

Pocket Guide to South Africa 2016/17 Communications



Department of Communications (DoC)

The DoC is responsible for the national communications policy and strategy; information dissemination and publicity; and the branding of South Africa. Improved communication and marketing will promote an informed citizenry and assist the country in promoting investments, economic growth and job creation.

The main role of the DoC is to energise and mobilise South Africans to participate actively in government's socioeconomic transformation programmes, which are there to address poverty, unemployment and inequality. The work of the department supports the realisation of Outcome 14 (a diverse, socially cohesive society with a common national identity) of government's 2014-2019 Medium Term Strategic Framework (MTSF).

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

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

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

To view digital TV signals on an ordinary analogue TV set, consumers will need a set-top box (STB). Government will provide about five million poor TV-owning households with free STBs.

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

As a result of the delay, Sentech continued to maintain both the analogue and digital platforms until the issue was resolved.

The Analogue Switch-Off Event took place in Carnarvon, Northern Cape in October 2016.

Brand South Africa

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

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

South Africa took second place in the *Africa Competitiveness Report* and the country's global ranking for 2016/17, improved by nine places from 56 in the 2014/15 report to 47 out of 138 countries worldwide.

Film and Publication Board

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

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

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

Independent Communications Authority of South Africa

ICASA regulates the South African communications, broadcasting and postal services sectors. The regulator's mandate is defined in the Electronic Communications Act of 2005 as licensing and regulating electronic communications

and broadcasting services, and in the Postal Services Act of 1998 as regulating the postal services sector.

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

ICASA seeks to protect consumers from harmful practices employed by the operators in the use of premium-rated information and entertainment services. The authority seeks to increase access to high-demand spectrum from the current 566.69MHz to 958MHz in 2019/20. Access to this spectrum will enable the rollout of wireless broadband infrastructure by licensees. In 2017/18, the authority was expected to make an additional 240MHz of broadband spectrum available to licensees for the provision of broadband services.

ICASA seeks to protect consumers from harmful practices employed by the operators in the use of premium-rated information and entertainment services. This will be achieved by finalising regulations on premium-rated services in 2017/18.

Media Development and Diversity Agency

The MDDA promotes media development and diversity to ensure that all citizens can access information in a language of their choice; and to transform media access, ownership and control patterns in South Africa. Its mandate, among others, is to:

- Create an enabling environment for media development and diversity which reflects the needs and aspirations of all South Africans.
- Redress exclusion and marginalisation of disadvantaged communities and persons from access to the media and the media industry.
- Promote media development and diversity by providing support primarily to community and small commercial media projects.
- Encourage ownership and control of, and access to, media by historically disadvantaged communities as well as by historically diminished indigenous language and cultural groups.
- Encourage the development of human resources and training, and capacity building, within the media industry, especially amongst historically disadvantaged groups.

- Encourage the channelling of resources to the community media and small commercial media sectors.
- Raise public awareness with regard to media development and diversity issues.

South African Broadcasting Corporation

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

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

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

Government Communication and Information System

The GCIS was formally established in terms of section 239 of the Constitution of the Republic of South Africa of 1996 and as a strategic unit in The Presidency in terms of Section 7 of the Public Service Act of 1994.

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

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

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

The GCIS uses different products and platforms to meet the information needs of various target audiences, as a constitutional right to the citizens of South Africa wherein Section 195(g) of the Constitution stipulates that to foster transparency, the public should be provided with information that is timely, accurate and accessible.

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

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

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

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

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

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

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

Department of Telecommunications and Postal Services (DTPS)

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

The NDP envisages that by 2030, the ICT sector will underpin the development of a dynamic and connected information society, and a vibrant knowledge economy that is inclusive and prosperous. Drawing from this vision, the DTPS contributes to Outcome 6 (an efficient, competitive and responsive economic infrastructure network) of government's 2014-2019 MTSF by ensuring that ICT infrastructure and services are accessible, affordable, robust, reliable and secure. Over the medium term, the department will expand and modernise ICT infrastructure by implementing the South Africa Connect broadband policy, coordinating the migration to digital broadcasting, and implementing the legislative framework stemming from the 2016 National Integrated ICT Policy White Paper.

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

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

South African Post Office

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

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

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

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

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

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

Sentech

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

National Electronic Media Institute of South Africa

By mid-2016, NEMISA, a state-owned entity, was in the process of being incorporated into the Ikamva National e-Skills Institute (INeSI). The new organisation involves the integration of three entities: NEMISA, INeSI and the Institute for Satellite and Software Applications.

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

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

Universal Service and Access Agency of South Africa

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

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

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

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

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

.za.Domain Name Authority (ZADNA)

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

Telkom

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

Broadband Infracore

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

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

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

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

State Information Technology Agency

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

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

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

Communication platforms

Radio

The SABC's national radio network comprises 18 radio stations. Fifteen of these are dedicated specifically to public-service broadcasting and include 11 full-spectrum stations, one in each of the official languages of South Africa; a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English; and a community station broadcasting in the !Xu and Khwe languages of the Khoisan of the Northern Cape. The radio stations reach 77,3% of the Adult population with 29,5 million listeners.

The SABC has three stations in its commercial portfolio – 5FM, Metro FM and Good Hope FM.

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

SABC Radio has more than 26 million listeners weekly in South Africa.

According to the Broadcast Research Council of South Africa, community radio listenership increased over time from 8 903 000 in 2011 to 9 557 000 in 2015. However, its reach is still less than that of commercial radio stations and African language stations.

Commercial radio stations

Commercial radio stations in South Africa include:

- Algoa FM
- Classic FM
- Kaya FM
- YFM
- 94.7 Highveld Stereo
- 702 Talk Radio
- Metro FM
- 5FM
- Good Hope FM
- Jacaranda 94.2
- OFM
- East Coast Radio
- 567 Cape Talk
- Radio 2000

- Capricorn FM
- Power FM
- Radio KFM.

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

Television

The SABC's TV network comprises three free-to-air TV channels. SABC TV has a weekly audience of 30,248 million (86,6% of adults watch SABC TV in South Africa). South African TV is broadcast in all 11 official languages and also in Sign Language. The SABC also broadcasts a 24-hour news channel on DStv (Channel 404).

Community TV

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

Free-to-air TV

e.tv is South Africa's first private free-to-air TV channel, launched in 1998. It is the largest English-medium channel in the country and the second largest overall. e.tv also has a pan-African presence through e.tv Africa, which is distributed on the DStv Africa bouquet and by local affiliates in African countries.

Satellite broadcasting

eNews Channel Africa (eNCA) is South Africa's first and most watched independent 24-hour TV news channel on the DStv platform (Channel 403).

The 24-hour news service is broadcast live in the UK to over 10,5 million subscribers on the SKY digital satellite platform. In addition, eNCA provides live news bulletins to nearly three million South African viewers each night on e.tv (in English, isiZulu and Sesotho) and to more than 200 000 Afrikaans viewers on kykNET.

The SABC's also has its own 24-hour news channel on DStv (Channel 404).

The Africa News Network 7 is South Africa's third 24-hour news channel on DStv (Channel 405).

Internet

The South African Internet user population passed the 20-million mark for the first time in 2016, reaching 21 million, and was expected to grow to at least 22.5 million in 2017.

This is the main finding of the Internet Access in South Africa 2017 study, released in July 2017 by World Wide Worx.

The report reveals that the single most common use of the Internet among South African adults is communication, reported by almost a third (31%) of respondents, followed by social networking (24,9%) and information (23,7%), both reported by almost a quarter of respondents. Only then comes entertainment at 22,1%.

According to Statistics South Africa's General Household Survey (GHS) 2016, almost six-tenths of South African households (59,3%) had at least one member who used the Internet either at home, their places of work or study, or at Internet cafés.

Using any means, more than two-thirds of households in Gauteng (72,2%) and Western Cape (68,5%) had access to the Internet while only just over one-third of households in Limpopo (42,4%) had access to the Internet.

Social media

In 2017, social media was expected to become an indispensable tool for South African marketers and politicians, artists and activists, reporters and media personalities alike.

According to the 2017 edition of the SA Social Media Landscape, released in September 2016 by World Wide Worx and Ornico, 2017 was expected to see the use of as many as four social media platforms becoming pervasive marketing tools in South Africa. The study included a survey of 116 major South African brands, making for a representative sample of the country's major brands.

Already, in 2016, some 91% of these brands were using Facebook, 88% were active on Twitter and 66% were on YouTube. LinkedIn slipped from 70% to 63%, as brands struggled to get to grips with its more serious nature. Meanwhile, Instagram increased sharply from 42% to 62% of brands making use of it.

Facebook is now used by 14 million South Africans, while YouTube has moved firmly into second place with 8,74-million

users, well outpacing Twitter's slower rise to 7,7-million. LinkedIn maintains its energetic rise, now standing at 5,5-million.

One of the most significant trends uncovered is that Facebook, with 14-million users, now has 10 million or 85% of its users, using mobile devices. This is significantly up from or 77% the year before.

While a significant number of these users are also accessing Facebook on computers and tablets, it is clear that the mobile phone has become the primary form of accessing social media.

Online retail

The South African online spend is forecasted to grow to over R53 billion by 2018. In 2016, some 43% of adults in South Africa shopped cross-border. The United States of America is the most popular cross-border online shopping destination for South African online shoppers, followed by China and the United Kingdom, according to the PayPal and Ipsos third annual cross-border commerce report.

According to the report, online shopping has been slow to take off in South Africa, but in recent years has picked up steam. The research indicated that 58% of online adults in South Africa shopped online over the past 12 months, amounting to an estimated total spend of R37.1 billion.

When it comes to buying products online, the most popular online categories for South African consumers were downloadable digital entertainment and education items (53%), event tickets (47%), clothing, apparel or footwear (45%).

With high rates of mobile penetration in South Africa, online shoppers are increasingly opting to make purchases on their mobile devices – resulting in an estimated 65% growth in online spend via mobile devices (smartphone or tablet) between 2015 and 2016, to reach an estimated R9.5 billion, with momentum expected to continue.

Cybercrime and cybersecurity

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

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

The Cybercrimes and Cybersecurity Bill, which aims to create offences and prescribed penalties related to cybercrime, was tabled in the National Assembly in February 2017.

Telecommunications

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

According to Statistics South Africa's General Household Survey 2016, nationally, only 3,5% of households did not have access to either landlines or cellular phones in 2016.

By comparison, 87,0% of households had access to at least one cellular phone, while 9,4% of households had access to both a landline and a cellular phone. Only 0,1% of households had only a landline.

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

By contrast, a combination of both cellular phones and landlines in households were most prevalent in the more affluent provinces, namely Western Cape (22,0%) and Gauteng (12,5%).

The media

South Africa has a vibrant and independent media, with print, broadcast and online offerings.

Print

Newspapers

Most South African newspapers and magazines are organised into several major publishing houses. These include Media24 (part of Naspers, the largest media group in Africa), the Irish-based Independent News & Media (Pty) Ltd group, Caxton Publishers & Printers Ltd and Tiso Blackstar Group. Other important media players include M&G Media Ltd; the Natal Witness Printing & Publishing Company (Pty) Ltd; Primedia Publishing Ltd; RamsayMedia, and Kagiso Media.

Magazines

By end of the 2016, there was a significant decline in magazine circulations in South Africa. Many of the international titles

such as *Heat*, *FHM*, *Elle*, *GQ*, *Cosmopolitan* and *Marie Claire* were being published under agreement with their international owners.

Media organisations and role players

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

The PDMSA recognised the advantages of extending its footprint online by extending its membership to include digital media publications. By the end of 2016, the PDMSA membership included more than 700 newspaper and magazine titles that cater for four different language groups.

The members include Caxton and CTP; Independent Newspapers; Media24; *Mail & Guardian*, and the Association of Independent Publishers, the latter which represents the interests of more than 250 independent publishers in southern Africa. The Times Media Group – whose stable includes the *Sunday Times*, *Sowetan*, *Financial Mail* and *The Herald* – has changed its name to Tiso Blackstar Group.

Tiso Blackstar is the largest, national English-language publishing group in South Africa and the country's second-largest digital publisher.

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

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

The **Forum of Journalists for Transformation**, which was launched in 2015, addresses issues that directly affect its members.

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

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

The **Forum of Community Journalists** is an independent body that represents, promotes and serves the interests of all community-newspaper journalists in southern Africa.

The **Broadcasting Complaints Commission of South Africa** is an independent self-regulatory body that serves

as a voluntary watchdog to adjudicate complaints from the public about programmes flighted by members who subscribe to its code of conduct.

Media Monitoring Africa (formerly Media Monitoring Project) is a non-profit organisation that acts in a watchdog role to promote ethical and fair journalism that supports human rights.

The **National Community Radio Forum** lobbies for the airwaves in South Africa to be diversified, and for a dynamic broadcasting environment through the establishment of community radio stations.

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

News agencies

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

International news agencies based in South Africa include:

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

Media awards

Some of South Africa's media awards include the:

- Mondi Shanduka Newspaper Awards
- Vodacom Journalist of the Year Awards
- South African Breweries (SAB) Environmental Media and Environmentalist of the Year Awards
- SAB Sports Media Awards
- Sanlam Financial Journalist of the Year Award
- CNN MultiChoice African Journalist Awards
- Discovery Health Journalism Awards
- Sanef's Nat Nakasa Award
- Local Media Excellence Awards
- Liberty Radio Awards

- Isu Elihle Awards
- Standard Bank Sikuville Awards.

Advertising awards

South Africa has a vibrant and dynamic advertising industry.

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

The 38th Annual Loerie Awards were held at the Durban International Convention Centre on 20 and 21 August 2016.

A total of 316 awards were handed out, including eight Grand Prix awards, from 3 112 entries from 22 countries across Africa and the Middle East.

