

African Media
Development
Initiative



South Africa

Research findings and conclusions

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South Africa

About this report

In March 2005, the UK Government's Commission for Africa delivered a report entitled "*Our Common Interest*", which represented a significant attempt to understand and recommend an action programme for Africa's social and economic development. A key component of the report focused on the importance of a strong media sector to support governance and development in Africa, and called for greater attention to, and resources for, media sector development as a result. The BBC World Service Trust and a number of international and African partners have subsequently set out to help develop ideas for future Africa media development initiatives.

In order to inform these efforts, the BBC World Service Trust – in collaboration with Rhodes University (South Africa) and Ahmadu Bello University (Nigeria) – has undertaken an extensive, pan-African research effort in 17 African countries, of which South Africa is one. Data presented in this report is based on both secondary research gathered by local researchers in South Africa and on extensive interviews conducted locally among key media practitioners and leaders. It is presented here in three parts:

- Media Sector Developments: an examination of developments in the media sector in South Africa over the past five years;
- Challenges for Future Media Development Activities: an analysis of the perspectives of a range of key informants on media development challenges in South Africa;
- Case Study: a case study from South Africa illustrating good practice in media development.

The research was funded by a generous grant from the UK Government's Department for International Development. The research was conducted jointly by Claire Milne and Anne Taylor and in association with the BBC World Service Trust Research and Learning Group.

The BBC World Service Trust is the independent international charity set up by the BBC, which uses media to advance development. The Trust works to: raise awareness of development issues among mass audiences and opinion formers; influence attitudes, awareness and behaviour among poorer communities through a wide range of educational programming on poverty-related topics; and build capacity in the media sector in developing and transitional countries.

Acronyms

- ACA** Association for Communication and Advertising
- ABC** Audit Bureau of Circulation
- AFMD** African Forum for Media Development
- AGM** Annual General Meeting
- AIP** Association of Independent Publishers
- AMAC** Art and Media Access Centre
- AMID** African Media Development Initiative
- AMPS** All Media and Products Survey
- ANC** African National Congress
- BBC** British Broadcasting Corporation
- BCCSA** Broadcasting Complaints Commission of South Africa
- CASE** Community Agency for Social Enquiry
- CEO** Chief Executive Officer
- CMS-Net** Community Multimedia Services Network
- CPA** Community Press Association
- FCJ** Forum of Community Journalists
- FOSS** Free Open Source Software
- FXI** Freedom of Expression Institute
- GAP** Grassroots Advertising Procurement
- GCIS** Government Communication and Information System
- GEMSA** Gender and Media Southern Africa
- GFMD** Global Forum for Media Development
- JSE** Johannesburg Securities Exchange
- IAJ** Institute for the Advancement of Journalism
- IBA** Independent Broadcasting Authority
- ICASA** Independent Communications Authority of South Africa

ICFJ International Centre for Journalist

IDASA Institute for Democracy in South Africa

IFEX International Freedom of Expression Exchange

IJW Investigative Journalism Workshop (Wits University)

IMA Independent Media Alliance

IMC International Marketing Council

ISS Institute of Security Studies

LSM Living Standard Measure

MAPPP Media, Advertising, Publishing, Printing and Packaging

MCC Media Credit Controllers

MDDA Media Development and Diversity Agency

M&G *Mail & Guardian* Newspaper

MISA Media Institute of Southern Africa

MMP Media Monitoring Project

NASA Newspaper Association of South Africa

MPCCS Multi-Purpose Community Centres

NCFR National Community Radio Forum

NEMISA National Electronic Media Institute

NiZA Netherlands Institute for Southern Africa

NEPAD New Partnership for Africa Development

NGO Non-Governmental Organisation

NPO Non-Profit Organisation

NRCF National Radio Community Forum

ODAC Open Democracy Advice Centre

OMD Optimum Media Direction

OSF-SA Open Society Foundation of South Africa

PMSA Print Media of South Africa

RU Rhodes University

SAARF South African Advertising Research Foundation

SABC South African Broadcasting Corporation

SADC Southern Africa Development Community

SAFREA South Africa Freelance Association

SANEF South African Editors' Forum

SETA Sector Education Training Authority

SPI Sol Plaatje Institute

TBN Trinity International Network

TUT Tshwane University of Technology

UNAIDS Joint United Nations Programme on HIV/AIDS

UNDP United Nations Development Programme

UNISA University of South Africa

UNSTAT United Nations Statistic Division

WITS Witwatersrand University (Johannesburg, South Africa)



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South Africa

Country Report

Context



1. Introduction

Compiling data for the first part of this project has been a disappointingly difficult and frustrating process. Economic and demographic data is relatively easily available from official sources, such as Statistics South Africa, the National Treasury and the Reserve Bank. The base year of 2000 provided some problems, as the latest census in South Africa was held in 2001. Available data for the year 2000 consisted of projections based on the previous census (1996). The census projections do not include some of the categories required for this research, such as age categories, languages and access to television, radio, computers and telephones. Where possible, this information was obtained from other sources, such as the South African Advertising Research Foundation (SAARF). Projections for 2005 from Statistics South Africa are based on the census data.

Industry bodies such as the Audit Bureau of Circulations (ABC) and the South African Advertising Research Foundation (SAARF), both funded by the media industry, have a wide range of information on media consumption. The data is recent (up to December 2005), and accurate. Unfortunately, SAARF's research work is proprietary and is only available to those who can – or are willing to – pay for it. There are a number of private research companies in South Africa, such as Kuper Research, as well as international players, such as Nielsen Media, but their research work is also proprietary. These companies also tend to focus on mainstream media, and the data does not always include smaller, private players or community media.

Some questions have not been answered simply because the information does not exist – or, if it does, it exists in a form that does not fit the questionnaire. For example, radio audience share was not obtainable for all radio stations. SAARF's Radio Audience Measurement Survey, the official "currency" of the industry, measures listenership as a percentage of the adult population. It should also be noted that SAARF's figures measure the adult population, ie, those over the age of 16. According to the Foundation, there were 30.66 million adults in South Africa in 2005 (SAARF, 2006). This means that where the questionnaire requested information on percentages of the population, the answers reflect the percentage of the country's adult population, not of the total population.

Information on media development was more difficult to obtain, as there is no single body that collates this data. For example, the number of registered non-governmental organisations (NGOs) is available from the Department of Social Development¹. But the department is not able to provide information on types or categories of NGOs. This information was obtained from another organisation, the South African NGO Network, or SANGONeT, an organisation that offers services to other NGOs in South Africa. As there is no requirement in South Africa for journalists to be registered, data about the number of professional journalists currently practising in the country is not readily available.

Some of the research definitions limited data collection. For example, 'absolute poverty' is defined differently by different organisations. For the purpose of this study, the percentage of the population living below 'absolute poverty' reflects the population in the first Living Standard Measure (LSM) or those earning less than R500 (US\$80) a month².

The definition of "foreign ownership" was problematic. For the purposes of this study, foreign ownership was taken to mean 100% ownership. The distinction between multinational franchise and foreign-owned agencies was difficult to define – especially as this terminology is not used in South Africa.

The time allowed for the collection of data was too short to allow proper attention to the wide scope covered by the questionnaire. Trying to capture the complexity of South Africa's media landscape was impossible. For example, information on community radio stations – of which there are hundreds – was impossible to pin down. This is despite questions to the Independent Communications Authority of South Africa (ICASA), the National Radio Community Forum (NRCF), the Media Development and Diversity Agency (MDDA), and the Institute for the Advancement of Journalism (IAJ), which has a radio training division.

Response to requests for information was tardy in most cases. Many people simply did not respond, or did not send through the data they promised to send – despite the importance of the project being explained and emphasised (and any approach backed up with reminders and follow-ups).

Primary sources included: The South African Advertising Research Foundation (SAARF), Statistics South Africa (Statistics SA), ICASA, the South African Broadcasting Corporation (SABC) and the Audit Bureau of Circulations (ABC).

¹ See <http://www.socdev.gpg.gov.za> for further information.

² For the purposes of this project, the Rand/dollar exchange rate was set at R6.30 to the US\$1.



2. Country Overview

South Africa is Africa's largest economy and has the continent's biggest and most diverse media industry. Since the year 2000, the country has been characterised by accelerating economic growth, slowing population growth, a rise in household disposable income and living standards, increasing literacy and greater integration into the global economy (South African Reserve Bank, 2005).

More than a decade into a democratic government (President Mandela was elected in 1994), the stable political situation and increasing business and investor confidence have resulted in a stable currency, higher direct foreign investment and soaring portfolio investment into South African equities and debt instruments (South African Reserve Bank, 2005).

The last population census was held in 2001, which set the population at 44.8 million people (Statistics South Africa, 2001). Statistics South Africa's mid-year population projection for 2005 was 46.9 million, an increase of 7.35% from 2000 (Statistics South Africa, 2005). According to the World Bank (2005b), the South African population is 45.5 million, with 33% of the population under 14 years of age and 37% under 35 years of age.

The country is broken into nine main regions with the two most densely populated regions being KwaZulu-Natal and Gauteng.

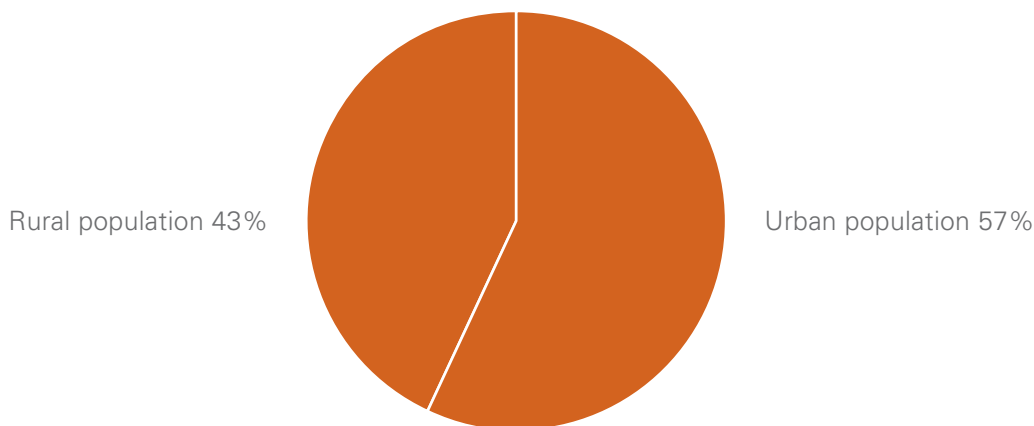
Table 1: Regional Populations

Regions/Provinces/States	Total Population in Millions
1. KwaZulu-Natal	9.43
2. Gauteng	8.84
3. Eastern Cape	6.44
4. Limpopo	5.27
5. Western Cape	4.52
6. North West	3.67
7. Mpumalanga	3.12
8. Free State	2.71
9. Northern Cape	0.82

Source: Statistics South Africa, 2001

More than half (56.9%) of South Africa's population live in urban areas (UNDP, 2003).

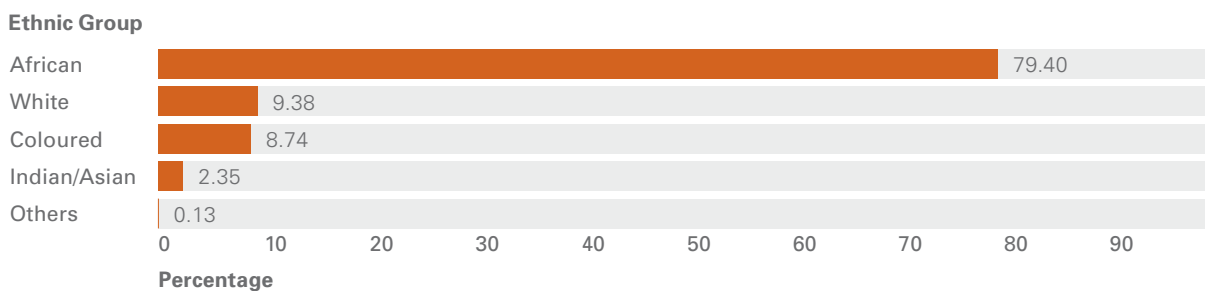
Figure 1: Urban vs Rural Population



Source: UNDP, 2003

South Africa relies on race groupings to define its ethnic groups. According to the 2001 census, the main ethnic groups in South Africa are African (79.4%), white (9.38%), coloured/mixed race (8.74%) and Indian/Asian (2.34%) (Statistics South Africa, 2001). The main religious groups are Christian, Muslim and Hindu, accounting for 82.5% of the population (Statistics South Africa, 2001). However, a significant proportion of the population (15.1%) regards itself as not religious (Statistics South Africa, 2001).

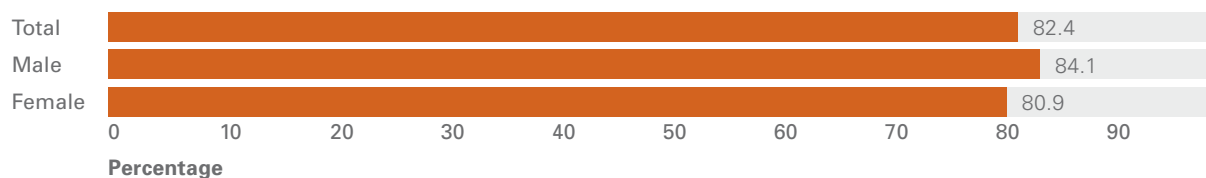
Figure 2: Main Ethnic Groups



Source: Statistics South Africa, 2001

According to the South African Advertising Research Foundation, literacy is at 94.4% of the adult population (SAARF, 2006). However, according to the UNDP (2003), adult literacy is 82.4% with male literacy at 84.1% and female literacy at 80.9% (see Figure 3).

Figure 3: Literacy Levels Age 15+

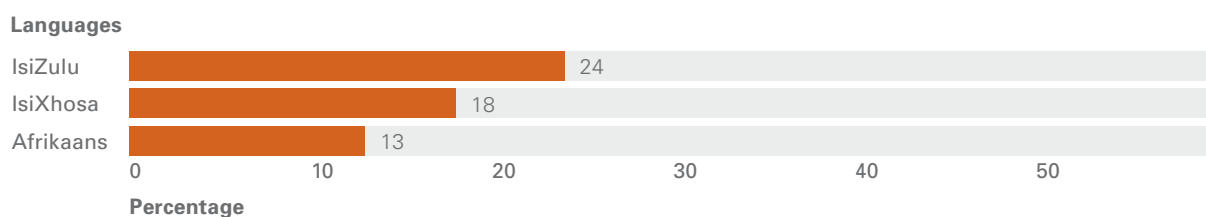


Source: UNDP, 2003

The country has 11 official languages. The most widely spoken language is isiZulu, followed by Afrikaans and isiXhosa.

According to a report by Statistics South Africa (2001), English is spoken at home by only 8.2% of the population. Most of the print media are in English.

Figure 4: Widely Spoken Languages



Source: Statistics South Africa, 2001

African-language radio has deep penetration among mother-tongue speakers and public-service television has begun to cater much more substantially to African-language speakers.

Much is made of the growth of South Africa's middle class – especially among previously disadvantaged groups – and the effects of this on media consumption. If one takes people earning between R3,000 (US\$476) and R16,000 (US\$2,540) a month as middle-class earners, this grouping has grown from 30.3% of the adult population in 2000 to 34.5% in 2005. The number of people falling into the high-income group in South Africa (ie, those earning more than R16,000 or US\$2,540 a month) has increased by one percentage point from 4.1% of the adult population in 2003 to 5.1% in 2005 (SAARF AMPS, 2005).

The government's service delivery programme is paying off, with 85% of homes having electricity in 2005 against only 80.3% in 2001. This figure was 58% in 1994. This has translated, for example, into an increase in the number of televisions per household.

On the other hand, one should also bear in mind that, despite progress, the number of people living “below absolute poverty” (or households earning less than R500 or US\$80 a month) is still 6.4% of the population. Although this is 1.6 percentage points down from 8% in 2003, it translates into more than two million people (SAARF AMPS, 2005). The CIA shows 50% of the population living below the poverty line. Once again, I believe this highlights the problem of the lack of a set definition of absolute poverty. As previously stated in this report, for the purposes of this study, the line was taken as LSM1, or those households earning R500 or US\$80 or less a month. A recent news report in *The Sunday Times* (Ntshingila, 2006) says that, according to a study by financial think-tank Eighty20, more than seven million South Africans live on less than R5 (US\$0.80) a day. The GDP of South Africa is US\$456.70 billion (OMD, 2005).

The country is governed by a parliamentary democracy based on proportional representation in two houses: the National Assembly and the National Council of Provinces. Elections for parliament are held every five years, with the last election being held in 2004. The executive is headed by an executive president, elected by parliament.

Key findings

- Politically stable and in great shape economically, South Africa has seen accelerating economic growth, slowing population growth, a rise in household disposable income and living standards, increasing literacy and greater integration into the global economy since 2001.
- The mid-year population projection for 2005 was 46.9 million, an increase of 7.35% from 2000.
- There are 11 official languages in the country, although isiZulu, isiXhosa, Afrikaans, English and Sesotho are the most widely spoken.



3. Media Health

3.1 Status of the laws regarding rights and access to information

The Constitution of the Republic of South Africa Act 108 of 1996 is the supreme law of South Africa. The interim Constitution, which was enacted in 1993, entrenched the right to freedom of expression, including freedom of “the press and other media”. This was carried over into the final Constitution, which was enacted in 1996.

Section 16 of the Constitution provides:

(1) Everyone has the right to freedom of expression, which includes:

- (a) freedom of the press and other media;
- (b) freedom to receive or impart information or ideas; and,
- (c) academic freedom and freedom of scientific research.

(2) The right in subsection (1) does not extend to:

- (a) propaganda for war;
- (b) incitement of imminent violence; or,
- (c) advocacy of hatred that is based on race, ethnicity, gender or religion, and that constitutes incitement to cause harm.

While rights to free speech and free media are enshrined in the Constitution, these rights do not extend to extreme or dangerous “hate” speech. As outlined in Section 16 of the Constitution, hate speech is defined as incitement to imminent violence or advocacy of hatred that is based on race, and which constitutes incitement to cause harm. Furthermore, the Constitution also provides for a balance between free speech and free media rights on the one hand and rights to equality and dignity on the other. At the same time, rights can only be limited if this is reasonable and justifiable in an open and democratic society based on human dignity, equality and freedom (Taylor and Berger, 2006).

Section 32 of the Constitution gives anyone the right to access information held by the state, and any information held by bodies that may be needed for the exercise of any other right. The Promotion of Access to Information Act 2 of 2002 was passed to give effect to this. While the Act does not apply to the media specifically, it has implications for the ability of journalists to gather information. The Act obliges public and private bodies to give members of the public access to records on request, in accordance with guidelines set out in the Act. The term “public body” is broadly defined and includes government departments, local

authorities, statutory bodies and para-statal. Records of Cabinet, Members of Parliament and provincial legislatures are exempt from the application of the Act (Mochaba, et al, 2003).

Public and private bodies may refuse a request for information on a number of grounds, including:

- protection of the privacy of a third party who is a “natural” person (a legal term denoting an individual person, unlike a juristic person which denotes an association, company or organisation);
- protection of commercial information of third parties;
- protection of the safety of individuals and property;
- protection of legally privileged information;
- protection of tax records; and,
- protection of defence, security and international relations.

Private bodies may also refuse to disclose information about their commercial activities. Grounds for refusal may be overridden by a legitimate public interest, defined in the Act as instances where the record would reveal either a substantial contravention of the law or an imminent and serious public safety or environmental risk (Mochaba et al, 2003).

The Act regulates the right of access to information, which is enshrined in South Africa’s Constitution. The effect of this Act has been positive in that it puts in place procedures that enable media workers to request information from private and government bodies. However, criticism has been levelled against the Act in that a wide range of information is excluded from the ambit of the Act (for example, the minutes of Cabinet meetings or municipal executive mayoral committee meetings as well as commercially sensitive information held by corporations).

3.2 Status of the laws regarding criminal defamation and insult

Insult (*crimen iniuria*) is a common-law offence. In addition, the Promotion of Equality and Prevention of Unfair Discrimination Act 4 of 2000 came into effect in 2001.

The purpose of the Act is to promote equality and eliminate unfair discrimination. To these ends, it includes sections prohibiting “hate” speech. Section 10 of the Act prohibits anyone from “publishing anything that could reasonably be construed to demonstrate a clear intention to be hurtful, cause harm or promote hatred on the basis of race, gender, sex, pregnancy, marital status, ethnic or social origin, colour, sexual orientation, age, disability, religion, conscience, belief, culture, language or birth” (Republic of South Africa, 2001).

This Section is wider than the limitation to freedom of expression in the Bill of Rights (as outlined in the Constitution), which refers only to hate speech based on race, ethnicity, gender or religion.

Section 12 prohibits the dissemination or broadcasting of information (including the display of advertisements or notices) that could reasonably be construed to discriminate against any person. There are some exceptions to this rule, including bona fide artistic creativity, academic or scientific inquiry and fair and accurate reporting in the public interest.

The Act not only criminalises “hate” speech and discriminatory speech, but also empowers equality courts to issue interdicts against publication and to award damages (Brand, 2005).

3.3 Status of the laws that exist to enable media regulatory bodies to function independently

Independent Communications Authority of South Africa Act

Parliament passed the Independent Communications Authority Act 13 in May 2000, building on the principles outlined by the Independent Broadcasting Authority Act 153 of 1993. The Act moved matters forward on many fronts: it amalgamated the Independent Broadcasting Authority (IBA) and the South African Telecommunications Regulatory Authority into a single regulator for the whole telecommunications and broadcasting sectors. This regulator is known as the Independent Communications Authority of South Africa, or ICASA.

The Act also took steps to enshrine the independence of ICASA from commercial and political interference. (ICASA's seven councillors are appointed by the president, who is only allowed to make appointments on the recommendations of the National Assembly, following a public hearing with all the candidates present.) The general provisions of the 1993 legislation – especially those around licensing provisions – remained in force.

Although ICASA is an independent body, current legislation stipulates that, as an organ of the state, it is nonetheless broadly accountable to the Minister of Communications through the provision of its annual report (Taylor and Berger, 2006).

The president's power to appoint one of the councillors as the chair was put up for revision in the ICASA Amendment Bill in 2005. The Bill, drawn up by the Parliamentary Portfolio Committee on Communications, establishes a panel of experts to advise on the nominations. But it was modified by the National Council of Provinces “at the 11th hour”, effectively handing over power to hire and fire councillors to the Minister of Communications, Ivy Matsepe-Casaburri (Dawes, 2006).

3.4 Current provisions that aim to secure the independence of publicly-owned media

The Independent Broadcasting Authority Act of 1993, the Broadcasting Act 4 of 1999 and the Independent Communications Authority of South Africa Act 13 of 2000 all ensure that the South African Broadcasting Corporation (SABC), South Africa's national broadcaster, is independent.

Additionally, the 1999 Act confirmed the Minister of Communications' role in policy formulation, but significantly limited ministerial interference and directives in the operations of the authority. Directives from the ministry would have to be made and approved in consultation with the national broadcaster and the stipulations of the Act. The ministry attempted to scrap this qualification in the Convergence Bill of 2005, but withdrew its bid in the face of widespread criticism by business and civil society (Taylor and Berger, 2006).

The SABC is governed by a 12-member board, which is appointed by the president on the advice of the National Assembly. This board is explicitly mandated in legislation to protect the SABC's freedom and independence. It is accountable to parliament and ICASA. The SABC's mandate as a public broadcaster is laid out in the Broadcasting Act 4 of 1999, which contains the charter to which the SABC must comply. The charter makes it clear that the SABC enjoys freedom of expression and journalistic, creative and programming independence (Taylor and Berger, 2006).

3.5 Current provisions to support community or alternative media

The purpose of the Media Development and Diversity Agency Act 14 of 2002 is to create an environment that encourages media development and diversity, to be fostered by the Media Development and Diversity Agency (MDDA). The Act applies to print, broadcast and new electronic media.

In terms of Section 3 of the Act, a key function of the MDDA is to encourage ownership and control of media by historically disadvantaged communities, language and cultural groups.

Section 17 empowers the MDDA to support media organisations through:

- ❑ financial support, in the form of cash subsidies or emergency bridging finance aimed at strengthening or ensuring the survival of media organisations;
- ❑ training opportunities and capacity development in the areas of media production and distribution; and,
- ❑ negotiating indirect support from state utilities or financial organisations, such as preferential pricing or discounted tariffs.

The Agency was established in 2002. In line with its mandate, the beneficiaries are intended to be the community media sector and small commercial enterprises. The MDDA may provide financial and logistic support, as well as training and capacity building.

3.6 Regulatory obligations for public or state broadcasters to fulfil a public-service broadcasting remit

The SABC's mandate as a public broadcaster is laid out in the Broadcasting Act of 1999. Section 10 of this Act deals with the SABC's public-service obligations, which include:

- ❑ broadcasting to South Africans in all 11 official languages;
- ❑ reflecting the diverse cultural and multilingual nature of South Africa;
- ❑ providing news and public affairs programming that meets the highest standards of journalism, as well as fair and unbiased coverage, impartiality, balance and independence from government, commercial and other interests;
- ❑ broadcasting significant amounts of educational programming;
- ❑ supporting traditional and contemporary arts;
- ❑ broadcasting programmes made by the Corporation as well as those commissioned from the private production sector; and,
- ❑ broadcasting national sports programming as well as developmental and minority sports.

The Act contains the charter to which the SABC must comply. The charter requires that the SABC must encourage the development of South African expression by providing (in the official languages) programming that:

- ❑ reflects South African attitudes, opinions, ideas, values and artistic creativity;
- ❑ displays South African talent in education and entertainment programmes; and,
- ❑ advances the national and public interest.

As already mentioned, the SABC is governed by a 12-member board, which is appointed by the president on the advice of the National Assembly. This board is explicitly mandated in legislation to protect the SABC's freedom and independence. It is accountable to parliament and ICASA (Taylor and Berger, 2006).

ICASA believes that, through local music and television programming, radio and television can make a "vital contribution to democracy, nation building and development in South Africa" (ICASA, 2000, p.4-5).

The latest licence conditions, which came into effect in August 2003, set the local content quota for the SABC's public-service television channels at 55%. Public-service radio stations are obliged to carry 40% local content (up from 20%).

While the SABC is obliged (in terms of its mandate) to broadcast in all South Africa's official languages, English language programming dominates all its television and radio schedules. New licence conditions introduced by ICASA in 2005 stipulate that South Africa's public TV stations must broadcast 66% of prime-time programming in languages other than English (Taylor and Berger, 2006).

3.7 Regulatory obligations for private broadcasters to fulfil a public-service broadcasting remit

South Africa has only one privately-owned free-to-air television station, e.tv. This station was licensed in 1998 as a broad spectrum free-to-air channel and is required by its licence conditions to serve "the universal television audience". Under its licence conditions, e.tv's local content obligation is 45%. It also operates under strict programming guidelines, such as 16 hours a week of children's programming, 19 hours of information programming and various other commitments in terms of programming in languages other than English (e.tv, 2004).

Under ICASA regulations' which came into effect in August 2003, local content must comprise 40% of community radio stations' programming (up from 20% set in 2000), while commercial radio stations' local content quota is 25% (up from 20%). These quotas are due to be reviewed again in late 2006 (Kantor, 2004).

3.8 Journalism

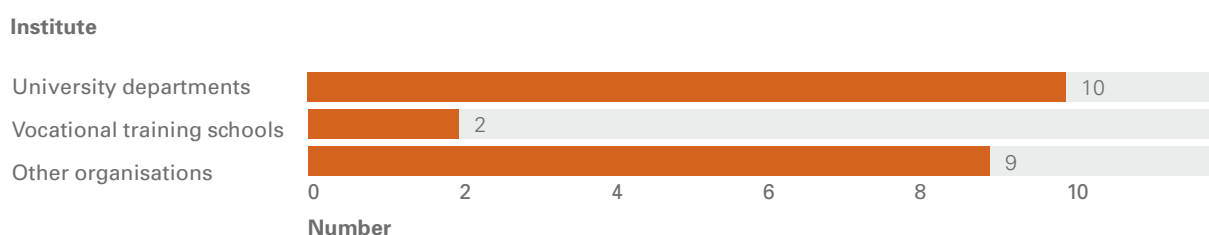
South African journalists are not obliged to be registered or licensed. As such, it was impossible to determine how many journalists are practising in the country today. The majority of editorial workers used to belong to the South African Union of Journalists, but this organisation was liquidated in 2005. Members joined up with the Media Workers Association of South Africa which (in mid-2006) had a membership of 35,000. This organisation represents journalists as well as other media workers.

The South African Editors' Forum (Sanef) skills audits carried out in 2002 and 2005 highlighted the lack of basic journalism and management skills among journalists and media managers in South Africa's newsrooms. In a meeting with journalists in 2005, President Thabo Mbeki said that the threat to the media in reporting African issues was not only the lack of editorial independence but also the ignorance of journalists (Kupe, 2005). This is despite no less than ten universities and 11 other institutions offering journalism and/or media training in the country. The findings of the skills audits, as well as continuing criticism from government, have sparked debate, and trainers are working on their curricula to make them more relevant.

All broadcasters and media owners contribute to a national skills levy on payroll. These funds go to the Media, Advertising, Publishing, Printing, Packaging Sector Education Training Authority (MAPPP-SETA) (see website: <http://www.mapp-p-seta.co.za/>). Media owners may claim back a percentage of the levy based on accredited training they provide for their employees. Under the MAPPP-SETA, a number of formal training standards have been drawn up to standardise courses in journalism (Taylor and Berger, 2006).

In 2005, there were an estimated 21 journalism training institutions, with most being university departments offering journalism programmes. Of the 21 institutions, only two were vocational journalism schools.

Figure 5: Number of Journalism Training Institutes



Source: Author's personal research, in association with Professor Guy Berger and Liz Barratt

Journalists' salaries vary significantly throughout South Africa. The variations cut across media companies, sectors (public, private and community), specialisations (print, radio and TV) and even journalism topics (politics, business and so on). The top salaries go to those who work for major media companies in the big cities of Johannesburg and Cape Town. It would be speculative here to give a definite figure as to the average salary for journalists in South Africa. However, we can assume that journalists, nurses and teachers are generally at the low end of the salary scale in South Africa with the average teacher's pay being US\$13,000 (personal communication with Fikile Hugo, South African Democratic Teachers' Union, 2006).

Key findings

- Rights to free speech and free media are enshrined in the Constitution. However, these rights do not extend to extreme or dangerous “hate” speech. The rights to freedom of expression are also balanced against the rights to equality and dignity.
- Laws exist in South Africa to protect the right of access to information, to promote equality and eliminate unfair discrimination (including the banning of “hate” speech). Insult is a common-law offence.
- The independence of the Independent Communications Authority of South Africa is enshrined in legislation passed in 2000. However, the controversial ICASA Amendment Bill of 2005, which is yet to be signed into law, effectively gives the Minister of Communications power to hire and fire councillors.
- Three pieces of legislation all work together to ensure that the SABC (South Africa’s national broadcaster) is independent.
- One of the key functions of the Media Development and Diversity Agency, created by law in 2002, is to encourage ownership and control of media by historically disadvantaged communities, language and cultural groups.
- The SABC’s mandate as a public broadcaster is to encourage the development of South African expression in programming that, inter alia, reflects South African attitudes and advances the national and public interest.
- Commercial and private broadcasters are obliged to submit to local content quotas.
- Basic skills are lacking among South African journalists. Training institutions are working with industry to address this.



4. State of the Media – Literature Review

4.1 Media Development and Diversity Agency (MDDA) (2001)

This position paper, written in 2001, sets out the rationale behind the formation of South Africa's Media Development and Diversity Agency (MDDA). A government initiative, the agency was proposed as a way to "promote access to the media by marginalised groups and to enhance media diversity. It is in accordance with the Constitution, the Bill of Rights and the Reconstruction and Development Programme and is further motivated by the National Action Plan for the Promotion and Protection of Human Rights, which emphasises freedom of expression and media diversity, and the need for mechanisms to ensure that this is achieved" (MDDA, 2001, p.7).

As the world moves rapidly towards an information society, the paper states that it is "critical all citizens have access to the widest range of information and opinion in order to participate effectively in an increasingly integrated world at local, national and international levels". It was envisaged that the MDDA would encourage the process of transformation of the media sector. "South African experience has shown that market forces, opportunities for broadcast licences and changes in ownership, while very important, cannot on their own fully achieve ... transformation" (MDDA, 2001, p.8).

Although the MDDA is a government initiative, it operates independently and "at an arm's length from government, the media industry and other donors". Its mandate will be to promote diversity and development in print, broadcast and new media (MDDA, 2001).

The Position Paper defines media development as that which promotes an enabling environment to help redress exclusion and the marginalisation of groups and interests from access to media – as owners, managers and producers of media. Media diversity is about ensuring that all interests and sectors have affordable access to a range of views and information sources fully reflective of our society. The achievement of diversity is also facilitated by the availability, to a diverse range of media (small and large), of the means of distribution (MDDA, 2001).

The paper covers topics such as:

- the international experience of support schemes;
- the character of the MDDA and its relationship with other bodies;
- the beneficiaries and the nature of the support; and,
- the MDDA's budget.

The position paper was translated into legislation and the Agency was established in 2002.

4.2 Steyn & De Beer (2002)

A number of factors led to this study being commissioned by the South African National Editors' Forum (Sanef) in 2002, not least of which was South African President Thabo Mbeki's complaints about the print media's unprofessional reporting (in the post-apartheid era). There is also criticism from government and civil society about the way in which the media have dealt with transformation in the media industry – especially in terms of news coverage of major socio-economic challenges, such as poverty and underdevelopment, and health issues such as HIV/AIDS.

To address these and other issues, Sanef has undertaken to expand investment in journalism training. This audit, and a second in 2004 (see below), are part of this process. "This skills audit investigates the status of reporting, writing and accuracy skills among reporters in the mainstream media. The outcome of this investigation was aimed at facilitating the design and development of journalism curricula at tertiary level, and improving the journalism skills of those journalists already working in the media" (Steyn and De Beer, 2004, p.388).

The stated research purpose was to conduct an analysis of journalism skills among reporters in South African newsrooms. It was a qualitative study, although information from self-administered questionnaires completed by reporters and the news editors' evaluations were partially quantified. The study sample comprised reporters with between two and five years' experience working in South Africa's mainstream media (Steyn and De Beer, 2002).

The research population consisted of major print and electronic news media in the four metropolitan areas of South Africa (Durban, Johannesburg, Port Elizabeth and Cape Town) as well as editors, news editors and reporters actively working in these areas. The media sample consisted of daily newspapers, weekly newspapers, magazines, television channels, radio stations and online news media.

Steyn and De Beer's 2002 study found that there were three major skills shortages in journalism training:

- newsgathering (the ability to develop a story or identify story ideas);
- accuracy (7% of the reporters could not correctly identify that Washington DC was the capital of the United States); and,
- writing (for example, news editors rated 42% of reporters "below average" in terms of writing a proper introductory paragraph).

The authors of the study concluded that reporters are, in many cases, ill-equipped to meet the highest industrial standards while portraying the essence of a changing society (Steyn and De Beer, 2004).

4.3 Steyn & De Beer (2005)

The background for this second audit, conducted on behalf of the South African National Editors' Forum (Sanef), was the assertion that "increased bottom-line pressure is seriously hurting the quality of news coverage" (*State of the News Media Report, 2004*, p.1 cited in Steyn and De Beer, 2005, p.1). Added to this were factors such as increasing competition for audiences and resources, criticism from government and the public, and changes to the media environment.

This study focused on managerial competencies among first-line news managers (such as news editors, assignment editors, section editors or night editors) responsible for the production of news by reporters in South Africa. The general research purpose was "to conduct an audit into the importance and implementation of managerial competencies across a national sample of first-line news managers within South Africa's mainstream news media" (Steyn and De Beer, 2005, p.2).

Quantitative (self-administered questionnaires) and qualitative (semi-structured interviews) research designs were combined with the main aim of transforming data into information insights and knowledge, and gaining a true understanding of the issues.

Among the findings reported were:

- news editors currently working in South African newsrooms are mostly male, have good educational qualifications and are mostly English-speaking;
- almost half of these news editors seem to lack management experience (i.e., they have only been in their current position for three years or less) and also the skills effectively to perform the functions expected of them;
- top management and owners in South African mainstream media should invest in improved management by equipping first-line news managers with managerial competencies that would enable them effectively to manage all available resources – especially human resources; and,
- from the perspective of first-line managers, areas that needed improvement included (from most to least important): global awareness; self-management; communication; strategic action; planning and administration; and teamwork.

4.4 Gender Links (2004)

The *South African Gender and Media Audience Study* was conducted by Gender Links (an NGO) in partnership with the Media Institute of Southern Africa, the Gender and Media Southern Africa Network, and universities and media advocacy organisations. With technical support from the South African Media Monitoring Project, the study covered 13 Southern African countries. It followed on from Gender Links's *Gender and Media Baseline Study* conducted in 2002 that showed that women are both under-represented and portrayed in limited roles in the news (this study showed that women constitute 19% of news sources in South Africa.)

The follow-up study focused on how audiences view these discrepancies. According to Gender Links (2004), the *Gender and Media Audience Study* was the first major regional study on media consumption patterns in Southern Africa, and had a special focus on gender.

The South African findings are based on the responses of 149 women and 157 men from the Western Cape, Eastern Cape and Gauteng across different age, education and racial groups.

Key findings included:

- television is the most important source of news, especially for women (49%);
- there is a gender gap in newspaper readership (21% of men rely on newspapers as their main source of news against 15% of women);
- there is a low reliance on the Internet as a main news source (1% by women and 4% by men);
- there is a strong correlation between levels of education and the main source of news (for example, women and men with primary level education constitute the highest proportion of those who rely on radio as their main source of news);
- both women and men prefer short news reports to any other news genre with a low percentage identifying opinion and commentary as their favourite news genre (this may reflect the low reliance on newspapers as a primary news source as well as the fact that the majority of South Africa's news audiences are relatively unsophisticated);
- there are mixed perceptions about women's representations in the news;
- there are strong views on the use of images that portray women as sex objects with no women and only 7% of men saying that such images would encourage them to buy a newspaper or watch the news; and,
- women (66%) and men (46%) say they would find the news more interesting if the ideas and views of women were reported more often (Gender Links, 2004).

4.5 Hadland & Thorne (2004)

This study, commissioned by the Media Development and Diversity Agency, provides an overview of relevant legislation and policy in South Africa, pre- and post-1994, as well as a review of international research that reveals global trends in small media development. The findings were presented to the MDDA's board in 2003. The study was a collaborative project of the Human Sciences Research Council (see website: <http://www.hsrc.ac.za>) and the NGO Mediaworks (see website: <http://www.mediawks.co.za/>).

The authors of the study define "small media" as a collective term for the community and private media sector.

Key elements of this report include the implications of convergence at a grassroots level on small media, identifying common interests of small commercial media and community media and, most especially, a detailed examination of sustainability and how it can be fostered in this sector. A holistic view is taken of sustainability that is fleshed out by a number of specific conclusions and suggestions.

These are among the conclusions reached by Hadland and Thorne.

- It is important for the MDDA to target least-served areas and groups, particularly in the rural parts of the country, as well as providing access to the media to women and the disabled. However, media organisations cannot simply be dropped into areas without a clear need being expressed by an already active group of organised people.
- A national awareness campaign is necessary to illustrate the potential of small media.
- Use should be made of pre-existing infrastructural or institutional resources (such as multipurpose community centres or telecentres) to locate future “small media” projects.
- Where more than one community media organisation exists in the same area, moves should be made to merge or collaborate in order to prevent unnecessary competition for resources.
- A management service to facilitate institutional support and development for small media needs to be established.
- Ownership structure is not always the best indication of the closeness of ties between a local media organisation and the community it serves.
- The relationship between small media and government needs to be more clearly defined.
- An ethical and mutually beneficial partnership should be established between mainstream media, including public and private broadcasters, and small media.
- Funding channels require improved co-ordination and information sharing.
- Project management needs to be built into training interventions as a matter of urgency.
- The authors propose a range of sustainability strategies, including research into a national advertising procurement agency, a new system for circulation verification, a new arrangement for printing procurement, the securing of a discounted rate for connectivity and the establishment of a sectoral investment institution.
- A national news agency for small media needs to be investigated.
- A technology plan for small media needs to be drawn up.

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Key findings

- The Media Development and Diversity Agency’s position paper, written in 2001, sets out the rationale behind the formation of the Agency. A government initiative, the Agency was proposed as a way to “promote access to the media by marginalised groups and to enhance media diversity”.
- Skills audits were conducted in 2002 and 2005 in South Africa’s newsrooms, across print and broadcast media. Journalists were found to be lacking in basic skills, such as newsgathering, accuracy and management.
- The *South African Gender and Media Audience Study* focused on how audiences view the discrepancies between how men and women are represented in the media. It found gender gaps in the media consumption habits of men and women. While television is the main source of news for both sexes, more men than women rely on newspapers as their main source of news. The majority of women and 46% of men said that the news would be more interesting if the ideas and views of women were reported more often.

- *The People's Voice* is a study commissioned by the MDDA that focuses on the challenges faced by “small media” in South Africa.
- The report emphasises the importance for the MDDA to target least-serviced areas and groups, particularly rural areas. Possible solutions to the hurdles faced by small media include reliance on existing infrastructural or institutional resources and the establishment of a management service to facilitate support.



5. Radio

5.1 Key changes and developments in the radio marketplace in the past five years

Radio is the undisputed mass medium in South Africa. More than 92% of South Africans listen to the radio. In 2005, according to figures from SAARF, about 88% of households had a radio (SAARF, 2006).

According to ICASA, there were 122 licensed radio stations in South Africa in 2005. Of these, there are about 90 community radio stations. There are five SABC (South African Broadcasting Corporation) radio stations that broadcast nationally and 13 regional SABC radio stations. Only one privately owned radio station – Radio Pulpit – broadcasts nationally, while there are 13 privately owned regional stations.

Of the SABC's 18 radio stations, three are commercial licences, while the rest are public broadcast stations.

About 16 international and African radio stations are available via DStv satellite's audio channel. These include BBC World Service Radio, Voice of America, World Radio Network and Radio Nederland. African radio stations include Radio Wave and Energy from Namibia as well as Christian stations, Trans World Radio and Radio Veritas. Listenership details were not available for these stations.

Community radio is gaining momentum in South Africa, with involvement and support from the MDDA, the National Community Radio Forum (<http://www.ncrf.org.za>) and a special training programme run by the Institute for the Advancement of Journalism (<http://www.iaj.org.za>).

According to SAARF (2006), the standard audience rating of which measures radio listening in the seven days preceding the survey, 5.29 million people (or 17.2% of the adult population) had listened to community radio in the past seven days in 2005. This is a 119% increase from 2.42 million (or 8.1% of the adult population) in 2003. Nearly 80% of the adult population claim to have listened to the radio the previous day.

It has been impossible to establish exactly how many community radio stations are broadcasting in South Africa. While ICASA could not provide figures for 2000, according to the recently supplied record of licensees, 90 community radio licences have been issued by ICASA. Fourteen of these were initially granted one-year licences, of which 11 have presumably been converted into four-year licences. (One station did not apply to be re-licensed, while two licences were declined by the Authority. Two other stations – Radio Today and Radio Pretoria – are both broadcasting under court order; they have been accused of contravening their licence conditions.) Note that community radio licences were initially granted on a temporary one-year basis, but are now granted for licence periods of four years. Of the 76 four-year licences issued, 26 were no longer valid in 2005. Four of the licensees are not dated. Neither ICASA nor the NCRF was able to supply information on how many community stations were actually broadcasting.

Although SAARF says it monitored 94 community radio stations in 2005, and the ICASA list shows that only 61 stations had valid licences in that year, it is unlikely that radio stations were broadcasting illegally. The broadcasting environment in South Africa is strictly regulated by ICASA and the discrepancy should rather be credited to the unreliability of the data provided.

Section 2 of the Independent Broadcasting Authority (IBA) Act, which sets out the primary objectives of the Act, includes the responsibility of “ensuring commercial and community broadcasting licences, viewed collectively, are controlled by persons or groups of persons from a diverse range of communities”. The Act also describes community broadcasting services as those that are “geographically founded”, or founded on “an ascertainable common interest”. The community radio stations do indeed reflect diverse interests: from rural women’s initiatives to campus radio stations to religious stations (Taylor and Berger, 2006).

Private regional stations are very successful, with listenership – and revenues – increasing. So-called “adult contemporary” stations are showing strong growth. Kim Heller, Head of Research for station owner Kagiso Media, says this is because “we focus on lifestyle rather than pure demographics. That is why radio stations like Jacaranda, with soft, relaxing music, appeal to everyone” (Smith, 2005). Jacaranda’s figures are impressive. Figures from SAARF in 2005 put the Pretoria-based station’s “past seven-day listenership” at 2.18 million (SAARF, 2005).

In sum, the national sector has held steady over the past five years with six radio stations broadcasting nationally in South Africa. Five of these are owned by the SABC; the sixth (Radio Pulpit) is private but shares a transmitter with Radio 2000, one of the public broadcaster’s channels.

It should be noted, however, that only two of the SABC stations are public-service stations. Metro FM and 5FM, both music stations, are driven by commercial imperatives. This is part of the tension inherent in the model that requires the SABC to “pay its own way” under its new licensing conditions.

The table below illustrates what percentage of the adult population listens to the six national radio stations. Despite being national radio stations, these six stations only claim 30% of the adult population as listeners. This is compared to 58.9% of the regional stations broadcasting to the five most populous regions of South Africa.

Table 2: National Radio Listening Figures

Radio station	2001 % of adult population	2005 % of adult population	Change in percentage
Metro FM	9.5	17.2	+7.7
Radiosondergrens (RSG)	3.7	5.8	+2.1
5FM	2.5	4.3	+1.8
Radio Pulpit	1.1	1.3	+0.2
SAfm	1.1	1.5	+0.4
Radio 2000	0.2	0.5	+0.3

Source: SAARF AMPS, 2001 and 2005

(Note: 2001 figures reflect Monday to Friday, while 2005 figures measure the past seven days.)

Radio Metro's growth of 7.7 percentage points is the most significant. This station, which is owned by the SABC, targets trendy, sophisticated African listeners in South Africa's major cities. It plays contemporary music, with news and talk. Its cool advertising campaign in 2001 – with the tagline "What makes you black?" – won a number of industry awards, and was credited for sparking its growth in listeners.

African language stations dominate regional listening figures, with four of the five regional stations broadcasting in languages other than English (see table below).

Table 3: Regional Radio and Broadcast Language

Radio station	Region	Broadcast language
Ukhozi FM	KwaZulu-Natal	isiZulu
Lesedi FM	Gauteng	Sesotho
Umhlobo Wenene	Eastern Cape	isiXhosa
Thobela FM	Limpopo	Sepedi
Kfm	Western Cape	English

Source: SAARF AMPS, 2001 and 2005

Table 4: Regional Radio Listening Figures (past seven days)

Radio station	2001 % of adult population	2005 % of adult population	Change in percentage
Ukhozi FM	17.1	21.2	+ 4.1
Lesedi FM	8.8	11.8	+ 3
Umhlobo Wenene	11	15.6	+ 4.6
Thobela FM	8.8	6.1	- 2.7
Kfm	1.6	4.2	+ 2.6

Source: SAARF, 2001; 2005

(Note: 2001 figures reflect Monday to Friday, while 2005 figures measure the past seven days.)

While most of the stations reflect positive growth in listenership, it is likely that the growth curve can be attributed to the change in methodology between 2001 and 2005. Although at 6.25 million listeners, Zulu-language station Ukhozi FM is the biggest in the country, it has begun to lose listeners. Listenership fell by 300,000 from March-May 2004 to March-June 2005 (Smith, 2005). In KwaZulu-Natal, Ukhozi's heartland, private player P4 KZN is steadily growing, with listenership of 598,000 in the period March-June 2005 (up from 590,000 in March-May 2004). East Coast Radio is up from 1.793 million to 2.089 million over the same period (Smith, 2005). It may be that "easy listening" or "adult contemporary" stations are beginning to threaten SABC's African-language stations. They certainly dominate advertising revenue.

The SABC launched X-K fm in February 2004. X-K is a community station and broadcasts in the Northern Cape in the San languages of Xu and Khwe. The station broadcasts between 6am and 6pm. As it is a community station, its listenership was not measured separately by SAARF for 2005.

The commercial sector has held steady. ICASA is expected to launch seven new commercial radio licences during 2006. That, together with the anticipated relaxation of strict cross-ownership and foreign ownership regulations, is expected to shake things up. Currently, foreign ownership is restricted to a maximum of 20% of a radio or television station. It is a legal requirement.

Unfortunately, due to the lack of response about community radio stations, it has been impossible to find out what new community stations began broadcasting in the five years under review.

5.2 Investment and growth in the radio sector in the past five years

As previously mentioned, private regional stations are very successful, showing growth in both listenership and revenues.

Commercial radio stations are hot licence items – largely because they are so profitable. In South Africa, audience share does not necessarily match revenues. Advertisers are interested in the higher-income brackets (usually those in urban areas, listening to “adult contemporary” stations). According to Nielsen Media, advertising spend for July 2004-June 2005 on Ukhozi FM (6.25 million listeners) was R147.19 million, while East Coast Radio saw revenues of R219.37 million. Jacaranda, Highveld Stereo and East Coast Radio, the top three ad revenue earners, have a combined audience share of 18.1%, yet they attract 32% of advertising spend on radio. In contrast, the top three public radio stations, Ukhozi, Umhlobo Wenene and Lesedi FM, which have between them 46.7% audience share, attracted only 14.7% of total advertising spend (SAARF, 2006, and OMD, 2005).

In general terms, radio’s share of South Africa’s gross advertising expenditure has held steady at around 12 to 13% between 2001 and 2004 (OMD, 2005).

Table 5: Top Radio Advertisers in 2004

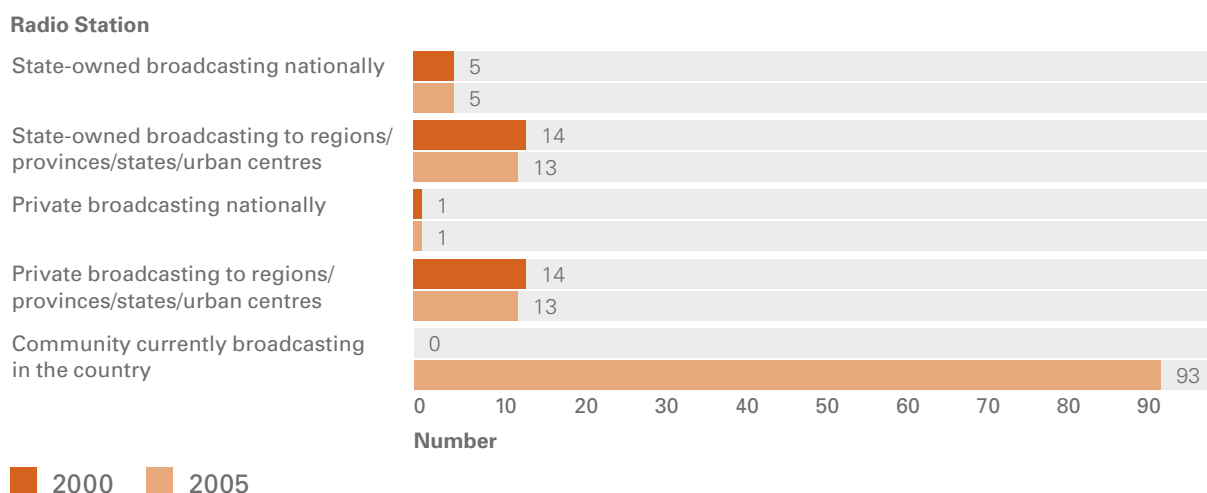
Advertiser	Sector	Spending (in Rand millions)
Government National	Government	130
Standard Bank	Financial services	59
MTN	Mobile service provider	54
Lever Ponds	Fast-moving consumer goods (FMCG)	53
First Rand Bank	Financial group	47
SABMiller	Breweries	42
Vodacom	Mobile service provider	32
Uthingo	National lottery	31
Cell C	Mobile service provider	30
ABSA	Financial services	29

Source: OMD, 2005

5.3 Plurality, ownership and control

As previously noted, there were (according to ICASA) 122 licensed radio stations in South Africa in 2005. Of these, there are about 90 community radio stations. There are five SABC radio stations that broadcast nationally and 13 regional SABC radio stations. Only one privately owned radio station (Radio Pulpit) broadcasts nationally, while there are 13 privately owned regional stations. These privately owned regional stations are very successful, with growing listenership and revenues.

Figure 6: Broadcasting and Ownership Status of Radio Stations



Source: ICASA, 2006

Of the SABC’s 18 radio stations, three are commercial licences, while the rest are public broadcast stations.

In addition, some 16 international and African radio stations are available via DStv satellite’s audio channel. These include BBC World Service Radio and Voice of America. African radio stations include Radio Wave and Energy from Namibia as well as Christian stations, Trans World Radio and Radio Veritas.

5.4 Diversity

The most important development in terms of new voices in radio is the launch of San radio by the SABC in the Northern Cape. This station is broadcasting in two languages that are not included in South Africa’s 11 official languages; this is in recognition of an important but marginalised sector of our society.

Many community radio stations, which should represent historically disadvantaged communities, have found the realities of broadcasting more onerous than they expected. Commercial pressures are high and they need a strong income base to survive. However, the very audiences they are set up to reach are poor communities.

Radio stations vary widely – from radio stations on university campuses to religious stations as well as community radio stations that target cultural or ethnic groups, such as Afrikaner communities.

As with all media, freedom of speech is constitutionally protected and radio stations are free to give comment that is fair. This is spelt out in the legislated code of conduct for broadcasters. For example, the code stipulates that licensees “shall be entitled to broadcast comment on, and criticism of, any actions or events of public importance”.

5.5 Quality of radio output and programming

A lack of suitable resources and viable revenue are allegedly driving some staff at community radio stations to seek other means of income. In an article entitled Public Neglect, Mbuyisi Mgibisa (2005) says community radio stations are forgetting their public role: “Community radio stations, both urban and rural, harbour agendas that interfere with... journalism. It also means that there has been an elimination or marginalisation of local news and current affairs programming at some stations. The focus has shifted to music and advertising” (p.40).

The reason for this, Mgibisa argues, is because journalists at these stations have “lost interest” in local news because they are driven to make money through other more successful means, such as doubling as sales reps, or are clamouring for fame by presenting music programmes. “With many of the journalists lacking a professional qualification, they also don’t have the skills to gauge how best to perform their functions in a complex situation” (Mgibisa, 2005, p.40).

The MDDA is attempting to address issues such as the lack of training and expertise among community radio broadcasters – especially in terms of management skills.

5.6 Specific challenges

Broadcasting in South Africa is strictly controlled and regulated by ICASA. However, ownership regulations are also expected to be relaxed – especially those on foreign and cross-media ownership, which may lead to further consolidation and, ICASA hopes, the emergence of a black-owned media giant.

ICASA is also expected to issue seven new commercial radio station licences this year. As this is such a highly lucrative sector, these licences will be eagerly sought after.

ICASA Chairperson Paris Mashile said, in 2005, that the regulator would focus on two areas: bringing down the high costs of communicating, and boosting nodal and secondary markets in radio. This “provides opportunities for the historically disadvantaged in communities outside the major metropolises” (Mashile in Smith, 2005).

But, as Smith (2005) points out, Alexandra, a township in Johannesburg and an official nodal point, had a radio station known as Alxfm but it closed down as it could not remain commercially viable. Community radio stations find it difficult to chase revenues as they serve very poor communities that have little money for advertising. What is more, bigger advertisers are not particularly interested in the audiences being delivered by community radio: they are not only too small, but they are also too poor.

What is becoming clear is that as South Africa celebrates more than ten years of democracy and slowly moves towards a more normalised society, the radio industry is having to rethink who it is broadcasting to. As Smith (2005) says in an article entitled *Brave New Categories* in *The Media Magazine*, South Africans “seem to be finally shaking off apartheid and the neat categories they were slotted into... and the most successful radio stations are paying attention”.

But what seems to be the fail-proof formula for commercial success in this sector seems to be just that: a formula of easy listening, adult contemporary content. Tleane and Duncan (2003) contend that “there is mounting evidence that both sectors are gradually being consumed by the commercial ‘steamroller’, losing their identity and ultimately leaving out their listeners – all as a result of the need to attain self-sustainability” (p.117).

Key findings

- 92% of South Africans listen to the radio.
- There are 122 licensed radio stations in South Africa. Of these, about 90 are community radio stations.
- African language radio stations dominate regional listening figures, with four of the five top stations broadcasting in languages other than English.
- Despite government support through the MDDA, the community radio sector is vulnerable.
- On the other hand, the commercial sector is booming, with adult contemporary formats being a “sure success” ticket. The sector is hot up with the issuing of about seven new licences in 2006.
- Change is the challenge. ICASA wants to see the rise of a black economic empowerment media group and radio broadcasters need to be creative in chasing new listeners.



6. Television

6.1 Key changes and developments in the television marketplace in the past five years

Television in South Africa operates in a strictly regulated environment, controlled by the Independent Communications Authority of South Africa (ICASA). There are three state-owned television channels (all owned by the SABC). There is only one privately-owned free-to-air channel, known as e.tv, which started broadcasting in 1998. There are two private television companies (M-Net and DStv) that broadcast to paying subscribers nationally¹. While no new television channels or stations have entered the marketplace in the five years under review, ICASA did issue a licence to Trinity Broadcasting Network (TBN) in the Eastern Cape in 2002. It was due to expire in April 2006. According to TBN's website (<http://www.tbn.co.za>), it broadcasts Christian programming through the DStv satellite system (see Figure 7). M-Net is a pay-television service that has seen a dramatic decline in viewer figures from 16.4% of adults in 2000 to 9.7% in 2005 (SAARF, 2004; SAARF, 2006). With a subscriber base of less than 254,400 (Koenderman, 2005), it is losing out to satellite digital television station DStv. (Note that viewership figures include viewers watching M-Net through DStv as well as "open time", when it is allowed to broadcast unencoded for two hours a day. ICASA is due to close this "open time window" in April 2007).

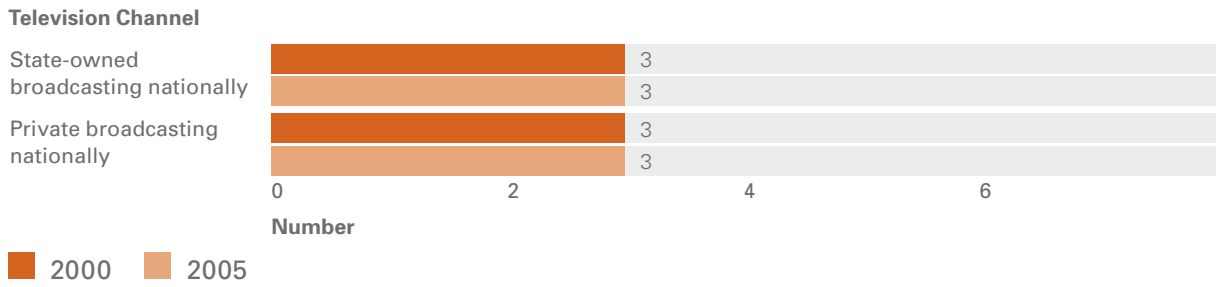
Because the cost of the receiving equipment and the subscription is relatively high, viewers are predominately drawn from the upper income-earning groups.

The most basic satellite television package costs about US\$32 for a monthly subscription².

¹ Note that M-Net and DStv are owned by the same company, MHIH/Naspers.

² See www.multichoice.co.za for further information.

Figure 7: Broadcasting and Ownership Status of Television Stations



Source: ICASA, 2006

DStv offers subscribers a choice of 60 channels, as well as about 40 audio channels, and has a subscriber base of more than 882,000 (Koenderman, 2005). Top channels on this service include M-Net, National Geographic, Hallmark, Supersport, BBC Prime and the History Channel. SAARF’s viewership figures for DStv show growth from 4.3% of adults in 2000 to 6.2% in 2005 (SAARF, 2004 and 2006). Because the receiving equipment and the subscription are relatively expensive, viewers are predominately drawn from the upper-income-earning groups. The company has tried to widen the net by offering a restricted, basic offering at US\$32 a month against the “full bouquet” at US\$63.50 a month.

According to figures from SAARF, in 2004, 78% of adults in South Africa claim to have watched TV in the past week (SAARF AMPS, 2005). This is up from 76.5% of the adult population in 2000 (SAARF AMPS, 2005). In 2004, just over 67.3% of adults watched TV daily, nearly four percentage points up from 63.5% in 2000 (SAARF, 2006).

As the SABC has upgraded its transmitters, so it has increased its broadcasting footprint. Expansion plans for television have also led to improved coverage, with SABC1 improving its reach from 83% of the population to 89%; SABC2 growing from 85% to 91% and SABC3 up from 72% to 77% (SABC, 2004).

In general terms, television’s share of South Africa’s gross advertising expenditure has held steady at around 44% between 2001 and 2004 (OMD, 2005).

Table 6: Top Television Advertisers in 2004

Advertiser	Sector	Spending (in Rand millions)
Lever Ponds	Fast-moving consumer goods (FMCG)	211
Procter & Gamble	FMCG manufacturer	146
Government National	Government	137
Coca Cola SA	Soft drinks	133
SABMiller	Breweries	120
MTN	Mobile service provider	105
Vodacom	Mobile service provider	103
JD Group	Furniture retailer	94
Clover	Dairy product manufacturer	90
Glomail	Infomercials	83

Source: OMD, 2005

There are no regional television stations in South Africa.

However, two new regional stations are in the pipeline – with licensing on hold until the SABC can secure funding. These stations will broadcast in indigenous African languages (see section 6.6).

The national television sector has held steady since 1998's entry of e.tv, the only private free-to-air channel. The table below illustrates what percentage of the adult population watches the nation's six television stations.

Table 7: National Television Viewership Figures

TV channel	2001 % of adult population	2005 % of adult population	Change in percentage points
SABC1	66.8	68.5	+ 1.7
e.tv	34.8	54.6	+19.8
SABC2	58.4	54.0	-4.4
SABC3	37.6	40.8	+ 3.2
M-Net	16.4	9.7	-6.7
DStv	4.3	6.2	+ 1.9

Source: SAARF AMPS, 2001 and 2005

(Note: Figures are for the past seven days. Also, the television viewership figures are given as percentages of the adult population not as percentage audience share).

e.tv's growth of almost 20 percentage points is the most significant. It has taken on the SABC by first extending its news broadcast to an hour, and then shifting it an hour earlier to 7pm. The SABC quickly felt the heat and, in response, moved their main English news bulletin back an hour to 7pm. e.tv is generally perceived as being truly independent and objective in its news coverage.

As ICASA has set local content quotas as part of each station's licensing conditions, investment has been internal and towards producing this local content. Local content quotas were recently increased – but to little complaint from broadcasters, who have found that audiences respond most strongly to South African shows. The table below shows how broadcasters are performing against their content quota requirements.

Table 8: Percentage of Local Content in Total Schedule

Channel	Time	Local content requirement	Actual local content
e.tv	Prime time	45%	Exceeds
M-Net	Open time	35%	Exceeds
M-Net	Full day	8%	Exceeds
SABC1	Prime time	55%	63%
SABC2	Prime time	55%	76%
SABC3	Prime time	35%	41%

Source: Broadcasters in Laschinger, 2005

Interestingly, the top five programmes on SABC channels and M-Net are overwhelmingly local. For the week of 14 February 2005, only two out of the 20 shows on these four channels were foreign (a movie and an episode of the *Bold and the Beautiful*, an American soap). The picture for e.tv, however, is a little different: three of the five shows were foreign imports. A news update and the live Lotto draw make up the difference. Two of the top five shows are wrestling shows (*International Smackdown* and *International Raw*), consistent top performers for e.tv.

Local content also allows broadcasters to build up a production library that they can exploit in other media, such as through sales to mobile content providers (Laschinger, 2005).

Dali Mpfu, the Chief Executive of the SABC, has said that he aims to set up two 24-hour channels (news and entertainment) that will broadcast across Africa in 2006. Content will be varied and broadcast in a range of colonial and indigenous languages. He has said that he plans to do this by securing partnerships with Africa's terrestrial public broadcasters. These channels, Mpfu believes, will dovetail with the African Union and the New Partnership for Africa Development (NEPAD), a socio-economic development framework for Africa's renewal, to realise the aspirations of the African renaissance (Bloom, 2005c).

6.2 Investment and growth in the television sector in the past five years

As South Africa's economy normalises, a wider middle class is emerging. And as the government's electrification programme progresses, more and more South African homes have televisions, creating more viewers. In 2000, 66.5% of households had a working television set in their homes. In 2005, this had increased to 7.76 million households (72.1% of households) (SAARF, 2006). With more than 80% of South Africa's adult population watching television, advertisers are paying attention.

Table 9: Advertising Revenue for the Top Five TV Channels in 2004

Channel	Total (Rands)
SABC1	1 325 888 422
e.tv	1 125 519 037
SABC2	1 050 831 722
SABC3	963 875 298
M-Net	674 667 786
Total	5 140 782 265

Source: AIS/Adex Nielsen Media Research, cited in OMD, 2005

With many other pressing demands, the government has been reluctant to fund a sector with a proven source of revenue: advertising. The company's financial results in 2005, which saw the SABC post record revenues of R3.3 billion with a net profit of R240.3 million (SABC annual report), only serve further to justify the government's reluctance, although the ANC in 2004 argued in favour of state funding of the broadcaster. In March 2004, as required by law, the SABC applied to ICASA to amend its licence conditions under the Broadcasting Amendment Act No 64 of 2002, which required that the SABC be formally restructured into a corporate entity. It provided for the SABC operations of three television channels (and 18 radio stations) to be divided into public and commercial operations that were to be administered separately. In terms of the Act, commercial sources of revenue should be used to subsidise the corporation's public broadcasting services (Taylor and Berger, 2006).

Here is what has been termed by Pippa Green (former head of radio news at the SABC) an “uncomfortable contradiction” to the model adopted for the SABC: while the Corporation has a public-service mandate, it has to compete commercially to survive. Licence fees account for just 13% of the SABC’s revenue (Green, 2004, p.42).

ICASA’s new licence regulations, released in June 2005, carefully outlined which SABC stations should do public service work (SABC 1 and 2) and which should make the money to pay for this (SABC 3). It can be argued, however, that the new conditions continue the SABC’s basic tension: “Thus, all public-service stations – despite their core mission – are nonetheless still licensed to make money through selling advertising. And commercial television – that is, SABC3 – is still required to do loads of public-service” (Berger, 2005a).

South Africa is the host of the 2010 Soccer World Cup, which is expected to act as a catalyst for further economic growth and investment in the media sector. However, there is “increased sabre rattling” from the government with respect to the banning of alcohol advertising after the 2010 World Cup (OMD, 2005). The government has successfully banned all cigarette advertising and has been threatening to do the same with alcohol. However, it had to put the brakes on its plans when it became clear that major sponsors of the World Cup are alcohol companies.

6.3 Plurality, ownership and control

Berger (2005b) argues that a new public broadcaster ought to have been established for the two new regional channels planned for South Africa: “The MDDA model spreads diversity rather than consolidating concentration. But now it is being ignored in favour of fattening the SABC – whose plate is already over-full. The prospect of SABC 4 and 5 points away from the country’s interests in a plurality of media owners, in fair competition and, indeed, in public service programming in whatever language.”

6.4 Diversity

In 2002, the government decided that two additional commercial television channels should be created with a mandate to broadcast entirely in indigenous languages. Initially, the view was that these would be directly accountable to the Department of Communications. However, protests by civil society and business saw these eventually being designated as public broadcast stations within the SABC’s portfolio (Berger, 2004).

In June 2005, ICASA gave the SABC approval to establish the two new channels: SABC 4 and 5. However, the issuing of these licences was put on hold until the public broadcaster was able to secure appropriate and sufficient funding, most of which will probably have to come from government. In a deviation from the position paper on public regional television services, ICASA said the channels would be able to carry advertising. This, once again, suggests a potentially problematic business model where a public broadcaster may have to rely on commercial imperatives (Taylor and Berger, 2006).

The new channels will be exclusively in African languages. SABC 4 will broadcast in Setswana, Sesotho, Venda, Pedi, Tsonga and Afrikaans in the areas of Limpopo, North West, Gauteng, Free State and Northern Cape. SABC 5 will broadcast in isiZulu, isiXhosa, isiNdebele, isiSiswati and Afrikaans in the areas of Mpumalanga, the east of Limpopo, KwaZulu-Natal, Eastern Cape and Western Cape. English will not be allowed on either channel, outside of news and current affairs programming (Derby 2005, as cited in Taylor and Berger, 2006).

But local voices are already making themselves heard on South African television screens (see also 6.1.1 on local content). The biggest growth area for South African television production is likely to be outside of English and Afrikaans. Broadcasters have realised that multilingual programmes draw large audiences. Indeed, SABC has already had success (particularly with local soap *Generations*) in subtitling local dramas that don't use English exclusively. SABC 1 reportedly delivered 42% of its programming in African languages in the 12 months to March 2005. It has plans to increase its African-language content to 50% in 2006. SABC 2's prime time was "dominated" by languages other than English, and prime time delivery of African languages increased 1.4% in the 12 months to March 2005 (Laschinger, 2005).

6.5 Quality of television output and programming

While the SABC constantly defends itself against criticisms that it is a "government mouthpiece", e.tv is perceived as being independent and much more objective in its news coverage.

In 2004, for example, the SABC was severely criticised after it broadcast the speech by South African President Thabo Mbeki – President and Chair of South Africa's ruling party, the African National Congress – at the party's launch of its election manifesto. Opposition parties were incensed. The public broadcaster defended itself, saying that what the President said would have an impact on everyone.

Broadcasting is beset by similar problems as print and radio: the "juniorisation" of the newsroom (ie, inexperienced reporters taking over from more experienced staffers who are moving on to other industries) and poor production skills. Both the SABC and e.tv, with their controversial top-down, heavy-handed management styles, have suffered from high staff turnover. But the appointment of a new chief executive at the SABC seems to have steadied the ship.

The production of South African programming has increased both in quantity and quality since 1994. This is partly due to local content provisions set by the government. Local shows have become significant audience drivers. South African viewers have also become more demanding. Increased local production has, however, led to skills shortages. Burgert Muller, an associate producer at Franz Marx Productions, was quoted in December 2005 (Laschinger, 2005) as saying there are bottlenecks in key areas, such as good crew and actors. Skills development has become crucial.

6.6 Specific challenges

As already mentioned, in 2002 the government decided that two additional commercial television channels should be created with a mandate to broadcast entirely in indigenous languages. Initially, the view was that these would be directly accountable to the Department of Communications. However, protests by civil society and business saw these eventually being designated as public broadcast stations within the SABC's portfolio (Berger, 2004).

Finally, in June 2005, ICASA gave the SABC approval to establish the two new channels: SABC 4 and 5. However, the issuing of these licences was postponed until the public broadcaster was able to secure sufficient funding. In a deviation from the position paper on public regional television services, ICASA said the channels would be able to carry advertising.

The quality of journalism produced by broadcasters is a serious challenge as newsrooms are hamstrung by the shortage of skills and “juniorisation”.

Key findings

- There are three state-owned channels, one private free-to-air channel and two subscription channels in South Africa. Two new regional African language stations are in the pipeline.
- Eighty percent of South African adults watch television and viewership is set to rise as the country’s electrification programme takes root and the middle classes grow.
- e.tv is posing a serious challenge to the SABC, despite the latter’s heavyweight status. Viewers are moving to the private player, which is often perceived to be more objective.
- Local content quotas have been increased by ICASA, but they are such powerful audience drivers most broadcasters are exceeding them.
- There are no new channels available in South Africa. However, two new commercial, regional stations are in the pipeline – with licensing on hold until the SABC can secure funding. These stations will broadcast in indigenous African languages.



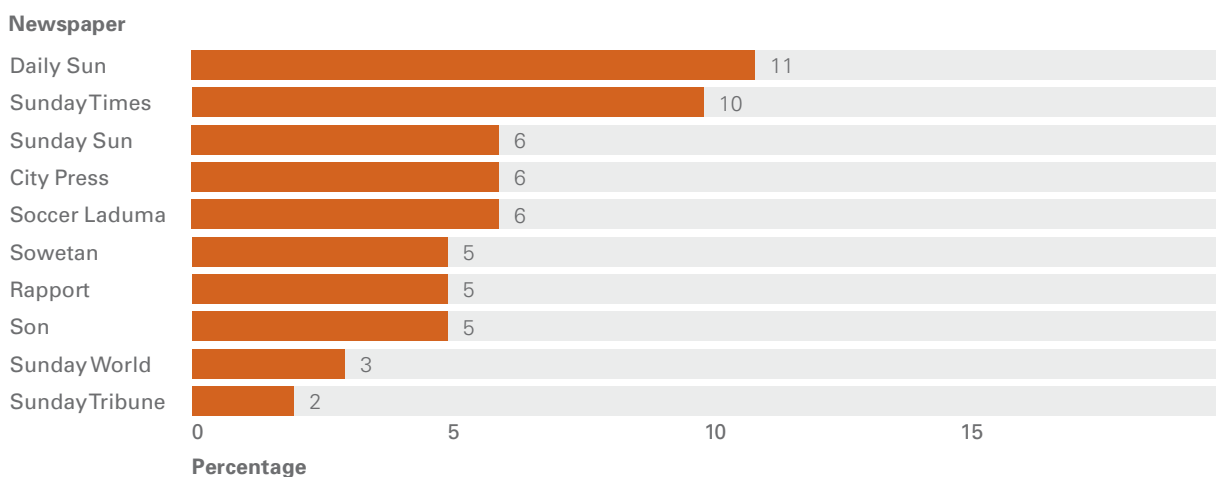
7. Newspapers

7.1 Key changes and developments in the newspaper marketplace in the past five years

South Africa has a diverse print media sector with a long history. The country's 43 daily, weekly and bi-weekly commercial newspapers range from business news publications such as *Business Day* to tabloid newspapers focused on gossip, entertainment and sensation, such as the *Daily Sun*. They are owned by four media groups (Naspers Ltd, Johnnic Communications Ltd, Caxton and CTP Publishers and Printers Ltd, and Independent News & Media Plc). They derive their revenue from a cover price and advertising in a ratio of roughly one to three. In addition, the country has more than 50 "knock and drops", or local "free sheets" owned and distributed by the major media groups as vehicles for local advertising.

One of the most significant events in the newspaper industry in South Africa over the past five years has been the emergence of tabloid newspapers, based on the British model and aimed at lower middle class, or "blue-collar", black readers. The significance of this development is best explained by examining the trend in newspaper circulation since 2000.

Figure 8: Percentage Readership Amongst the Ten Largest Newspapers



Source: SAARF AMPS, 2005

The South African newspaper market, in defiance of international trends, has seen rapid growth since the year 2000, marked by new entrants into the market and rising overall circulation and readership (Audit Bureau of Circulations, 2006; SAARF, 2006). Between 2000 and 2005, total circulation of daily newspapers increased by 38.4%, from 1.13 million per day to 1.57 million (ABC, 2006). This suggests a healthy print media sector. Closer analysis, however, reveals a less rosy picture for the so-called “mainstream” or established dailies (which also purport to be “serious” and news-focused). The increase in total daily newspaper circulation is entirely accounted for by two new publications, the *Daily Sun* (444,061) and *Isolezwe* (86,232) (ABC, 2006). Excluding these two publications, there has been a decline of 10.8% in the total circulation of the remaining 17 dailies monitored by the ABC. Only six recorded an increase in circulation over the period: *Beeld* (+2.5%), *Cape Times* (+1.9%), *The Mercury* (+1.5%), *The Star* (+1.7%), *The Diamond Fields Advertiser (DFA)* (+9%) and *The Pretoria News* (+14.2%) (ABC, 2006).

In the first four cases, the increases are insignificant; the other two increased from a relatively low base (*DFA* from 8,256 to 9,001; *The Pretoria News* from 25,240 to 28,819). The total circulation added by those six newspapers amounts to 11,179 (ABC, 2006).

The 11 other mainstream daily newspapers (between them) have lost 121,971 copies. The biggest losers were the *Sowetan*, which declined by 35.2% from 203,352 to 131,714, the *Citizen*, which dropped 31.2% from 106,120 to 73,008, and the *Daily News*, which declined 21.7% from 65,476 to 51,251 (ABC, 2006).

These are newspapers that compete directly, in terms of language, target readership or geographic location, with the *Daily Sun* and *Isolezwe*, which are both aimed at lower-middle-class black readers (*Isolezwe* is an isiZulu daily, while the *Daily Sun* is an English-language tabloid newspaper). This suggests that the two newcomers are not only attracting new readers, but are also taking readers away from established newspapers, especially those that target the same reader types, such as the *Sowetan*, the *Citizen*, and *Daily Dispatch*.

From those figures, it is clear that the circulation and readership of traditional news- and information-focused newspapers is in decline, in line with world trends. Total newspaper readership, however, is rising, as a result of the entry of tabloid newspapers and indigenous-language newspapers into the market. The percentage of the population that reads a newspaper has remained stable between 2000 and 2005, at 40.4 to 40.6% (SAARF, 2006).

In 2000, 40.4% of the adult population read a newspaper at least once a week (SAARF AMPS, 2002). Over the subsequent five years, this has risen only slightly to 40.6% in 2005 (SAARF AMPS, 2005).

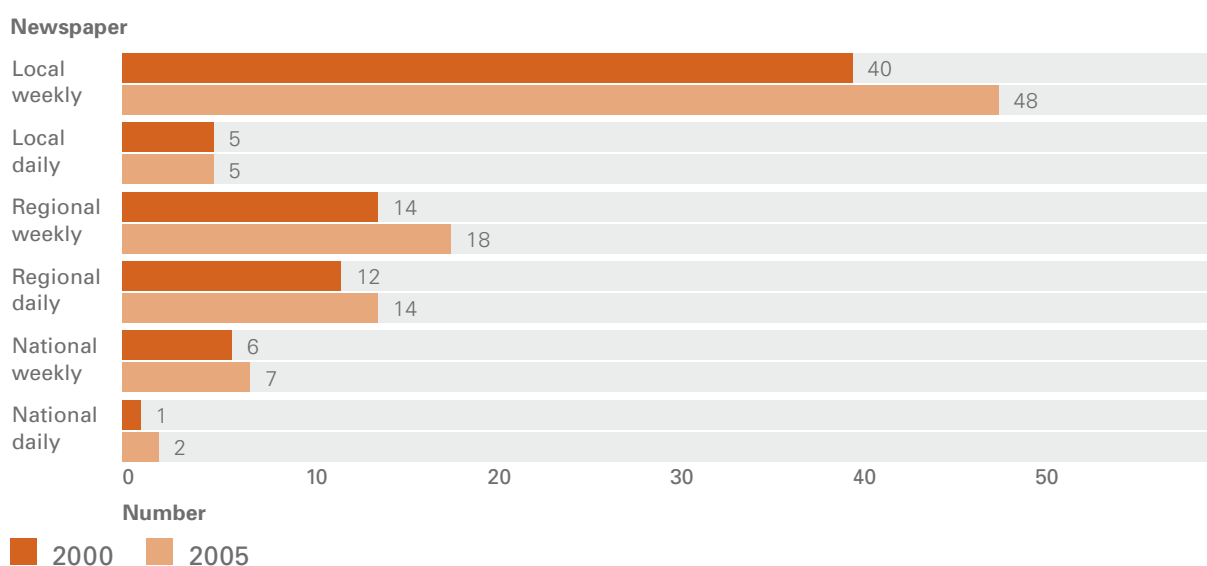
Circulation figures from ABC show that the magazine sector in South Africa is growing “at an unprecedented rate”. By 2005, there were about 350 ABC-audited titles (or 20 million magazines) being distributed in South Africa every month. Five years ago, this total was “closer to 13” titles with overall growth just under 55%. A large part of this increase, says Bloom (2005b), is due to the entry of “custom” magazines or targeted customer magazines published by corporate companies.

- Circulation increases in consumer magazines – that is, from a readership that buys its publications – are also reflective of the mounting global tendency to focus on a reader’s personal tastes... the biggest jumps have come from the most specialised segments. Magazines targeted at the youth, parenting and home sectors are showing the strongest growth (Bloom, 2005b).

As the following figure shows, the number of national daily newspapers has doubled since 2005, with the addition of the *Daily Sun*. The other national title is *Business Day*. The number of weekly newspapers has also increased by one (*Sunday Sun*).

Most new title growth has occurred in the regional and local weekly newspaper categories. New regional weeklies are mainly weekend editions of existing daily newspapers, while local weeklies are mostly free sheets, also called “community newspapers”, even though they are for-profit commercial enterprises, owned by the four major newspaper publishers. All four newspaper groups have identified local weeklies as a major growth area and have been expanding, either by starting new titles or buying up existing, private local newspapers.

Figure 9: Total Number of Newspapers



Source: SAARF, 2005

Undoubtedly, one of the most significant developments in South Africa’s newspaper market over the past five years has been the emergence of the *Daily Sun*, a tabloid newspaper that was launched by Naspers Ltd and publisher Deon du Plessis in 2003. Within two years, the *Daily Sun* had become South Africa’s largest circulation newspaper ever, and spawned a number of other tabloids, including the *Sunday Sun* and the *Son* (both owned by Naspers and Du Plessis), and the *Voice* (Independent News & Media Plc), all tapping the same market: lower-middle-class black and coloured readers.

Two daily newspapers – *ThisDay*, owned by ThisDay Nigeria, and *Nova*, owned by Naspers – were launched and closed down within the period.

7.2 Investment and growth in the newspaper industry in the past five years

The decline in circulation of the mainstream newspapers, referred to earlier, has not resulted in a decline in profits of the publishers. This is mainly due to the fact that South Africa's consumer boom – fuelled by interest rates at three-decade lows, as well as a series of tax cuts affecting mainly lower- and middle-income earners – has led to increased advertising and enabled newspapers to charge higher advertising rates. Total advertising spending on newspapers increased by 44% between 2002 and 2005, from R2.97 billion to R4.29 billion (Nielsen Media Research cited in OMD, 2005). Newspapers' share of total advertising spending remained fairly constant, however, at about 27%.

Table 10: Top Ten Advertisers in Daily Newspapers 2004

Advertiser	Sector	Total (Rands)
Shoprite/Checkers	Retail	108 166 694
Pick n Pay	Retail	93 458 702
Spar	Retail	54 040 683
e.tv	Media	53 390 702
MTN	Mobile operator	50 424 563
Government	Government	48 241 233
Ster Kinekor Films	Film/Cinema	37 827 794
Standard Bank	Banking	32 522 088
Vodacom Communications	Mobile operator	30 200 154
Nu Metro Film Distribution	Film/Cinema 2	9 549 575
Total		537 822 188

Source: OMD, 2005

Paradoxically, the success of new publications such as the *Daily Sun* in attracting new readers has not necessarily translated into higher profits. The *Daily Sun*, now South Africa's largest daily newspaper, has yet to make a profit. This is because the *Daily Sun's* readers fall predominantly into the lower Living Standard Measure categories not sought after by advertisers.

Table 11: Top Five Revenues in Daily Newspapers 2004

Newspaper	Total (Rands)
Beeld	258 052 926
The Star	218 153 283
Die Burger	162 689 333
Cape Argus	113 834 324
The Citizen	109 650 767
Total	862 380 633

Source: OMD, 2005

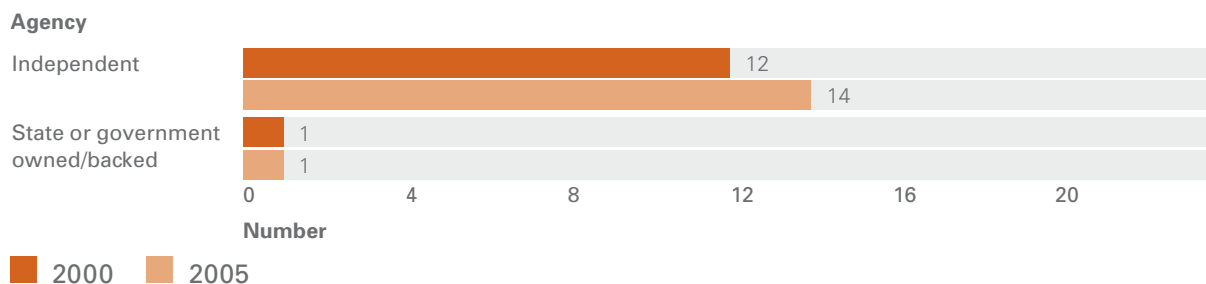
7.3 Plurality, ownership and control

The majority of South African newspapers are owned by four companies: Naspers Ltd, Johnnic Communications Ltd, Caxton and CTP Publishers and Printers Ltd, and Independent News & Media South Africa. The first three companies are publicly listed on the Johannesburg Securities Exchange (JSE), while the last is a unit of Independent News & Media Plc, listed on the London Stock Exchange. Ownership and control are therefore transparent, and companies are obliged to publish financial and other information in accordance with stock exchange regulations.

A major theme in the ownership and control of South African media is black economic empowerment. New Africa Investments Ltd, a black-owned company, sold its media interests in 2004, leaving Johnnic Communications as the only JSE-listed black-controlled media group in the country. The demise of New Africa Investments Ltd as a media player precipitated a measure of consolidation in the newspaper industry, concentrating ownership in the hands of the four major groups. Johnnic Communications acquired the *Sowetan* and *Sowetan Sunday World* from New Africa Investments Ltd, adding to its existing newspaper titles.

Caxtons, the publisher of the *Citizen*, merged with its printing company CTP Printers Ltd, while Independent News & Media acquired the shares it did not own in its South African unit, formerly Argus Newspapers Ltd, from Johnnic Communications. Naspers Ltd bought the Pietermaritzburg-based *Natal Witness*, a family-owned daily, and Zimbabwean businessman Trevor Ncube bought a controlling stake in M&G Media, publisher of the *Mail & Guardian*, from the Manchester UK-based *Guardian*.

Figure 10: Ownership of Newspaper Agencies



Source: South African Government Information, 2005

The success of the *Daily Sun*, *Sunday Sun* and *Son* contributed to making Naspers South Africa's largest newspaper publisher, both in number of titles and total circulation. Four of the five biggest-circulation newspapers are Naspers titles; all four (*Daily Sun*, *City Press*, *Sunday Sun* and *Soccer Laduma*) target primarily black readers. The second-largest newspaper, the *Sunday Times*, is owned by Johnnic Communications. Naspers, which was established in 1917 as the publisher of Afrikaans-language newspaper *Die Burger* (until 1993 the official mouthpiece of the National Party), has now also become the country's biggest English-language newspaper publisher.

7.4 Diversity

The five years since 2000 have seen a move towards greater diversity in news coverage, with an increased content focus on previously neglected areas and population groups.

Newspapers such as the *Daily Sun*, which was launched in 2003, cater specifically for a previously marginalised audience (blue-collar blacks with more than a high-school education). Thus, tabloids such as the *Daily Sun* have contributed to more diverse coverage of South African society. The emergence of indigenous-language newspapers, such as *Isolezwe* (isiZulu), have also contributed to this trend.

However, while the big publishing companies continue to target community and grassroots titles, there is a concern that the real losers will be diversity and local coverage. Commentators have warned that the concentration in ownership may lead to fewer voices and local issues being represented – especially as the publishers look to keep their costs down by sharing resources and editorial copy.

However, the MDDA is working to promote media diversity and is focusing on publications that may appeal to neglected audiences (for example, rural or township audiences) or publishers that are aiming to produce newspapers in languages other than English or Afrikaans.

7.5 Quality of newspaper reporting

Two major studies by the South African National Editors' Forum have revealed shortcomings in journalism training and practice. The shortcomings relate mainly to accuracy, news gathering and writing skills, and managerial skills (Rabe, 2005).

7.6 Specific challenges

Although overall newspaper readership in South Africa is rising, the newly established tabloid newspapers and vernacular newspapers account entirely for the increase. The challenge facing the industry, therefore, is to halt the decline in the readership of mainstream newspapers to ensure long-term survival of the industry in the face of competition from a number of other media. Although strong economic growth and an unprecedented consumer-spending boom have ensured that newspapers have remained profitable, declining circulation will inevitably affect profits in the longer term. A related challenge facing the newspaper industry is to transform ownership, staff compositions and coverage to reflect the demographics and interests of broader society. Without transformation, newspapers will become increasingly irrelevant to a growing majority of people, affecting circulation, readership and profitability.

Key findings

- Although overall newspaper readership is increasing, the newly emergent tabloids and vernacular newspapers account for the entire increase.
- Circulation of mainstream, established newspapers is in decline.
- New, non-tabloid entrants have not survived in a tough market.
- Newspaper companies have remained highly profitable, despite declining circulation, as a result of rising advertising spend on the back of strong economic growth.
- The tabloids, though highly successful in terms of gaining readers, have not yet translated their circulation successes into profits.



8. Media Support

8.1 Key changes and developments in new media technologies in the past five years

Despite great expectations, growth in Internet access among the South African public has slowed to a crawl, with the dial-up market experiencing no growth in subscribers for the first time since the industry was launched in 1993, according to a report in December 2005 by World Wide Worx (see website: www.theworx.biz), a company that produces an annual report on Internet access in South Africa. However, “solid growth” in corporate usage and a “dramatic uptake” of broadband helped to push the number of South Africans with Internet access up to 5%.

According to figures from SAARF, 4% of the adult population accessed the Internet “in the past seven days” in 2000. This grew to 5.1% in the first half of 2005. Only 3.3% of adults (or little over one million people) access the Internet every day (SAARF, 2006).

This should be noted in relation to 12.5% of the adult population with access to a personal computer in 2005 (SAARF, 2006), as detailed in the table below.

Table 12: Population Accessibility Data

	2000	2005	% year over year change
% population with access to a personal computer	9.4%	12.5%	3.1%
% population with access to the Internet	4.0%	5.1%	1.1%
% population with access to fixed-line telephone	33.8%	23.1%	-10.7%
% population owning a mobile phone	No data	41.6%	

Source: SAARF, 2005; SAARF, 2006

Owing to the high cost of telephone calls that make dialling-up from home expensive, most South Africans access the Internet during work hours. The average time spent online is 6.59 minutes. Most people (56.89%) access the Internet at work. Only 12.5% of Internet users have ever bought anything online (OMD, 2005).

Developments that were expected to boost growth in 2004 and 2005, such as the roll-out of competitive access services to businesses by the Second Network Operator (SNO), failed to materialise, and there is still no clarity on when or how the SNO will begin to serve the local Internet market. As stated by World Wide Worx previously, accelerated growth in Internet usage is heavily dependent on the timely and effective roll-out of the SNO (Goldstuck, 2005b).

These are among the other significant findings in the World Wide Worx report (Goldstuck, 2005b) were:

- The dial-up market has stalled since it passed the one million mark for the first time in 2002, with rapid growth in Telkom Internet’s service making up for tremendous churn in the customer bases of other dial-up ISPs.
- As broadband access comes down in price and improves in performance, it will reduce the size of the dial-up market. The future of the dial-up market will only be secure if more concrete efforts are made to reach disadvantaged communities.
- The leased-line market for corporate access remains healthy, bolstered by growth in Virtual Private Networks and corporate grade Voice-over Internet Protocol (VoIP). However, while the number of lines continues to grow to support volume of demand from existing users, it is not matched by equivalent growth in new users with access to such lines.
- Schools connectivity has disappointed after much was promised by provincial authorities, with delivery delayed by up to three years.
- Most Internet service providers are evolving into providers of specialised data and telecommunications services, no longer depending on dial-up subscribers or pure Internet connectivity for their revenue.

“The good news is that impatience with the slow pace of Internet growth and the high cost of connectivity has permeated the upper echelons of government,” wrote Goldstuck. “As a result, another significant shift in telecommunications policy, equivalent to the deregulation of voice calls over the Internet, could occur in the next two years” (Goldstuck, 2005b).

The table below describes the top five brands advertising on the Internet in February 2005.

Table 13: Top Five Internet Brands

Brand	Total (Rands)
Outsurance	652 947
Upstream Advertising	473 622
Auto General Insurance	458 905
Silversand Casino	399 356
Microsoft Software	319 225
Total	2 304 055

Source: OMD, 2005

The *Gender and Media Audience Study* in 2004 shows that despite progressive gender and ICT policies, there is a low reliance on the Internet in South Africa for news. Usage also reflects a gender gap, with 1% usage by women compared to 4% by men. The findings, say the research, “highlight continued racial and gender disparities in access to ICTs, despite a relatively sophisticated IT sector” (Gender Links, 2004).

8.2 Key changes in media support in the past five years

The Commercial Producers’ Association (CPA) represents the commercial sector in South Africa. It excludes television and long-form (feature movie) production companies, although some companies involved in commercials are also involved in other production forms. Bobby Amm, an executive officer at the CPA, says the Association has “around 50 operational companies in commercials; of these, approximately four are owned or co-owned by foreign companies” (B.Amm personal communication, 9 March 2006).

The CPA conducted an industry survey last year (CPA, 2005) to measure developments in the commercial production sector. Thirty-four CPA members, as well as 13 non-members, formed the sample. More than 42,000 people a year are employed by this sector. More than 770 commercials were produced in the 2004/5 period under review. The reported average number of commercials produced per company for this period was 18.

Of all commercials produced, 94% were filmed in South Africa, and 51% were directed by South African directors. Of all commercials produced, a reported 53% originated from South Africa. The report points out that the total billable value of commercials originated by foreign agencies, that are produced by foreign production companies with the assistance of South African service companies, exceeds that of commercials originated by South African agencies and produced by South African director-based production companies (CPA, 2005).

The reported average total billable value, for all types of commercials produced, per company was R16.63 million a year. A total of 20 long-form service projects were facilitated in the reporting period. Of these, seven were feature films, four television series and three reality series.

The CPA carried out a similar survey in 1998 and 1999. Although the response rates in previous surveys were lower than the 2005 survey, the average number of local-origin commercials produced per company in 2005 was down 32% from 1999. The average number of foreign-origin commercials was down 39% from 1999 (CPA, 2005).

8.3 Audience and readership research data

In 2005, the Southern African Marketing Research Association had 44 corporate members, according to its head, Nishta Naidoo (personal communication, 29 March 2006).

The South African Advertising Research Foundation, an industry-funded body, has been collecting data manually on the media consumption habits of South Africans since the mid-1970s. Together with Nielsen Media Research (previously known as AC Nielsen) they have provided the data for its All Media and Products Survey (AMPS), the “common currency” among marketers, advertising agencies and media owners. They have recently taken on African Response, a local and empowerment research company, as a partner for the AMPS research.

Although the foundation's AMPS data is the most used, there are other surveys that provide unique findings, such as Roots and Future Fact. However, this data, while significant, is all proprietary (Bloom, 2005a).

Key audience measurement includes radio, television, newspaper and mobile telephony data gathered by the South African Advertising Research Foundation and Internet usage data gathered by Nielsen Media Research.

Many South African companies are forming international alliances, and multinational research companies such as Millward Brown, Interactive Market Systems and TGI Global, which bought local companies in the early 2000s, are now firmly entrenched in South Africa.

While many changes are expected in this sector, especially technologically and in terms of the data collection itself, local research companies are cautious about the effect on South African structures and methods. The media industry is familiar and supportive of SAARF, especially as it is industry-driven. New technologies are also expensive and many data collection methods are dependent on bandwidth, something that is in its infancy in South Africa. In addition, of course, more data brings more challenges in terms of management and interpretation (Bloom, 2005a).

There are eight companies responsible for monitoring the media listed on the Biz Community website (see <http://www.biz-community.com>), a leading advertising, marketing and media news resource for the industry. The companies listed include clippings services.

An important NGO in this field is the Media Monitoring Project (MMP), which did the data analysis for the Global Media Monitoring Project, the largest civil-society monitoring project in the world. South Africa was one of 76 participants (see <http://www.info.gov.za/otherdocs/2006/gmmp.pdf>).

A report on monitoring coverage on HIV and gender in 11 Southern Africa countries was due to be released in May 2006. This was carried out by the MMP with other NGOs, such as the Southern African Editors' Forum, the Media Institute of Southern Africa, UNAIDS, Gender Links, Panos and others.

8.4 Media support, ISPs and ownership

The number of ISPs in South Africa grew from an initial seven ISPs operating in 1994, to a total of 150 ISPs operating at the end of 2002. South Africa's Internet Service Providers Association currently has 103 members. (see <http://www.ispa.org.za/>).

There are five suppliers of broadband in South Africa. The biggest of these is Telkom, which has a 66% share of the market (Goldstuck, 2005a). The expected arrival of a second network operator may well open the way for more niche operators.

The government has introduced multi-purpose community centres, or one-stop shops, that offer a range of government products and services under one roof, and simplify the processing of applications for passports, identity documents, pensions and other social grants. Four years after they began to be rolled out, multi-purpose community centres (MPCCs) have mushroomed in every province. By November 2003, 54 MPCC centres (including seven satellite sites) were established. The government aimed to establish 60 centres across South Africa, with at least one per district/metropolitan municipality, by 2005. The centres also provide training in skills, such as how to use information and communication technologies like the Internet. The telecentre at the Mapela MPCC in Limpopo province, for example, has a satellite-connected network that will give a state-of-the-art edge to computer skills training courses for members of the community (IMC 2003).

There are 46 locally owned television/film production companies and only four that are international or foreign owned (CAP and Evolution, 2005). All these companies are for commercials only and exclude film and long-form production.

Across South Africa there are 35 locally based advertising agencies, 15 of which are part of a multinational franchise (CAP and Evolution, 2005). It should be noted that they are all ACA members, the membership of which accounts for 85% of the advertising spend in South Africa.

Key findings

- Internet access figures have remained at 5%. High connection costs are impeding growth.
- The average number of local-origin commercials produced per company in 2005 was down 32% from 1999. The average number of foreign-origin commercials decreased by 39%.
- SAARF has been collecting data on the media consumption habits of South Africans since 1975, but this data is proprietary.
- The number of research companies has increased in recent years to match the growing media sector. Samro has 44 members.
- South Africa's Internet Service Providers Association has 103 members.
- The government's programme of multi-purpose community centres aims to put technology within everyone's reach.



9. NGO Activity

9.1 Key changes and developments in NGO activity in the past five years

While current information about the number of registered non-governmental organisations was available from the Department of Social Development (see website: <http://www.socdev.gpg.gov.za/>), the department was not able to provide information on types or categories of NGOs. It was not possible to obtain information on the number of NGOs focusing on media development. Instead, this information had to be obtained from another organisation, SANGONeT (<http://www.sangonet.org.za/>), which runs a searchable database of South African NGOs categorised by type and focus. This is not necessarily a comprehensive listing. SANGONeT does not have data for the base year, 2000.

9.1.1 According to data from the Department of Social Development, the number of registered NGOs in South Africa has more than trebled in the five years since 2000, from 13,282 to 36,981. Although NGOs are not obliged to register, they must be on the books of the department if they are to qualify for funding or donations.

The growth in this sector is, in part, motivated by South Africa's HIV/AIDS crisis, with international funders filling the gaps left by the government's widely criticised health policy.

There are an estimated 61 media-related projects being run in South Africa by 15 NGOs listed by SANGONeT, a South African NGO network, as being involved in media development. This reflects both the strength of the sector and the size and strength of the media industry itself.

Unfortunately, it is not possible definitively to identify the changes within the media sector NGOs in the past five years as this data is not available.

9.2 Key NGOs involved in media development activities

Although it is impossible to sift through more than 36,000 NGOs to ascertain which are involved in media development projects, the following list focuses on the more high-profile NGOs in this field.

Media Monitoring Project (MMP)

According to their website (<http://www.mediamonitoring.org.za/>), the MMP aims to monitor the media in order to promote the development of a free, fair, ethical and critical media culture in South Africa and the rest of the continent.

A major share of its resources (80%) is devoted to advocacy activities focused on women. A key project for the MMP is its involvement with the 16 Days of Activism, a national project that aims to draw attention to the abuse of women. It also monitors the representation of women in the media (see Section 4.4, Gender and Media Audience Study).

Research (35%), monitoring (35%) and general advocacy (20%) make up the other key areas of the MMP.

William Bird, the project's Director, says "many or most" of the MMP's activities interrelate. "Everything we do is usually related to monitoring, so that could be 100% of our activities and resources." However, the MMP's monitoring also serves to promote change and build strengths in the media sector. Advocacy and research are stated as direct outcomes as well as goals (William Bird, personal communication, 18 April 2006).

National Community Radio Forum (NCRF)

The NCRF (<http://www.ncrf.org.za>) was established in December 1993 "to lobby for the diversification of the airwaves in South Africa, and to foster a dynamic broadcasting environment in the country through the establishment of community radio stations" (see NCRF website as above).

The NCRF has a programme-sharing and networking project in place that allows stations to receive and share programming via satellite. According to undated information on the forum's website, 37 stations are part of this network, with plans to expand this number to 60. This is especially helpful as community broadcasters are obliged to carry news and other informational content, which is usually expensive to produce.

Freedom of Expression Institute (FXI)

The FXI (<http://www.fxiproject.org.za>) was established in 1994 "to protect and foster the rights to freedom of expression and access to information and to oppose censorship".

The FXI is a member of the International Freedom of Expression eXchange (IFEX), which monitors freedom of the media and freedom of expression on a global scale.

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

More specifically, the FXI assigns the majority of its resources (25%) to general advocacy activities – something which is expected to increase in the future. This slice of the pie excludes related activities, such as research, monitoring, training and litigation.

Although only 5% of activities are focused on women, Director Jane Duncan points out that "women are indirect beneficiaries of much of the work, especially around the right to protest and the commodification of basic services, which affects women disproportionately" (J. Duncan personal communication, April 19, 2006).

The FXI is also involved with monitoring (5% of its activities) as well as education and training (20%). It also does a great deal of research (20%). About 10% of the FXI's resources are directed towards networking and collaborating with a wide range of organisations, locally and internationally.

Institute for the Advancement of Journalism (IAJ)

According to the IAJ's website (<http://www.iaj.org.za>), the Institute was set up in 1992 to help improve journalism just as South Africa entered a new democratic era. Since this time, thousands of people have passed through its doors.

Activities include training (including in-house training at the major media houses) as well as assisting journalists from disadvantaged backgrounds. More than 73% of IAJ course participants have been journalists of colour, and 49% women. Courses include "reporting AIDS" which aims to keep journalists up to date in their coverage of the pandemic. The IAJ is a member of the Southern African Media Trainers' Network and works with journalists and trainers across Africa.

Special programmes include the Newsroom Leadership and Management Programme, which was, according to the Institute's website, "designed to equip the growing cadre of young black media managers with the skills they need", and the Community Radio Training Project, which takes broadcasting skills out to radio stations in South Africa's rural areas. The Schools Newspaper Project brings schoolchildren and teachers from townships and suburbs together to develop and share media skills.

Open Society Foundation of South Africa (OSF-SA)

The OSF-SA has a media programme in place that, according to the foundation's website (<http://www.osf.org.za/Media/flatspin87.asp>), seeks to "promote media plurality and the use of the media as a tool for sustaining democracy and promoting development in South Africa".

Areas of support include community radio (such as equipment and technical support, training and organisational development). It also provides support for programming in community radio and is involved in content provision for television, video, film, print and performance.

It has a special focus on information and communication technologies. According to the Foundation's website, it believes these "have the potential to play a pivotal role in strengthening and promoting development, poverty reduction and open society".

OSF-SA recently embarked on a new project focused specifically on strengthening media content in relation to HIV/AIDS. This includes a pilot project focused on community radio.

9.3 Climate of opportunity for media development activities

The vibrant and sizeable community radio sector in South Africa is testament to the effectiveness of media development activities in the past ten years – especially given that this is a tier of broadcasting that did not exist in South Africa before 1994.

However, a true community press or television has yet to take root. Plurality in these sectors exists – but only within the commercial realm. Even so-called "community newspapers" in South Africa are misnamed as they are generally for-profit initiatives. There is no doubt that South Africa needs – and deserves – a community press that gives expression to the large number of voiceless people who live in this country.

According to the Media Development and Diversity Agency's 2004/5 annual report, the Agency received a paltry R7 million (US\$1.1 million) from the government in that financial year. (Media companies contributed a further R10 million or US\$1.59 million.) While the Agency is indeed a government agency, it seems it is not being given the resources to do its job. As Anton Harber pointed out in a column in *Business Day* (19 October 2005), "this means that the MDDA can give about enough to each project to get into trouble, and seldom enough to get it out of it".

To illustrate his point, Harber highlights 2005's launch of *Vuk'uzenzele*, a government magazine, that has a budget of R20 million (US\$3.17 million). So if the government has R20 million to distribute a "message from the President", asks Harber, "can it really manage only R7 million for all those out there who are risking their necks to publish something new and authentic?" Harber's point, really, is to question why the government would go to the lengths of creating the MDDA if it were not prepared to give it enough resources to have a substantial effect.

Key findings

- The number of NGOs in South Africa has more than trebled in the past five years.
- There are an estimated 61 media development projects being run by national NGOs.



10. Conclusions

South Africa has made great strides since the dawn of democracy in 1994. However, it is clear that much more still needs to be done. In 2001, President Thabo Mbeki identified nodal points for rural development and urban regeneration as part of the Integrated Sustainable Rural Development Programme.

“Nine million South Africans live in these areas [nodal points] including the bulk of the poorest of the poor. Amongst other things, a survey [undertaken by Statistics SA] found that in these areas only three-quarters of households had a radio; and only a third a television. Other surveys tell us that in such areas newspapers are read by less than 20% of people,” remarked Minister Essop Pahad in his speech to introduce the MDDA to the National Council of Provinces in 2002. He continued; “None of us would want such a situation to persist. We must find ways that assist in the dismantling of the many barriers to participation in the media; as consumers, as writers, as managers. Transformation must touch every major institution and sector of our society if we are to make a reality of our vision of a fully democratic society. That includes the media. The recognition that it is in the interests of democracy that we should all work together to address the imbalances of the past, informs the broad support for the MDDA that has been built” (Pahad, 2002).

The agency approved R8.7 million in support of 51 different media projects around the country in the 2004/5 financial year.

In general terms, the commercial media are benefiting from the political and economic stability of recent times. South Africa’s middle class is growing as the income disparities of the past begin to even out. Advertising revenues are on an upward curve. New newspaper readers are being created by the tabloids and new television viewers are emerging as the government’s service delivery takes root.

But, in a sense, it is economic successes that justify commercial imperatives. The SABC has been accused of being more focused on the bottom line than on its public service obligations. Its funding from government is not as generous as in the past and it has been forced to become increasingly self-sustainable.

It is this that also makes the community radio sector vulnerable. It does not receive any direct state funding and has to rely on the MDDA or donor funding. And donor funding is not as forthcoming since the demise of apartheid, and community radio stations are being hamstrung by a shortage of resources and skills (although much attention is being given to training). Community radio stations have to rely on advertising to be viable and, given that these stations are often in poor communities that hold little interest to advertisers, the outcome is sadly predictable.

If ICASA's (and the government's) vision of a three-tier system is to survive, community radio, where development issues are paramount, must be better supported.

Although there is a growing community radio sector, pro-poor and women's issues are still not well represented. One study found that, as befits the divide between public and private television, the SABC scores twice that of e.tv in terms of the quantity of items on these issues. Remarkably, however, public-service radio broadcasting scored very poorly. As a whole, broadcasting lagged far behind newspapers when it came to the amount of attention given to poverty (Taylor and Berger, 2006).

Yet, somehow, it appears that it is the print sector that most needs attention, particularly in terms of editorial content. Driven by the profit-motive, it is a growing and strong sector. While tabloid newspapers are growing readers in South Africa, there are strong arguments against their sensationalised gossip and scandal-focused content. Are they speaking for the "worker in the blue overall" or are they just taking his money? There are only three African-language newspapers (*Isolezwe*, *Umafrika* and *Illanga*); these are all isiZulu titles and published in KwaZulu-Natal. All are showing strong growth. Most so-called "community newspapers" in South Africa are motivated by profit. Projects by the MDDA hope to shift this as they provide seed-funding, management input and skills to help develop this sector. However, funding from government is minimal and industry's contribution is not enough to effect transformation in this sector.

ICASA, as an private regulator, has room to create policies that will allow the sector to transform in ways that support "small media" as well as match the needs of the society. However, it is beset by problems.

The ICASA Amendment Bill, which potentially affects the independence of the regulator, was sent back to parliament by President Thabo Mbeki in April 2006. Critics had argued against the Bill, saying it would take the power of selecting councillors out of the hands of parliament and place it in the hands of the Minister of Communications, which would be unconstitutional. The Electronic Communications Bill (formerly known as the Convergence Bill) has been promulgated but its commencement date has not been set as it is dependent on the ICASA Amendment Bill (Gedye, 2006).

Despite the detail, each of the two pieces of legislation "will have major implications" for ICASA (Dawes, 2006). The Electronic Communications Bill, for example, has been designed to liberalise dramatically the sector and increase competition. However, commentators have warned that it will take a great deal of knowledge and resources – and resolve – to administer it successfully (Dawes, 2006).

ICASA is under-resourced. In an interview in 2005, the regulator's Chair, Mashile, said: "We are not properly funded and we are regulating a very complex sector that contributes 6% of GDP. Our difficulty is that when we get good people, the industry soon poaches them. It is a form of national duty to work here" (Smith, October 2005, p.23). What is more, the internal problems (for example, lack of resources, too much work, etc) of a "severely weakened" ICASA are being compounded by an exodus of top staff and a pending disciplinary hearing against the CEO (Dawes, 2006).

Government's role in community radio can be described as fair. The challenges are largely administrative. However, the government's decision to award the broadcasting of the new regional, indigenous language television stations to the SABC has been criticised. Berger (2006), for example, argues that a new public broadcaster ought to have been established for the two new channels: "The MDDA model [a partnership between the government and commercial media] spreads diversity rather than consolidating concentration. But now it is being ignored in favour of fattening the SABC – whose plate is already over-full. The prospect of SABC 4 and 5 points away from the country's interests in a plurality of media owners, in fair competition, and, indeed, in public-service programming in whatever language."

While great strides have been made since democracy, there is no doubt that more progress is needed. Media development NGOs are attempting to address some of these issues, especially those highlighted by the MDDA. In fact, as the health crisis around HIV/AIDS explodes, the need for a higher standard of reporting and a wider coverage net becomes clearer.

Although broadband is now available in South Africa, it is really only the employed and the wealthy who access the Internet. The high costs of connectivity have impeded growth and, despite the presence of a number of private ISPs, Telkom, the previously state-owned telecommunications company, has a grip on this sector. While much is made of the government's attempts to bring technology closer to the people, in practice this has been slow and unsatisfactory. The digital divide continues to underscore the differences between South Africa's people.



11. Appendices

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Appendix 2: Individuals/organisations consulted during the research

- Bobby Amm, Executive Officer, Commercial Producers' Association
- Elizabeth Barratt, Executive Editor, *The Star*
- Guy Berger, Head of School, School of Journalism and Media Studies, Rhodes University
- William Bird, Director, Media Monitoring Project
- Russell Cory, Financial Officer, Association for Communication and Advertising
- Jane Duncan, Executive Director, Freedom of Expression Institute
- Arthur Goldstuck, Managing Director, World Wide Worx
- Sharon Grundy, Secretary, Audit Bureau of Circulations
- Fikile Hugo, South African Democratic Teachers' Union
- Manana Monareng, Communications Officer, National Community Radio Forum
- Tshifhiwa Mulaudzi, Technical Support Executive, South African Advertising Research Foundation
- Nishta Naidoo, South African Marketing Research Association
- Graham Noot, Marketing Manager, Witness Newspapers
- Joan Roberts, Director, South African National Editors' Forum
- Piet Smith, Chief Technical Officer, South African Advertising Research Foundation
- Tracy Stafford, Research Manager, Primedia Broadcasting
- Thabo Thamage, Media Strategist, SABC Radio Airtime Sales
- Nandi Tshabalala, Deputy Marketing Services Manager, SABC Television Sales
- Martin Vilikazi, Head of Radio Department, Institute for the Advancement of Journalism
- Nomvula Zinta, Independent Communications Authority of South Africa



South Africa

Country Report

Way Forward



12. Introduction

Interviewees for this section of the African Media Development Initiative (AMDI) research were identified according to the set criteria provided by the BBC World Service Trust; where possible, more than one interviewee for each category was identified. Interviews were conducted with 15 media professionals working in a variety of sectors. Due to the limited budget and time available for the study, it was necessary to prioritise interviewees living in Johannesburg and surrounding areas. However, this does not adversely affect the reliability of the information collected as the majority of media professionals in South Africa operate from this centre. To further ensure diversity, women were prioritised as interviewees wherever possible.

On the whole, the media professionals approached were more than willing to participate in the study. Difficulties arose in trying to schedule appointments to conduct the interviews; media professionals tend to have extremely full programmes. This difficulty was exacerbated by the fact that the fieldwork fell over several public holidays, and a large number of people took their annual leave over this period.

It was particularly difficult to secure interviews with the Government Communication and Information System (GCIS: a governmental organisation) and the Parliamentary Portfolio Committee on Communications. To accommodate Mr Joel Netshitenzhe's (of GCIS) busy schedule, the researcher was obliged to conduct a telephone interview. The researcher was unable to interview a representative from the Parliamentary Committee on Communication. The Committee chairman had completed his term and the succeeding chairperson had not yet been nominated.

Most interviewees came across as sincere and passionate during their interviews. Despite this, interviewees' responses to the various questions suggested they were aware of their own needs and agendas, and at some points it felt as if they were trying to increase their own chances of receiving support rather than spelling out the difficulties in the industry. This is indicative of the difficulties media development initiatives are facing in South Africa. There is a limited amount of funding available, and competition for this funding is rife.

All 15 interviewees were willing to be tape-recorded. Fourteen of the interviewees were willing to be quoted in the report. Those interviewees that consented to being quoted did so on condition that they would be shown the final country report (to ensure that they had not been misquoted).

Data collection commenced on 13 April 2006 and was completed on 23 May 2006. Fourteen interviews were conducted between 13 April 2006 and 5 May 2006, during which time the researcher was in Johannesburg. The final interview was conducted by telephone on 23 May 2006.



13. Media Development: an organisational perspective

This section of the report provides contextual information about the media professionals interviewed, and a brief insight into their experiences of media development in South Africa. It is hoped that this section will provide the reader with contextual information against which the rest of the report can be interpreted.

The 15 media professionals interviewed identified three major changes that they felt have come about between 2000 and 2005 in South Africa – policy developments (15 interviewees), media diversity (12 interviewees) and shifts in content (nine interviewees).

13.1 Key organisations

The 15 media professionals interviewed for Stage Two of the African Media Development Initiative were selected from non-governmental organisations (NGOs), governmental organisations, the private sector, training organisations, media networks and lobbying groups. Appendix 1 provides a comprehensive list of the interviewees and the organisations they are affiliated to.

As mentioned previously, interviews were conducted with representatives from prominent media organisations in all sectors, except the Parliamentary Committee on Communication. Interviewees hold senior positions within their organisations and are actively involved in the implementation of the media development initiatives with which their organisations engage. Thirteen of the 15 organisations that participated in the study run various media development initiatives. These initiatives are discussed in more detail in Section 3.

13.2 Impact of media development initiatives

The media professionals interviewed identified three major changes that they felt have come about between 2000 and 2005 in South Africa – policy developments, media diversity and shifts in content. Each of these areas will be discussed separately, focusing on the strategic effects of these shifts and the impact of media development on the media sector. It is important to note that these changes are closely linked to one another and to the media development initiatives that prompted them; they have been discussed under one section.

During discussion about the new policy developments that have occurred between 2000 and 2005 in South Africa, Tula Dlamini highlighted the participatory nature of the policy development process. He viewed this in a positive light and as a hopeful sign for the future of media freedom in South Africa.

“ It is only in South Africa that this has been possible, that the legislation system has been more consultative. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

Two policy changes were highlighted by interviewees. The development of the Media Development and Diversity Agency Act (No. 14 of 2002), and its influence on the media environment, was highlighted by all 15 media professionals that participated in the study. It was seen as the most significant policy development across all the media sectors. The Media Development and Diversity Agency (MDDA) was formed in response to lobbying by various media organisations for a statutory body that would support small commercial and community media organisations.

“ I know that the Freedom of Expression Institute and other organisations lobbied support and did advocacy work in order to ensure that there is a statutory board which is responsible for ensuring there is funding and capacity building for media institutions, or for people who want to develop the media. ”

(**Virginia Magwaza-Setshegi**, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

The MDDA was viewed by interviewees as unique in that both government and large independent commercial media houses fund it jointly (and therefore make it possible):

“ Resources are being allocated by government to the MDDA. What is unique about the process in our country is that, in the course of developing the MDDA and its legislation, we managed to interact with big commercial companies, both in broadcasting and print. All of them [large independent print and broadcasting organisations], agreed (with regards to print media) that the more you encourage a reading culture within South Africa, through assisting small commercial and community newspapers, the more they will [large independent print] benefit, because people who read and produce local newspapers will in time graduate to the other established papers. So we developed a partnership. ”

(**Joel Netshitenzhe**, Chief Executive Officer; Government: Government Communication and Information System, South Africa)

The policy is also unique in that it is the first initiative of its kind to be implemented within a developing country. South Africa might be viewed as a pilot for possible future initiatives in other African countries.

“ As far as I know, and as far as anyone who has done any research knows, it is the first such initiative in a developing country, so it has impact beyond South Africa. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

Another positive impact of the MDDA is that, through its support for media diversity, it has provided South African citizens with the opportunity to access a range of media products.

“ The establishment of the MDDA is a change, or at least the beginning of a change, in that more media organisations are setting up now. There is starting to be more choice for people, or at least the potential for more choice. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

The media professionals interviewed finally pointed out that the establishment of the MDDA has provided them with commitments that they are able to enforce against the large independent print media organisations to ensure that smaller media players are able to operate within the industry. Without these comments from the large commercial independent print organisations it would be difficult for small, independent and community print media to survive in the extremely competitive South African economic environment.

“ Just having the MDDA is a big stick to wield, because the MDDA is effectively a partnership between government and the private sector [large independent print media organisations]. In terms of which the private sector has committed itself to certain things. We’re able to use those commitments [to enhance media diversity in South Africa by donating a set amount to the MDDA each year] as a tool to try and enforce, or to create space for ourselves. We have seen increasing sensitivity to the fact that there has to be media diversity. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

The only concern raised about the MDDA relates to how funds are being allocated to various types of media.

“ When the budget set by the MDDA is somehow reduced, and more than half of the money is being used to develop government media, other media suffer. So there is a question mark over how effective the MDDA is. ”

(**Virginia Magwaza-Setshegi**, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

Five of the media professionals interviewed recognised the Independent Communications Authority of South Africa (ICASA) Act (No. 13 of 2000) as a significant event between 2000 and 2005. ICASA is the regulator for the South African communications sector, responsible for the regulation of broadcasting and telecommunications services. It is charged with licensing telecommunications and broadcasting service providers, monitoring compliance of licensees against their licence conditions, developing policy, managing the frequency spectrum and protecting consumers within the communications environment.

The establishment of ICASA is viewed by interviewees as having both positive and negative implications for the media environment. ICASA is seen as having a positive influence on media diversity within the broadcasting sector in that it has made entry more open by making licences available to community media.

“ The broadcast industry has been liberalised; the legislation is simpler and allows for competition. The broadcast industry has been revitalised in South Africa. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

Through their licensing, ICASA has also gone a long way towards regulating the (previously unregulated) content put out by the South African Broadcasting Corporation.

“ The regulator made them [the SABC] apply for a licence last year. Previously they just had a general licence; now they have a very specific licence. They are restricted by how much advertising they can have per hour, how many minutes. So they can't make as much money as they [would] like but they have to use it for socially good purposes. ”

(**Guy Berger**, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa)

The ICASA Act will assist in regulating converging media. This is seen as a proactive approach to the influx of new media platforms in the market.

“ There is a huge benefit in that, even before we get an electronic communications act etc, we have a structure that is ready to deal with convergence and the fact that broadcasting will be delivered over many different platforms in the future. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

The establishment of ICASA meant that the previous Independent Broadcast Authority (IBA) mandate was expanded to include telecommunications. This expansion elicited concern among interviewees who felt the Act had increased the area of focus without increasing the manpower to implement associated activities.

“ You have the same number of counsellors that you had on the IBA, but they are focusing on telecommunications as well. The telecommunications sector is massive, and brings a lot of money into the country, so there is pressure to focus on this sector. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

Finally, concern was raised about the recently proposed Amendment Bill. To date, ICASA has had to make all the decisions relating to broadcast licences, the government's role being the development of broad policy. As far as the telecommunications sector is concerned, the Minister of Communication has the role of making all the decisions. With the imminent introduction of the Convergence Act, this division will no longer be workable. The amendment states that, as a solution to this duality, the Minister of Communication should be given the power to make the decisions relating to the broadcast sector as well as the telecommunications.

Two interviewees (MMP and MISA) explained that they view the Amendment Bill as part of a systematic effort to reduce the independence of ICASA.

“ Thank goodness the President recently sent this bill back to parliament. There have been some worrying shifts in terms of giving power to a single minister rather than leaving it in the hands of parliament. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

Finally, two interviewees (RU and M&G) noted that some laws relating to the media in South Africa are in need of amendment and updating (these laws no longer being appropriate in a democratic South Africa). One such law (which was mentioned specifically) is Section 125 of the Criminal Procedures Act, which requires journalists to provide evidence about sources in a court of law.

“ In particular, the continuance of the threat of Section 125 of the Criminal Procedures Act, which means that journalists may be called upon in a court of law to reveal their sources (is a concern). ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner, Private Sector: *Mail & Guardian* Newspaper, South Africa)

Of the 15 media professionals interviewed, 12 felt the increase in media diversity has been a significant change over the past five years. Interviewees note that there have been significant increases in the range of media products available across the industry. This increase has been associated with the revival of community print media (possibly as a result of the MDDA), the growth in community radio stations due to more favourable licensing conditions, the introduction of local government publications, the recovery of online media and the possibility of mobile and additional platforms for new media.

According to the interviewees, this increase in range of media products has resulted in high levels of competition for scarce advertising revenue.

“ The mushrooming in the number of radio and television stations means that the cake we had before has become much smaller, because everyone must eat from that same cake. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

In response to this very real difficulty, the large commercial media houses have been seen to consolidate.

“ For me, the key change has been consolidation of media. Unfortunately, you see fewer and fewer independent titles; in fact, you have seen consolidation of the monopoly [large independent print media]. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner, Private Sector: *Mail & Guardian* Newspaper, South Africa)

Large commercial media houses have consolidated by expanding their community press operations, in many cases through buying up existing community media.

“ The large commercial broadcasters have become more interested in small concerns across the board, in some cases buying them up as their own outlets in these communities. At the same time that you are creating more opportunity and spreading the ownership structure, there is also a tendency towards centralisation. We have to deal with these contradictory trends all the time. ”

(**Jacob Ntshangase**, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

The consolidation of the large commercial media houses has sparked conflict between the houses and the community media sector. The community sector (particularly the print media) has started organising itself, uniting its efforts against the larger conglomerates.

“ We are seeing more clashes between the grassroots print media and the existing conglomerate media, and those clashes are becoming increasingly acrimonious; we are seeing increasing militancy at the grassroots. People in small business are starting to believe that they are being subjected to unfair business practices, so small businesses are banding together. They are saying ‘We can’t fight these guys on our own, so let’s band together.’ ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers (AIP), South Africa)

Smaller community media have started working together to ensure that they receive fair treatment within the industry. The Association of Independent Publishers was established at the end of 2004. Before that, it was known as the Community Press Association and was dominated by Caxton, Media 24, Independent Publishers and Johnnic Communications (large independent print media organisations).

Justin Arenstein comments:

“ Two and a half years ago... the smaller guys started getting more active and organised, and effectively staged a coup in the Community Press Association. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

Another vast shift that has occurred over the past five years is the shift in media content. Nine of the media professionals recognised this. These shifts concern the quality of the content being produced, the tabloidisation of print media and the type and extent of the coverage of gender and race. Interviewees’ views on these shifts are varied – with some seeing them as a positive progression of the media and others as a threat to journalism as a profession.

Five of these nine interviewees feel strongly that journalism standards have dropped in South Africa over the past five years, and that there has been a decline in the quality of media content.

“ For me, the most marked shift has been in the quality of journalism. I think we have moved to a kind of journalism that is single source, reliant on official sources [instead of a variety of sources and critical discussion], lacking in depth. There is little culture of investigative journalism. The way journalism has developed does require some attention. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

For these interviewees, a quality media sector upholds journalistic ethics and contributes to democracy through keeping the government in check and providing society with information about what is happening around them, on their rights and how to ensure that these are upheld. In so doing, it enables them to participate in this democracy.

“ Quality media makes the fourth estate really function as the fourth estate. It is not about celebrity or the front pages of tabloids. It is about helping people make better decisions in a democracy, and keeping those in power on their toes. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner Private Sector: *Mail & Guardian* Newspaper, South Africa)

The decline in the quality of media content is regarded by interviewees as closely linked to the trend for experienced journalists to leave the sector, with the resulting “juniorisation” of the newsroom. The meagre salaries journalists are paid is seen as contributing to this difficulty. Experienced journalists are able to secure well-paid jobs in other sectors, for example public relations or related careers.

“ In my opinion, we have lost a number of highly skilled journalists and editors who have gone to the private sector. Some of them have joined government. Rather than work for a by-line or be dedicated and passionate about journalism, the more experienced people prefer to take the money; the skills base of journalism has been eroded. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

Coupled with the juniorisation of the newsroom is the high rate of expansion of the media sector.

“ The media industry is expanding rapidly. But it has expanded faster than the capacity of new journalists to cope with the wide field of opportunities. To my mind, it's not that people are not talented, it's just that they aren't adequately trained yet. ”

(**Deon Du Plessis**, Publisher; Private Sector: *Daily Sun*, South Africa)

One of the media professionals interviewed feels strongly that the change in journalism viewed by the other interviewees as a decline in standards is in fact the natural progression of the media in South Africa. He explains that South African society at large has not been educated in terms of the culture of reading newspapers, and that information needs to be presented in a more user-friendly format to make it accessible.

“ I am not on the bandwagon of people who say journalism in this country is in the doldrums. I say it is in a period of transformation, but the public is still informed as they should be. Maybe because of the public’s inability, or level of education, [they are not interested in] the news. ”

(**Pedro Diederichs**, Head of Department; Academic: Department of Journalism, Tshwane University of Technology, South Africa)

The shift towards the tabloidisation of the print media was a further concern raised by interviewees. Seven of the interviewees feel that tabloid publications do not adhere to journalistic standards of quality as previously defined and that their publishers are more concerned with the number of copies they are able to sell than with providing genuine news that contributes to democracy.

“ A questionable change for me has been the tabloidisation of the print media – for example there is the Daily Sun and the Sowetan. That in itself has been a big challenge because it takes away the serious substance of the news – because of commercialisation of the media [newspapers are writing what sells as opposed to hard news]. The news is no longer distributed to the people who are developing the nation, with the purpose of making sure the reader gets news that is genuine, but is only done for the sake of being able to say how many copies have been distributed and how much profit has been made. As long as it catches the eye, then the people buy. ”

(**Virginia Magwaza-Setshegi**, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

On the other hand, the tabloid media has been acknowledged for introducing thousands of new readers to newspapers. It is felt by some that getting the South African public reading is the first step towards developing a greater readership for the more serious publications.

“ I think we have involved a new readership. The Daily Sun’s readership is now at three and a half million a day, perhaps even four million. The majority of these people are new to the newspaper-reading market. This has been a sensational change in South Africa. ”

(**Deon Du Plessis**, Publisher; Private Sector: *Daily Sun*, South Africa)

The final shift in content identified by interviewees is the coverage of gender and race issues. According to the MMP and GEMSA, the coverage of women in the media has increased. More women have been approached to be sources in articles. These organisations aim to promote equal rights and ensure that all citizens are provided with a space in the media.

“ There has been a positive shift in the representation of women. As far as our monitoring is concerned, in 1999 we found that women constituted 10% of all sources used. In 2004 this figure had increased to 23% or 24%. Representation has more than doubled in five years, a very positive and dramatic shift. ”

(William Bird, Director; NGO: Media Monitoring Project, South Africa)

When it comes to coverage of race issues, however, William Bird feels less upbeat.

“ There have been negative shifts in issues of race. There is the Daily Sun being blatantly xenophobic, and yet it doesn't cause a stir (which it would have done five years ago, as quite rightly it should). ”

(William Bird, Director; NGO: Media Monitoring Project, South Africa)



14. Media Development Initiatives

This section discusses in more depth the specific media initiatives that are being undertaken by interviewees. It focuses particularly on how these various initiatives are being evaluated. Furthermore, attention is paid to interviewees' understanding of the successes that have been achieved, and the lessons that have been learnt through this process. For the purposes of clarity and detail, a chart (Appendix 2) has been appended, which provides an additional layer of specificity.

The 15 study interviewees were involved in 37 media development initiatives between them. These development initiatives comprise the following: twelve training initiatives (IAJ, AIP, GEMSA, MDDA, *M&G*, TUT, RU x 2, SABC, MMP, *M&G Online*, and FXi); nine advocacy initiatives (PMSA, AIP, GEMSA x 2, MDDA, MISA x 2, FXi, and MMP); five research initiatives (IAJ, GEMSA, MDDA, MISA, and MMP); three training media initiatives (TUT and RU x 2); two legal support initiatives (MISA and FXi); one award initiative (PMSA); one grant-making initiative (MDDA); one conference (AIP); and, one revenue stream generation initiative (AIP).

Although the various organisations that participated in this study each have their own goals and objectives, a comparative analysis shows that they do, in fact, share the following six overarching objectives:

- ❑ creating an enabling environment for the media industry;
- ❑ building capacity in journalism skills;
- ❑ ensuring that women and other marginalised groups are equally represented in the media;
- ❑ increasing media development and diversity, and enhancing the sustainability of small media organisations;
- ❑ Increasing the quality of journalism content through enhancing knowledge of ICTs; and,
- ❑ Enhancing awareness of the rights of freedom of expression and access to information.

Interviewees identified a variety of factors that they feel contribute to (and detract from) the success of the media development initiatives they are involved with. These are:

- a clear vision and strategic planning;
- the meeting of real needs;
- financial support;
- professional outcomes;
- partnerships (sustained over an extended period of time);
- awareness of the initiative among its recipients;
- flexibility toward specific contexts; and,
- passion and drive from the media initiative team.

The factors detracting from success highlighted by media professionals include the shortage of financial resources, lack of logistical support, lack of human resources and improper management and governance.

Through their experiences of designing, implementing and evaluating their media development initiatives, interviewees offer the following learning points regarding success. They stress the importance strategic planning and long-term planning of working with partners where possible, avoiding dependency on donors and taking the cultural context into account.

The various media development initiatives being undertaken by the interviewees will be discussed in greater detail in the sections that follow.

14.1 Review

14.1.1 Approaches to media development

An interesting development in South Africa has been the move towards cooperation between various non-government media organisations. Cooperation ranges from the discussion of ideas during an annual conference that is organised by GEMSA to collaboration on various projects.

“ There is a high level of consciousness around media consultation, that the way to do things is collaborative. I also think that is a more sophisticated way to do things. Whereas five years ago people were scrambling around for scarce resources and operating in competition (perhaps this hasn't changed much!), we are learning. It is almost like the corporatisation of the media sector in that various initiatives are working together, ensuring the effective utilisation of resources. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa (GEMSA), South Africa)

For example, the MMP and GEMSA work together to promote equal rights and a voice for women in the media. MISA assists with this project on a smaller scale.

Of the 15 media organisations that participated in this study, 13 are involved with media development initiatives. In many cases, organisations are involved with more than one initiative at the same time. There are a range of development initiatives, but most include **training, advocacy** and **research**. Each of these will be discussed in more detail. It is important to note that the information that follows is not an all-inclusive list of the media development activities currently in operation in South Africa, but merely a discussion of the initiatives in which our 15 interviewees are involved.

Training is the most common media development initiative being undertaken by the interviewees. Eleven of the media professionals interviewed are involved in training trainee journalists, junior journalists or communities. In this context, training refers to formal degrees, workshops, mentoring programmes and internships.

A variety of topics are covered in training. The School of Journalism and Media Studies at Rhodes University, and the Tshwane University of Technology, offer formal qualifications in journalism as well as practical training on newspapers run by these institutions. MISA and the FXi run workshops with community members to enhance awareness of their right to access information. *The Mail & Guardian* and the SABC provide trainee or junior journalists with the opportunity to acquire practical journalism skills through their internship programmes. The IAJ and the AIP have had discussions with various universities to develop courses that meet the needs of the media industry. The IAJ also offers a variety of short courses in journalism skills. Short courses in management skills and issues are run by the Sol Plaatje Institute under the School of Journalism and Media Studies at Rhodes University. GEMSA provide their members with training on gender in the media. Their training focuses on educating media professionals on the importance of having equal numbers of men and women in the newsroom as employees, as well as increasing the number of women sources that are called upon. The MMP trains communities and other interested parties in how to monitor their different media. Finally, the MDDA have a mentoring programme that offers grassroots media hands-on assistance and experience.

For the purposes of this report, advocacy refers to the act of lobbying for support and contributing to various policy processes. Just under half (seven) of the interviewees participate in advocacy activities. Three of these interviewees (MDDA, AIP and Print Media South Africa – PMSA) are (broadly) involved in lobbying for a more supportive environment for the media in South Africa. FXi and MISA, however, are more specifically focused on advocacy in support of media freedom and access to information. The media's representation of women and other marginalised groups within society is of special concern to the MMP and GEMSA.

Only five of the organisations that participated in the study have conducted any research. The MDDA commissions research with the aim of increasing the sustainability of grassroots media. The MMP is concerned with research through its monitoring of the media, and the Sol Plaatje Institute (under the School of Journalism and Media Studies at Rhodes University) has a full-time researcher dedicated to researching management-related issues. Other organisations (GEMSA and MISA), however, are involved in research to a much lesser degree.

Despite the widespread activities and agendas of the media organisations that participated in this study, there is a high level of commonality when the objectives of their various media development initiatives are compared. The 37 media development initiatives run by the 14 participating media organisations share six overarching objectives. The table below presents these objectives, and shows the organisations that are committed to each.

Table 1: Associated Media Organisations and their Objectives

Organisation	Objective
<input type="checkbox"/> PMSA <input type="checkbox"/> AIP <input type="checkbox"/> MDDA <input type="checkbox"/> MISA <input type="checkbox"/> MMP	Creating an enabling environment for the media industry
<input type="checkbox"/> M&G <input type="checkbox"/> M&G Online <input type="checkbox"/> IAJ <input type="checkbox"/> Department of Journalism, Tshwane University of Technology <input type="checkbox"/> School of Journalism and Media Studies, Rhodes University <input type="checkbox"/> SABC	Building capacity in journalism skills
<input type="checkbox"/> GEMSA <input type="checkbox"/> MMP <input type="checkbox"/> M&G <input type="checkbox"/> MISA	Ensuring that women and other marginalised groups are represented equally in the media
<input type="checkbox"/> MDDA <input type="checkbox"/> AIP <input type="checkbox"/> MISA	Increasing media development and diversity, and enhancing the sustainability of small media organisations
<input type="checkbox"/> Highway Africa under School of Journalism and Media Studies, Rhodes University <input type="checkbox"/> FXi <input type="checkbox"/> GEMSA	Increasing the quality of journalism content through enhancing knowledge of ICTs
<input type="checkbox"/> FXi <input type="checkbox"/> MISA	Enhancing awareness of the rights of freedom of expression and access to information

14.1.2 Funding of media development

The majority of media organisations interviewed rely entirely on donor or private sector funding to make their development initiatives possible. The only exceptions are the courses offered by the two universities, where students are required to pay course fees.

The only organisation interviewed that is responsible for allocating funds for media development initiatives is the MDDA. Libby Lloyd explains how these funds are distributed:

“ We funded research, but according to the regulations that guide the MDDA, a very tiny portion of the grant money can go on research, only 5%. There is a minimum 60% for community media initiatives and a minimum of 25% for small commercial media initiatives, and then there is 10% which we can allocate either way. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

The MDDA's funding comes from the government and the private sector. However, Libby Lloyd explains that, although the amount of funding has remained constant over the past two years, due to inflation, the MDDA is able to achieve less with the money. That said, there is hope that the MDDA will be able to secure additional funding in the near future.

“ In terms of the Electronic Communications Bill, telecommunications operators have always had to give a portion of their income to the Universal Service Fund, which provides telecommunication services to needy persons. With the Telecommunications Act they wanted to extend that to include broadcasters as well. They did this, but broadcasters were very angry, saying that the Universal Service Agency was set up to support telecommunications only. So together with them we got written into that Act that they can write off any contributions to the MDDA against that. So potentially when that comes into effect broadcasters might give all of that to us instead of giving it to the Universal Service Fund. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

14.2 Success and impact

14.2.1 Evaluating the success of media development projects

Just under half (14 of 37) of the media development initiatives being run by interviewees are not evaluated. Eight of the programmes are internally evaluated. These evaluations range from informal discussion with training recipients about their experiences of the training (MMP) to more formal evaluation forms (MDDA, GEMSA). Other methods of internal evaluation include the piloting of the AIP's "newspaper in a box" with potential users and having an internal committee assess the quality of advocacy documents and course content (AIP). The "newspaper in a box" is an initiative that aims to provide individuals with advice and step-by-step instructions to assist them in running a small publication.

The academic institutions that participated in the study conduct both internal and external evaluations on the degrees and short courses they offer. The internal evaluation is aimed at ensuring that the student or course interviewee attains a competency-based certification, and includes formal tests and examinations. The external evaluation is conducted by the Media, Advertising, Publishing, Printing and Packaging – Sector Education Training Authority (MAPPP-SETA) to ensure that the training being offered by these institutions is of an appropriate standard.

Donors have requested external evaluations for 11 of the development initiatives discussed by interviewees. Once again, these evaluations range from less formal evaluation forms and discussions conducted by the donors themselves (*Mail & Guardian* and *Mail & Guardian Online*) to more formal third party evaluations that aim to assess the impact, reception and quality of the initiatives (Highway Africa under Rhodes University, SABC, MISA and FXi).

As a result of these evaluations (and their own personal experiences), interviewees identified a number of factors that they feel contribute to (or detract from) the success of media development initiatives.

14.2.2 Factors contributing to the success of media development projects

The most frequently mentioned factor contributing to success was the need for a **clear vision**, and for **strategic and practical planning to make this vision a reality**. Interviewees stressed that such planning should ensure appropriate administrative and financial systems are in place.

“ We have a vision that I think is very, very clear. ”

(**Guy Berger**, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa)

Secondly, five interviewees maintained that, for media development initiatives to be a success, **they should address a real and pressing need within the industry**. It is felt that institutions need to listen to the recipients of their programmes and ensure their needs are met.

“ I think that this project responds to a real need. It’s not just a good idea because I thought training and IT was a good thing to do; it responded to a real need. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Media professionals highlighted **financial support as a contributing factor** to future success. They emphasised that, without financial backing from donors and other partners, many media development initiatives would not be possible.

“ Without our funders we would not be here. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

The fourth most-mentioned factors were: **the need for an initiative to show tangible, high-quality products**, and be presented in a professional manner. Once an initiative delivers a positive outcome the organisation is more likely to receive funding in the future.

“ An organisation has to prove its track record, an ability to show tangible results in the short term. These short-term successes will mean that future projects will be assumed to bring similar successes. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

Interviewees from the AIP, Rhodes University and MMP feel that this will allow the organisation to win favour with both the recipients of their programmes and their donors.

The development of partnerships with interested parties, working in the same or similar area was also cited as important. These partnerships benefit interviewees, both financially and in terms of manpower and expertise.

“ The partnership approach is a must, it helps share the load and minimise stress. ”

(**Pedro Diederichs**, Head of Department; Academic: Department of Journalism, Tshwane University of Technology, South Africa)

Next, media professionals explained that, for a development initiative to stand a real chance of success, it needs to **operate over an extended period of time and receive long-term funding**.

“ I think that what we would really like from partners is a medium- and long-term (rather than one-off) approach. Ideally, we want three- to five-year relationships. It just makes it easier because you can have a long-term plan. ”

(**Guy Berger**, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa)

Two interviewees highlighted the need for creating **an awareness of the initiative within its target community**.

“ The main thing was we went out and raised awareness with people. ”

(**Virginia Magwaza-Setshegi**, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

It was also mentioned that **media development initiatives should be flexible** in order to take account of the prevailing context:

“ The initiative was put into context before we went in and did the training. We worked with the local facilitators who knew the context. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa (South Africa))

Finally, **the passion and the eagerness of the media professionals** rolling out the various development programmes was identified as a contributing factor to success.

“ They are putting so much passion and drive into this. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

14.2.3 Factors undermining the success of media development projects

The **shortage of financial resources** available for media development initiatives was most frequently identified by interviewees (PMSA, MMP, MISA, TUT – Tshwane University of Technology) as a factor working against success:

“ Some of our less successful ones – on the basis of insufficient funding because we weren't able to implement them completely. They were not the way we wanted them to be. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

The second most frequently mentioned factor identified as working against success is **lack of cooperation and “buy in”** from various stakeholders, in terms of logistical support relating to organisation and the manpower to carry out these initiatives.

“ The underlying primary reason for failure was that these projects needed external support. There are considerable logistical challenges with these kinds of things. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

The **lack of human resources** was identified by interviewees as a related problem.

“ I feel that the other issue is human resources. You may have the money to get a project done, but often you don't have the people or even the skills. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

Finally, **improper management and governance of development initiatives** is viewed as contributing to the lack of success.

“ Governance is a major issue. I don't think people pay enough attention to it. They think that if you have got a good product they will make it succeed. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

14.3 Lessons learned

The media professionals interviewed were in agreement about the need for development initiatives to be sustainable, although they had very different understandings of what sustainability entails. Three interviewees equated sustainability with financial resources (*Mail & Guardian Online*, *Mail & Guardian* and *Daily Sun*). Five interviewees (RU, MMP, AIP, PMSA and SABC) proposed that sustainability included human as well as financial resources, explaining that many organisations may not be profitable but had people who were committed enough to volunteer their time. Three interviewees (MDDA, MMP and GEMSA) explained that sustainability involves the impact of any programme, and the “buy in” from its recipients in that it meets a real need within the community. One interviewee feels that sustainability should be understood in terms of organisational learning (AIP).

Interviewees offered three insights in into their quest to guide programmes toward sustainability. First, three interviewees (IAJ, MMP and MISA) stressed the importance of partnerships to attract financial resources and sharing the logistical load involved in mobilising large-scale initiatives.

“ We have learned that we can't do it alone as the IAJ. We have understood that there are other organisations out there we can learn from; we can see what they do. ”

(**Jacob Ntshangase**, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

Secondly, interviewees emphasised strategic planning and long-term vision.

“ There must be strategic planning. You can't say, 'That was nice for a year, now what?' Strategic planning and management are key. ”

(**Pedro Diederichs**, Head of Department; Academic: Department of Journalism, Tshwane University of Technology, South Africa)

Finally, the need to avoid dependency on donors was highlighted by interviewees.

“ As much as our Southern African Development Community (SADC) growth is supported by donor funding, we also have income-generating courses that enable us to keep going – our investments and paid courses. ”

(**Jacob Ntshangase**, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

14.3.1 The importance of the cultural context in planning and designing initiatives

In addition to the lessons that interviewees have learned generally, they specifically mentioned the importance of taking the cultural context into account when designing and implementing a programme. However, one of the interviewees feels that initiatives should not be designed to be in line with certain contexts; she was referring specifically to sexist and homophobic societies.

“ In our work, quite often context is highly suspect. An African media context does not address issues of gender inequality; nor does it address issues of homosexuality and unequal power relations. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Seven of the media professionals (IAJ, RU, *Mail & Guardian*, MMP, FXi, SABC and TUT) highlighted the importance of taking the cultural environment into account, in particular the political situation, literacy levels and economic factors.

“ Clearly, many of the obstacles to media development in Africa are political; this has to be grasped. Also, the economics of Africa are such that there are some media for example community media, that will not be profitable. There is still quite a high illiteracy rate in Africa. ”

(**Guy Berger**, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa)



15. Developing the Environment for Success

This section of the report focuses on the environment in which media development initiatives are being implemented, with specific reference to the influence of political and economic factors on the success of the media, and the extent to which the donor community is taking these environmental factors into account in the selection and support of media development initiatives.

15.1 Key factors

The interviewees identified a number of environmental factors that contribute to the success of media development in South Africa. When discussing the political and economic factors that both foster and inhibit media development initiatives, all 15 interviewees highlighted the South African Constitution as a contributing factor to the success of media development. Concern was raised about the tendency of government to interfere with the role of the media, and the lack of legislation regarding the dominance of large conglomerates.

It was acknowledged that South Africa has a growing economy. However, the difficulties mentioned were the increasing emphasis within the media industry on commercialism (GEMSA, FXi, *M&G*, and MISA), the high costs of production (IAJ, PMSA, *Daily Sun*, *M&G*, MDDA, and MMP) and the control of resources by large conglomerates.

Interviewees praised media development initiative donors for starting to seek advice about the real needs on the ground. However, interviewees feel that donors are falling short in the following ways:

- ❑ the withdrawal of funding from South Africa;
- ❑ the duplication of initiatives;
- ❑ conducting the wrong training;
- ❑ only providing short-term funding;
- ❑ being too prescriptive; and,
- ❑ not providing for core costs.

The various factors contributing to and inhibiting the success of media development in South Africa will be discussed in greater detail in the sections that follow.

15.2 Political and economic influences

The media professionals were asked to discuss the positive and negative implications of the political and economic environment in South Africa for media development initiatives.

All 15 interviewees agree that (to a large extent) the South African Constitution and legal environment is favourable to media development initiatives.

“ I think our constitutional framework and human rights approach works in favour of media diversity. The fact that we have a significant level of media freedom certainly promotes media development. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

Despite this, interviewees raised two main concerns regarding South Africa's political environment. There is a broad acceptance among the interviewees that the government at various levels tries to interfere with the duties of the media. Interviewees explain that government officials do not want the media to report negative information about them, and have contempt for the role of media:

“ We are not talking about back in 1994 during the end of apartheid; we are talking about the last three years. I have had journalists arrested by police on the instruction of local government officials, without any basis in law. We have had debilitating law suits, supported by government, again without any basis in law. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

The second concern raised by interviewees is the lack of legislation to deal with the dominance of the media market by large conglomerates.

“ I think a lot of us expected to see laws being passed which would end the newspaper monopolies, but in fact now there is greater consolidation. I think a couple of years ago, Joel Netshitenzhe from GCIS said that the biggest threat to the media industry was internal rather than external; I think he was right. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner Private Sector: *Mail & Guardian* Newspaper, South Africa)

The free market system, coupled with the economic growth being experienced in South Africa, is seen as a positive factor that contributes to media development initiatives. The economic growth means that there is more advertising spend available, and readers and audiences have more disposable income with which to purchase media and advertisers' goods.

“ Audiences are growing, not only in Johannesburg but also in other areas. Because of economic growth, people in the rural areas can afford to buy televisions. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

Other positive economic factors that were felt to contribute to media development initiatives were the money being received from large conglomerates through the development of the MDDA and technological advances, such as the Internet and mobile broadcasting, in that they have enhanced media diversity.

However, interviewees highlight various economic concerns. Four interviewees (FXi, GEMSA, M&G, and MISA) are distressed by the media's focus on making money. They feel that the obsession with making money impacts negatively on media content. For them, the more the media focus on profit the more likely they are to produce cheap, sensational content that has little developmental and educational value.

“ Community organisations call the media to cover their stories and they don't come. They are interested in big publicity stories. ”

(Virginia Magwaza-Setshegi, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

Related to this concern is the high cost of media production (specifically printing and Internet access). In a profit-driven environment, with high production costs, there is a tendency to spend less money on content, and so the quality of the media suffers.

“ The tendency is to cut costs; as a result, you reduce the newsroom, the number of people who are on the ground. You rely on email and telephone journalism. ”

(Jacob Ntshangase, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

A final economic concern for interviewees (M&G, AIP and MISA) is once again the dominance of conglomerates. As a result of their sheer size, the conglomerates are able to offer advertisers special deals that smaller media are unable to compete with. More concerning is the control they have over the media sector, and their ability to boycott smaller media initiatives.

“ The large conglomerates control not just the media but also have tentacles in virtually every sector of the economy. So we have conglomerates that control your distribution agency, that control your news agent outlets and the printing presses; they are into broadcasting, into newspapers, into virtually any subcategory you can think of. ”

(Justin Arenstein, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

15.2.1 State support for media development

The state was identified by interviewees as providing four different forms of support to counter the factors that negatively influence the success of media development initiatives. A large majority (12) of the media managers interviewed commended the government for the establishment of the MDDA. Two of these interviewees (AIP and FXi), however, voiced concerns about the efficiency of the MDDA in meeting its mandate.

“ The MDDA is an important initiative, but it is under-funded [by the government and the private sector]. It is under-resourced. It has an incredibly small secretariat which is incapable of handling the workload. ”

(Justin Arenstein, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

One person each mentioned the Broadcasting Complaints Commission (BCCSA), the National Electronic Media Institute of South Africa (NEMISA) and the willingness of government to be an active participant in media development.

Five of the interviewees (GEMSA, RU, TUT, M&G and FXi) feel that media organisations have no commitment to a diverse and pluralistic media. It is believed that many media organisations are only committed to their own commercial interests.

In opposition to this, four of the interviewees interviewed (GCIS, *Daily Sun*, SABC and *M&G Online*) feel that media organisations are generally strongly committed to an independent and diverse media.

“ I think media organisations are committed to independence and pluralism. A lot of people say they aren't because they are a monopoly. There is this perception that they are all singing from the same hymn sheet, but they have many titles that appeal to different markets so are pluralistic. ”

(**Matthew Buckland**, Online Publisher; Media Practitioner, Private Sector: *Mail & Guardian Online*, South Africa)

One interviewee commented that media organisations are committed to as little as they can get away with, without having regulations forced upon them.

“ I think the conglomerates recognise that unless they make real, tangible gestures of support they will have transformation imposed on them by the state. So there is a level of support, but I think it's as little as they can possibly get away with in terms of financial help and the opening up of market space. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

Joel Netshitenzhe of GCIS understands large media groups' support of small independent media in a different light. He explains that large media groups see the benefit to themselves of producing readers at a community level.

“ There is an appreciation that, if you encourage a culture of reading, people will start with their small, local, commercial and community newspapers but will (over time) migrate to the more established newspapers. So, from this perspective, there is an element of self-interest on their part. ”

(**Joel Netshitenzhe**, Chief Executive Officer; Government: Government Communication and Information System, South Africa)

One interviewee (MMP) feels that NGOs and one interviewee (MDDA) feels that community media are committed to media pluralism and independence.

Very few of the media professionals interviewed were willing to comment on their impressions of the attitude of the state media towards other forms of media in South Africa. Of the six interviewees that commented on this, only one made a positive remark.

“ The state media are not critical towards the private sector and this encourages interaction between them and the private sector. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

The other interviewees described the state media as “aggressive” (AIP) and “critical of other media” (MISA).

15.3 Donor communities’ role

When asked what they feel media donors are doing right, and what they could improve on, media professionals gave the following responses. Three interviewees (GEMSA, GCIS and MMP) felt that the most positive development is that donors are starting to realise that the organisations they are working with have high levels of expertise in the areas in which they operate, and are able to provide valuable assistance to donors regarding direction and identifying needs on the ground.

“ Donors are beginning to engage with media development organisations in a very real way, on a more strategic, involving level. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa (GEMSA), South Africa)

One interviewee identified the following trends of donors: the shifting away from broadcast media toward print; acknowledging the need for sustainability of initiatives and providing organisations with assistance in this by providing funding for overhead expenses; encouraging recipients to share resources; starting to develop long-term relationships with organisations; the support of human rights principles and, finally, the promotion of partnerships between various media development initiatives.

15.3.1 A different donor approach

Media professionals identified a number of areas where they feel media donors could improve. The most frequently highlighted concern is the trend of donors to withdraw funding from South Africa. Interviewees’ feel that the withdrawal of funding from South Africa at this point in time will result in the achievements that have been reached thus far being negated. They explain that there is still some way to go before the sector’s goals are realised. They further stress the role of media development initiatives in keeping the South African media industry accountable. If left unchecked, South African media, due to their relative strength, could monopolise the region.

“ South Africa is a huge economic conglomerate, and it is rolling out across the continent, imposing itself on less powerful countries. So you can put money into creating community media in other countries, but as soon as the South African juggernaut arrives (in the form of Media 24 or Johnnic Communications), they will take everything over and impose their South African way of doing things. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

The duplication of initiatives being funded by donors is a second major concern for interviewees. The media professionals interviewed feel that large amounts of money are wasted as a result of duplication between various donors, and that this money could be better spent.

“ Training institutions also contributed to this duplication because they would agree to run courses when they knew the guy next door was running a similar course. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

Four areas of concern were identified by two media professionals (GCIS and RU): donors are only providing short-term funding, which makes it difficult for media development initiatives to plan ahead.

It was felt rather strongly by AIP and MDDA that donors are wasting money on implementing the training without having conducted research into training needs and ensuring that training is competency based.

“ Squandering tens of millions of rands on inappropriate training, where the aim is simply to put bums in seats. This is not really about accreditation or making sure you are reaching the right people. You are not leaving any lasting legacy because the people trained are either too junior or are not actually attached to functional media; they are not attached to publishing media. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

It was further felt by MISA and FXi interviewees that, although some donors have started taking advice from the initiatives they fund, many donors are still prescriptive.

“ Part of the frustration is that donors are now seen as being too powerful and controlling. They can impose terms. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

Finally, the fact that many donors do not fund the basic running costs of media development initiatives makes it difficult for media institutions to survive.

“ The other problem is that donors don't fund core costs. While you can see the logic for this, it also places incredible stress on organisations because everything has to be project-funded. The donors don't want you to have funds for salaries and new equipment or increases in rent and electricity. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

15.4 Other issues

In addition to the factors discussed above interviewees (3) highlighted three further factors that they feel contribute to the success of media development in South Africa. Deon du Plessis from the *Daily Sun* explains that for media development to be a success the initiative has to be aligned with the needs of contemporary society.

“ I just want to underline the big one. Is matching media's initiatives with what happens in life. ”

(**Deon Du Plessis**, Publisher; Private Sector: *Daily Sun*, South Africa)

Tula Dlamini from MISA highlighted the various training programmes being offered by universities in South Africa. He feels that universities are aiding media development through equipping potential media producers with the necessary skills to succeed in the media industry:

“ I personally like what academic institutions have been doing with media training, media theory, what WITS University is doing, what Rhodes University is doing, what University of South Africa (UNISA) is doing, and the technikons, in terms of developing journalists at the diploma level. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa (MISA), South Africa)

Finally, Justin Arenstein from the AIP draws attention to a factor that he views as inhibiting media development in South Africa. He believes that there is the incorrect assumption that the MDDA is able to cater completely for the needs of the development of small community media in South Africa. A result of this assumption is that donors are no longer directing funds towards this sector.

“ I think that an inhibiting factor is the expectation that the MDDA is fulfilling a gap in the market when in fact it is not. So we see money not going to certain projects because there is an assumption that the MDDA will be funding those kinds of things. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)



16. Future Strategies

This section sets out interviewees' views on the strategic priorities for media development in South Africa. It then goes on to discuss how these priorities would best be addressed through development initiatives.

According to the interviewees, the strategic priorities for media development are media management training, community participation, specialised reporting training and media monitoring.

Interviewees suggest that, instead of establishing a new media development initiative, these priorities should be addressed through the support and coordination of existing initiatives.

Finally, interviewees mentioned three roles of the media in terms of the country's democratisation process – a voice for communities, a watchdog of the government and a channel through which to create awareness among citizens regarding public policy.

16.1 Strategic priorities

The strategic priorities for a new donor-funded media development initiative (as identified by interviewees) were as numerous and diverse as the interviewees themselves. In many cases, media professionals identified their own area of interest as a priority. For this reason, only those priorities that were identified by two or more interviewees will be discussed.

Three of the 15 interviewees to the study (*M&G*, *M&G Online* and PMSA) emphasised media management training and curriculum development as a key priority for South Africa.

“ I think there is a great need for senior and development skills. However, training is often focused on the lower end. It is journalistic training, rather than the type of training that, for example, the Sol Plaatje Institute undertake. They provide media management training – stuff like broadcast management and newsroom management. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner, Private Sector: *Mail & Guardian* Newspaper (*M&G*), South Africa)

A further three interviewees (FXi, MMP and MISA) feel that the priority should be to focus on community participation in the media. This would range from raising awareness among communities of their rights to getting them actively involved in setting up and monitoring their own media.

“ I think much has to be done on access to information training. It should not only focus on media practitioners but should go out to communities, to the people living out there. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

The need for training in specialised reporting was emphasised by two of the interviewees (M&G and MISA).

“ Who can understand economic and business reporting? Political reporting is generally well covered, but the coverage of economic and business reporting is limited; generally, writing about development issues requires work. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner Private Sector: *Mail & Guardian* Newspaper, South Africa)

Finally, two interviewees (MMP and MISA) identified the need for media monitoring as a priority.

“ I am very passionate about media monitoring for broadcasting. I believe it should happen. Monitor elections; monitor programming in general, news in general. It should be continuous so that we can increase the voices in the broadcasting media through monitoring and awareness. ”

(**Tula Dlamini**, National Director; NGO: Media Institute of Southern Africa, South Africa)

16.2 Focus of support

During the interviews, interviewees were presented with a list of possible areas for the focus of support to enhance media development in South Africa. The table to follow illustrates how participating media professionals regard the relative importance of focusing on the various areas.

Table 2: Focus of Support

Media Organisation	Focus of Support
<input type="checkbox"/> GEMSA <input type="checkbox"/> GCIS <input type="checkbox"/> IAJ <input type="checkbox"/> RU <input type="checkbox"/> PMSA <input type="checkbox"/> MMP <input type="checkbox"/> MISA <input type="checkbox"/> SABC <input type="checkbox"/> <i>M&G Online</i> <input type="checkbox"/> MDDA	Raising standards of journalism/training
<input type="checkbox"/> AIP <input type="checkbox"/> GCIS <input type="checkbox"/> IAJ <input type="checkbox"/> FXi <input type="checkbox"/> TUT <input type="checkbox"/> MDDA	Supporting the growth and development of the independent media
<input type="checkbox"/> GEMSA <input type="checkbox"/> GCIS <input type="checkbox"/> IAJ <input type="checkbox"/> <i>M&G</i> <input type="checkbox"/> MDDA	Developing content/local content
<input type="checkbox"/> GCIS <input type="checkbox"/> IAJ <input type="checkbox"/> <i>Daily Sun</i> <input type="checkbox"/> MDDA	Developing media frameworks to support media/fulfil public-service remits
<input type="checkbox"/> AIP <input type="checkbox"/> PMSA	Supporting trade bodies

16.2.1 Raising standards of journalism

The most frequently highlighted area of focus by interviewees is “raising standards of journalism/training”. As discussed in Section 2, there is a widespread belief among interviewees that the quality of media content has declined in South Africa.

“ I would say there is a need for assistance to make sure that we (the media profession) are growing our own timber (training our staff to enable them to move through the hierarchy). The existing corps of journalists should be helped to stay in the profession, and be adequately trained for the demands of the profession. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner, Private Sector: *Mail & Guardian* Newspaper, South Africa)

16.2.2 Supporting the growth of independent media

Six of the media professionals interviewed (AIP, GCIS, IAJ, FXi, TUT and MDDA) as part of this study earmarked “supporting growth of independent media” as an area for focus.

One interviewee (FXi) highlighted the importance of ensuring that the environment is conducive to media diversity.

“ And on the issue of supporting growth and development of independent media – by definition independent media needs to be critical of issues of the government and discuss things like political and economic policies. If the environment is not supportive then you will find that they [independent media] aren't independent enough. And if they are and they are viewed as radical and they are not given a space. To see development, independent media needs the space and the chance to be critical. ”

(**Virginia Magwaza-Setshegi**, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa)

16.2.3 Developing local content

The need to focus on “developing local content” was stressed by five of the interviewees (GEMSA, GCIS, IAJ, M&G and MDDA) as a priority area. Much of the information that is disseminated about South Africa and Africa, in interviewees’ opinion, is developed by foreign news agencies. Interviewees feel that South African journalists should be developing local content for both national and international use.

“ Developing content and local content. For me that is important. Because so much of stories in Africa is told by Reuters, Bloomberg, etcetera. So establishing local wire services for one would be wonderful. Establishing pools of competent correspondents in each country would be great. ”

(**Ferial Haffagee**, Editor in Chief; Media Practitioner, Private Sector: *Mail & Guardian* Newspaper, South Africa)

Jacob Ntshangase clarifies this:

“ Donors can assist by equipping people with the resources and skills to develop local content, but not with direct participation in the development of the content itself. ”

(**Jacob Ntshangase**, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

16.2.4 Media frameworks

Four of the interviewees (GCIS, IAJ, *Daily Sun* and MDDA) identified “media frameworks” as an important area for the focus of donor support. Interviewees acknowledge that there is a media framework within South Africa. They feel that the focus should be on how this framework is implemented, especially so far as independent media is concerned.

“ We've got a broad media framework, it's making it work in South Africa that needs to be a priority. ”

(**Libby Lloyd**, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa)

16.2.5 Supporting trade bodies

Only two of the interviewees (AIP and PMSA) identified “supporting trade bodies” as an important priority for media development. Justin Arenstein explains that it is important to support trade bodies as he believes it is a way of strengthening the media community and enabling them to support themselves.

“ I think develop trade bodies. Teach the media to support themselves. So you are planning for a day when there are no donor bodies. ”

(Justin Arenstein, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

Support in this instance refers to the lobbying for media rights and negotiating for various forms of revenue generation methods.

16.3 Media sector focus

Seven participants (AIP, IAJ, GCIS, M&G, Daily Sun, SABC and TUT) identified community media organisations as a key focus for assistance. This was largely based on the view that other forms of media in South Africa have access to ample resources, and are able to fend for themselves.

“ Basically, community organisations need this funding. They are suffering and battle to reach the community, even though they receive funding from the MDDA. ”

(Snuki Zikalala, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

The other six media professionals (GEMSA, RU, PMSA, MMP, M&G Online and MDDA) who were willing to comment on this issue felt that all types of media organisations would benefit from development initiatives.

“ I think a range of sectors, even the state media, would benefit. It might be very instructive for the state media to learn more about the commercial media, or understand more about the principles of journalism. I suppose the independent media are seen as being more under threat, resource-strapped and in need, but I think we should look at a range of areas. ”

(Matthew Buckland, Online Publisher; Media Practitioner, Private Sector: Mail & Guardian Online, South Africa)

16.4 Type of support most needed/useful

Once again, the various types of support identified by interviewees as most needed were as numerous and diverse as the interviewees themselves, and were closely related to the areas they were involved with. For this reason, only those types of support that were identified by two or more interviewees will be discussed.

The need for a training institution was identified by four interviewees (GEMSA, M&G, SABC and M&G Online). It is envisioned that this institution would address interviewees' concerns about the declining quality of content in South Africa.

“ Training would involve continuous monitoring and evaluation; it would address identified skill gaps, it would be practical. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Three interviewees (IAJ, RU and MMP) explained that (in their opinion) South Africa does not need any new initiatives. They felt that South Africa needs a coordinating body to support existing initiatives and provide a forum where people can share their experiences.

“ There is nowhere people can come together to discuss what is important at present. There is a lot of fragmentation. Some governments are giving funding, either through the MDDA (joint venture between government and the private sector) or they fund their broadcasters or their newspapers in some cases or news agencies, but there is no base where they say ‘what are the conditions of doing this and what are the priorities across the board in terms of media development initiatives’. You need a place where you can start setting an agenda. ”

(**Guy Berger**, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa)

16.5 Appropriate organisational framework

The media professionals interviewed generally agreed on the appropriate organisational framework for new media development initiatives in South Africa. Nine interviewees (GEMSA, IAJ, RU, M&G, MMP, TUT, MDDA, AIP and SABC) explained that they do not feel that the South African media would benefit from a new initiative. They proposed that already existing initiatives be given support, and that a coordinating body be established. They suggest that such a body would help to ensure high standards within the sector.

“ We need our review mechanism. A lot of people because of being involved in the media for years go out and confuse the funding world. They are providing training of a very low standard and receiving funding for it. It must be coordinated and there must be standards. ”

(**Jacob Ntshangase**, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa)

They also feel that it would be useful to have a forum where they could meet to “start setting an agenda” (Guy Berger, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa).

The remaining interviewees identified the need for an organisation that would be willing to fund core costs and an exchange programme as a means of implementing basic skills training.

16.6 Pan-regional versus country-specific initiatives

Nine of the interviewees (GEMSA, RU, PMSA, MISA, MDDA, AIP, *Daily Sun*, TUT and IAJ) feel that any new initiatives should be both country-specific and pan-regional. They caution that this does not mean that identical initiatives can be implemented in each country. Initiatives need to take each country's context into account. They suggest that initiatives start on a country-specific basis and then move into the region.

“ My experience of being in a regional organisation is that it is remarkably enriching to be part of a regional network, a regional structure. It helps in terms of regional integration; you can leverage work across borders. So whatever best practice is happening here or in Zambia can be filtered through. Contextual factors, however, are still important. It is about the sharing of knowledge and learning. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Only one interviewee (*M&G Online*) felt that a new initiative should be country-specific.

“ I think that new initiatives should be country-specific. I think that pan-regional initiatives will take too long and be too cumbersome. Every country is in a completely different situation, and has completely different needs – too much politics and red tape will threaten any project. Country-specific initiatives would be highly focused, and therefore a lot quicker to implement. ”

(**Matthew Buckland**, Online Publisher; Media Practitioner, Private Sector: *Mail & Guardian Online*, South Africa)

16.7 Initiatives relating to developmental content

Of the eight interviewees that were willing to comment on this issue, six maintained that training in basic journalism skills, as well as training on the importance of development goals, would be the most appropriate intervention.

“ What is needed is ongoing training and development in all organisations. Everyone must invest in training and development. Senior people must be involved because knowledge is not static, knowledge develops. So we must keep giving people (including those over 60) fresh knowledge and fresh ideas. ”

(**Snuki Zikalala**, Group News Executive; Public Sector: South African Broadcasting Corporation, South Africa)

The remaining two interviewees (*Daily Sun* and *M&G Online*) felt that it was important to stress that developmental content should not be presented in a formal and dull way. For them, this kind of information can have a far greater impact if it is presented in a lively and accessible way.

“ I think content must be informative but also entertaining. I find that much developmental content tends to be dry and boring. ”

(**Matthew Buckland**, Online Publisher; Media Practitioner Private Sector: *Mail & Guardian Online*, South Africa)

16.8 Initiatives to develop independent media

Interviewees identified a variety of ideas on how independent media (financed by advertising or sponsorship) could be developed. Three interviewees (GEMSA, IAJ and MMP) felt that encouraging independent media that is financed by advertising should be avoided. Kubi Rama from GEMSA is concerned that placing more focus on advertising would encroach on editorial independence and space.

“ I struggle with this one, because I do understand the need for the bottom line and profit, and the need to increase advertising. But I also then worry about the balance because I think advertising is taking over where the editorial space should be. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Jacob Ntshangase (IAJ) and William Bird (MMP) are more concerned about the size of the advertising market and its ability to sustain an increase in media organisations:

“ I don't know if you want to do that to begin with... I don't think we have sufficient advertising market in South Africa to do that. ”

(**William Bird**, Director; NGO: Media Monitoring Project, South Africa)

A further three interviewees (RU, *M&G* and *M&G Online*) suggested that media owners be provided with training in media management and business skills.

“ Training, not only in content but also in business skills. Like my job is a business job and I only have journalism training. ”

(**Matthew Buckland**, Online Publisher; Media Practitioner, Private Sector: *Mail & Guardian Online*, South Africa)

Other suggestions made by interviewees (AIP) include the development of an advertising body for the small independent media and conducting research into good practice that can be shared with other small independent media organisations.

16.9 The role of media development in the country's democratisation process

The media professionals that participated in the study mentioned three roles of the media in South Africa's democratisation process. Four interviewees (AIP, *Daily Sun*, FXi and MDDA) feel that the media in South Africa contribute to democracy through giving communities a voice. Within this, the development of rural-based media is particularly important in order to avoid rural communities merely being fed information, and being unable to participate.

“ In South Africa the media tend to be either urban or metropolitan-based; as a result we have uneven democratisation. In rural areas you feel that you are in a completely different country, if not a political system. I think a developmental initiative should be focused on creating sustainable, rural-based media. ”

(**Justin Arenstein**, President; Media Entrepreneur: Association of Independent Publishers, South Africa)

The 'watchdog' role was mentioned next frequently by media professionals:

“ I think that the media have a role to play in the democratisation process, which does not mean that you take the government line. What it does mean is that you hold government accountable. ”

(**Kubi Rama**, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa)

Finally, interviewees felt the role of the media is to educate the public about public policy and thereby equip them to participate in the democracy as active citizens.

“ A vibrant democracy is defined (quite essentially in my view) by whether citizens have information – information on public policy, on how they can contribute to the development of such policy, and how they can access the opportunities that exist. ”

(**Joel Netshitenzhe**, Chief Executive Officer; Government: Government Communication and Information System, South Africa)



17. Summary & Conclusions

Overall, South Africa has a relatively vibrant and developing media environment. The 15 interviewees were involved in 37 media development initiatives between them. These development initiatives comprise the following: 12 training initiatives; nine advocacy initiatives; five research initiatives; three training media initiatives; two legal support initiatives; one award initiative; one grant making initiative; one conference; and, one revenue stream generation initiative.

Although the various organisations that participated in this study each have their own goals and objectives, a comparative analysis shows that they do, in fact, share the following six overarching objectives:

- creating an enabling environment for the media industry;
- building capacity in journalism skills;
- ensuring that women and other marginalised groups are represented equally in the media;
- increasing media development and diversity, and enhancing the sustainability of small media organisations;
- increasing the quality of journalism content through enhancing knowledge of ICTs; and,
- enhancing awareness of people's rights to freedom of expression and access to information.

Interviewees identified a variety of factors they feel contribute to (and detract from) the success of the media development initiatives they are involved with. The factors contributing to success include:

- a clear vision and strategic planning;
- the meeting of real needs;
- financial support;
- professional outcomes;
- partnerships (sustained over an extended period of time);

- awareness of the initiative among its recipients;
- flexibility toward specific contexts; and,
- passion and drive from the media initiative team.

The factors detracting from success highlighted by interviewees include the shortage of financial resources, lack of logistical support, lack of human resources and improper management and governance.

Through their experiences of designing, implementing and evaluating their media development initiatives, interviewees offer the following learning points regarding success. They stress the importance of strategic and long-term planning, of working with partners where possible, avoiding dependency on donors and taking the cultural context into account.

When discussing the environment in which they operate, interviewees were asked to focus on the political and economic factors that both foster and inhibit media development initiatives in South Africa. The South African Constitution was highlighted as a contributing factor to the success of media development. Concern was raised about the tendency of government to interfere with the role of the media, and the lack of legislation regarding the dominance of large conglomerates.

It was acknowledged that South Africa has a growing economy. However, the difficulties mentioned were the increasing emphasis within the media industry on commercialism, the high costs of production and the control of resources by large conglomerates.

Interviewees praised media development initiative donors for starting to seek advice about the real needs on the ground. However, interviewees feel that donors are falling short in the following ways:

- the withdrawal of funding from South Africa;
- the duplication of initiatives;
- conducting the wrong training;
- only providing short-term funding;
- being too prescriptive; and,
- not providing for core costs.

According to the participating media professionals, the strategic priorities for media development are media management training, community participation, specialised reporting training and media monitoring.

Interviewees suggest that, instead of establishing a new media development initiative, these priorities should be addressed through the support and coordination of existing initiatives.

Finally, interviewees mentioned three roles of the media in terms of the country's democratisation process – a voice for communities, a watchdog of the government and a channel to create awareness among citizens regarding public policy.



18. Appendices

Appendix 1: Interviewees

Justin Arenstein, President; Media Entrepreneur: Association of Independent Publishers, South Africa

Guy Berger, Media Analyst and Head of School; Analyst: School of Journalism and Media Studies, Rhodes University, South Africa

William Bird, Director; NGO: Media Monitoring Project, South Africa

Matthew Buckland, Online Publisher; Media Practitioner, Private Sector: *Mail & Guardian Online*, South Africa

Pedro Diederichs, Head of Department; Academic: Department of Journalism, Tshwane University of Technology, South Africa

Tula Dlamini, National Director; NGO: Media Institute of Southern Africa, South Africa

Deon Du Plessis, Publisher; Media Entrepreneur: *Daily Sun*, South Africa

Ferial Haffagee, Editor in Chief; Media Practitioner Private Sector: *Mail & Guardian* Newspaper, South Africa

Libby Lloyd, Former Chief Executive Officer; Government: Media Development and Diversity Agency, South Africa

Virginia Magwaza-Setshegi, Head of Media and ICTs Programme; NGO: Freedom of Expression Institute, South Africa

Joel Netshitenzhe, Chief Executive Officer; Government: Government Communication and Information System, South Africa

Jacob Ntshangase, Executive Director; NGO: Institute for the Advancement of Journalism, South Africa

Kubi Rama, Chief Executive Officer; NGO: Gender and Media Southern Africa, South Africa

Eugene Saldanha, General Manager; Media Support: Print Media South Africa, South Africa

Snuki Zikalala, Group News Executive; Media Practitioner, Public Sector: South African Broadcasting Corporation, South Africa

Appendix 2: Media development projects/activities described in Section 14

Interviewee name and organisation	Specific media development project title	Key purpose/aim of project/initiative/activity	Project time span (dates or length in months/years of project) and status (ongoing, etc)	Outcome sought	Target audience	Evaluation method used (if any)	Result of evaluation	Is/was this project/activity considered by your organisation to be a success? On what basis?
Eugene Salbanha, Print Media South Africa (PMSA)	Advocacy/Lobbying	To create an enabling environment for the media industry	Ongoing	An environment that allows for a diverse, vibrant and sustainable media	State regulatory agencies and industry	No evaluation	No evaluation	Project a success in that it has shaped both provincial and national legislation
	Awards	To encourage and acknowledge professional journalism	Ongoing	Outstanding journalists are acknowledged	Journalists	No evaluation	No evaluation	
Ferial Haffagee, Mail & Guardian	Internship programme	Mutual benefit – journalism training for intern and assistance for the Mail & Guardian	Six months/ongoing	Increased knowledge of newspaper production and practical experience in journalism	Trainee reporters	Evaluation forms and informal interviews conducted by donors	Determines whether the programme will be allowed to continue	Interns are satisfied with the programme and they are viewed by the Mail & Guardian as being very productive
	Journalism aids	To ensure that women and young professionals are represented equally in the media	Various publications eg a directory of female professionals that can be used as sources	Journalists will reference more women and young professionals in their articles	Working journalists	No evaluation	No evaluation	There has been an increase in the number of women that have been quoted as experts in the media

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Appendix 2: Media development projects/activities described in Section 14 – continued

Jacob Ntshangase, Institute for the Advancement of Journalism (IAJ)	Training	Building capacity in journalism skills	Ongoing	Increased quality of media products	Journalists	No evaluation	No evaluation	Project a success because it meets real needs and is provided in three stages
Justin Arenstein, Association of Independent Publishers (AIP)	Consultation	Building capacity of journalism schools/ universities	Ongoing	Increased quality of courses offered	Journalism schools/ universities	No evaluation	No evaluation	Too soon to tell
	Newspaper in a box	To provide the necessary practical tools to run and produce a newspaper	Ongoing	Small publishers are able to compete with larger conglomerates	Small publishers	Tools are piloted by small publishers and a technical committee ensures quality	Assesses whether the tools are meeting small publishers' needs	Project has been accepted as the best of its kind in the industry
	Advocacy	To create an environment that allows for a diverse, vibrant and sustainable media	Ongoing	An environment that allows for a diverse, vibrant and sustainable media	State regulatory agencies and industry	Checked by reference committee	Checks the implications of policy and suggestions	Project a success in that it has shaped both provincial and national legislation
	Training	Development of curricula that meet the needs of small publishers and sponsored training	Ongoing	Small publishers receive training that is relevant to their needs	Small publishers	Training courses are piloted by small publishers and the board committee ensures quality	Assesses whether the workshops are meeting small publishers' needs	
	Revenue streams	To promote small publishers to industry and commercial bodies	Ongoing	Small publishers are able to secure advertising	Industry and commercial bodies	No evaluation	No evaluation	

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Appendix 2: Media development projects/activities described in Section 14 – continued

Kubi Rama, Gender and Media Southern Africa (GEMSA)	Advocacy	To promote equal rights and a voice for citizens in society	Ongoing	Women have equals rights and a voice in society	GEMSA members – media practitioners, gender and media activists, freedom of expression organisations and organisations concerned with media diversity	No evaluation	No evaluation	GEMSA feels that it is too soon to determine the success of this project
	Research	To monitor the news from a gender perspective	Ongoing	Women are equally represented in the media	All forms of media	No evaluation	No evaluation	GEMSA feels that it is too soon to determine the success of this project
	Policy development	To facilitate gender mainstreaming in laws and policy	Ongoing	Women are equally represented in the law and policy	All forms of media	No evaluation	No evaluation	GEMSA feels that it is too soon to determine the success of this project
	Training	Gender in media education	Ongoing	Increased gender awareness	GEMSA members – media practitioners, gender and media activists, freedom of expression organisations and organisations concerned with media diversity	Anonymous document evaluation	Indicates whether interviewees found the workshop valuable	The interviewees have provided positive feedback on the workshops

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Appendix 2: Media development projects/activities described in Section 14 – continued

Libby Lloyd, Media Development and Diversity Agency (MDDA)	Grants	To increase media development and diversity through increasing the sustainability of media initiatives	Ongoing	Increased sustainability of media initiatives	Community and small commercial media initiatives	Evaluation forms completed by beneficiaries	Indicates whether specific project has been carried out according to original application and proposal	On the whole, evaluations have been positive. The MDDA feels it has to wait five years before the projects can be truly assessed
	Mentoring	To increase media development and diversity through increasing the sustainability of media initiatives	Ongoing	Increased sustainability of media initiatives	Community and small commercial media initiatives	Evaluation forms completed by beneficiaries	Indicates whether specific project has been carried out according to original application and proposal	On the whole, evaluations have been positive. The MDDA feels it has to wait five years before the projects can be truly assessed
	Research	To increase media development and diversity	Ongoing	Knowledge that will feed into increased media development and diversity	Researchers	Evaluation forms completed by beneficiaries	Indicates whether specific project has been carried out according to original application and proposal	On the whole, evaluations have been positive. The MDDA feels it has to wait five years before the projects can be truly assessed
	Enabling environment	To create an enabling environment for media development and diversity	Ongoing	An environment that allows for media development and diversity	All media organisations	No evaluation	No evaluation	On the whole, evaluations have been positive. The MDDA feels it has to wait five years before the projects can be truly assessed
	International internship programme	Mutual benefit – journalism training for intern and assistance for <i>Mail & Guardian Online</i>	Six months/ongoing	Increased knowledge of online technology and practical experience in journalism	Trainee reporters	Evaluation forms and informal interviews conducted by donors	Determines whether the programme will be allowed to continue	Interns were satisfied with the programme and they are viewed by the <i>Mail & Guardian Online</i> as being very productive

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Appendix 2: Media development projects/activities described in Section 14 – continued

Pedro Diederichs, Ishwane University of Technology	Degrees	To provide school leavers and graduates with practical training in journalism and media studies	Ongoing	Expertise in journalism and media studies	School leavers and graduates	Tests, examinations and external evaluation to ensure courses meet MAPP-SETA standards	Determines whether students are able to move to the next course or degree and the qualification that students will receive	Seen as a leading institute for the training in journalism and media studies
	<i>Record West News</i>	To provide practical newspaper experience for students	Ongoing	Students have experience in newspaper production	Students	No evaluation	No evaluation	The <i>Record West News</i> sells well as a community publication
	TUT Top Stereo	To provide practical radio experience for students	Ongoing	Students have experience in radio	Students	No evaluation	No evaluation	
Professor Guy Berger, Rhodes University	Degrees	To provide school leavers and graduates with training in journalism and media studies	Ongoing	Professional expertise in journalism and media studies	School leavers and graduates	Tests, examinations and external evaluation to ensure courses meet NQF standards	Determines whether students are able to move to the next course or degree and the qualification that students will receive	Seen as a leading institute for the training in journalism and media studies
	Sol Plaatje Media Leadership Institute	To provide training and conduct research in the area of media management	Ongoing	Current and future media managers are better equipped to run a media organisation	Current and future media managers	Evaluation form, assessment task and external evaluation to ensure that courses meet MAPP-SETA standards	Competency-based certification	NOF level 7 qualification. Several media managers from South Africa and the SADC region have attended courses and provided positive feedback
	<i>Grocott's Mail</i>	To provide practical newspaper experience for degree students	Ongoing	Students have experience in newspaper production	Degree students	No evaluation	No evaluation	The <i>Grocott</i> sells well as a community publication
	Highway Africa	To improve journalism content by increasing knowledge of various technologies associated with journalism	Ongoing	Increased knowledge of various technologies associated with journalism	Journalists	External evaluation	Evaluation of the conference events and suggestions for improvements	The Highway Africa conference is well-attended and well-known in the SADC region

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Appendix 2: Media development projects/activities described in Section 14 – continued

Snuki Zikalala, South African Broadcasting Corporation (SABC)	Internship programme	Journalism training for interns and assistance for the SABC	One year/ Ongoing	Increased journalism skills	Trainee reporters	Formal evaluations done by MAPP-SETA	Ensures that training is of an appropriate standard	Can see how their writing has improved over time
Tula Dlamini, MISA	Freedom of expression and the right to information	To enhance awareness of the right to freedom of expression and access to information	Ongoing	National access to information workshops, awareness campaigns and advocacy to raise public awareness of their rights	NGOs, journalists and government information officers	All MISA chapters undergo a two yearly external evaluation	Suggestions for where the chapter can improve	Workshops had high levels of participation
	Media freedom and monitoring	To ensure all sectors of society are given a voice and that basic human rights are not infringed	Ongoing	MMP and GEMSA assisted in the monitoring of the media	All media	All MISA chapters undergo a two-yearly external evaluation	Suggestions for where the chapter can improve	
	Media diversity and development	Advocacy for an environment that enables a democratic and diverse media	Ongoing	Contributions to various policy discussions	State regulatory agencies and industry	All MISA chapters undergo a two-yearly external evaluation	Suggestions for where the chapter can improve	
	Media support	To build sustainability in the small media sector	Ongoing	Needs assessment of small media and provision of assistance in these areas	Small media sector	All MISA chapters undergo a two-yearly external evaluation	Suggestions for where the chapter can improve	

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Appendix 2: Media development projects/activities described in Section 14 – continued

Virginia Magwasa-Setshedi, Freedom of Expression Institute (FXI)	Media and ICTs	To lobby for freedom of expression and to promote the development of alternative media	Ongoing	Lobbying and training in the freedom of expression	State regulatory agencies and industry	Occasional external evaluation for donors	Determines the usefulness of the project	
	Access to information	To promote the implementation of the Access to Information Act	Ongoing	Training community members in their rights relating to the access to information	Community members	Occasional external evaluation for donors	Determines the usefulness of the project	Has become permanent item on agendas of several community meetings
William Bird, Media Monitoring Project (MMP)	Anti-censorship and legal support	To assist the media in censorship cases	Ongoing	Media are assisted with legal expertise in cases of censorship	All media	Occasional external evaluation for donors	Determines the usefulness of the project	
	Advocacy	To create an enabling environment for a free and democratic media that promotes human rights	Ongoing	An environment that supports a free and democratic media	State regulatory agencies and industry	No evaluation	No evaluation	Project a success in that it has shaped both provincial and national legislation
	Training and development	To enable communities and other organisations to monitor the media in their areas	Ongoing	Communities and other organisations are able to monitor their own media to ensure all sectors of society are given a voice, and that their human rights are not infringed	Community members and organisations with an interest in media monitoring	Informal evaluation through discussions with interviewees	Feedback is integrated into future training	
	Media monitoring	To ensure all sectors of society are given a voice, and that basic human rights are not infringed	Ongoing	The media are aware of the need to give all sectors of society a voice, and to uphold basic human rights	All media	Check the final report against the initial objectives of the project	Ensures that all objectives have been achieved	Research is professional and reliable

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South Africa

Country Report

Case Study



19. Case Study

The Association of Independent Publishers

The Association of Independent Publishers (AIP) is southern Africa's largest and most active coalition of grassroots and community newspapers.

Registered as a public benefit non-profit organisation (NPO) in South Africa, the AIP champions the interests of Southern Africa's estimated 250 small, independent newspapers. As a member-driven, 'self-help', association, the AIP is essentially a project-driven organisation that aims to improve the quality and economic sustainability of grassroots independent publications, ranging from traditional newspapers to "alternative" wall (publications that are printed in poster form and pinned to public notice boards or walls) and fax papers (which are delivered to subscribers via fax), as well as magazines, journals and other news-driven publications.

Fax newspapers are a particularly innovative medium in regions where printing presses are either non-existent or too expensive for emergent media to run.

Established at a special plenary summit of independent publishers in Johannesburg on 18 September 2004, the regional umbrella body incorporates South Africa's 126-year-old Community Press Association (CPA) and the more militant, rural-based Independent Media Alliance (IMA).

The AIP has deliberately not positioned itself as a traditional media freedom NGO but rather as a professional industry association focusing on the technical aspects of the "business of news".

The AIP has been admitted as a constituent member of the Print Media of South Africa (PMSA) cluster of media advocacy associations. As such, it has won executive representation on important regulatory and standards-setting authorities, including the Audit Bureau of Circulations (ABC), the Press Ombudsman, the South African Advertising Research Foundation (SAARF), the MAPPP-SETA journalism education standards authority and the Media Credit Controllers (MCC). A full list of AIP's industry representation and other links is provided below.

The AIP has also deliberately positioned itself as a small, effective and "smart" organisation that eschews empire-building and instead trades on strategic leadership. This involves the maintenance of a wide range of "smart" networks and project implementation partners, high-level policy interventions, credible qualitative research into media sustainability and business and/or revenue models, and lobbying against structural hurdles that prevent equitable market access for grassroots media.

The AIP also sets itself apart from other local media support bodies through its non-negotiable insistence that support programmes **never** create “donor dependence”, and that all media support beneficiaries make some kind of equity investment by investing their own time and labour to prove their commitment. And finally, projects are designed to tap into sustainable market revenue streams and business models.

The AIP’s 108 founding members mandated the Association to represent not only South Africa’s independent grassroots-based newspapers but also publishers operating in the broader SADC region.

Membership is open to anyone publishing a home-grown, grassroots-based, independent title that is free from conglomerate ownership. Membership is dependent on acceptance of the AIP’s Code of Business Conduct, subscription to the Press Ombudsman Code of Editorial Conduct and membership of the ABC. The term “grassroots media” was adopted because of the contested legal and judicial definition of the term “community media” across the region, and because existing “community media” definitions do not accommodate the broad variety and hybridisation of grassroots media ownership and control structures.

The AIP is meant to live up to its founding charter (and the mandate granted by subsequent AGMs) by becoming the primary clearinghouse for research, policy debate and the setting of industry standards for the grassroots print media sector.

The AIP is further mandated to lobby on behalf of publishers with government and industry and training agencies, as well as to develop technical training standards comparable with the mainstream commercial media. It is also mandated to pioneer the design of management toolkits and tip-sheets and Free Open Source Software (FOSS) products to “level the playing field” and provide the grassroots media with tools that are equivalent in quality to the proprietary software used by the conglomerate media.

This mandate, and AIP’s substantive contributions to national and regional debate, has seen the Association co-opted to serve in an executive capacity on the following statutory or other stakeholder bodies:

- ❑ Print Media SA (PMSA) Executive Board;
- ❑ African Forum for Media Development (AFMD) Southern African Task Team;
- ❑ Newspaper Association of SA (NASA) Sub-committee on Community Journalism;
- ❑ Forum of Community Journalists (FCJ) Board of Directors;
- ❑ Press Ombudsman Founding Body’s Council;
- ❑ Audit Bureau of Circulations (ABC) Board of Directors;
- ❑ South African Advertising Research Foundation (SAARF) Board of Directors;
- ❑ Media Credit Controllers (MCC) Board of Directors;
- ❑ Open Democracy Advice Centre (ODAC) Board of Directors;
- ❑ Media, Advertising, Publishing, Printing and Packaging (MAPPP) Sector Education Training Authority (SETA) Print Media Chamber and its Standards Generating Board;
- ❑ Community Multi-Media Services Network (CMS-Net);
- ❑ Institute for the Advancement of Journalism (IAJ) Advisory Panel;

- Art & Media Access Centre (AMAC) Advisory Panel on Media Training;
- Open Society Foundation of South Africa Media Advisory Council;
- South African National Editors Forum (SANEF) Education & Training Committee;
- SA Freelance Association (SAFREA) Industry Liaison Committee.

The AIP's contributions to policy formation on the above bodies has resulted in its board directors and policy consultants being co-opted into assisting research by the:

- Media Development and Diversity Agency (MDDA);
- Sol Plaatje Institute for Media Management (SPI);
- Media Institute of Southern Africa (MISA);
- Wits University Investigative Journalism Workshop (IJW);
- Netherlands Institute for Southern Africa (NiZA);
- Open Society Foundation of South Africa (OSF-SA);
- USAID/Rhodes University Journalism Department;
- Community Agency for Social Enquiry (CASE);
- Institute of Security Studies (ISS); and,
- Institute for Democracy in South Africa (IDASA).

The AIP also delivered a keynote research paper on the *"Grassroots Impact of State-funded Media"* at the 12-nation 2005 MISA regional summit in Lesotho, published position papers on *"The Grassroots Impact of the Conglomerate Expansion into Rural Markets"* and *"The Grassroots Impact of Abolishing Legal Notices"*, and participated in panels at the 2005 Commonwealth Editors Forum in Sydney, the 2005 Global Forum on Investigative Journalism in Amsterdam and the 2005 Global Forum for Media Development (GFMD) in Jordan.

The AIP is careful that its projects do not to duplicate efforts elsewhere in the media support sector in southern Africa, and focus on developing tangible and practical tools or mechanisms for use by grassroots publishers.

The AIP's current flagship projects include:

- the annual Innovative Media Awards, in association with NiZA and OSF-SA – the awards showcase home-grown solutions to technical and/or system challenges faced by grassroots publishers, ranging from new FOSS-based advertising booking and management tools to FOSS-based editorial copy management tools, tailored FOSS payroll software, geo-mapping and reader/market research toolkits and other business systems;
- the annual Grassroots Newspaper Summit, in association with OSF-SA – the summit is Southern Africa's largest gathering of grassroots publishers and editors, and features the AGMs for the AIP, the Forum for Community Journalism and Capro (advertising agency for independent media) as well as 12 training workshops, three policy roundtables, two gala dinners and a media expo. The inaugural 2005 summit attracted 450 publishers and editors, representing 228 grassroots titles;

- the AIP's "newspaper in a box" (NiB) project, in association with MAPPP-SETA, NiZA and MDDA – this multi-year project seeks to create a one-stop resource for new and emergent grassroots publishers, giving them all the FOSS production and management tools, "how-to" tip sheets, manuals and other resources needed to establish sustainable grassroots newspapers or magazines. The first modules include an automated advert booking, tracking and invoicing tool, an automated payroll system for commission-based advertising representatives and freelance journalists, and a three-part court reporting kit.
- The AIP's Grassroots Advertising Procurement (GAP) project, in association with MDDA and NiZA – the AIP is undertaking the most comprehensive research yet into practical strategies for giving grassroots print media access to mainstream commercial advertising, as well as government advertising, public-service announcements and related NPO publicity campaigns. The AIP is simultaneously running two pilot syndicates that bring like-minded, regionally-based publications together to make joint pitches for advertising accounts;
- Census 2006, in association with MDDA – the AIP is currently conducting the most comprehensive survey yet of independent grassroots publications in South Africa, including community-owned, small commercial, advocacy (faith-based, gender, NGO, etc) and similar titles. The census is also attempting to provide the first-ever overview of the extent of government-funded or owned print media in South Africa. The results will be publicly available in either geo-mapping format or as a searchable database, for use as a planning tool by media support agencies, advertising agencies and the general public;
- AIP bursaries, in association with ODAC, OSF-SA and MAPPP-SETA; the AIP has partnered with some of the most credible and renowned journalism schools in South Africa to custom design and manage a series of "mid-career" practical training courses for grassroots publishers, media managers and journalists. All the courses are accredited by MAPPP-SETA (and as such contribute towards a nationally-recognised academic degree), and include the innovative use of distance learning via online tuition, face-to-face lectures, workplace mentoring and career-path planning. The pilot phase sees the AIP administering 18 annual bursaries, with a total of 54 planned for 2007.

The AIP is also finalising funding for the following major projects:

- publisher 'peace corps' – the AIP is spearheading the creation of an International Centre for Journalists (ICFJ) type "peace corps" of veteran or retired publishers, business experts and newsroom managers who volunteer for placements as "technical advisors" in grassroots publishing concerns for periods of up to six months;
- AIP legal advice desk – the AIP is spearheading the creation of a specialist media law advice desk and legal fund to undertake anti-trust and anti-competitive test cases, as well as to underwrite landmark or precedent-setting cases in the fields of defamation law, media freedom (specifically around economic freedom and equitable access issues), information access and related matters. The proposed legal advice desk would be managed in conjunction with a leading law school/s;
- AIP research and lobbying unit – the AIP is spearheading the creation of a specialist lobbying unit that undertakes/commissions the necessary substantive research in order to lobby government, parliament, regulators and industry stakeholders on policy issues hindering the sustainability and growth of an independent, diverse and pluralistic grassroots press.

All finalised projects are presented to the AIP's membership at its annual AGM, and are further evaluated through a focus group report with a final follow-up evaluation report from a broader cross-section of beneficiaries, six months after release.

The second core component of the AIP's mandate is lobbying. The Association is often the only institutional voice for small shantytown or rural-based publishers. As such, the AIP conducts two primary types of lobbying activities:

- policy or issue-based lobby campaigns, based on research and/or member surveys, and targeting statutory, regulatory and industry stakeholders;
- commercially-motivated negotiations or lobby campaigns targeting industry or regulatory stakeholders, designed to give grassroots publishers the same economies of scale or bulk-discount benefits enjoyed by conglomerate publishers.

Major AIP lobby campaigns over the past 19 months, between January 2005 and August 2006, include:

Audit Bureau of Circulation certification – the AIP has successfully lobbied for the introduction of entry-level ABC certification in South Africa for emergent or small grassroots publications that cannot afford the onerous conditions of commercial certification;

Journalism qualifications – the AIP successfully defeated attempts by conglomerate publishers to introduce a lesser or lower qualification for community journalists, which would effectively have consigned grassroots and neighbourhood newspaper media workers to a second-class status, affecting their employment potential as well as their salary;

State-funded media – the AIP undertook a concerted lobby campaign to mitigate the growing impact of South Africa's new state-funded municipal, provincial and national publications on the commercial sustainability of independent grassroots press. The campaign has included fast-track (in-house) desktop research into the public cost, extent and nature of the threat as well as the drafting of position papers for public debate, participation in roundtable discussions and public debating panels, and the publication of the AIP's views on a broad range of mainstream and trade media. The AIP is currently preparing for a seminal presentation on the issue to parliament's Portfolio Committee on Communications, plus to the Government Communication and Information System (GCIS);

Legislation threats – the AIP has proactively monitored, researched and made substantive submissions on proposed changes to regulations/law, or the introduction of new laws, that would impact on the commercial sustainability of the grassroots press. The campaign differs from the media freedom campaigns undertaken by other media advocacy organisations by using commercial law and commercial precedents to protect or expand press freedom, and has successfully protected grassroots interests by amending or scrapping proposed laws on filming/photographing of public property, the proposed abolition of the publication of changes to land use (environmental impact assessments) and the proposed abolition of the publication of deceased people's estates. The AIP continues to lobby around the proposed prohibition of advertising for baby milk formula and supplements, and the prohibition of alcohol advertising;

Conglomerate expansion – based on member complaints and desktop research, the AIP is currently aggressively lobbying regulatory and industry stakeholders to mitigate the impact of the conglomerate media's rapid expansion into rural, shantytown and related markets (which have traditionally been the preserve of the grassroots press). Even veteran or well-established grassroots publishers are being forced to sell their titles to the conglomerates for relatively poor returns and subject to stringent restraints of trade, which range from contractual prohibitions against owning or even working for other media, to contractual stipulations that make the publishers employees of the new owners. Those that refuse to sell or surrender their independence are subjected to (often unfair) competition, discount wars and dumping, and are denied access to printing presses and/or distribution companies by better-resourced conglomerate titles. Defiant independent publishers are also subjected to concerted headhunting raids by the conglomerates, with key production and sales staff targeted especially.

Other lower profile AIP lobby campaigns include targeting software/hardware suppliers to negotiate bulk purchase discount schemes, targeting printers to negotiate bulk order discount schemes and better print slots, and targeting statutory media development agencies, such as the MDDA, to use its funds more strategically and to base its funding decisions on better research.

The AIP is governed by an executive board, elected annually by the membership. This board comprises provincial/regional representatives and special interest group representatives.

The 2005/6 Board President is Justin Arenstein (of the rural *African Eye News Service* news agency and *Lowveld Living* magazine in Mpumalanga). The rest of the board comprises:

- Dr Hilda Grobler (Kwana Newspaper Group in Kwa-Zulu Natal);
- Zaidi Khumalo (*Kathorus Mail* newspaper in Gauteng);
- Sheila Mhlongo (*KZN Community News* newspaper in KZN);
- George Motloane (*Township Roundtrip* newspaper in the Northern Cape);
- Willida Peach (*Chalkline* newspaper in Western Cape);
- Mahmood Sangley (*Muslim Views* newspaper in Western Cape);
- Martin Sheppard (*Eastern Free State Issue* newspaper in the Free State);
- Louis Vale (*Grocott's Mail* newspaper in Eastern Cape); and,
- Anton van Zyl (Zoutpansberger Newspaper Group in Limpopo).

The AIP board also has two non-executive members, namely Karin Espag (Chairwoman of the Forum of Community Journalists) and Rishaad Mahomed (Chairman of CAPRO Community Advertising).

The AIP's secretariat is based in Johannesburg, as part of the PMSA cluster of media advocacy organisations, with financial support from the Newspaper Association of SA (NASA).

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African Media Development Initiative Research

This report is one of 18 produced as part of the African Media Development Initiative Research Project, completed in 2006. To obtain a copy of any of the following reports, please visit: www.bbcworldservicetrust.org/amdi

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