SOUTH AFRICA YEARBOOK 2023/24

Communications and Digital Technologies

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Communication plays an important role in the fundamental operation of a society. It links people and businesses, facilitating communication and the flow of ideas and information, and coordinating economic activities and development.

The Department of Communications and Digital Technologies (DCDT) is mandated to enable South Africa's digital transformation in an effort to achieve digital inclusion and economic growth by creating an enabling policy and regulatory environment. This is done through the implementation of the 2016 *National Integrated Information and Communications Technology (ICT) Policy White Paper*, which provides for the participation of multiple stakeholders for inclusive digital transformation; interventions to reinforce competition and facilitate innovation across the value chain; measures to address issues raised by ICT and convergence; and the establishment of a new national postal policy framework.

It also provides for policies to address the digital divide and affordable access, supply-side issues and infrastructure rollout, and demand-side issues to facilitate inclusivity.

Legislation

The DCDT derives its mandate from several acts and policies. Key among these are the:

- Film and Publications Act, 1996 (Act 65 of 1996), as amended, which provides for the classification of certain films and publications, and establishes the Film and Publication Board (FPB) and Appeals Tribunal;
- Postal Services Act, 1998 (Act 124 of 1998), as amended, which makes provision for the regulation of postal services;
- Broadcasting Act, 1999 (Act 4 of 1999), as amended, which establishes a broadcasting policy in South Africa;
- Independent Communications Authority of South Africa (ICASA) Act, 2000 (Act 13 of 2000), which establishes the regulator in the sector;
- Electronic Communications Act (ECA), 2005 (Act 36 of 2005), as amended, which provides the legal framework for convergence in the broadcasting, broadcasting signal distribution, and telecommunications sectors. It also allows for the granting of new licensees and social obligations; the control of the radio frequency spectrum; and the regulation of electronic communication network services, electronic communication services and broadcasting services; and
- South African Postbank SOC Limited Act, 2010 (Act 9 of 2010), as amended, which provides for the corporatisation of Postbank and its shareholding arrangements as well as the existence of the Post Office and its subsidiaries.

Over the medium term, the department will focus on coordinating the rollout of broadband internet into underserviced areas through the South Africa Connect project, and on enabling digital transformation and inclusion through legislative and regulatory interventions. Cabinet-approved reductions to the department's budget amount to R727.9 million over the MTEF period (R415 million in 2024/25, R153.7 million in 2025/26 and R159.2 million in 2026/27), mainly on transfers and subsidies, capital assets, and goods and services.

The department plans to absorb this by reducing travel and hosting more meetings online, conducting more work in-house rather than using consultants, and reducing the number of non-core personnel, which will see a decrease in its number of personnel from 357 in 2024/25 to 346 in 2026/27. As a result, and following the one-off funding for phase 2 of the South Africa Connect project in 2024/25 and 2025/26, total expenditure is expected to decrease at an average annual rate of 8.3%, from R3.3 billion in 2023/24 to R2.6 billion in 2026/27.

An estimated 53% (R4.9 billion) of the department's budget over the MTEF period is allocated to transfers to entities for their operations and for project-specific funding. Of this amount, R1.7 billion is allocated to the South African Post Office for its universal service obligations to provide postal services in underserviced areas, R1.5 billion is allocated to the ICASA for regulating the ICT and postal sectors, and R672.4 million is allocated to the South African Broadcasting Corporation for various activities.

The department was finalising its revised organisational structure and is filling critical positions. As a result, expenditure on compensation of employees is set to increase at an average annual rate of 4.4%, from R302 million in 2023/24 to R344.2 million in 2026/27. Projected spending on goods and services amounts to R2.9 billion over the MTEF period, representing 34.8% of the total budget. This is mostly for computer services for the implementation of the South Africa Connect project, and, to a lesser extent, travel and subsistence, consultants and operating leases for office accommodation.

Rolling out broadband in underserviced areas

The department will continue to roll out the South Africa Connect project, supported by relevant state-owned entities such as Broadband Infraco, Sentech and the State Information Technology Agency (SITA). As a result, 970 government facilities will continue to be provided with connectivity over the MTEF period through Phase 1 of the South Africa Connect project, and 5.1 million households will be connected through Phase 2.

An amount of R2.4 billion is allocated for implementing the project over the medium term, with one-off allocations for Phase 2 made in 2024/25 (R1.9 billion) and 2025/26 (R267.4 million). This spending is in the Broadband subprogramme in the ICT Infrastructure Development and Support programme.

Enabling digital transformation and inclusion

The department will continue to provide a supporting and enabling legislative environment through the development of relevant policies, strategies and legislation. Over the MTEF period, this will include submitting the Audio and Audiovisual Content Services and Online Safety Bill to the Minister for approval, and monitoring the implementation of the national data and cloud policy. As a result, expenditure in the ICT Policy Development and Research programme is set to amount to R134 million over the medium term.

Entities

Broadband Infraco (BBI)

BBI's legislative mandate, as set out in the BBI Act, 2007 (Act 33 of 2007), is to provide ICT infrastructure and broadband capacity in South Africa. Its main objectives are to expand the availability and affordability of access to electronic communications, including in underdeveloped and underserviced areas; ensure that bandwidth requirements for specific projects of national interests are met; and enable the state to provide affordable access to electronic communications networks and services.

Over the medium term, the entity aimed to focus on implementing Phase 2 of the South Africa Connect project, maintaining broadband connectivity to the 713 government sites it is responsible for and the time taken to restore faults on the core network at 7.5 hours. Expenditure is expected to increase at an average annual rate of 27.4%, from R437.6 million in 2023/24 to R904.3 million in 2026/27.

This is mainly due to an increase in payments to access network providers as South Africa Connect Phase 2 is rolled out using one-off allocations in 2024/25 and 2025/26, and an increase in expenditure on capital investments. BBI planned to spend a total of R2.6 billion over the MTEF period on capital expenditure, particularly fibre networks and points presence.

The entity plans to maintain its approved number of personnel at 117 over the medium term. Compensation of employees is set to increase at an average annual rate of 4.9%, from R135.9 million in 2023/24 to R156.7 million in 2026/27. Revenue is expected to increase at an average annual rate of 7.9%, from R870.6 million in 2023/24 to R1.1 billion in 2026/27, mostly due to the receipt of funding for the implementation of the South Africa Connect project, which accounts for a projected R1.3 billion in revenue over the MTEF period.

Film and Publication Board

The FPB was established in terms of the Films and Publications Act, 1996 (Act 65 of 1996), as amended. Its mandate is to regulate the creation, production, possession and distribution of certain publications and films by classifying them; imposing age restrictions on content; and rendering the exploitative use of children in pornographic publications, films or online material punishable. Since the operationalisation of the Films and Publications Amendment Act, 2019 (Act 11 of 2019) in 2022, the board is also mandated to issue, renew and revoke licences; impose fines and make recommendations for criminal prosecution to the National Director of Public Prosecutions; search and inspect premises; and stop illegal online activities.

Over the MTEF period , the board aimed to focus on implementing its digital roadmap strategy and enforcing industry compliance by continuing to monitor online platforms. To ensure appropriate content regulation and research and development in the film, gaming and other publication industries, R50.3 million is allocated over the medium term. An amount of R273.3 million over the period ahead is earmarked for improving and maintaining organisational governance, risk management and internal control to create a high-performing, digitised organisation.

Compensation of employees accounts for an estimated 50.4% of total expenditure, increasing at an average annual rate of 7.3%, from R73.2 million in 2023/24 to R90.4 million in 2026/27. This is due to inflationary increases as well as the reskilling of staff who will enter higher salary bands in priority positions as the board builds capacity for its expanded mandate. Accordingly, expenditure is expected to increase at an average annual rate of 12.6%, from R132.7 million in 2023/24 to R189.7 million in 2026/27.

This increase is in line with projected revenue and will be supported through the revenue enhancement unit that was operationalised on 1 May 2023. As the amended act has increased the scope of material to be licensed, self-generated revenue is expected to increase at an average annual rate of 41.3% over the medium term. The board expects to derive 66.1% (R323.5 million) of its revenue over the period ahead through transfers from the department and the remainder through fees charged for classification and registration.

Independent Communications Authority of South Africa

The ICASA was established by the ICASA Act of 2000 to regulate the South African communications, broadcasting and postal services sectors. The regulator's mandate is defined in the ECA of 2005 as licensing and regulating electronic communications and broadcasting services, and in the Postal Services Act of 1998 as regulating the postal services sector. Enabling legislation also empowers the regulator to monitor licensee compliance with licence terms and conditions, develop regulations for the three sectors, plan and manage the radio frequency spectrum, and protect consumers in relation to these services.

Over the medium term, the regulator will continue to focus on its regulatory activities in the communications, broadcasting and postal services sectors. It will proceed with the next phase of licensing high-demand spectrum in 2024/25, and monitor 255 broadcast licences and produce six tariff analysis reports over the medium term. Spending on compensation of employees accounts for an estimated 75.8% (R1.2 billion) of total expenditure, increasing at an average annual rate of 4.7%, from R359.2 million in 2023/24 to R412.3 million in 2026/27.

The authority expects to receive almost all of its revenue over the medium term (R1.5 billion) through transfers from the department. Revenue is expected to increase in line with expenditure.

National Electronic Media Institute of South Africa (NEMISA)

The NEMISA was established as a non-profit institute for education in terms of the Companies Act, 1973 (Act 61 of 1973) and is listed as a schedule 3A public entity in terms of the Public Finance Management Act (PFMA), 1999 (Act 1 of 1999). The institute's programmes are structured to enhance the market readiness of students in a wide range of broadcasting disciplines. The institute is responsible for the implementation of digital programmes, including the development of South Africans' digital skills capacity.

The entity's expanded mandate includes providing digital skills and training through identified partnerships with government, education, business and civil society. Identified digital skills priority areas include government e-enablement, creative new media industries, e-inclusion and social innovation. As such, the institute aims to train a total of 310 000 learners in digital literacy and 42 000 small, medium and micro enterprises in digital entrepreneurship between 2024/25 and 2026/27.

In line with its expanded mandate, the entity's organisational structure was revised from 48 positions in 2022/23 to 98 in 2024/25. Spending on compensation of employees is expected to increase at an average annual rate of 4.5%, from R46.4 million in 2023/24 to R53 million in 2026/27. Transfers and subsidies to higher education institutions to fund e-skills projects account for an estimated 15.9% (R41.2 million) of spending over the period ahead.

The institute is set to derive 96.3% (R304.2 million) of its revenue over the medium term through transfers from the department and the balance through fees for training and development. Revenue is expected to decrease at an average annual rate of 0.6%, from R109.6 million in 2023/24 to R107.6 million in 2026/27 due to higher spending in 2023/24 as a result of National Treasury-approved retention of surplus funds from the previous financial year.

Sentech

Sentech was established in terms of the Sentech Act, 1996 (Act 63 of 1996) is listed as a schedule 3B public entity in the PFMA of 1999 and derives its mandate from the ECA of 2005. It is responsible for providing broadcasting signal distribution services to licensed television and radio broadcasters.

In 2002, following the deregulation of the telecommunications sector, Sentech was licensed to provide international voice-based telecommunications and multimedia services. Sentech will continue to operate an estimated 330 terrestrial distribution sites and satellite platforms over the MTEF period to provide customers with content and multimedia connectivity services, and managed infrastructure services and satellite platforms to achieve its public service mandate while ensuring financial sustainability. These operations will continue until all analogue transmitters are shut down after migration to digital terrestrial television, which is scheduled for completion in December 2024.

The entity plans to continue investing in core infrastructure to ensure the provision of digital television coverage to 99.8% of households in each year over the medium term. It will also focus on various technology enhancement programmes and innovations to maintain infrastructure and service integrity. These include over-the-top services and the provision of infrastructure services through its data centre. The national satellite strategy has been developed and due process will be followed to obtain a national satellite for South Africa through partnership arrangements with interested parties.

An estimated R1.7 billion in capital expenditure is planned over the MTEF period, R666 million of which is allocated to roll out the access network portion of the South Africa Connect project. Spending on compensation of employees accounts for an estimated 29.1% (R1.5 billion) of total expenditure, increasing at an average annual rate of 5.2%, from R451.3 million in 2023/24 to R525.3 million in 2026/27. The entity plans to increase its number of personnel from 445 to 453 over the medium term to support the planned capital investment.

The entity expects to derive 95.9% (R5.1 billion) of its revenue over the MTEF period through fees for television, radio and streaming services, and the remainder through other sources such as rental income. As a result, revenue is expected to increase at an average annual rate of 5.9%, from R1.6 billion in 2023/24 to R1.9 billion in 2026/27.

South African Broadcasting Corporation

The SABC derives its mandate from the Broadcasting Act of 1999 and is listed as a schedule 2 public entity in the PFMA of 1999. The corporation is mandated to provide broadcasting and information services through a wide range of programming that displays South African talent in educational and entertainment programmes; offer diverse views through a variety of news, information and analysis; and advance national and public interests through popular sports. The corporation is charged with upholding the democratic values of the Constitution, and enhancing and protecting the fundamental rights of South Africa's people.

Over the medium term, the corporation will focus on implementing its turnaround plan to alleviate its financial challenges, mainly due to poor revenue collection. This includes implementing a revenue improvement plan to increase revenue from sources such as digital platforms, increasing compliance with television licence collections and acquiring new content. The corporation will continue to discuss alternative funding models with the department and implement its cost-deferment plan to spend more efficiently. Compensation of employees accounts for an estimated 38.1% (R7.5 billion) of projected spending over the medium term, while goods and services accounts for 38%, mostly for signal and broadcast costs, and programming, film and sports rights. Total expenditure is expected to increase at an average annual rate of 2.5%, from R6.4 billion in 2023/24 to R6.8 billion in 2026/27.

The corporation expects to derive 81.4% (R16.7 billion) of its revenue over the MTEF period through advertising and other commercial activities, with proceeds from television licence fees accounting for an estimated 15.1% (R3 billion) and transfers from the department amounting to an estimated 3.5% (R672.4 million). Total revenue is expected to increase at an average annual rate of 3.7%, from R6.4 billion in 2023/24 to R7.1 billion in 2026/27, in line with the implementation of revenue-generation initiatives.

South African Post Office

The SAPO is a government business enterprise established to provide postal and related services to the public. It is a schedule 2 public entity in terms of the PFMA of 1999 and derives its mandate from the Postal Services Act of 1998 and the SAPO SOC Ltd Act of 2011.

The Postal Services Act of 1998 makes provision for the regulation of postal services and the operational functions of the post office, including universal service obligations, and grants it an exclusive mandate to conduct postal services in the reserved sector for items such as letters, postcards and parcels weighing less than 1 kilogram.

Over the medium term, the entity will focus on providing universal access to postal and related services, particularly courier services, postal services, financial services and e-commerce. An amount of R1.7 billion is allocated to the post office over the MTEF period to fund its public service mandate. The post office was placed under business rescue on 10 July 2023 and business rescue practitioners were appointed later that month. The business rescue plan was published in November 2023 and creditors voted for the adoption of the plan in December 2023.

Expenditure over the next three years is expected to decrease at an average annual rate of 4.9%, from R6.2 billion in 2023/24 to R5.3 billion in 2026/27, mostly due to a projected decrease in the number of personnel due to the implementation of the business rescue plan.

The plan also seeks to reduce the branch network to approximately 600 branches with an equitable spread of geographic locations across South Africa. As such, expenditure on compensation of employees is projected to decrease at an average annual rate of 11.7%, from R3.3 billion in 2023/24 to R2.3 billion in 2026/27.

The entity generates revenue by providing postal and courier services, and through fees for financial transactions. Revenue is expected to increase at an average annual rate of 10.8%, from R4.1 billion in 2023/24 to R5.5 billion in 2026/27, as a result of potential revenue opportunities in the public sector and the unreserved market in which the post office competes with the private sector.

State Information Technology Agency

The SITA was established through the SITA Act, 1998 (Act 88 of 1998). The agency is mandated to provide IT, information systems and related services to and on behalf of government departments and organs of state. This includes the provision and maintenance of transversal information, data-processing systems and their associated services, the maintenance of secure information systems, and the execution of its functions according to approved policies and standards.

Over the medium term, the agency will continue to focus on strategic projects related to digitisation, digitalisation and modernisation. This will include projects such as creating a collaborative and shared digital services platform for government departments, modernising legacy systems in government departments, the South Africa Connect project and the provision of cloud services for government. Spending on goods and services accounts for an estimated 62.2% (R13.7 billion) of the agency's expenditure over the medium term, mainly for the provision of IT services.

Compensation of employees accounts for an estimated 33% (R7.6 billion) of total expenditure over this period as the agency requires highly skilled personnel to fulfil its mandate. As the implementation of strategic projects such as South Africa Connect and cloud infrastructure are expected to require substantial capital investment, R3.2 billion over the medium term is earmarked for the acquisition of assets. Total expenditure is expected to increase at an average annual rate of 8.9%, from R6.3 billion in 2023/24 to R8.1 billion in 2026/27, due to a general increase in the cost of products and services, as well as maintenance costs for facilities and computer equipment.

The agency generates revenue by providing ICT infrastructure and services to government departments and organs of state. Revenue is expected to increase at an average annual rate of 10%, from R6.7 billion in 2023/24 to R8.9 billion in 2026/27, due to the agency adding new customers and revenue streams such as providing cybersecurity and cloud services.

Universal Service and Access Agency of South Africa (USAASA)

The USAASA was established in terms of Section 80 of the ECA of 2005 as a statutory body and is listed as a Schedule 3A public entity in terms of the PFMA of 1999. Its sole mandate is to promote universal service and access to electronic communications services, electronic communications network services and broadcasting services. The agency is allocated a total budget of R263.7 million over the Its sole mandate is to promote universal service and access to electronic communications and broadcasting services.

Over the MTEF period, the agency will continue to manage the Universal Service and Access Fund to ensure that it reaches intended qualifying beneficiaries in line with its legislative mandate. To ensure that the fund is managed effectively and efficiently, the agency plans to set up tools and mechanisms to improve internal control systems and processes. The entity is set to be disestablished towards the end of the MTEF period, in line with the ECA of 2005 and directives from the department.

Expenditure is expected to decrease at an average annual rate of 4.2%, from R101.5 million in 2023/24 to R89.3 million in 2026/27, due to higher expenditure in 2023/24 on items such as legal services as a result of National Treasury's approval to retain surplus funds from 2022/23. The agency expects to derive its entire budget over the medium term through transfers from the department.

Universal Service and Access Fund

The USAF was established in terms of section 80 of the ECA of 2005, as amended, and is listed as a schedule 3A public entity in terms of the PFMA of 1999. Its sole mandate is to promote universal service and access to electronic communications and broadcasting services.

Over the MTEF period, the agency will continue to manage the USAF to ensure that it reaches intended qualifying beneficiaries in line with its legislative mandate. To ensure that the fund is managed effectively and efficiently, the agency plans to set up tools and mechanisms to improve internal control systems and processes.

The entity is set to be disestablished towards the end of the MTEF period, in line with the ECA of 2005 and directives from the department. Expenditure is expected to decrease at an average annual rate of 4.2 per cent, from R101.5 million in 2023/24 to R89.3 million in 2026/27, due to higher expenditure in 2023/24 on items such as legal services as a result of National Treasury's approval to retain surplus funds from 2022/23. The agency expects to derive its entire budget over the medium term through transfers from the department.

Programmes and projects

National e-Government Strategy and Roadmap

The e-government or digital government concept is the innovative use of communications technologies (including mobile devices), websites, apps and other ICT services and platforms to link citizens and the public sector, and facilitate collaborative and efficient governance. ICT is perceived as a key enabler to governments globally, in efforts to deliver better services and efficiency while enhancing their relationship with citizens and business.

The National Development Plan stipulates that by 2030, government will make extensive use of ICT to engage with and provide services to citizens. This will be achieved through an enabling coordinated and integrated e-Strategy that cuts across government departments and sectors. The purpose of the National e-Government Strategy and Roadmap is to guide the digital transformation of South Africa into an inclusive digital society where all citizens can benefit from the opportunities offered by digital technologies to improve their quality of life. This strategy defines a renewed approach and programme of action that will radically improve the electronic government situation in South Africa.

Fourth Industrial Revolution (4IR)

The 4IR has necessitated that countries develop new policies, strategies and innovation plans to enable an inclusive developmental approach that will comprise of the representatives of a cross section of stakeholders, including the public sector, business, academia and research institutions, experts, labour, SMMEs, youth, women and non-governmental organisations. In essence, South African policies, strategies and plans should seek to advance the goals of inclusivity and shared growth. A core short-term focus of South Africa's national response will be on the impact of the changing technological landscape on the economy and employment.

The country needs a more broad-based approach that looks at threats and opportunities that technological change and convergence will have on South Africa's other development imperatives. This includes economic infrastructure, environmental sustainability and transitioning to a low-carbon economy, an integrated and inclusive rural economy, human settlements, education, training and innovation, health, social protection, safer communities, and building a capable and developmental state.

The DCDT's priorities are anchored in an endeavour to prepare South Africa for the 4IR. Key initiatives in this regard included coordinating the establishment of the Presidential Advisory Commission on the 4IR to ensure that the country is in a position to seize opportunities and manage the challenges of rapid advances in ICT. The commission acts as an advisory body that ensures that South Africa leverages on the benefits of the latest technology by coordinating and planning across the industries and sectors that will underpin the drive towards the 4IR.

Its work is centred on eight work streams dealing with the impact of technological advancement on human capital and the future of work as well as social and economic development. The 30-member commission, chaired by President Cyril Ramaphosa, comprises eminent persons from different sectors of society and reflects a balance in gender, youth, labour and business, including digital startups as well as digital entrepreneurships.

The commission's objectives are to:

- develop an integrated country strategy and plan to respond to 4IR, including detailed interventions to be carried out achieving global competitiveness of the key economic sectors (agriculture, finance, mining, manufacturing, ICT, and science, technology and innovation);
- advise on a technology research and development programme to advance 4IR;
- advise on strategies for skills development and future of work;
- make recommendations on enabling relevant infrastructure for the country to participate in the digital economy; and
- make recommendations on an institutional framework and mechanism to coordinate 4IR programmes.

4IR ICT Skills Programme

The DCDT, through the Media, Information and Communication Technology Sector Education and Training Authority, has launched the 4IR Skills Programme as part of its efforts to create one million new jobs by 2030. The programme, which provides skills in key 4IR domains namely; data science, 3D printing, cloud computing, drone piloting, software development, cyber security and digital content production, is in partnership with Deviare, Microsoft, Cisco and Leaders in Motion Academy.

Deviare has developed an online platform 4IRSkills.Africa to initiate recruitment of learners for the programme. 4IRSkills.Africa is an active platform for building the capability and capacity for future digital skills that can be applied across sectors in African. The learning methodology promotes blended, high touch and outcome-oriented learning, giving learners the opportunity to access training anywhere anytime through virtual classrooms, access to global teaching assistants and mentorship programmes.

National Digital and Future Skills Strategy

The combined impact of digital technology trends, such as the Internet of Things (IoT), big data, robotics, and AI, is changing the ways in which people, economies and societies operate. The ability of countries, organisations and individuals to participate in the growing social and economic revolution, to benefit from and to be enriched by it, increasingly depends on the acquisition and deployment of digital skills.

Globally and locally, the mining, manufacturing and services sectors are in the process of being transformed by digital automation, AI and a range of other digital technologies. Furthermore, government entities, private sector firms and development institutions increasingly rely on digital technologies to drive economic growth, promote social development and provide cultural enrichment. Legacy skills, and even existing ICT skills, are becoming obsolete, while new digital skills are in short supply.

This means that countries seeking to advance the competitiveness of their key economic sectors and public services need to adopt a continual skills upgrade approach, where both ordinary citizens and research specialists acquire and advance their digital skills as part of a broad spectrum of 21st century skills. The whole of society must become digitally adoptive and digitally adaptive to ensure digital inclusivity for future generations.

The challenges implied by these ongoing developments, therefore, requires that South Africa adopts a clear and comprehensive digital and future skills strategy in order to foster the country's ability to engage with, compete within, and benefit from the emergent digital revolution, also referred to as the 4IR. The National Digital and Future Skills Strategy envisages a society of digitally skilled South Africans.

It sets out a structured series of initiatives intended to contribute to the capacities of South Africans to meet the challenges arising from the increasing deployment and adoption of digital technologies in economy and society, understanding that the digital revolution (using cloud technologies that enable big data; bringing virtual and augmented reality into a real world environment; introducing autonomous vehicles and drones; making IoT, AI, robotics and 3D printing part of everyday life) occurs within the context of the broader 4IR (working with advanced materials, biotechnology innovations, and the wider landscape of scientific innovation).

The combined impact of these technology trends is having a substantial impact on the world of work, on schooling, education and research, individuals and communities. The strategy presents a vision of a South Africa in which all its people are able to benefit from enhanced digital skills, thereby contributing to a significantly enhanced quality of life, improved education and higher economic growth. Digital skills are one of the key skills sets required for the creation of new kinds of 21st century jobs. Originality, agility, critical thinking and problem-solving are important 21st century skills that must be interwoven with digital skills.

The strategy elements needed to realise that the digital skills vision will need to be undertaken by a range of stakeholders, including government, private sector, and educational institutions, who should engage in continuous, structured consultation, collaboration and coordination involving all stakeholders. The strategy is underpinned by current research and its implementation will be assessed through ongoing monitoring and evaluation.

Internet

The Internet is a vital resource to access information and to communicate with others. Having access to the Internet has become so ubiquitous that it is difficult to imagine how access have expanded over the years.

According to Statistics South Africa's (Stats SA) General Household Survey (GHS) of 2023, the percentage of households who could access the Internet through a fixed connection (be it dial-up, ADSL or, more recently, fibre) has remained relatively stable between 2010 and 2021, before increasing slightly to 14,5% in 2023. By contrast, mobile broadband – connecting to the Internet through a cell phone – increased by 50,6 percentage points over the same period, growing from 28,0% in 2010 to 78,6% in 2023. More than three-quarters (78,6%) of South African households had at least one member who had access to or used the Internet at one or more locations such as their homes, work, place of study, internet cafés, or at public hot spots. Internet access using all available means was highest in Western Cape (88,1%) and Gauteng (81,9%), and lowest in Limpopo (69,7%) and Eastern Cape (70,2%).

About 14,5% of South African households had access to fixed Internet at home. Access to the Internet at home was highest among households in Western Cape (40,1%) and Gauteng (21,5%), and lowest in Mpumalanga (3,1%) and Limpopo (4,5%). Just over seven-tenths (72,6%) of households could access the Internet using mobile technology. Access to Public Wi-Fi spots was highest in Western Cape (14,9%) and Gauteng (11,3%) and lowest in Eastern Cape (1,6%) and Limpopo (1,9%).

A larger percentage of households in metropolitan areas (84,7%) could access the Internet than South African households in general (78,6%). Almost three-quarters (74,6%) of metro residents had access to mobile internet (compared to 72,6% of South African households in general), while 23,8% of metropolitan households had a fixed internet connection at home (compared to 14,5% of South African households in general). It is notable that 44,2% of households had fixed internet at home in Cape Town, compared to 25,8% in Nelson Mandela Bay, 23,5% in Tshwane and 22,9% in Johannesburg.

Household access to the Internet at home was highest in Western Cape (40,1%) and Gauteng (21,5%) and lowest in Mpumalanga (3,1%) and Limpopo (4,5%). While 23,8% of households in metropolitan areas had access to the Internet at home, this was true for only 1,7% of rural households in general and less than 1% of rural households in KwaZulu-Natal (0,4%), Eastern Cape (0,5%) and North West (0,7%). A large percentage of households accessed the Internet at work (14,0%) and Internet cafés or at educational institutions(11,6%).

Households in Western Cape (22,3%) and Gauteng (18,3%) were most likely to access the Internet at work, while only 5,4% of households in Limpopo and North West accessed the internet at work.

Using mobile devices to access the Internet includes access on cellular telephones or using mobile access devices such as 3G cards. It is clear from Table 14.3 that mobile access to the Internet has made it much more accessible to households in rural areas. Nationally, Internet access using mobile devices (72,6%) was the most common form of access to the Internet. Although the use of mobile Internet devices in rural areas (66,3%) still lags behind its use in urban (76,1%) and metro areas (74,6%), it is much more common in rural areas than any of the alternative methods.

Social media

South Africa has 43.5 million internet users, of these, 35.15 million are social media users. According to World Wide Worx, South Africa's leading independent technology research and strategy organisation, with a focus on technology in business strategy, In comparing the top five social media platforms used in 2022 and 2023, several trends become apparent. Facebook remains the most popular platform among respondents, with usage increasing from 56.7% in 2022 to 59.6% in 2023. This slight growth indicates that Facebook continues to maintain a strong user base.

TikTok follows as the second most popular platform, showing a significant rise in usage from 30.6% in 2022 to 34.0% in 2023. This growth reflects TikTok's increasing popularity, likely due to its engaging short-form video content that continues to attract a wide audience. Instagram, although still among the top three, experienced a slight decline in usage, dropping from 27.6% in 2022 to 26.9% in 2023.

This suggests that while Instagram remains a key player in the social media landscape, its growth may be plateauing as it faces competition from other platforms. Twitter also saw a noticeable decline in its user base, with usage decreasing from 22.5% in 2022 to 18.8% in 2023. This drop could be attributed to various factors, including changes in user preferences and possibly the impact of new features or policies on the platform.

LinkedIn rounds out the top five, with its usage declining from 14.7% in 2022 to 12.2% in 2023. The decrease in LinkedIn usage might indicate a shift in how respondents are using professional networking sites or the emergence of alternative platforms for professional connections. Overall, the data highlights the dynamic nature of social media usage, with some platforms gaining traction while others experience a decline in popularity.

Cybercrime and cybersecurity

Cyberspace comes with new types of challenges to governments of the world and it, therefore, introduces a further dimension to national security. The cyberworld is a borderless platform that enables more sophisticated threats such as cybercrime, cyberterrorism, cyberwar and cyber-espionage. For this reason, cyberthreats need to be addressed at both the global and national levels.

The National Cybersecurity Hub is South Africa's National Computer Security Incident Response Team, and strives to make cyberspace an environment where all South Africans can safely communicate, socialise, and transact in confidence. It offers alerts and warnings, announcements, security-related information dissemination, incident-handling and incident response support as services to its constituents.

These services can be categorised as proactive, reactive and social services. Incidents are logged via the National Cybersecurity Hub website and depending on their evaluation, they are timeously resolved or escalated to other agencies for further investigation.

Mobile communications

South Africa has one of the largest telecommunications markets on the continent. It has four mobile operators, namely Cell C, MTN, Vodacom and Telkom Mobile. Mobile phones are the dominant technology for voice and data communication among base of pyramid (BoP) users and for informal businesses. People in this group access the Internet mostly via their mobile phones and smartphones because they have taken over functions that used to be performed by computers. Users are also finding innovative ways to bypass expensive cellphone SMS rates by using Facebook Zero or other instant message services such as WhatsApp.

Although half of the South African population lives below the poverty line, more than 75% of those in low-income groups, who are 15 years or older, own a mobile phone. In terms of mobile ownership at the BoP, households with an income of less than R432 per month, per household member, is relatively high, compared to other African countries. This is according to research commissioned by infoDev, a global partnership programme within the World Bank Group, about the use of mobile phones amongst BoP users.

According Statistics South Africa's General Household Survey of 2023, nationally, only 3,8% of households did not have access to either landlines or cellular phones while only 0,1% of South African households exclusively used landlines. By comparison, 91,2% of South African households exclusively use cellular phones.

The exclusive use of cellular phones was most common in Mpumalanga (95,1%) and Limpopo (94,1%) and least common in Northern Cape (86,3%). Households that used both cellular phones and landlines were most common in Western Cape (6,9%).

The media

South Africa has vibrant and independent media. According to the Bill of Rights, 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; and
- academic freedom and freedom of scientific research.

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

Radio

Radio is a great communications medium and still enjoys the broadest reach of any media category in South Africa. The diversity of stations, formats, voices and offerings ensures that most of the public's needs are catered for. It also fulfils a vital need for information and entertainment, with relatively low costs to the distributors and the listeners. As a communication medium, radio has very few barriers to access. SABC radio has more than 25 million listeners weekly in South Africa.

The fact that radio cuts across boundaries of illiteracy strengthens the importance of the medium to the consumer and the advertiser. The SABC's national radio network comprises 18 radio stations, of which 15 are dedicated specifically to public service broadcasting.

These include 11 full-spectrum stations, one in each of the official languages of South Africa: a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English; and a community station broadcasting in the !Xu and Khwe languages of the Khoisan 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.

Commercial radio stations

Commercial radio stations in South Africa include:

- YFM
- 702 Talk Radio
- Metro FM
- 5FM
- Channel Africa
- Good Hope FM
- 567 Cape Talk
- Radio 2000
- Capricorn FM
- Radio KFM
- Lotus FM
- X-K FM
- TruFM
- RSG
- Power 98.7.

Radio platforms such as 94.2 Jacaranda FM, 94.7 Highveld Stereo, OFM, Algoa FM, Classic FM, Kaya FM 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 also available online.

Community radio

Community broadcasting remains an important project for the South African Government. From the early days of Cape Town's Bush Radio, Africa's oldest community radio station project, to today's broadcasting landscape which boasts more than 200 stations across the country's nine provinces, community radio has provided communities with an indispensable platform from which to raise awareness of their grassroots issues, irrespective of race, gender, disability or economic class.

Still a relatively youthful sector, community radio can trace its origins back to Bush Radio, the idea for which started in the 1980s when community activists and alternative media producers explored ways in which media could be used for social upliftment.

The radio was officially formed in 1992, broadcasting illegally, following numerous attempts to apply for a broadcast license from the apartheid government. It was however only after the first democratic elections of 1994 that South Africa saw the liberalisation of the airwaves with the establishment of an independent regulator, the Independent Broadcasting Authority, now the ICASA.

Television

The SABC's TV network comprises of three free-to-air channels and two other channels carried on a subscription digital satellite network. South African TV is broadcast in all 12 official languages. According to the GHS of 2023, about 78,4% households commonly owned TVs and that ownership was more common in metropolitan and urban areas than in rural areas. About 72,1% of rural households owned TVs.

Community TV

Soweto TV was the first community TV station to obtain a seven-year broadcasting licence from ICASA in 2007. Since then, more seven-year licences have been issued to stations operating in Soweto, Cape Town, Tshwane, Empangeni and Nelson Mandela Bay.

Free-to-air TV

eMedia Holdings owns e.tv – South Africa's first private, free-to-air TV channel, launched in 1998. It is the largest English-medium channel in the country and third-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. The company launched a 24-hour news channel on the DStv platform, eNews Channel Africa (eNCA) in 2008.

Satellite broadcasting

MultiChoice started as the subscriber management arm of M-Net. It is the leading multichannel digital satellite TV 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.

StarSat offers three main packages and multiple add-on packages that viewers can use to customise their experience. eSat.tv (branded eNCA) supplies TV, mobile and online news to various channels in South Africa, including the 24-hour eNCA (Channel 403).

The company provides live news bulletins to viewers each night on e.tv in English, on eKasi+ in IsiZulu (available on OpenView HD) and on kykNET through eNuus in Afrikaans (available on DStv). Newzroom Afrika is a premier South African 24-hour TV news channel on the DStv Platform (Channel 405).

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.

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include:

- Media24 (part of Naspers, the largest media group in Africa);
- Independent News & Media (Pty) Ltd group;
- Caxton Publishers & Printers Ltd; and
- Arena Holdings.

Other important media players include:

- M&G Media Ltd;
- The Natal Witness Printing & Publishing Company (Pty) Ltd;
- Primedia Publishing Ltd;
- Ramsay Media; and
- Kagiso Media.

Some of the prominent daily and weekly newspapers in South Africa include *The Sunday Times; Citizen; Sowetan; The Daily Sun; The Witness; Sunday World; City Press; The Weekly Mail and Guardian; Beeld; Pretoria News; The Star; Die Burger; The Cape Argus; Cape Times; Son; Daily Dispatch; The Herald; The Daily News; The Mercury; The Witness; Business Day; Die Volksblad; Diamond Fields Advertiser; Isolezwe; Rapport; Sunday Tribune; Ilanga; The Post,* and *Soccer Laduma.*

Magazines

Some of the prominent magazines in South Africa are: *The Financial Mail; Finweek; Entrepreneur; Forbes Africa; Noseweek; BusinessBrief, Leadership; Farmer's Weekly; Landbouweekblad; Plaastoe; Veeplaas; Personal Finance; TV Plus; Drum; Huisgenoot; YOU; The Big Issue; Taalgenoot; Leisure; Easy DYI; Sarie Kos; Elle, Decoration; SA Home Owner; Tuis Home; VISI; Woolworths' Taste; Fresh Living /Kook en Kuier; Braintainment; Destiny Man; Blaque Magazine; GQ; Men's Health; Popular Mechanics; Stuff; Tjop & Dop; Amakhosi; Kick Off; Golf Digest; Compleat Golfer; Magnum's Game; Hunt / Wild; Jag; SA Hunter; Zigzag; Modern Athlete; CAR; Leisure Wheels; Drive Out / WegRy; Auto Trader; Bike SA; SA 4×4; Speed and Sound; Getaway; Weg / Go; Glamour; Elle; Fair Lady; Finesse; Destiny Magazine; Ideas/ Idees; Leef; Move!; True Love; Fitness Magazine; Kuier; Marie Claire; Sarie; Women's Health and Longevity.*

Media organisations and role players

The Publishers Support Services (PSS) is an umbrella body incorporating print and digital media. It is a natural progression from the long-established Print Media South Africa and illustrates its commitment as an interactive organisation to keeping pace with the fast-changing media world of the 21st Century.

An evolving and vibrant association, its express purpose is to represent and promote all aspects concerning the industry and its members. PSS is a non-profit, voluntary association. Its membership includes more than 500 newspapers and magazine titles that cater for four different language groups. The South African National Editors' Forum promotes excellence in journalism through fighting for media freedom, writing policy submissions, research, education and training programmes.

The Forum of Journalists for Transformation addresses issues that directly affect its members. The Press Council, the Press Ombud and the Appeals Panel are independent co-regulatory mechanisms set up by the print and online media to provide impartial, expeditious and cost-effective adjudication to settle disputes between newspapers, magazines and online publications, on the one hand, and members of the public, on the other, over the editorial content of publications.

The Freedom of Expression Institute (FXI) was formed to defend freedom of expression, to oppose censorship, to promote access to information and knowledge, and to promote media diversity. The FXI is the leading organisation on issues of freedom of expression and access to information as enshrined in the Bill of Rights in Section 16 of the Constitution of the Republic of South Africa of 1996.

The Forum of Community Journalists (FCJ) is an independent, nonprofit, non- racial and voluntary organisation striving to promote and express the interests of all journalists employed on a permanent or freelance basis at regional community newspapers, magazines and online community publications in South Africa.

The Broadcasting Complaints Commission of South Africa (BCCSA) serves as a voluntary watchdog to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct. The National Association of Broadcasters (NAB) was established in 1993 as a membership-based voluntary association to foster and promote the development of a sustainable and robust broadcasting system in South Africa. It is the only industry association in the country that represents all three tiers of the regulated broadcasting industry.

Its members include the public broadcaster (SABC), commercial broadcasters (Multichoice, e.tv, StarSat, Primedia, Kagiso Media, AME, amongst others) and community broadcasters (Bush Radio, Jozi FM, Radio Pulpit, Voice of Wits, Radio Tygerberg, Tshwane FM and others). The NAB's mission is to engage with policymakers and regulators to advocate for a level playing field and an industry that is grounded in the principles of democracy, diversity and freedom of expression.

The NAB established the BCCSA that has been recognised by the ICASA since 1995. The commercial members of the NAB are funders of the Media Development and Diversity Agency and the NAB collaborates with NEMISA on training for the sector. Media Monitoring Africa is a non-profit organisation that acts in a watchdog role to promote ethical and fair journalism that supports human rights. The National Community Radio Forum lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

Other press organisations operating in the country are the Foreign Correspondents' Association of Southern Africa; Printing Industries Federation of South Africa; South African Typographical Union; Specialist Press Association; South African Guild of Motoring Journalists; Professional Photographers of South Africa; Media Institute of Southern Africa; Publishers' Association of South Africa, and various press clubs in major centres." Other press organisations operating in the country include the:

- Foreign Correspondents' Association of Southern Africa
- Printing Industries Federation of South Africa
- South African Typographical Union
- South African Guild of Motoring Journalists
- Professional Photographers of South Africa
- Media Institute of Southern Africa
- Publishers' Association of South Africa.

News agencies

Local and international news agencies based in South Africa include:

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

Journalism and media awards

Some of South Africa's media awards include the:

- Vodacom Journalist of the Year Awards
- South African Breweries Environmental Media and Environmentalist of the Year Awards
- Sanlam Group Awards for Excellence in Financial Journalism
- CNN MultiChoice African Journalist Awards
- Discovery Health Journalism Awards
- Nat Nakasa Award
- FCJ Excellence Awards
- Isu Elihle Awards
- Sikuvile Journalism Awards
- South African Social Media Awards
- SADC Media Awards
- New Generation (Social & Digital Media) Awards.

Marketing and advertising awards

South Africa has a vibrant and dynamic marketing and advertising industry. Some of the awards include: Loeries; Assegai Awards; Creative Circle Annual Awards; Effie Awards; FM AdFocus Awards and Marketing Achievement Awards.

Advertising

South Africa has a vibrant and dynamic advertising industry. Local advertising agencies are often recognised internationally for their excellence. Marketing, Advertising and Communications SA (MAC SA) Charter Sector Council. In March 2022, government launched the MAC SA Charter Sector Council to redress economic imbalances. The council has been tasked with broadening the meaningful participation of blacks, women, youth and people with disabilities in the marketing, advertising and communications (MAC) sector – not just as consumers but also as entrepreneurs.

It will monitor transformation of the sector by facilitating the implementation of the Broad-Based Black Economic Empowerment (B-BBEE) Sector Code. The council is also tasked with building progressive partnerships that will unleash the creative abilities of professionals and technically skilled people in this sector and change MAC and society for the better.

The council has representatives from academia, government, the regulator, marketers, women, youth, and people with disability, public relations institutes, organised labour, outdoor media, industry associations and interactive marketers. The council will ensure that transformation in the sector is promoted, monitored and reported on annually in line with the provisions of the B-BBEE Act of 2003, as amended.

The council is responsible for, amongst others:

- oversight over the implementation of the MAC Charter Sector Code; monitor compliance with the MAC Charter Sector Code;
- providing guidance on matters relating to B-BBEE in the MAC sector; and
- engaging and advising the sector Minister, the Government Communication and Information System and other relevant regulatory entities regarding the MAC Charter Sector Code.

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 manage 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 of the industry and the South African society.

Public relations

Public Relations Institute of Southern Africa (PRISA)

Established in 1957, the PRISA represents professionals in public relations and communication management throughout the southern African region and has registered practitioners in Botswana, Namibia, Lesotho, Eswatini and South Africa.

It is a founding member of the Global Alliance for Public Relations and Communication Management, and initiated the formation of the Council for Communication Management in South Africa. The council is the coordinating body representing various groupings of professionals in South Africa. PRISA plays a leading role in uniting professionals and driving transformation. As the recognised leader of the public relations and communication management profession in southern Africa and beyond, PRISA provides the southern African industry with the local professional advantage.