also guided, among other things, by:

- The Constitution of the Republic of South Africa, 1996 (Act 108 of 1996)
- The Public Service Act, 1994 (Act 103 of 1994), as amended
- The Public Finance Management Act, 1999 (Act 1 of 1999), as amended.

The department has prioritised the amendments of the Electronic Communications Bill, the Icasa Bill, the Post and Telecommunications-Related Matters Amendment Bill and the Electronic Communications and Transactions Bill.

The Electronic Communications Act, 2005 is the most important piece of legislation regulating the ICT sector, and its amendment is vital in ensuring the sector's continued dynamism.

Funding and expenditure

The department was allocated R1,7 billion in the 2011/12 financial year. This includes allocations to the following state-owned enterprises (SOEs):

- Sapo: R180,442 million
- Sentech: R279 million; R109,9 million was rolled over from 2010/11 for roll-out of digital terrestrial television infrastructure and transferred to Sentech 2011/12
- South African Broadcasting Corporation (SABC): R126,137 million
- National Electronic Media Institute of South Africa (Nemisa): R33,473 million
- Universal Service and Access Agency of South Africa (Usaasa): R344,098 million
- Icasa: R313,378 million
- .za Domain Name Authority (DNA) R1,5 million.

Role players

The following public entities and SOEs report to the Minister of Communications: Icasa, the Sapo, Sentech, the SABC, Nemisa, Usaasa, and the .za DNA.

The South African Post Office

Sapo was established as a government business enterprise to provide postal and related services to the public. It was granted an exclusive mandate to conduct postal services in the country by the Postal Services Act, 1998. This Act makes provision for the regulation of postal services and operational functions of the postal company, including universal service obligations and the financial services activities of Postbank.

By mid-2012, Sapo had a retail infrastructure of 2 487 service points, which deliver postal, courier, financial and Postbank services. Sapo is expected to open an additional 150 new points of presence by 2014/15. Between 2008/09 and 2011/12, Sapo rolled out more than 4,9 million new addresses. Between 2008/09 and 2011/12, the Postbank depositor's funds increased from R3,2 million to at least R3,9 million. The depositor's book is expected to grow to R5,2 million by 2014/15.

South African Broadcasting Corporation (SABC)

The SABC's mandate requires it to:

- provide its services to all South Africans in all the official languages
- provide programming that informs, educates and entertains, and which reflects the diversity of South Africans
- maintain freedom of expression and journalistic, creative and programming independence.

The SABC's service and broadcasting activities are regulated through the licence conditions issued by Icasa for each of its radio and television services. It reports to the authority quarterly to comply with licence conditions.

The SABC is further bound to meet licence conditions set for its individual radio stations and television channels, and has to abide by regulations set by Icasa, outlining minimum quotas and standards in areas such as local content.

The SABC has two operational divisions: public broadcasting services and commercial broadcasting services.

As a national public service broadcaster, the corporation operates 18 radio stations and three television stations, reaching about 24 million people daily.

Sentech

Sentech provides broadcasting signal distribution for broadcasting licensees. In 2002, Sentech was awarded value-added network service licences for its multimedia and carrier of licences, thus allowing for converged ICT solutions.

In 2009, these licences were converted to individual electronic communications network service and individual electronic communications service licences under the Electronic Communications Act, 2005.

Sentech is responsible for migrating signal distribution infrastructure from analogue to digital in line with technological developments and agreements with the International Telecommunications Union for worldwide migration to digital.

Sentech's activities will ensure that the digital terrestrial television network is ready in time to meet the December 2013 analogue switch-off deadline.

National Electronic Media Institute of South Africa (Nemisa)

Nemisa is a non-profit institute of education formed as part of a government initiative in 1998, in response to the *White Paper on Broadcasting Policy*. The institute's main purpose is to train previously disadvantaged individuals, particularly women, to equip them with the necessary skills to play significant roles in the constantly changing broadcasting environment.

The institute offers hands-on training in electronic media, including content design and production, technical operations and content transmission. It offers national certificates and short courses. National certificates are offered in the areas of television production, animation and radio production.

Between 2008/9 and 2011/12, the institute trained 268 learners in strategic partnerships and special multimedia projects. The number of students trained in electronic media increased from 118 in 2008/9 to 131 in 2011/12 and is expected to increase further to 171 by 2014/15, driven by growth in demand for courses in the areas of television production, radio production, design and animation.

Universal Service and Access Agency of South Africa (Usaasa)

Usaasa's sole mandate is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services. The agency is responsible for managing the Universal Service and Access Fund (Usaf).

The Usaf receives contributions from licensed telecommunications providers and broadcasters, which are used to fulfil universal access obligations in underserved areas. The agency plays a key role in facilitating the achievement of 100% ICT penetration by 2020. Between 2008/9 and 2011/12, 54 access cen-

tres were established. In addition, 267 schools and 56 further education and training institutes were provided with Internet connectivity over the same period. Over the medium term, the fund expects to deploy 600 cyberlabs to underserved areas by 2014/15.

.za Domain Name Authority (DNA)

The .za DNA is responsible for the .za domain name space.

The Department of Communications provides funding for the .za DNA and will continue its support and participation until the .za DNA is fully operational and sustainable. Funding will then be sourced through a funding model developed in accordance with the Electronic Communications and Transactions Act, 2002. The DNA will also oversee the implementation of the alternative resolution mechanism.

Independent Communications Authority of South Africa (Icasa)

Icasa is the regulator for the South African communications, broadcasting and postal services sector. Its mandate is spelt out in the Electronic Communications Act, 2005 for the licensing and regulation of electronic communications and broadcasting services, and by the Postal Services Act, 1998 for the regulation of the postal sector.

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

Icasa's functions include:

- licensing broadcasters, signal distributors

In June 2012, government, Google South Africa and the United Nations Children's Fund launched a local version of the Google Online Family Safety Centre.

The website, www.google.co.za/familysafety, is available in English, isiZulu and Afrikaans, and assists parents and caregivers to help children navigate the internet safely. The site forms the first part of the Online Child Safety Campaign.

and providers of telecommunications and postal services

- making regulations
- imposing licence conditions
- planning, assigning, controlling, enforcing and managing the frequency spectrum
- ensuring international and regional cooperation
- ensuring the efficient allocation of numbers
- ensuring interoperability of networks
- receiving and resolving complaints.

Icasa completed the conversion of licences issued under repealed legislation to licences that comply with the prescripts of the Electronic Communications Act, 2005. Between 2008/09 to 2011/12, the authority completed 4 538 inspections of distribution and sealing of electronic equipment. Over the same period, Icasa received, analysed and closed 11 464 spectrum licensing applications.

South African Accreditation Authority

The South African Accreditation Authority is responsible for the accreditation of authentication and certification products and services used in support of electronic signatures. It is also concerned with monitoring the activities of authentication and certification service providers whose products or services have been accredited.

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

The PNC on ISAD advises the President on matters related to the development of an inclusive information society, facilitates the coordinated development of an inclusive information society, and achievement of the country's information society vision.

The commission comprises leaders in government, industry and civil society. A corresponding body is the Presidential International Advisory Council on ISAD.

Programmes and initiatives

In 2011/12, the department prioritised key policy initiatives, the major one being a com-

prehensive policy review of the telecommunications, postal, broadcasting and information technology policies. This process will lead towards the development of a *White Paper on Communications for South Africa*.

In April 2012, the department hosted a successful National ICT Policy Colloquium under the theme *Defining a New Era in ICTs for All South Africans*. It served to unpack key issues to be confronted in plans to craft the country's digital future. The policy review will address availability, accessibility and affordability of broadband.

Broadband Infrastructure Development

Broadband is an essential digital resource for accessing basic services, products, commerce and job creation. It has the potential to create job opportunities and open new markets that will allow businesses, particularly small, medium and micro-enterprises (SMMEs), to grow.

By May 2012, it was estimated that only 2% of the population had broadband access at home. Given the strategic importance of broadband, the department, together with the ICT industry, has committed to delivering 100% broadband penetration and creating a million jobs by 2020.

The Department of Communication is aware of the interconnectedness of broadband and the licensing of radio frequency spectrum, which is a scarce natural resource. It therefore committed to finalising the policy directions on high demand spectrum to facilitate the licensing of broadband applications in 2012.

The Broadband Strategy and Implementation Plan, outlining the fibre connectivity across the country to district level, is currently being finalised.

Broadband Infraco

Broadband Infraco sells high-capacity long-distance transmission services to licensed fixed and mobile network operators, internet service providers and other value-added network service providers.

In January 2012, Woza Online was launched as a joint venture between Google, the Department of Trade and Industry, Vodacom and the Human Resources Development Council with the aim of enabling South African small and medium-sized enterprises (SMEs) to create their own websites quickly and at no cost.

In the first two months following the launch of Woza Online, a total of 11 200 SMEs created their own websites. Many services provided by SMEs could not have existed before the arrival of the World Wide Web and interactive database queries.

It has a 13 600-km network of long-distance fibre and five open-access points of presence in key metropolitan areas – with an additional seven open access points of presence expected over the next few years.

To enhance South Africa's international connectivity and the speed of broadband, Broadband Infraco co-invested with the private sector in the deployment of the West African Cable System (WACS).

The WACS is the fifth submarine cable system linking South Africa to the world and was launched in May 2012. 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 also boasts 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.

Sentech and Broadband Infraco have also commenced with the broadband plan for the KwaZulu-Natal province pilot project, and site surveys in three districts are complete.

Broadcasting digital migration

During 2011/12, the department made substantial progress towards the implementation of the Broadcasting Digital Migration Policy. In February 2012, final amendments to the policy were published in the *Government Gazette* for implementation by various role players.

Icasa has started the process of finalising the digital terrestrial television regulations.

The SABC, Sentech and Usaasa will play a key role in assisting the department to deliver digital broadcasting in the country. Sentech has already achieved digital signal coverage of more than 60% of the population on the DVB-T2 transmission standard.

The South African Bureau of Standards standard, according to which locally manufactured set-top boxes (STBs) will be built, was launched at the inaugural ICT Indaba in June 2012.

A digital terrestrial television awareness campaign was launched in 2012 to educate the South African public about digital broadcasting and how to access it. The campaign is presented in different phases in all the provinces.

By late 2012, 60% of digital terrestrial television rollout coverage was achieved.

Rural Development Strategy

ICTs play a significant role in speeding up the integration of services for the development of rural areas and ensuring that rural communities, including those in remote areas, are not left out of the knowledge economy.

The main goal of the department's Rural Development Strategy is therefore to address the vacuum in rural ICT and empower rural communities by promoting sustainable job creation and eradicating poverty in rural areas.

The strategy includes programmes that will encourage civil society to promote the use of ICT services and provide the necessary infrastructure.

New Partnership for Africa's Development (Nepad) e-Africa Programme

The Department of Communications provides programmatic support to the implementation of the Nepad e-Africa Programme.

Nepad's e-Africa Programme promotes Africa as a globally competitive digital society. The programme was previously known as the Nepad e-Africa Commission and is tasked with developing policies, strategies and projects at

A study conducted by World Wide Worx – the first ever in-depth analysis of South Africa's internet economy – has revealed that the internet economy contributes up to R59 billion (or 2%) to South Africa's gross domestic product (GDP). Moreover, this contribution is rising by around 0,1% a year, and will reach R79 billion by 2016, contributing up to 2,5% to South Africa's GDP.

The total spent by consumers, small and medium-sized enterprises, and government on products and services via the internet, as well as on internet access and infrastructure, is R59 billion.

continental level for the development of ICT throughout Africa.

Key initiatives include the ICT Broadband Infrastructure Network for Africa, a submarine cable system (Uhurunet), a terrestrial cable system (Umojanet), and the Nepad e-Schools Initiative.

This initiative aims to harness ICT to improve the quality of teaching and learning in African primary and secondary schools and equip young Africans with the knowledge and skills that will enable them to participate confidently and effectively in the global information society and knowledge economy.

Sixteen African countries have signed memorandums of agreement with the Nepad e-Africa Programme and a consortia of private sector companies to participate in the Nepad e-Schools demo project. By 2012, over 80 Nepad e-Schools demonstrations have been implemented. Each school in the demonstration project was equipped with a computer laboratory containing at least 20 personal computers as well as a server and networking infrastructure and peripheral devices such as scanners, electronic whiteboards and printers. The schools were connected to the internet to enable them to access content and to communicate with the rest of the world.

Job creation

In line with government's New Growth Path, the department, together with the ICT sector, aims to facilitate the creation of over 150 000 direct and indirect jobs by 2020.

An industry-wide committee will be established to identify opportunities, using a collective database to ensure effective monitoring and evaluation.

Jobs will be created across various subsectors of the industry through:

- providing broadband infrastructure
- establishing content hubs for radio and television
- animation
- e-cooperatives
- using ICTs in further education and training colleges
- tailor-made solutions for SMMEs
- digital broadcasting and distributing STBs
- rolling out PostBank.

Internet

South Africa's internet economy contributes 2% to the country's GDP, according to a study by research consultancy World Wide Worx, released in May 2012. This contribution is rising by around 0,1% a year, meaning it should reach 2,5% by 2016.

The study confirmed South Africa's position as having the largest Internet economy in Africa: South African consumers, small businesses and government spent R59 billion on products and services via the internet, internet access and infrastructure in 2011.

Of this, R29,2 billion was spent on internet presence and access, while R13,5 billion was invested in fibre and other data infrastructure by mobile networks. Business-to-consumer e-commerce, the biggest subsector of which is

In June 2012, South Africa played host to the inaugural Information and Communication Technology (ICT) Indaba at the Cape Town International Convention Centre. The event was organised by the Department of Communications and endorsed by the International Telecommunications Union. Expected to run annually for the next five years, the ICT Indaba will be used to discuss ICT policies geared towards poverty reduction and the creation of a knowledge based economy across the continent. A medium-term target of 80% internet connectivity throughout Africa by 2020 was set.

South Africa's airline industry, comprised close to R9 billion in 2011.

South African e-commerce is growing at a rate of around 30% a year, according to the study, with the growth showing no signs of slowing down.

The *Small to Medium Enterprises (SME) Survey 2012* found that 410 000 SMEs in the country have a website – representing 63% of active, formal SMEs. Approximately 150 000 SMEs in South Africa would not be able to survive without their web presence. With SMEs accounting for about 7,8 million jobs in South Africa, this means as many as 1,56 million jobs would be in jeopardy were it not for the internet.

This indirect economic impact is expected to increase significantly in the coming years, fuelled by rapid growth in the number of Internet users, stimulated partly by the smartphone explosion taking place in South Africa.

Mobile penetration stands at about 80%, with 40 million South Africans using cellphones. Around 10 million phones are sold in South Africa every year, and it is expected that by 2013, smartphones will account for half of this number. Smartphone users, in turn, eventually become Internet users, a trend that already began in South Africa in 2010.

Internet access

A study conducted by World Wide Worx in May 2012, found that the number of Internet users in South Africa rose rapidly in 2011/12, driven by both smartphones and ordinary cellphones, as these made the internet accessible to the mass market.

The findings showed that the internet user base grew by 25%, from 6,8 million in 2010 to 8,5 million at the end of 2011. This trend was expected to continue in 2012, taking South Africa's internet user base past the 10-million mark by the end of 2012.

According to the survey, 7,9 million South Africans access the internet on their cellphones. Of these, 2,48 million access it only on their cellphones, and do not have access on computers. The remaining 6,02 million users access the internet on computers, laptops and tablets.

However, 90% of this number – 5,42 million – also access it on their cellphones. This means that almost eight million South Africans sometimes or regularly access the internet on their phones.

Broadband access

Broadband access in South Africa has more than doubled in the last two years, as mobile operators slashed the cost of data and network roll-out accelerated. This is according to the *Internet Access in South Africa 2012* study by World Wide Worx, released in December 2012.

The report shows that the number of broadband subscriptions grew from 3,6 million at the end of 2010 to an expected 8,2 million by the end of 2012 – 128% growth. Many users have multiple forms of broadband access – such as an ADSL account as well as 3G – while many hop between operators to take advantage of promotional offers. As a result, the number of individual broadband users is substantially lower, but has also more than double in the past two years. The number has grown from 2,8 million to 6,7 million – 140% growth in just two years.

World Wide Worx's research found that fixed-line broadband subscriptions are now outnumbered eight to one by mobile broadband subscriptions. Telkom's ADSL service now holds just 10,6% of the broadband subscriber market in South Africa.

Measured by subscriptions, South Africa now has an apparent 15,8% broadband penetration of the population. However, due to extensive multiple-use of broadband subscriptions, especially owing to the falling cost of data and the proliferation of promotional offers, the number of individuals using broadband subscriptions represents only 11% penetration of the population.

Social media

The emergence of social media as a social and business communication tool in the last few years has been dramatic. In South Africa, a country where first- and third-world conditions

are often separated by a mere few kilometres, social media has evened the playing field and created a platform that is affordable to everyone, easy to use and highly effective as a communication tool.

By July 2012, there were 5 119 620 Facebook users in South Africa, making it the country with the 31st most Facebook users in the world. It grew by more than 279 160 from the beginning of 2012.

Users in the 18 to 24 and the 25 to 34 groups each comprise 30% of the market, followed by the 35 to 44 age group at 15% and the 45 to 54 segment at 8%. The 65 years and older and the 6 to 16 years old group each comprises 5%, with age group 55 to 64 taking 4% and the 13 to 15 age group making up the remaining 3%. The demographics are split fairly, with 51% of Facebook users being female.

South Africa was the most active country in Africa regarding the use of Twitter. During the last three months of 2011, over 11,5 million geo-located tweets originating on the continent was analysed, complemented by a poll of 500 of Africa's most active tweeters.

Over the survey period, South Africa registered over twice as many tweets (5 030 226) as the next most active country, Kenya (2 476 800), followed by Nigeria (1 646 212), Egypt (1 214 062) and Morocco (745 620).

Africa's tweeters were considerably younger than their global counterparts: 60% of the continent's most active tweeters are aged 20 to 29, whereas the average age of Twitter users worldwide lies at 39.

The study's finding also included that:

- 57% of tweets from Africa are sent from cellphones

As part of efforts to reach its goal of being carbon neutral by 2020, the South African Post Office (Sapo) plans to buy 30 electrical scooters per year until 2015. It is estimated that this will reduce the carbon dioxide emissions of its delivery scooters by 67%, which is equivalent to 87,3 tons of carbon. During 2013, Sapo will also plant 2 000 trees at schools to offset carbon emissions and create a better environment.

- African Twitter users are also active across a range of social media, including Facebook, YouTube, Google+ and LinkedIn
- Twitter in Africa is widely used for social conversation, with 81% of those polled saying that they mainly used it for communicating with friends
- Twitter is becoming an important source of information in Africa: 68% of those polled said that they used Twitter to monitor news, while 22% said they used it to search for job opportunities.

Cybercrime and cybersecurity

A National Cybersecurity Policy Framework was approved by Cabinet on 8 March 2012. The policy focuses on building the institutional framework and capacity necessary for mitigating any threats to the ICT environment. South Africa is one of the few countries in Africa with a policy document.

As a result of the population's ever-increasing dependence on the internet, there has been a significant rise in hacking, security breaches, misuse of personal information, cybersecurity threats and cybercrime.

As a result of these trends, and in an attempt to ensure that South Africa measures up to international best practice, the Minister of Communications on 26 October 2012 published the Electronic Communications and Transactions Amendment Bill, inviting the public to submit written comments to the proposed amendments to the Electronic Communications and Transactions Act, 2002.

Mobile communications

According to *Census 2011*, the proportion of households owning cellphones significantly increased from 31,9% in 2001 to 88,9% in 2011. The proportion using landlines decreased from 23,9% in 2001 to 14,5% in 2011.

According to research by web marketing company Xcellent Media, there were 29 million cellphones in use in South Africa by June 2012. Vodacom led the market with a 41% share, while MTN trailed at 40%. Some 95% of subscribers remained with their network

In November 2012, the Department of Economic Development in collaboration with FibreCo Telecommunication launched the first five-day fibre optic training programme on the maintenance of telecommunication cables.

FibreCo Telecommunications, a joint venture between Cell C, Convergence Partners and Internet Solutions, has passed the halfway mark of the first link of its R5-billion national fibre-optic broadband network.

The company said that the construction of 600 km of the targeted 1 000 km stretch from Johannesburg, through Bloemfontein, to East London has been completed.

This network forms part of FibreCo three-phase, 12 000 km, high-speed, open-access, longhaul, fibre-optic network plans. FibreCo aims to complete the first 2 000 km connecting Johannesburg and Cape Town through Bloemfontein, Port Elizabeth and East London by the third quarter of 2013.

for around 4,2 years. The majority (82%) of mobile subscribers opted for prepaid packages while only 18% signed contracts, and 70% of mobile subscribers did not own a landline.

South Africa has five operators: Vodacom, MTN, Cell C, Virgin Mobile and Telkom (8ta).

The Regulation of Interception of Communications and Provision of Communication-Related Information Amendment Act, 2008 (Act 48 of 2008), aims to help law-enforcement agencies investigate and combat serious crime. It gives law enforcement access to the identity and whereabouts of SIM-card owners who use cellphones in planning and executing serious crimes.

As of July 2011, cellphone service providers are prohibited from activating a new SIM card unless they have recorded the customer's cell number, full names, identity number and address, and verified the information.

Telkom

Telkom is Africa's largest integrated communications company, providing integrated communications solutions to a range of customers. Telkom operates in nine different countries across Africa; however, its core market is South Africa, contributing 98,9% in revenue.

Did you know?

SABC News and Current Affairs is responsible for:

- 1 255 radio news bulletins in 13 languages on 18 radio stations every week
- 32 daily current affairs radio shows
- six television news bulletins broadcast daily and 10 television current affairs shows on SABC 1, SABC 2 and SABC 3 every week.

The SABC's online news service attracts about 600 000 visits a month.

It is listed on the Johannesburg Stock Exchange Ltd and majority-owned by the Department of Communications. Telkom was the country's only fixed-line operator until 2006, when the country's second fixed-line operator, Neotel, began its operations.

The organisational structure comprises three major business units: Telkom South Africa, Telkom International and Telkom Data Centre Operations.

In October 2010, Telkom launched its mobile operator, 8ta. In September 2011, it launched Telkom Business Mobile, which focuses exclusively on the business market.

Postal sector

The cornerstone of national policy for the postal sector is the provision of a universal service at an affordable price and an acceptable standard for all citizens. To ensure this, a universal service obligation has been 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.

Mail Business boasts 26 mail sorting centres for domestic mail and parcels, and three international sorting centres for international mail and parcels. Between these centres, approximately six million mail items are handled daily and 50 tons of parcels are processed a year.

Mail is transported to and from these sorting centres domestically to 7 188 delivery offices (delivery depot centres, lobby boxes and 2 443 post office branches). In 2010/11, over 1,7 mil-

lion new addresses were rolled out, of which 65% were in rural and underserved areas.

Specialised Sapo products include:

- Securemail
- Speed Services Couriers
- Parcelplus
- insurance and cash-on-delivery
- Postbank
- a courier freight group made up of XPS and PX
- Docex.

Philatelic Services

The Philatelic Services of Sapo is responsible for producing South Africa's postage stamps and other stamp-related products.

Sapo prints more than 380 million postage stamps a year. They not only reach every corner of South Africa, but also the rest of the world. Although stamps are produced mainly to serve as prepayment for postage, their beauty and historical significance have inspired people to collect them since the first postage stamps were produced in England in 1840.

Over the years, many of them have become valuable collector's items. For example, the first triangular postage stamp was issued on 1 September 1853 in the Cape of Good Hope, which was a British colony at the time. The triangular-shaped stamp, which became known as the Cape Triangular, was the first stamp to be issued in Africa and has become a sought-after collector's item worldwide.

Stamp issues are divided into two main categories:

- Definitive stamps are issued every five to seven years and comprise a set of designs in a full range of face values to provide for the country's postal needs. They usually reflect a particular theme, such as the seventh definitive series, Colourful South Africa, which depicts fish, flowers, birds and butterflies.
- Commemorative stamps are issued according to an annual commemorative stamp-issuing programme. Between 12 and 15 commemorative issues are produced per year. They often commemorate significant historical events or people, or coincide with

important days such as Heritage Day or World Post Day.

Postbank

The Postbank Limited allows Sapo, through the Postbank, to prioritise the banking needs of the unbanked majority, thus facilitating their inclusion into the economic mainstream.

The Postbank Limited Act established the Postbank division of Sapo as a separate legal entity, with the principal aim of expanding the existing range of banking services to, among others:

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

In doing so, the Postbank will use the existing Sapo infrastructure but it is not bound by the Act to do so exclusively.

PostNet

PostNet was founded in 1994 when there was a need for an operation that could deliver a range of efficient and reliable business solutions.

PostNet is South Africa's largest privately owned counter network in the document and parcel industry, trading across more than 250 owner-managed retail stores. PostNet serves in excess of 55 000 walk-in customers per day, countrywide.

There are five product types within PostNet, namely courier, copy and print, digital, stationery and mailboxes.

The media

When South Africa became a democracy in 1994, the media was freed from all restrictions. According to the Bill of Rights, as contained in the Constitution, 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.

Media Development and Diversity Agency (MDDA)

The MDDA is a statutory development agency for promoting and ensuring media development and diversity, set up as a partnership between the South African government and major print and broadcasting companies to assist in, among others, developing community and small commercial media in South Africa.

It was established in 2003, in terms of the MDDA Act, 2002 (Act 14 of 2002) and started providing grant funding to projects on 29 January 2004.

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 to address the legacy of imbalances in media access.

With a limited budget of just more than R201 million accumulatively since 2004, the MDDA has supported more than 413 media projects, focusing on historically disadvantaged communities, using indigenous languages.

By March 2012, the agency had trained over 1 764 people; and provided 247 bursaries to different radio and print media. It had created approximately 310 direct and indirect job opportunities.

Radio

Established on 1 August 1936, the SABC is South Africa'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 2012, the SABC's national radio network comprised 18 radio stations. Fifteen of these were dedicated specifically to public-service broadcasting and included 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 people of the Northern Cape. The SABC has three stations in its commercial portfolio. These are 5FM, Metro FM and Good Hope FM.

Channel Africa broadcasts live on three platforms: shortwave, satellite and the internet. Its broadcasts are in Chinyanja, Silozi, Kiswahili, English, French and Portuguese.

SABC Radio has 25,486 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
- 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.

Community radio

Community broadcasting remains a critical project for the Department of Communications.

In 2011/12, R5 million was transferred to Nemisa to fund capacity-building for community radio stations in the department's community

In South Africa, mobile phone use has increased from 17% of adults in 2000 to 76% in 2010. Today, more South Africans – about 29 million – use mobile phones than radio (about 28 million), TV (about 27 million) or personal computers (about six million). Only five million South Africans use landline phones.

radio broadcasting support programme and implement content production programmes. R5 million was transferred to the SABC for radio programme production. R7 663 million was transferred to the SABC for upgrading the existing stations and providing additional infrastructure to stations that currently have single studios.

By June 2012, South Africa had 165 community stations, with some 8,6 million listeners a week, collectively. Their scope and reach varies enormously – from the 416 000 Johannesburgers who make up the audience of Jozi FM to, for example, the 32 000 people who listen to Overvaal Stereo in the farming communities of the Free State province.

Icasa licensed 19 community radio stations in 2011/12.

Television

The SABC is South Africa's national public-service broadcaster. As such, it is obliged to provide a comprehensive range of distinctive programmes and services. It must inform, educate, entertain, support and develop culture and education and, as far as possible, secure fair and equal treatment for the various groupings in the country, while offering world-class programming on television and radio.

The SABC's television network comprises three television channels – all free-to-air. SABC TV has an audience of 30,248 million weekly (86,6% of adults watch SABC TV in South Africa). South African television is broadcast in all 11 official languages and also in Sign Language.

Community television

In 2007, Soweto TV was the first community television station to obtain a seven-year broad-

casting licence from Icasa. Since then, five more seven-year licences have been issued. There are currently five stations operational in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay. The issuing of new community television licences is on hold until the migration from analogue to digital broadcasting is complete.

Free-to-air television

e.tv is South Africa's first private free-to-air television channel, launched in 1998. By mid-2012, it was 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.

e.sat tv supplies television, mobile and online news to various channels in South Africa, across the African continent and in the United Kingdom (UK) under the brand name eNews Channel Africa (eNCA). Growing out of the success of *eNews Prime Time*, eNCA is South Africa's first and most watched independent 24-hour television news channel. 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 200 000 Afrikaans viewers on kykNET.

Satellite broadcasting

MultiChoice started as the subscriber management arm of M-Net. It is the leading multichannel digital satellite television operator across the African continent.

MultiChoice provides its DStv services to different market segments. The DStv bouquets cater for different lifestyles and pockets, from entry level to premium. In October 2012, DStv expanded its subscription satellite television bouquet by adding a new set of high-definition (HD) movie channels. The HD channels upgrade and additions meant that DStv has 14 HD channels.

The changes come as a result of MultiChoice's expanded capacity since the successful launch of the new Intelsat 20 (IS-20) satellite at the start of August 2012, giving the pay-television platform a massive boost in broadband capacity, which makes more television channels possible.

In 2009, Icasa made licences available to new entries into the pay-TV market. Top-TV was launched in May 2010. It offers five bouquet options, arranged in seven package options.

Print

Technical handling of the print media in South Africa rates among the best in the world. This is one reason why newspapers and magazines have held their own in a volatile information era, characterised by the vast development of various new forms of media-delivery platforms via the Internet.

Most South African newspapers and magazines are organised into several major publishing houses: 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; Ramsay, Son and Parker (Pty) Ltd; and Kagiso Media.

A merger between Media24, the Paarl Media Group and the Natal Witness was approved by the Competition Tribunal on May 2012.

Newspapers

According to the *Audit Bureau of Circulations (ABC) 2012 Third Quarter Report*, total newspapers declined by 30 000 copies, compared to the previous quarter.

The daily newspaper category continued to decline in 2012, with several sharp drops in total circulation, although growth in vernacular circulation continued.

Independent News-papers' *Isolezwe* rose 0,8% in the third quarter to 107 628 total circulation from the corresponding period in the

previous year. Four Independent Newspapers titles showed the largest declines, although a large part of this is owing to the fact that the company reduced incentivised sales: the *Cape Argus* was down 27% to 33 006 total circulation from the year before; *The Star* was down 23% to 105 686; the *Cape Times* down 20% to 34 523; and the *Pretoria News* down 17% to 19 235.

Weekly newspapers – led by Ramcom’s *Motorsport World* (up 47% to 4 246 total circulation) and Media24’s *Soccer Laduma* (up 5% to 360 668) – posted solid growth.

English and Afrikaans weekend newspapers continued to slide – led by Independent Newspapers’ *The Saturday Star* (down 22% to 75 682 total circulation from the year before); *Pretoria News Saturday* (down 22% to 11 174); and Media24’s *Sondag* (down 17% to 39 085).

Vernacular growth continues with Independent Newspapers’ *Isolezwe ngeSonto* showing the biggest growth (up 4% to 84 577 total circulation from the year before).

Magazines

The magazine industry in South Africa is a fiercely competitive environment in which new titles appear all the time, despite the worldwide competition 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.

Figures for the third quarter of 2012, released in November 2012, showed that overall consumer-magazine circulation declined sharply, yet there was strong growth from titles such as Media24’s *Kuier* (up 68% to 78,896 total circulation from the year before); Media24’s *Kick Off* (up 35% to 61,140), and Caxton’s *Living and Loving* (up 34% to 29,257).

Sciofon’s *Playboy*, however, dropped 65% to

In June 2012, Cheryllyn Ireton became the first woman, as well as the first South African to head the World Editors’ Forum, the global organisation for editors within the World Association of Newspapers and News Publishers.

3,839 total circulation from the year before.

Online media

The February 2012 Digital Media and Marketing Association (DMMA)/Effective Measure website statistics reveal that News24 has the largest website in South Africa, followed by IOL and Howzit.MSN.

The February 2012 Effective Measure statistics reveal that South Africa produced 14 708 417 unique browsers registering 453 773 181 page views. This is an increase of 2% over the January 2012 stats.

News24 remains the top South African website with 2 587 454 unique monthly visitors, followed by IOL with 1 990 347 unique visitors and Howzit.MSN with 1 888 378 unique browsers. News24 also reigned supreme in the mobile arena with its News24 Mobi site, which attracted 953 748 unique monthly browsers in February 2012.

Media organisations and role players

Print Media South Africa (PMSA), established in 1996, administers individual bodies, namely the Newspaper Association of South Africa (the oldest communication organisation in South Africa, established in 1882), the Magazine Publishers’ Association of South Africa and the Association of Independent Publishers (AIP).

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 more than 700 newspaper and magazine titles in South Africa.

The 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 the PMSA, but not a constituent member, is the ABC, responsible for auditing and verifying print-media circulation figures.

The AIP was formed in September 2004 and 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 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.

Against the backdrop of positive political developments on the African continent, Sanef spearheaded the formation of the All Africa Editors' Conference. The Southern African Editors' Forum was subsequently formed in 2003.

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.

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.

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

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

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.

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 decision to become an independent body followed the restructuring of the Community Press Association into the AIP.

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 flouted by members who subscribe to its code of conduct.

Members include the SABC, M-Net, Radio 702 and the Trinity Broadcasting Network. However, the commission does not deal with X-rated material, the broadcast of which is prohibited under criminal law.

The Broadcasting Monitoring Complaints Committee (BMCC) was established under sections 21 and 22 of the Independent Broadcasting Authority Act, 1993 (Act 153 of 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, 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.

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.

The mission of the DMMA is to provide a 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.

The National Community Radio Forum (NCRF), launched in December 1993, 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.

The Professional Journalists' Association was launched in March 2010. Its mission is to give a voice to working journalists and represent their interests in newsrooms across the country.

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

News agencies

The national news agency, the South African Press Association, is a cooperative, non-profit organisation.

The main foreign news agencies operating in South Africa are:

- 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
- Sappi Magazine Publishers Association of South Africa Pica Awards
- Sanlam Community Press Awards
- Vodacom Awards for Journalism Across All Mediums

- South African Breweries Journalism Awards
- Sanlam's Financial Journalist of the Year Award
- CNN MultiChoice Africa Awards
- Discovery Health Journalism Awards.
- Sanef's Nat Nakasa Award for media integrity, which was awarded to Press Ombudsman Joe Thloloe. Thloloe had been a journalist for over 50 years, and had headed a number of media organisations, like the SABC News and e.tv.

Media awards

The 2012 MDDA/Sanlam Local Media Awards included the inaugural Rantho/Letsebe Community Media Achievement Award, which recognises the best community media project in South Africa that ensures the noble principles of community ownership and control, community participation and relevant community content in the languages spoken in the community served.

Entries from 509 community and small commercial newspapers, corporate-owned local newspapers and community radio stations from across the country as well as one from Namibia was received.

These included:

- 921 individual entries in the typography, writing and photography categories
- 79 entries for the radio categories
- more than 213 photographs
- over 79 radio programmes.

This makes the competition the largest of the many community/grassroots competitions held in South Africa annually.

Rantho/Letsebe Community Radio Riverside won the Rantho/Letsebe Community Media Achievement Award. Other winners included:

- Best Community/Small Commercial Newspapers: *Alex Pioneer*
- Independent Emerging Newspaper (between two to five years): *EC Today (Eastern Cape Today)*
- Independent established newspaper: *Polokwane Observer*
- Best Free Paper: *Tygerburger*
- Best Paid Paper: *Lowvelder*

- Hultzer Trophy (circulation under 10 000): *Polokwane Observer*
- Cronwright Trophy (circulation above 10 000): *Lowvelder*.

Advertising

South Africa has a vibrant and dynamic advertising industry. Local advertising agencies are often recognised internationally for their excellence.

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.

It is an independent body established and funded by the marketing-communication industry to regulate advertising in the public interest by means of self-regulation.

The ASA cooperates with government, statutory bodies, consumer organisations and industry to ensure that advertising content complies with the Code of Advertising Practice.

The code is the ASA's guiding document based on the International Code of Advertising Practice, prepared by the International Chamber of Commerce. Drawn up by the ASA with the participation of representatives of the marketing communication industry, the code is amended from time to time to meet the changing needs both of the industry and of our society.

Advertising awards

The Loerie Awards are the best-known South African awards recognising distinction in advertising. In 2012, the 34th Loeries attracted 3 182 entries, a big increase on 2011's figure of 2 870. The awards were judged by panels comprising over 130 local and international experts in their fields. Some 261 awards were handed out.

Grands Prix were awarded to OFM's Change your Tune Direct & Promotional Mail by Joe Public; South African Breweries Be the Coach Integrated Campaign by Ogilvy Cape Town; Mercedes-Benz Attention Assist Radio Cam-

paign by Net#work BBDO; and Nando's South Africa The Last Dictator Standing TV & Cinema Commercial by Black River FC.

For the first time in Loeries history, a Gold Loerie was awarded to two agencies, King James and Black River FC, for their TV & Cinema commercial campaign, which saw a battle of wits between two local brands, Santam and Nando's South Africa.

A Lifetime Achievement Award was presented to John Hunt, Worldwide Creative Director, TBWA Worldwide, for his outstanding contribution to the South African and global advertising industry over the course of his career.

The Marketing Leadership and Innovation Award was presented to Robbie Brozin of Nando's.

Other important annual awards are the Eagles and the Pendoring Awards.

At the 2012 AdReview Awards, held in May 2012, Gloop was named Media Agency of the Year for 2011, becoming the first digital agency to win the award. The awards give recognition to the advertising agencies and individuals that performed best during the previous calendar year – from January to December 2011.

Nunu Ntshingila won the Lifetime Achievement Award, while the Boabab Award went to The Old Shanghai Firecracker Factory.

Conclusion

Today's modern, global and competitive economy is driven by ICT, which emphasises the strategic role that the Department of Communications has to play.

The department is entrusted with two main leadership roles as it charts the course towards sustainable development. On the one hand, it must help ensure that government maximises its use of ICT to improve the delivery of services to all citizens. On the other, it must help the ICT sector fulfil its role as one of the primary enablers of economic growth and job creation.

The two roles require the department to assist South African citizens, as well as the private sector, to take full advantage of the

opportunities provided by ICT to interact with government, with each other and with business partners. This will unlock this country's enormous potential, but will require dedicated cooperation.

ICT also play a significant role in public service delivery. In the recent past, communities, through protest action, have called on government to accelerate delivery of basic services.

The Department of Communications is perfectly positioned to provide solutions on how government can interact and communicate with citizens effectively, both virtually and physically. In this regard, the ICT sector is a crucial factor, as it provides the info structures that make society functional.

The department is therefore continuing to establish partnerships with various stakeholders in the sector, big and small, corporate and non-governmental, in the quest to provide quality services to the people.

However, for the ICT industry to play its part in helping the country tackle its various challenges successfully, the skills shortage needs

to be addressed. This requires developing better ways of ensuring that the supply of trained people matches industry demand. In particular, the department must continue to ensure that the ICT industry is responsive to the high unemployment in the country. Its e-skills initiative is on such intervention, and it is engaging with the industry to use its training resources to the best effect.

Because the ICT industry is a fast-moving sector, the department's training initiatives must be flexible enough to respond to these changes.

Currently, South Africa's ICT industry is highly competitive and noted for its vibrancy and the high quality of its work. However, one issue that needs to be dealt with properly is the better use of resources like radio spectrum and broadband.

The department will therefore continue to focus on an informed and progressive strategy that will help transform the ICT sector, attract investment, and create jobs.

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