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ANALYSING THE RELEVANCE OF PUBLIC SERVICE BROADCASTING IN THE SOUTH AFRICAN TELEVISION SECTOR FOR THE DIGITAL DISPENSATION

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A research report submitted to the Faculty of Humanities, of the University of Witwatersrand, in partial fulfilment of the requirements for the Degree of Master of Arts in ICT Policy and Regulation

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ABSTRACT

In the current era of the digital television (TV) broadcasting dispensation, the relevance of the Public Service Broadcasting (PSB) mandate in South Africa remains critical, to inform and build democracy in the public interest. Recent debates with regard to the relevance and retention of PSB in the digital era seem to suggest that there are divergent views in this regard. These debates gave rise to this study.

The study aimed to assess and reconfigure the role of the South African Broadcasting Corporation (SABC) in carrying the public broadcasting mandate in the digital era. Furthermore, the study explored how the PSB remit can be repositioned to meet the needs of South African citizens in the 21st century. In addition, this study investigated the evolution of public service broadcasting policy and the role played by the Department of Communications (DoC), the policy maker in informing policy. The study seeks to ascertain whether the policy direction provided by the DoC is in actual fact in sync with the developments taking place in the TV broadcasting sector.

This research followed a qualitative research approach, by exploring the relevance of PSB in the digital era and also by examining South Africa's 3-tier broadcasting system, with a particular focus on the SABC. The research analysed the SABC (PSBs), MultiChoice (pay-TV licensee), e.tv (Free-to-Air commercial licensee) and Association of Community Television in South Africa (ACT-South Africa), a body representing Community TV licensees, in their attempts to discharge the PSB remit in the digital era. The qualitative paradigm aided in the process of describing and understanding the research topic.

The main findings of this study revealed that the PSB mandate still has relevance in the digital era, however weak this may be. The multi-channel and the competitive TV broadcasting landscape will deplete the commercial advertising market share, on which the SABC heavily relies for revenue income. Secondly, the SABC's mandate can never be upheld unless appropriate funding is secured by government. Lastly, the findings reveal that the DoC has regressed in providing policy and prescriptions and that there is thus a policy vacuum in the implementation of the PSB mandate.

DECLARATION

This serves to confirm that this research report is my own work submitted in partial fulfilment of the requirements for the degree of Master of Arts in the field of ICT Policy and Regulation. I declare that I have not plagiarised the contents thereof.

Nomonde Gongxeka

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31 October 2016

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Proverbs 4:7 “Getting wisdom is the most important thing you can do. Whatever else you get, get insight. Love wisdom, and she will make you great. Embrace her, and she will bring you honour. She will be your crowning glory.”

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ABBREVIATIONS

ACMA	Australian Communications and Media Authority
ACOO	Acting Chief Operating Officer
ACT-South Africa	Association of Community Television in South Africa
ANC	African National Congress
ASO	Analogue Switch-Off
ATU	African Telecommunication Union
AU	African Union
AUB	African Union of Broadcasting
BBC	British Broadcasting Corporation
CA	conditional access
CAP	Common African Position
CDITP	Centre for the Development of Information Technology Policy
CIB	Campaign for Independent Broadcasting
CODESA	Convention for a Democratic South Africa
COM	Campaign for Open Media
COMESA	Common Market for Eastern and Southern Africa
COO	Chief Operating Officer
CTO	Chief Technology Officer
DBAB	Digital Broadcasting Advisory Body
DG	Director-General
DMWG	Digital Migration Working Group
DoC	Department of Communications
DTPS	Department of Telecommunications and Postal Services
DTT	digital terrestrial television
DVB	Digital Video Broadcasting
DVB-T	Digital Video Broadcasting – Terrestrial 2nd Generation
EBU	European Broadcasting Union
EC	Electronic Communications
ECA	Electronic Communications Act

ECOWAS	Economic Community of West African States
EPG	electronic programme guide
EU	European Union
FAWO	Film and Allied Workers Organisation
GE	Group Executive
GCEO	Group Chief Executive Officer
HD	High Definition
IBA	Independent Broadcasting Authority
ICASA	Independent Communications Authority of South Africa
ICT	information and communications technology
IP	Internet Protocol
IPO	Independent Producer's Organisation
IPTV	Internet Protocol Television
ISDB-T	Integrated Services Digital Broadcasting-Terrestrial
IT	Information Technology
ITU	International Telecommunication Union
ITV	interactive television
LLU	local loop unbundling
MDDA	Media Development and Diversity Agency
MPEG	Moving Picture Experts Group
MPR	Methods for Policy Research
MPs	Members of Parliament
NAB	National Association of Broadcasters
NDP	National Development Plan
NEPAD	New Partnership for Africa's Development
NFVF	National Film and Video Foundation
NP	National Party
OBV	outside broadcast van
OTT	over-the-top
PCS	Public Commercial Services
PE	political economy

PMO	Project Management Office
PPCC	Parliamentary Portfolio Committee on Communications
PSB	public service broadcasting
PSBs	public service broadcasters
PSM	public service media
PwC	PricewaterhouseCoopers
RFP	Request for Proposals
RIPE	Re-Visionary Interpretations of the Public Enterprise
ROI	return on investment
RTHK	Radio Television Hong Kong
SABC	South African Broadcasting Service
SACF	South African Communications Forum
SADC	Southern African Development Community
SADIBA	Southern African Digital Broadcasting Association
SAPA	South African Press Association
SARS	South African Revenue Service
SATRA	South African Telecommunications Regulatory Authority
SDA	secondary data analysis
SIP	Strategic Integrated Project
SONA	State of the Nation Address
SOS	Scheme for Ownership Support
SOS Coalition	Support Public Broadcasting Coalition
SSDI	semi-structured depth Interviews
STB	set-top-box
TIR	Triple Inquiry Report
TV	television
TV-BMS	Television Broadcasting Management System
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USAASA	Universal Service and Access Agency of South Africa
VOD	video-on-demand

CHAPTER 1
THE PUBLIC SERVICE BROADCASTING MANDATE: TRANSITIONS FROM ANALOGUE TO DIGITAL

1.1. Introduction

Broadcasting in the 21st century remains a deeply social medium because of its crucial role in the promotion of democracy. According to Bardoel and d'Haenens (2008), broadcasting is currently going through what has been termed "a disruptive change". Globally broadcasting has been characterised by all the changes that have been sweeping the information and communications technology (ICT) sector, namely digitisation and convergence, cost competition, content ecology and funding.

The origins of the crisis faced by public service broadcasters (PSBs) in this disruptive era are threefold: declining budgets, audience fragmentation and the debate over their proper role, and rapid technological advancement (Collins, 2001). Broadcasting challenges have seen policy makers being forced to review their policies on globalisation, knowledge economies, bridging the digital divide, and convergence. The evolution of digital technologies has called into question the relevance of public service broadcasting (PSB) with respect to the introduction of new media and digital migration. Many new forms of broadcast media have become possible and the old public broadcast mandate must undergo change, though the nature of the change remains a subject for further examination and study.

This study is located in South Africa, which at the time of writing was undergoing a digital migration process, concurrently with a policy reform process. South Africa's policy review process, it would seem, has been plagued by a number of challenges and has many hurdles to overcome. The aim of this study was to analyse the relevance of PSB in the late analogue era, contrasting it with the relevance of PSB in the digital era. The study further sought to explore the development of South Africa's policy direction and framework towards building a digital future for its citizenry. The study was intended to provide insights into the origins of the public interest rationale. Finally, this study reviewed literature that has been published on the topic, and identified the gaps that this particular body of work may have to fill. The broadcasting

medium to be studied is television.

The main research question is: How does a renewed understanding of the relevance of PSB in the digital era inform the PSB mandate?

This chapter outlines the evolution of television (TV) broadcasting in South Africa and the policy reforms around TV broadcasting. It provides a summary by reviewing the relevance of PSB in the digital era whilst the country prepares to make a transition from analogue to digital technologies.

1.2. Background

South African Context for Digital Migration

South Africa's digital migration context was largely driven and influenced by the International Telecommunications Union (ITU) and its formalised agreement amongst member states, which was reached in 2006. The agreement outlined the terms for the digitalisation of broadcasting services in preparation for the 17 June 2015 analogue switch-off (ASO). This saw South Africa make the commitment that it would complete its digital migration process by 2011, implement digital terrestrial television (DTT) on digital networks and pilot-testing of set-top boxes (STBs) in preparation for the international broadcast of the 2010 FIFA World Cup which was later hosted in South Africa, and lastly undertake the formation of relevant bodies to drive and implement South Africa's digital migration process.

Crucial to understanding the feasibility factors of PSB in South Africa are: (a) the policy direction provided by the Department of Communications (DoC) with regards to PSB in the interconnected and fast-changing digital era, and more especially with regards to the digital migration process; (b) the readiness of the PSB, the South African Broadcasting Corporation (SABC), to broadcast content in a multi-platform digital environment; (c) the capacity of the broadcast content industry to produce in digital formats to populate the future multi-channel environment post digital migration; (d) the readiness of the SABC to commission and procure interesting and innovative content for a 21st century audience through the PSB model; (e) the possible new avenues for PSB such as e-education services; and lastly (f) funding options for a future SABC that will operate in a multi-channel environment, and also

the overall funding of the digital migration process by the DoC.

1.3. The Public Interest Rationale

Melody (2001) provides insights on the public interest approach and the heritage of the public utility principle by suggesting that this approach to important industries is affected by delivering services as a public good. The heritage of the public utility principle, according to Melody, has been recognised as a special category of business affected with a public interest, and hence it is afforded public utility status (Melody, 2001, p.12). Melody classifies the following common industries as public utilities: telephone, electricity, water services and public transport services. This special public utility classification applies where the demand for a good or service is considered a common necessity for the public at large; this is why governments issue regulations to ensure that these services are provided at a reasonable price.

Public goods are described as goods which are non-rival and non-excludable, on which everyone can “free ride” and which no-one has an economic incentive to provide: e.g. parks, lighthouses, street lights, etc. Public goods are for everyone, a collective provision, where one person’s use does not deprive another. They are not used up, and one person’s consumption cannot exclude the consumption of others. Free-to-air broadcasting is another form of public good (Collins, 2007). Ibarra (2012, p.10) describes public goods as goods that can be consumed by more people without affecting the supply of the goods themselves.

Buckley, Duer, Mendel and Siochru (2008) cite the key features of communication and media in the analogue phase: respect for the right to freedom of expression as a primary need, ready and timely access to information of public interest, media independence, media that reflect and enhance the full diversity of views in society, accessibility by all groups in society, and a sustainable economic and institutional base.

1.4. The Periodisation of South Africa's Broadcasting Policy Reform Process: 1990-2013

The researcher sought to explore the relevance of PSB in the digital era, and analyse the policy choices adopted by the DoC on the implementation of the digital migration process. The researcher also analysed the characteristics that defined this period.

1.4.1. 1990-1994: A Prelude to South Africa's Policy Reform

> "South Africa's policy model of the 1990s was one of unitary, centrally-controlled approach which was no longer viable in the modern ICT environment. If we want to create an enabling environment we must leave no stone unturned. It is going to be complex and sometimes difficult and challenging, but we have no choice" (Ngcaba 2012, pp. 37).

When reviewing the evolution of policy in South Africa, it is necessary to reflect on South Africa's political history, since it influenced and shaped the country's first ever democratic policy formulation. South Africa's policy making process in the early 1990s was aimed at correcting the past isolationist apartheid policies (Ngcaba, 2012, pp. 11). It is stated in the Triple Inquiry Report (TIR), which was adopted by the National Assembly in early 1996, that by 1990 there were clear signs of acceptance by the apartheid, ruling National Party (NP), that a transition to democracy in South Africa was inevitable. The first NP stance led the party to adopting a more liberal media policy by appointing Professor H C Viljoen (SABC Chairman 1989-1993 and member from 1993 to 1994, when he resigned) to chair the Task Group on Broadcasting in South and Southern Africa. At the time a number of conferences and workshops were held and discussion groups such as the Campaign for Open Media (COM) and the Film and Allied Workers Organisation (FAWO) were established.

In August 1991 the Jabulani Freedom of the Airwaves Conference was held in the Netherlands. The conference was organised by the anti-apartheid movement in conjunction with the African National Congress (ANC), FAWO and Radio Freedom. The conference was convened to propose and discuss the freeing up of South

Africa's airwaves. In September 1991, another conference was held at the University of Bophuthatswana with the aim of taking forward a number of resolutions passed at the Jabulani Conference. These resolutions included calls for the formulation of policy, media monitoring and the setting up of a broadcasting development network.

In 1991 the Centre for the Development of Information Technology Policy (CDITP) also hosted a conference which was aimed at preparing South Africa for the transfer of power post the Convention for a Democratic South Africa (CODESA) negotiations. The CDITP was involved with the training and development process that would support improved policy making, a skill which Ngcaba (2012) puts forward as lacking in the current policy formulation process. In his presentation Ngcaba (2012) states that the "writing of policy is a skilling issue, policy formulation is an interpretation of science which also requires investment in research and development". It was during the CODESA negotiations that critical decisions were taken regarding the then national state broadcaster, and the need for an independent broadcast regulator, mooted.

COM and the Centre for Development Studies organised the "Free, Fair and Open Conference", which brought together a number of stakeholders, comprised a wide range of media practitioners and political formations in an attempt to reach broad consensus about the process of media transition. The resolutions of this conference were later proposed at CODESA, to be considered by the body on "how mass media could contribute to a climate for free political participation during the transition period" (TIR, IBA, 1995). The conference resolutions also called on CODESA to facilitate the appointment of Boards of Control for public broadcasting services, and called for an interim regulatory body rather than a commission of enquiry which they believed would create unacceptable delays in the transitional period.

It is stated in the Triple Inquiry Report that by 1992 there was general agreement that the SABC, which was a state broadcaster, be transformed and remolded to serve the interests of all sectors of the South African population. This was followed by a call by the Campaign for Independent Broadcasting (CIB), a broad-based coalition, for the appointment of an entirely new, more representative and independent SABC Board. This new board was appointed in 1993. This particular

period was preparing the groundwork for the democratisation of South Africa, the freeing up of the airwaves and the setting up of the various institutions.

1.4.2. 1994-2004: South Africa's Democratic Transitional Period

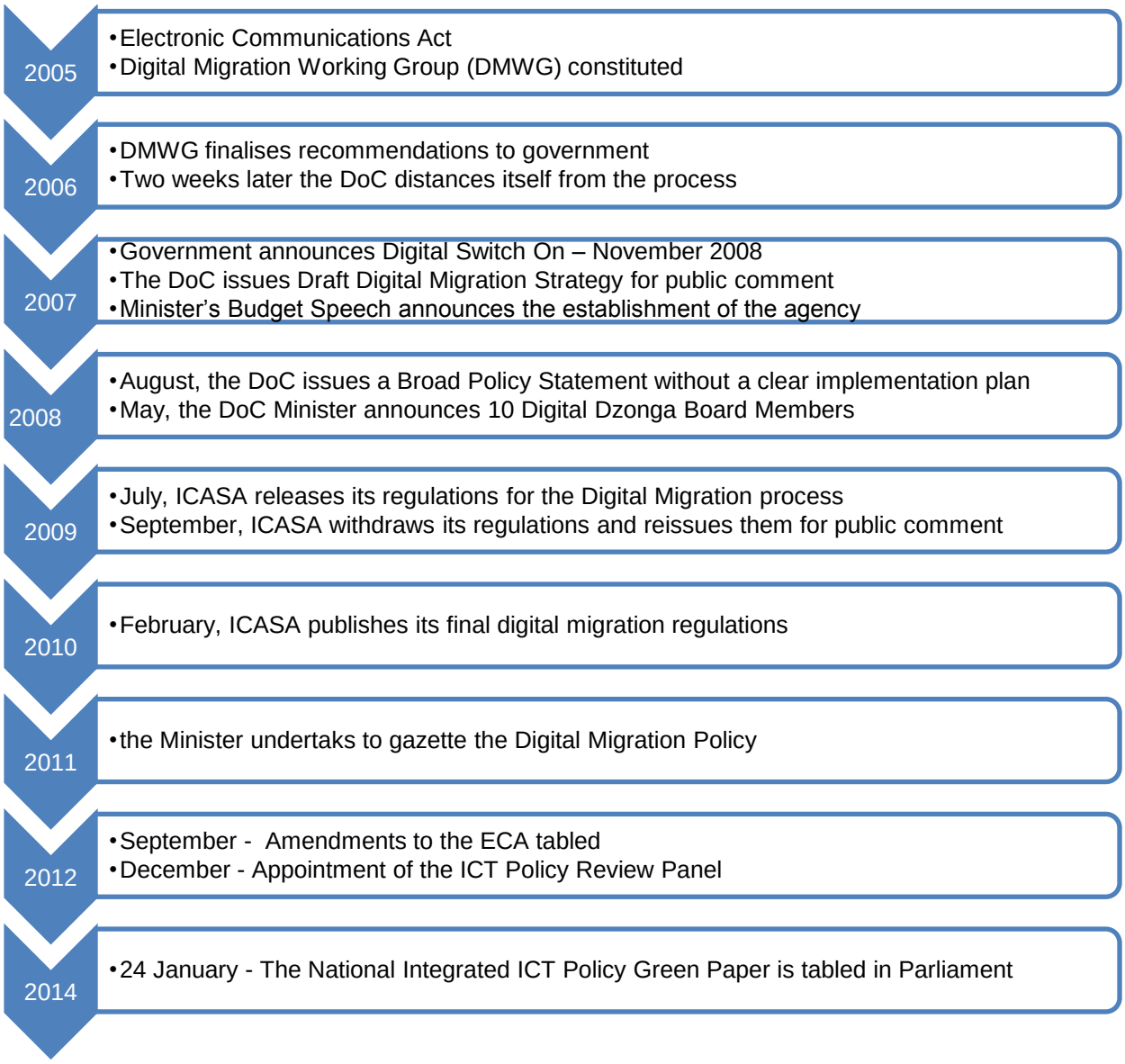
This period can be termed the post-apartheid era, an era which redefined South Africa's broadcasting landscape. This era was ushered in by South Africa's first ever democratic elections, which took place on 27 April 1994. However, Buckley, Duer, Mendel & Siochru (2008, p.3) caution that "building democracy is a process, often long-term and promoting free, pluralistic and independent media should be a central part of it."

Castells' (2009, pp. 296) insights on democracy are spelt out as follows, "In the early twenty-first century, in a globally interdependent world, democracy is understood as the form of government resulting from the will of citizens choosing between competitive candidacies in relatively free elections held at mandated intervals of time under judicial control." South Africa having ushered in a new democratic dispensation, it became clear that a new broadcasting policy had to be formulated. The country's broadcasting policy was founded on the principles of universal access, diversity, plurality of voices, nation building, and the democratisation of the airwaves, education and the strengthening of the moral fiber of society (Mtimde, 2008). This policy was underpinned by the constitutional principles of freedom of expression, equality, language equity, non-racialism and cultural diversity. Against this backdrop, globally innovative technologies were creeping in and forcing policy makers to rethink their strategies on policy formulation.

Cohen & Schmidt (2013, pp.121-123) state that communication technologies have been successful in enabling new connections and generating more room for expression. However, we cannot avoid the fact that the now virtual space offers new avenues for dissent and participation, and that the world has been introduced to digital activists. It has therefore become important for decision makers who work within institutions like Parliament, with its constitution and electoral politics, to note that the 21st century, which has been termed an age of hyper-connectivity, is being swamped by new technologies, and has created virtual public spaces. In order to navigate the new-found digital terrain, decision makers have had to re-engineer their

careers by upskilling themselves and acquiring new knowledge.

Figure 1: The Digital Broadcasting Timeline (2005- 2014)



Source: Author, 2013

Figure 1 above seeks to outline the policy processes undertaken by South Africa since 2005 when the ECA was enacted.

1.5. South Africa's Digital Migration Processes

ITU Formalised Agreements, Analogue Switch-Over by 2015: South Africa's Policy Decision to Complete the Digital Migration Process by 2011

In 2006, the ITU, a United Nations (UN) agency whose core function is to co-ordinate global telecommunications and services amongst member countries, set a deadline of 17 June 2015 for broadcasters to migrate to digital television broadcasting technology for both transmission and reception (Bussiek et al., 2010). It must, however, be noted that a deadline for the digitisation of radio is yet to be announced, as are the timeframes for the radio digital switch-on.

In 2010 South Africa was elected to the ITU Council to represent Southern Africa. This afforded South Africa an opportunity to ensure that its obligations, including those of the region and the continent, were represented on the world body. Participating in the international global arena created a platform for South Africa to influence international efforts aimed at finding policy, regulatory and technological solutions to challenges confronting broadcasting and telecommunications – challenges which continue to plague the world even in the 21st century. The key issues which were being addressed internationally were: spectrum allocation and management, digital migration and content distribution, Internet Protocol (IP) numbering, and universal access and service (Ngcaba, 2012, pp.16).

The ITU sees the digitisation of broadcasting as a means of establishing a more equitable, just and people-centered information society, leapfrogging existing technologies to connect the unconnected in underserved and remote communities and bridge the digital divide (Bussiek et al., 2010, pp. 71). Sharing his insights on the digital divide, Ngcaba asserts that this important policy issue ought to be framed not solely as an access problem. He points out that the issue of skills disparities is also part of the problem (2012, pp. 18). The ITU seems to have been focused more on technology as a key driver for the digital migration process and did not come out boldly on issues pertaining to relevance, democratisation, content obligations or upskilling of personnel for the digital era.

Similarly, when the DoC was making preparations for the digital migration and most notably the hosting of South Africa's 2010 FIFA World Cup, the Ministry's focus, it would seem, was also solely on technological aspects. FIFA's, in its positioning regarding the hosting of the 2010 FIFA World Cup, apart from South Africa's infrastructure readiness, focused also on the technological aspects of hosting the event.

As host broadcaster in preparation for the 2010 FIFA World Cup, the SABC had to acquire digital outside broadcast vans (OBV) which cost the corporation R1 billion, this is the only investment that the public broadcaster made ever since where their technology upgrade was concerned. On 31 October 2006, then SABC GCEO Dali Mpofu informed the Parliamentary Portfolio Committee on Communications (PPCC) that the total technological expenditure needed to host the 2010 FIFA World Cup would be upwards of R1.3 billion (Hamlyn, 2007).

When following the ITU directive, South Africa must do so intelligently, by identifying other issues that impact on it as a country, one being the issue of the relevance of PSB in the digital era, and localising its policy and legislative framework in this regard. The emphasis on the technological aspects of digital migration leaves a gap in understanding, in that questions of the relevance of PSB in digital broadcasting receive insufficient attention. The core of PSB is programme making and its basic provision is essential for the democratic order and for the cultural life of a nation (Katsirea, 2012).

Broadcast digital migration is described as the process of converting the broadcast television and radio signals from analogue to digital formats. After the analogue television switch-off, spectrum for wireless broadband will become available to accommodate digital sound broadcasting in the allocated band. This available spectrum is termed the "digital dividend". Hartson and Hogan (2009) describe digital dividend as the spectrum over and above the frequency required to support existing broadcasting services in a fully digital environment, including current public service obligations.

In 2007, South Africa's Cabinet announced that the digital television signal would be switched on, on 1 November 2008. The Cabinet made a further announcement that the analogue signal would be switched off in November 2011, thus allowing for a three-year dual illumination period. On 1 November 2008, the SABC, e.tv and Sentech (the signal distributor) began to trial the new DTT services and technology to test if the services worked. The DTT trial was piloted across Gauteng, KwaZulu-Natal and the Western Cape. In October 2010, newly appointed Minister of Communications Roy Padayachie extended the analogue switch-off date to 2013. The extension resulted from the delays that occurred during the country's implementation phase. On 24 October 2011, exactly a year later, President Zuma reshuffled his cabinet, leading to the removal of Minister Padayachie and Deputy Minister Obed Bapela. They were replaced by Minister Dina Pule and Deputy Minister Stella Ndabeni, respectively.

1.6. Key Government Interventions: South Africa Hosts a Stakeholder ICT Colloquium

Following the Cabinet reshuffle of October 2011, Minister Pule and Deputy Minister Ndabeni came into office. In 2011, acting Director General (DG) Rosey Sekese was confirmed as DG, following her acting stint after DG Mohlala was removed from office in 2010.

Minister Pule's debut assignment was to initiate the ICT Competitiveness and Job Creation Summit, held on 07 March 2012 in Woodmead, Gauteng. The purpose of the summit was to address competitiveness in the industry and explore strategies for creating jobs within the sector.

The summit was followed by a stakeholder National Integrated ICT Policy Colloquium which was held on 19 and 20 April 2012 at Gallagher Estate in Gauteng. The purpose of the gathering was to develop an ICT sector vision and policy for South Africa's Vision 2020. Minister Pule, in her keynote address, explained that the rationale behind the colloquium was to reflect on the road travelled by the DoC and define a journey towards an integrated ICT environment, review policies in a manner that was transparent and consultative, invest in local research, development and

innovation, ensure universal access, and attract and increase the number of female executives in the ICT sector (Gongxeka, 2012).

Minister Pule explained that the DoC Policy Review would endeavor to do the following: define a new era for the ICT sector by overhauling the work that had been carried out over the years by the Ministry, remove aspects of the legislation that were irrelevant and hindering progress within the sector, close policy loopholes, realign the broadband strategy by setting clear policy directives, prioritise ICT policies to realise Vision 2020's objective of ensuring South Africa's ICT competitiveness, job creation and poverty alleviation, and take the country to 2030. With the digital broadcasting migration looming, the DoC Policy Review aimed also at examining the opportunities the process may present and formulate strategies to meet the challenges it may pose, promote fair competition by lowering the costs of communication, and, finally, work towards the formulation of the White Paper process which would address broadcasting, spectrum allocation, local content development, e-skills development, investment growth to create jobs, rural connectivity, and infrastructure roll-out.

Where relevance of content was concerned, at the colloquium, it was during a panel discussion themed "The Ideal ICT Sector in 2030" that then MultiChoice South Africa CEO Nolo Letele shared his insights about the future of local content. Letele asserted that it was important for South Africa to recognise what was happening to content in the digital era where "over-the-top (OTT) and on-demand content" were concerned. Letele suggested that South Africa needed to look at best global practice and that as a country it should be cognisant of the fact that new media services remained unregulated and were now competing with broadcasting. The then CEO further stated that the country needed to focus on broadband issues and their impact where content was concerned, by creating local content user-generated hubs, and by content creation and distribution. Crucial in his address were the recommendations that Letele made, that the country must invest in its people by up-skilling them and assisting them with career path choices which were mostly urgently required in the sector.

The theme that prevailed in one of the break-away sessions at the colloquium and was cited as the biggest challenge facing the local content sector focused on intellectual property rights. This was in relation to copyright regarding local content, for ensuring that local content quotas were met and that they were being monitored. It related also to collaborations, an integrated approach between government departments in funding local content, responding to and meeting the country's transformation targets, up-skilling of the sector, and content creation and distribution, by building content-generation hubs. Minister Pule closed her address by announcing that the DoC would host an ICT Indaba, endorsed by the ITU, to be held from 4-7 June 2012.

Soon after the above engagements, the DoC hosted the ICT Indaba which was held at Cape Town's Convention Centre from 4-7 June 2012. Almost two months later, on 31 July 2012, a National Broadband Enquiry led by the Department of National Treasury was convened. The rationale for the enquiry was to determine how much funding would be required from government in order to achieve the government's aims of universal broadband access by 2020.

On 15 August 2012, Minister in the Presidency for National Planning, Collins Chabane hosted a National Planning Commission meeting. The aim of the Commission was to develop a long-term vision and strategic plan for South Africa. On 19 September 2012, Minister Pule tabled the DoC's proposed amendments to the ECA, which sought to improve the application of the ECA. This summary of policy processes that were under way by 2012 were driven through a fragmented approach to policy making by the various government departments, namely, the DoC, the Presidency and the Treasury.

The relevance of PSB in the digital era in South Africa hinges on the proposals that were to be made by the ICT Policy Review Panel, appointed in 2012. The proposals were made in March 2015, the month of completion of this Research Report, via the Panel's National Integrated ICT Policy Review Report, available on the DTPS website. It is important to note that this policy review process took place almost 15years after the initial policy review was last undertaken. The National Integrated ICT Policy Green Paper was tabled in Parliament on 24 January 2014 and the

Framing Paper was gazetted in April 2013 (Gazette No 36408). The Green Paper was used to canvas opinions on the various aspects of the communications sector that needed to be reviewed and the possible policy approaches that should be adopted. The Green Paper presented a detailed review of the broadcasting, postal, telecommunications, e-government and electronic commerce markets, and developments in the sectors since the adoption of the current policies.

While the policy review process was under way, the Review Panel sought to consider policy gaps that had been identified by Gillwald (2002), in the paper, "The Periodisation of Broadcasting and Telecommunications Reform in South Africa". Gillwald asserted that from a policy point of view, during the formulation of the Electronic Communications Act (ECA), the telecommunications sector issues were adequately addressed. However, this was not the case with the broadcasting sector, a policy risk of which the Review Panel should be wary.

According to Gillwald, the institutional arrangements in the broadcasting and telecommunications sectors were periodised into four overlapping phases: the Pre-transition phase (1991-1993), the Reform phase or First Policy Formulation phase (1993-1997), the Implementation phase (1994 – 2000) and the Review phase (1998-2001). This reform process later culminated in the dissolution of the once separate regulatory bodies, namely, the Independent Broadcasting Authority (IBA) and South African Telecommunications Regulatory Authority (SATRA), and the formation of a single regulatory body known as the Independent Communications Authority of South Africa (ICASA) which came into being in 2000, an era described by Gillwald (2002) as the "Changing Regulatory Framework". At the time the IBA under the IBA Act, No 153 of 1993 was mandated to regulate the broadcasting industry and take into account the public interest principles as stipulated in the South African Constitution. As Gillwald (2002) explains, the establishment of the IBA resulted in the regulation of control and ownership of broadcasting services. Its brief contained specific anti-monopoly provisions, inter alia, limiting control of television and radio stations, and introduced cross-media provisions.

The IBA Act dissolved the near-monopoly state of the broadcasting system and liberalised the broadcasting market, opening it up to competition (Khan, 2011). Khan

stated that the IBA served as a catalyst for the transformation of the SABC from state broadcaster to public broadcaster. Khan asserted that the IBA Act leveled the broadcasting playing fields by emphasising the regulation of the market through cross-media ownership and by introducing local content quotas. SATRA, on the other hand, was responsible for regulating a range of telecommunications matters in the telecoms industry.

The repeal of the once existing broadcasting and telecommunications legislation was aimed at consolidating new legislation that sought to unite the previously separate sectors under a single licensing authority, and to promote the convergence of network services and technologies in these sectors. It was during the analysis of this review process that Gillwald asserted that the then policy review process was biased in favour of the telecommunications sector. Ngcaba (2012, pp.10) expressed similar sentiments, stating that the ICT policy developed in the early 1990s was done so within the context of ICT being dominated by voice communication, with mobile communication still in its infancy and a dominant fixed-line incumbent.

The ECA 36 of 2005 repealed and replaced the IBA Act and the Telecommunications Act with effect from 19 July 2006. Gillwald suggests that at the time telecommunications was recognised as a key sector requiring reform, and that the South African government then set out its policy in this regard in the White Paper on Telecommunications Policy, published in 1994. The White Paper recognised the need for liberalisation of the market in line with international trends, and for facilitating the roll-out of networks and services in line with government's development goals.

The birth of ICASA was largely driven by the convergence of technologies, a global phenomenon which was taking place at the time. With all the imminent changes, advances in digital broadcasting promised to bring knowledge in abundance to one part of society. The current reality in South Africa is that a large sector of the population is being serviced by analogue broadcasting, which foregrounds the question: Will the digital migration process result in greater relevance and thus contribute towards bridging the digital divide?

1.7. The DoC's Attempts to Foster PSB in the Digital Era

In the Digitizing Democracy abstract Born (2006) states that "recent years have seen attempts to rethink the nature and scope of PSB and to justify its existence anew. It is uncontroversial that the original conditions namely; technological, economic, political, social and cultural that fostered the birth of PSB and sustained it over decades have undergone such radical transformation that the concept and practice of PSB demands to be reconceived." Hence the current global discourse around the transition from PSB to public service media (PSM). Nakamura in his presentation at the Re-Visionary Interpretations of the Public Enterprise RIPE conference described PSM as a difficult concept to define. However, he identified the following as the basic values that underpin the performance of PSM: innovation, universality, plurality and accountability, diversity, independence and excellence (RIPE, 2014).

This study was also concerned with what Flew (2012) has described as the "convergent media policy moment" and sought to enquire into and analyse the future of South Africa's policy and its impact on the regulatory framework in the digital era.

Flew, as cited by the Australian Communications and Media Authority (ACMA, 2011, pg. 7), defined convergence as "the phenomenon where digitisation of content, as well as standards and technologies for the carriage and display of digital content, were blurring the traditional distinctions between broadcasting and other media across all elements of the supply chain, for content generation, aggregation, distribution and audiences." In contrasting the converged and divergent areas, Flew (2012) suggests that information providers are no longer being compared simply as radio and television networks, but that the newspaper websites, a plethora of blogs and other online opinion sites have also become a presence, and have to be factored into discussions and analyses.

1.7.1. The Formation of Relevant Bodies to Drive the Digital Migration Process

The planning for digitisation is important in the digital migration process. Planning in South Africa started in 2001 when the late Minister for Communications, Matsepe-Casaburri established the Digital Broadcasting Advisory Body (DBAB). DBAB recommended the Digital Video Broadcasting (DVB) family of standards to the Minister. In 2005 then Minister Matsepe-Casaburri established and appointed the

Digital Migration Working Group (DMWG), a body that recommended the adoption of Digital Video Broadcasting – Terrestrial (DVB-T) Standards which use the Moving Picture Expert Group – 4 (MPEG-4) compression standards. For years South Africa evaluated various DTT standards, and later adopted the DVB-T for its digital broadcasting needs. The European DVB-T standards were also passed and declared by the Southern African Development Community (SADC), Region 1 as the official and preferred standard of choice following a long contestation with the Japanese Integrated Services Digital Broadcasting – Terrestrial (ISDB-T) digital standard.

The DMWG comprised representatives from government, the broadcasting industry, organised labour and civil society. This appointment was immediately followed by the policy development process, which paved a way for the formation of the Digital Dzonga, a body that was established to oversee the migration process on behalf of government. Key among its functions were consumer education and awareness, liaison with relevant stakeholders including ICASA and STB manufacturers monitoring the implementation, and provision of regular reports to the Minister of Communications.

In April 2010 the Digital Dzonga was dissolved by the Minister of Communications Siphiwe Nyanda owing to the alleged conflict of interests by members serving on the body. This body was later reconstituted by Minister Padayachie in November 2010, a move which saw him appoint new industry representatives to serve on the structure. This structure was dissolved, and yet again and the reason cited was that the members appointed to serve on the advisory body were found to have a conflict of interests.

The above sequence of events paints a picture of a transition that was not seamless for the DoC Ministers. Each Minister, it would seem, formulated their own individual blue-print, regardless of the long-term proposed strategies and implementation plans that had been in place.

The table below outlines the DoC's Ministers' terms of office.

Table 1: The Department of Communications: Leadership Changes Timeline (2004-2014)

Ministers	Deputy Ministers	Directors- General	Years
Ivy Matsepe-Cassaburi	Roy Padayachie	Lyndall Shope-Mafole	2004-2009
Siphiwe Nyanda	Dina Pule	Mamodupi Mohlala	2009-2010 October
Roy Padayachie	Obed Bapela	Rosey Sekese (Acting)	2010-2011 October
Dina Pule	Stella Ndabeni	Rosey Sekese Appointed (on suspension)	2011-2013, 09 July
Yunus Carrim	Stella Ndabeni	Gift Buthelezi (Acting) Rosey Sekese's suspension is lifted	2013-2014 May
Faith Muthambi	Stella Ndabeni	Rosey Sekese official appointment	2014, 25 May - Current

Source: Author, 2014

The above timeline seeks to reflect, as asserted by Ngcaba, that "the length of political terms, or more accurately, the frequent turnover in leadership, contradicts the requirements of long-term policy making" (2012, p.4).

It must be noted that soon after the country's 2014 national elections President

Zuma once again reshuffled his cabinet. The twist in this particular reshuffle led to the restructuring of the communications department by splitting it into two separate Ministries, namely the DoC headed up by Minister Muthambi and the Department of Telecommunications and Postal Services (DTPS) headed up by Minister Siyabonga Cwele. The restructuring of one of the country's most crucial ministries was perceived by industry practitioners as being the most radical, taking the country back to the IBA – SATRA analogue era.

1.7.2. South Africa's Public Policy Reform towards Digital Migration

In a constitutional democracy, policy making is one of the key pillars in preparing a country for its future participation in the knowledge-based economy. The policy framework for South Africa in building a digital future for the ICT sector is determined by the DoC. One of the key functions of the DoC is to provide a policy direction for the country. Policy directions are instruments designed to refresh some of the policy issues which will be critical to new policy frameworks (Ngcaba, 2012).

Ngcaba suggests that the central tenets of policy making in the digital age ought to contribute to human development, and states that "each person should have the opportunity to acquire the necessary skills and knowledge in order to understand, actively participate in, and benefit from the information society and knowledge economy"(2012, pp.15). The significant technology and global regulatory changes currently under way further complicate the process before us. These changes include the digital migration process and growth of data (Ngcaba, 2012, p.6).

The digital migration process in South Africa commenced in 1995. The process, however, gained momentum during the tenure of Minister Matsepe-Cassaburi. It was at this time that the South African government committed itself to ensuring universal access to high quality, free-to-air digital broadcasting. Digital television is set to revolutionise broadcasting as it makes for better use of the spectrum, allowing for more television channels that can be carried in a single multiplex. It also offers better picture and sound quality.

Upon ushering in the new democratic dispensation, South Africa adopted a 3-tier broadcasting system, namely, public, private and community broadcasters. The 3-tier broadcasting system was based on section 192 of the Constitution of South Africa (Act No 108 of 1995). South Africa's legislative and regulatory policies emphasise that the broadcasting system should fulfill certain public service responsibilities. The rationale behind the 3-tier broadcasting system was aimed at opening up the airwaves to private and community broadcasters, to provide competition for the PSB and extend choice to audiences. The 3-tier system is a media structure which reflects the totality of media in a country. The SABC under apartheid rule operated as a state broadcaster, but under South Africa's democracy and following the recommendations made by the IBAs Triple Inquiry Report, it remains the only broadcaster tasked by the law to fully deliver the PSB remit. The SABC is further required to make its services available throughout South Africa, whilst other services have their respective coverage areas prescribed through their license conditions (Bussiek et al. 2010, pp. 55).

Whilst in pursuit of analysing the relevance of PSB in the digital era in South Africa, the question to be asked is: How are the three tiers to continue to be fostered (as an element of a PSB dispensation) in the digital era?

South Africa began with its digital migration switch over process on 1st November 2008 by running pilot trials across the following provinces: Gauteng, KwaZulu-Natal and the Western Cape, the first and only deadline that the country has met according to the digital migration process timelines that had been set.

To prepare for the digital migration process, the SABC called for an enabling policy environment requesting adequate spectrum allocation, a flexible regulatory regime, protection during dual illumination, and a simultaneous broadcast of licensed television channels on analogue and digital transmissions. The SABC prioritised its digital plans by developing applications for new media services. To implement this bold plan, Waghorn (2010) the broadcaster's then Chief Technology Officer (CTO) stated that the SABC would have to set aside R1.3 billion to upgrade all its production facilities in order for the broadcaster to be fully digital. Waghorn said that the SABC's New Media Development services should aim to offer viewers greater

opportunities to engage with its programming, thus achieving an online operation that would maximise public value, extend reach to as many citizens as possible, and develop new commercial opportunities, including interactive and web-based services.

Candel (2012) listed the following as the new forms of relevance: a better fulfilment of the public service remit by means of a more diverse, plural and socially representative offer, achieving more adequate content scope and platform reach, maximisation of content exploitation, new channel offer diversification and interactivity by catering better to the needs of a more complex society. An organisational benefit, said Candel, would be that it would offer an opportunity for technical upgrade and operational efficiency. Finally, it would reinforce the public operators' role as content and technology innovators and universal service and access providers (2012, pp. 61-62).

1.7.2.1. Changing of Technology Standards: the Review of PSB, and the Missed Digital Migration Deadlines

In 2008 the DoC embarked on a PSB mandate review process. The Ministry engaged with the affected broadcasters and various stakeholders and this process was followed by public consultations. The entire process ended with a Draft PSB Bill being tabled in Parliament on 28 October 2009. Contained in the Bill were proposals for a PSB Fund which was meant to be accessed by any broadcaster or content provider commissioning PSB mandate content.

In 2010 the battle for digital standards ensued after the then DoC DG Mamodupi Mohlala announced that South Africa had actually not finalised the DTT standards for digital broadcasting. Mohlala called for consideration of a change from the agreed-upon DVB–T standards, a European technology, to ISDB–T, a Japanese technology. The announcement caused outrage in the industry because South Africa had pronounced its digital switch-off date of 2011, the pilot tests launched in November 2009 were in progress, and vast amounts of money had already been invested in equipment for the project. Concerns were raised that Region 1 standards were long agreed upon in 2006 in Geneva and that Mohlala's change of strategy would present challenges where the interoperability of technologies within the region

were concerned.

Broadcasters such as MultiChoice's M-Net and e.tv, and independent industry bodies such as the Southern African Digital Broadcasting Association (SADIBA) and the South African Communications Forum (SACF) slated Mohlala's proposal, citing the chain of events leading up to April 2010 (Vermeulen, 2010). Then Minister Nyanda later recanted and announced that South Africa's chosen standard was in actual fact a DVB-T standard, contradicting then DG Mohlala's claims. Minister Nyanda's decision was in consistent with that of the SADC member states, who had originally recommended the use of the DVB-T family of standards, in line with the Geneva ITU GEO6 Agreement. DG Mohlala's decision was reversed in early January 2012, by then Minister Padayachie.

Vermeulen (2010) wrote that "it is strange that the DoC would adopt a policy to fast track the migration from analogue to digital television broadcasting over three years and then waste seven of the 36 months re-evaluating South Africa's decision on broadcasting standards." Vermeulen went on to explain that the DoC had set the analogue switch-off date for 1 November 2011 in order to reduce the costs of digital migration and that a shorter dual illumination period would mean that South Africa could reap the digital dividend sooner. Due to all the delays, the changes and the redeployment of the various DoC Ministers, South Africa missed her self-imposed 1 November 2011 analogue switch-off deadline.

Shortly thereafter in 2012, a court battle ensued which saw e.tv's Chief Operating Officer Bronwyn Keene-Young taking Minister Pule to court by filing an affidavit disputing the legality of the decision the Minister took by appointing Sentech as the signal distributer responsible for the conditional access system on STBs. Keene-Young said that the STB control system should fall to e.tv and SABC, both free-to-air broadcasters. The STB control system is expected to prevent the use of the government subsidised STB outside the country. Keene-Young argued that Minister Pule had no mandate to unilaterally make such a decision.

On 14 January 2013, the South Gauteng High Court ruled in favour of e.tv, a motion the DoC threatened to appeal. This litigious impasse was not viewed lightly by the

sector since it posed a threat and caused further delays to South Africa's migration to DTT by up to three years. Another major concern was that the appeal would cause the country to miss yet another deadline, but this time the ASO date of 17 June 2015 as set by the ITU. The delays in the digital migration process implied the delay in the release of the digital dividend which had been earmarked by ICASA, the regulator for the use of wireless broadband rollout.

Vermeulen (2012) outlined the steps that still needed to be taken before the STB can be made available to the general public. These were echoed by Keene-Young: the tender for government-subsidised STBs, which closed on 14 September 2012, needed to be evaluated and awarded, contracts with successful companies had to be negotiated, commencement of the manufacturing of the 5 million government subsidised STBs, including the creation of the necessary technology and infrastructure and the training of staff (a process that would take up to 6-9months), the distribution of the subsidised STBs to the South African Post Office, from where they can be bought, the design and implementation of a means-based subsidy programme to determine which of South Africa's citizens would receive subsidised STBs, the distribution and installation of STBs in people's homes, and awareness media campaigns necessary to educate the public about all of the above. It is important to note again that during the digital migration debacle very little was being said about the relevance of content and the PSB mandate; the debate seemed to come across once again as being technology-focused.

1.8. South Africa's Television Landscape: The Future of Broadcasting in a Converged Terrain

South Africa has a wide range of media, both print and electronic. The electronic sphere comprises broadcasting (both radio and television), the Internet and telecommunications. Radio is one of the most affordable mediums and has the greatest reach of any media in the country. To date ICASA, the regulator, has licensed 13 television operators. The SABC, a public broadcaster has three television stations, one 24-hour News Channel, and nineteen radio stations which are also carried on MultiChoice's bouquet of channels.

Table 2 below depicts South Africa's licensed television broadcast operators.

Table 2: Licensed Television Broadcast Operators in South Africa

- SABC TV (1976), three national public television channels, namely SABC 1, 2 & 3 and SABC 24-hours News Channel on DStv Channel 404 (2013)
- Four community television licensees, namely Soweto TV, Cape TV, Bay TV and Tshwane TV
- One national private commercial free-to-air channel, namely e.tv (1998)
- One terrestrial subscription service, namely MultiChoice's M-Net (1986)
- One satellite subscription service, namely MultiChoice's DStv (1995)
- Five licensed satellite subscription services, namely Top-TV, Super 5 Media, Walking on Water and On Digital Media (2007). e.tv's sister company E-Sat pulled out after it had been awarded the licence
- e.tv's Sadibo Investments launched Platco OpenView HD multi-channel decoder, with four channel offerings, namely eKasi+ channel, eAfrica+ channel, eMovies and eToonz+ channel (2014)
- ICASA award licenses to five new subscription television broadcasters, namely Kagiso TV, Siyaya, Close TV, Mindset and Mobile TV (2014)

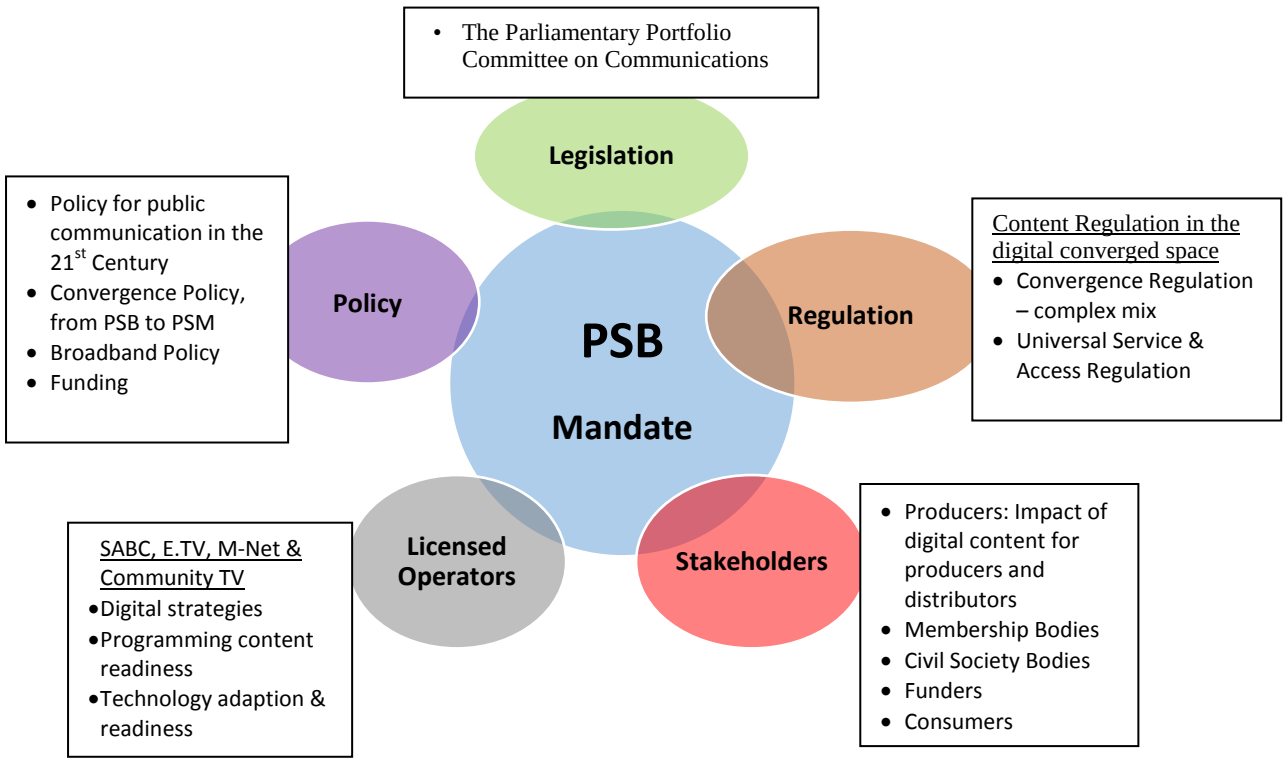
Source: Author (2014)

1.9. Institutional Framework and PSB Digital Ecosystems

Figure 2 below seeks to provide an overview of South Africa's institutional framework and the elements that are influenced by this particular framework for PSB. Central to

this study was an investigation of the relevance of the PSB mandate in the digital era, which is the reason why the PSB mandate is located at the centre of diagram.

Figure 2: Institutional Value Chain & Stakeholders



Source: Author, 2013

1.10. Problem Statement

Conventional models of PSB are being challenged by new media; this is

characteristics of the digital revolution. For PSB to remain relevant in the digital era, governments have had to reassess the role of PSBs and how the PSB remit can meet the needs of its citizens in the 21st century.

Jakubowicz (2007) asserts that PSB should be able to benefit from the possibilities offered by technological developments, otherwise it would no longer be in a position to comply with its service remit and satisfy its audience. Whilst in pursuit of transitioning from the analogue to the digital world, retaining the PSB relevance in the digital era should remain at the core of policy, regulatory and broadcasters' imperatives. Part of being relevant suggests that the country's policy objectives should be well articulated and the strategies to be employed be clearly understood, in order for them to be effectively implemented by affected stakeholders.

In South Africa it would also be important to review how the SABC readied and positioned itself to claim its relevance in the digital era. The SABC remains the only institution legislated to wholly discharge the PSB mandate.

1.11. Purpose Statement

The primary research focus of the study was to investigate the contemporary relevance of the PSB mandate in the digital era of South African television. The secondary component of the study's research focus was to analyse the role played by the DoC in providing policy direction. This was necessary to understand the reasons behind the slow adoption of a policy strategy for the delivery of digital content. This would enhance the relevance of PSB with regards to the content value, choice and all other elements of the new digital dispensation..

The study considered the advances made by the regulator, ICASA, the public service broadcaster, the SABC, and the broadcast content production industry's response to the transitioning media landscape and its attempt to discharge the PSB remit.

In order to achieve this purpose, the study reviewed the following four forms of relevance by analysing their impact in discharging the PSB remit in the digital era: the relevance of the public interest approach to broadcasting media and how it enhances public services, how the public space phenomenon has emerged in the

digital space, thereby enhancing public engagement. The public space in the digital space theme has underlying sub-themes: digital content and programming on demand, and the role of innovation in creating interactive formats. The remaining forms of relevance were PSB and its contribution towards strengthening democracy, and the influences in the political economy as they relate to access and affordability in the transitional digital period.

At the conclusion of this report, it should be possible to understand the depth and character of the PSB remit in South Africa and how the mandate has been discharged while making a transition to the digital era. In addition, the research will provide insight into the role that has been played by the relevant department, the DoC in shaping a future policy path for South Africa's television broadcasting sector.

1.12. Research Question

The main research question is supported and accompanied by numerous sub-questions. The sub-questions are informed and structured in such a way that they mirror the four thematic forms of relevance as outlined in Chapter 2 of this research report. They also provide insights into the PSB relevance and its application in the digital broadcast terrain.

1.13. Main Question

The main question this research seeks to answer is: To what extent are South African television outlets, and the policies that guide them, contributing to maintaining the relevance of PSB in the digital dispensation?

The research also seeks to understand the policy context within which PSB exists within the television (TV) broadcast environment, hence the following sub-questions:

1.13.1. Research Sub Questions

1. To what extent are South African TV outlets, and the policies that guide them, advancing a public interest approach to television delivery in the digital dispensation?
2. To what extent are South African TV outlets, and the policies that guide them, advancing the maintenance of a public space in the digital

dispensation?

3. To what extent are South African TV outlets, and the policies that guide them, contributing to the potential of broadcasting in the digital dispensation to help strengthen democracy?
4. To what extent is the potential of the South African TV sector to deliver a PSB mandate in the digital dispensation (and the policy efforts in support of this TV sector's PSB potential in the digital dispensation) being affected by the dynamics of political economy?
5. How have the policy frameworks that guide policy implementation and the execution of the PSB mandate for TV, fared with regards to policy success and policy failures?

The following chapter presents a literature review, and a conceptual framework which explores the body of knowledge, also looking at both the analogue and digital eras within TV broadcasting. This has been carried out by analysing the relevance of the PSB mandate in the analogue era and relevance in the digital era. While the study is located in South Africa, the research design was informed by a brief review of broadcasting trends in Sub-Saharan Africa, and globally.

CHAPTER 2

EXPLORING THE RELEVANCE OF PSB IN THE DIGITAL ERA: THE NEXT TECHNOLOGICAL FRONTIER

This literature review chapter sets out to "demonstrate a familiarity with a body of knowledge and establish credibility, to further outline the path of prior research and how a current project process is linked to it" (Neuman, 2011, pp.111). Chapter 2 will integrate and summarise what is known in the field of this study.

2.1. The Public Service Broadcasting Rationale

Traditionally, the function of PSB in relation to democracy, pluralism and public debate has been emphasised, but more recently socio-cultural goals, such as serving social integration and cohesion, and cultural bonding, have become more prominent (Bardoel & d'Haenens, 2008). The basic principles of PSB have been identified as "the low cost of universally available reliant provision of information, education and culture, and the catering for minority tastes and interests" (Bardoel & d'Haenens, 2008). Public broadcasting can be defined as a meeting place, where all citizens are welcome and considered equals (UNESCO, 2001). Public broadcasting

must also appeal to the imagination and entertain, but it does so with a concern for quality that distinguishes it from commercial broadcasters. It is not subject to the dictates of profitability (UNESCO, 2001).

The four promises of PSB as outlined by Murdock (1997) are: (i) a potential space for free expression and open debate; (ii) accessibility for everyone to this space of expression and debate; (iii) the inclusion of a range of experiences, perspectives and arguments within a single stream of mixed programming; (iv) that audiences are addressed by PSBs as citizens and not as consumers. The PSB mandate and its values entail "the provision of an impartial space for free expression and open debate, the provision for all interests and tastes (plurality and diversity), the provision for minorities, concern for national identity and community, competition in good programming rather than for numbers, the liberation rather than restriction of programme makers, universal accessibility and addressing audiences as citizens, not as consumers" (Murdock, 1997).

2.2. The PSB Transition to the Digital Dispensation

Wood (2002) asks, "How are the new technologies of the information age reshaping the labour force, transforming communications, changing the potential of democracy, and altering the course of history itself?" Dominick (2011, p.66) asserts that new means of communication make it easier for democracy to function.

The literature suggests that the principles of PSB in the digital era are likely to remain the same. However, its relevance is under question, and also, how the PSB obligations are going to be sustained. Dominick (2011, pp.66) states that the new communication media have spurred the growth of large conglomerates whose main goal is profit and not cultural enrichment. Public broadcasters on the other hand, with the exception of the British Broadcasting Corporation (BBC) and Radio Television Hong Kong (RTHK), have been slow in developing new digital platforms. In the era of continuous technological innovation, the questions to be raised are: How are public interests being safeguarded in the digital era, the era of on-demand media? How will public value be enhanced utilising new media to promote social cohesion? How crucial is it really for public broadcasters to develop new "platforms", i.e., to be technological leaders? In discussing the idea of "the public", Papacharissi (2002)

makes the point that this notion is bound up with the ideals and expectations around participation attaching to democracy. That, “the public is closely tied to democratic ideals that call for citizen participation and public affairs which ought to contribute significantly to an individual’s sense of existence and self-respect”, said Papacharissi (2002, pp.10).

Wood (2002) identified the following as the PSB obligations in the digital era: promotion of digital inclusion and an understanding of the information society, bringing the new benefits of the new audio-visual world to the public, maintenance of “must carry” provisions and extension of these to other electronic communications networks used for the distribution of television and radio broadcasts. Finally, Wood emphasises the obligation of the PSB to unblock the digital distribution that has resulted in gateways that could block viewers’ access, namely conditional access (CA) system the electronic programme guide (EPG). Thanks to technological innovation, the delivery modes of PSB have evolved and Figure 4 (below) provides a preview of the technological revolutions that have taken place.

The evolution of societies typically brings technological advances. In this age of information and telecommunication, we are currently in the middle of what has been termed the 5th technological revolution, which has resulted from the convergence of technologies.

Wood (2002) describes the media environment as a tool that influences what we do, the way we think and how we act. Media are a diversion, a stimulant, a source of information, inspiration. Broadcast media, in particular are part of the fabric of today’s society. In the world of media, we find that there are dimensions which look into the new transmission capacity: the widening media, from one channel to multiple channels, and the deepening media, which has resulted from user-generated content. Broadcasting has changed and expanded beyond the traditional broadcast of radio and television, and has embraced new media platforms seemingly far removed from their established fields of activity. Technological innovation has created a gateway for audio-visual content to be received over the Internet, mobile phone networks and other media.

The benefits of digital broadcasting migration include: the efficient use of spectrum which is a scarce public resource, the creation of multi-channel platforms which translates to more diverse content being delivered to the public, with a programme choice being far greater and more varied, better picture quality, and the potential for special interactive services (DoC, 2008).

The context within which PSBs operate has changed completely and the viability of the PSB mandate can no longer be taken for granted, hence the need to review and asses its relevance in the digital era. Digitisation in broadcasting is an unavoidable process characterised by morphing technologies, yet it is confronted by diminished prospects for future funding, vague policy direction, and identity and operational challenges. In their eagerness to embrace the digital era, PSBs are faced with challenges such as the "individualisation of societies, lesser collective participation, lower interest in politics, reaching and appealing to young audiences, their emphasis on audience share rather than audience reach, a shift which has been termed "audience universality" (Collins, 2001).

Chalaby and Segal (1999, pp.151) argue that the process of digitisation is challenging PSBs and may contribute to their weakened presence within the television media dispensation. The authors caution that digitisation has increasingly emphasised universal access as one of the key principles of public broadcasting and that this is threatened by the growth of conditional access television. Smith (2012, p. 5) suggests that in order for PSBs to thrive, they must still maintain audience support and funding regardless of the fact that the digital era can now deliver more channels and more choice.

Bardoel and d'Haenens (2008) list the following as the basic challenges facing the delivery of PSB in the 21st century: commercialisation and digitisation, individualisation of society, the overall unfavourable political climate where governments are less willing to provide adequate funding, limited growth of public broadcasters, and a shift towards market economies. The emergence of the Internet has also raised questions, challenging the extent to which PSBs are contributing towards a more fundamental rethinking of public service, especially with the mandate being delivered via the online digital space. As with all media, PSBs have to follow

their audiences wherever they go, hence the call that their content be available on all significant distribution platforms. Jakubowicz (2004) argues that “in the new digital era, PSBs will have to acquire the tools to do their job much better.”

2.3. How do We Understand Relevance?

2.3.1. The Relevance of the Public Interest Approach to Media and How it Enhances Public Services

The public interest approach aims to ensure that the welfare of the public as a whole is always the main priority in the formulation and implementation of policy, in legal operations, and in the regulatory environment for the media (Buckley et al., 2008, p.7). The public interest approach is underpinned by the achievements of the public interest goals, such as transparency of government and accountability to the public, enhanced quality of life and participation in public debate, and increased opportunities for marginalised groups to develop and be able to articulate their own views.

Currently there are two prevailing dominant and contrasting schools of thought within the PSB public space discourse. There are scholars such as Banerjee & Senevitratne (2005) who argue that the digital space is also a public space that still requires active public intervention. These scholars firmly believe that the only way to protect and promote public interest is through the enhancement of the PSB remit. They believe that the PSB mandate is more relevant than ever before, and argue that there is an urgent need to nurture and strengthen PSB institutions. These scholars advocate that PSBs should adopt new and emerging communication technologies and utilise them as value-added services in accordance with the mandate and the role of PSBs.

There are other scholars such as Berry and Holland (2007) who are advocating for the complete elimination of the PSB. They state that it has neither a future nor a role in contemporary media. These scholars argue that “state-funded broadcasters should not replicate services that the market can already provide.” This anomaly is exacerbated by Holland (2003) who asserts that “public service is criticised as condescending and paternalist, whereas a ‘market driven’ system seems responsive to the public.” Holland further suggests that “in the current climate where the market

is sexy, public service is worthy but lacks vigour and feels stuck in the past."

"We are witnessing not only the decline of PSB, but a substantial erosion of the public media space" Smith (2012, p.5). Smith went on to argue that despite this decline, in Europe and certain other regions, PSB was doing well and was leading the digital revolution, therefore implying that the future role of the PSB remit lies in the adoption and utilisation of new technologies. PSBs globally continue to get public support even though emerging digital media technologies and platforms introduce new challenges and opportunities for delivering the public service remit (Khan 2011, pp.42) citing Meijer [2005, pp.29] Ward [2004, p.7] and Whittle [2004, p.7]).

> Despite all the prophecies that were written around the millennium claiming that the Internet and other new media platforms would kill it off, television has kept its leading position in terms of media consumption. Public service broadcasters continue to play a dominant role (Skinner, 2008).

Chalaby and Segal (1999, pp. 360) suggest that public broadcasters are losing their pre-eminent position in the broadcasting landscape. Barwise (2002) has identified three potential threats to PSB: firstly, the impact of multi-channel television, secondly, the personal video recorder (PVR) which, it is said, has the potential to lead to the dearth of a scheduler and is a perceived threat to television advertising revenue, and lastly, the political and ideological climate. PSBs as content aggregators are facing the threat of being replaced by search engines, content on mobile handsets and possibly by foreign broadcasters, add Barwise. Skinner (2008) also notes that traditional ways of watching television have seen a sharp decline, especially among young viewers between the ages of 16 and 25 years.

2.3.2. PSB and its Contribution towards the Strengthening of Democracy

Smith (2012, p.7) defines PSB as a cornerstone of democracy and inclusive knowledge society, especially when supported by pluralism, programming diversity, editorial independence, appropriate funding, accountability and transparency. Without democracy all aspects of public service would be less significant. The ability to empower citizens facilitates participatory democracy and assists in advancing,

defending and deepening democracies. Television is a powerful medium with the potential to influence public opinion, and has a role to play in promoting and shaping a country's cultural identity (DoC, 2012).

"Building a democracy is often a long-term process and promoting free, pluralistic and independent media should be a central part of it" (Buckley et al., 2008, p. 3). Democratisation of communication creates a space for public participatory approaches that contribute to facilitate the placing of decision making in the hands of the people (Buckley, 2008, pp. 17). Buckley et al. further state that media independence is vital, since it must reflect and enhance the full diversity of views in society (2008; pp. 21).

Candel (2012, pp.76) added that "public service is still used as an instrument of serving political interests; its management and performance are strongly influenced by politics and public policies. McNair and Matthew (2003, pp. 46) purport that the new forms of public participation media explicitly address formal and institutional politics. The authors further attest to the notion that "citizenship is no longer a spectator sport" and that public participation is creating a platform for achieving the following democratic goals: (i) representation of the people in the public sphere, (ii) interrogation or the critical scrutiny of the political elite, and (iii) the mobilisation of citizens to participate in politics (2003, pp. 269).

In a speech entitled "Campaign for an Independent SABC", delivered in 1992, in referring to the democratic SABC, then Secretary General of the ANC and now South Africa's Deputy President, Cyril Ramaphosa stated:

> The ANC believes that unquestioning loyalty by a public broadcaster to a ruling party is incompatible with democracy, whether or not the ruling party enjoys the support of the majority of the population. The ANC is committed to public broadcasting which is independent of the government of the day, and which owes its loyalty not to a party, but to the population as a whole, a service that is free, fair and open. We do not do this in our own, narrow party political interests, but in the interests of all South Africans and of democracy (SAPA PR Wire Service, 1992).

Castells (2009, pp.264) argues that the state remains a critical actor in defining

power relations through communication networks, and in how democracy relates to media politics. Proponents of the digital space suggest that online discourse will increase political participation and pave a way for a democratic utopia (Papacharissi, 2002, pp.10).

2.3.3. Public Space in the Digital Space: Programming on Demand, Distribution of Digital Content and Interactive Formats

"Digitisation presents viewers with a possibility to watch almost any programme at the most convenient time to them, making their television consumption a matter of choice rather than fate" (Chalaby & Segal, 1999, pp.365). Programming on demand explores new ways of sourcing and engaging with digital and online content. However, the successful implementation of delivering this digital offering hinges on the availability of broadband.

Literature suggests that while scheduled broadcast television is still dominant in South African households, on-demand viewing is increasing and that people are prepared to pay for on-demand television and video (Bekker, 2012, pp.26). Bekker, who pioneered and launched pay-tv in Africa in 1986, advised that traditional broadcasters have to learn to serve a new-look consumer with a variety of content options, distribution technologies and devices to choose from. Bekker describes this new-look consumer as a youthful one, who accesses content via mobile devices. Bekker, however, warns that this new-look consumer is not loyal to channels but to individual programmes or series, and is not averse to illegally downloading content and sharing it with friends (Bekker, 2010, pp.27).

The Internet as a new media platform has achieved some form of prominence as a medium for communication. New media are based on networks of cell phone users, Internet users, participants in social networking sites, etc. (Mosco, 2010, pp.123). Khan (2011, pp.33) posits that in the future, declining costs and increased availability of bandwidth will make possible new options of distributing content over different Internet Protocols (IP) based platforms such as streaming via the Internet and

mobile.

Innovation means technologies or practices that are new to a given society, though not necessarily new in absolute terms. These are technologies which are diffused into economies or societies. Mosco (2010, pp.68) asserts that communication is not just the transmission of information but that it is also the social construction of meaning. Communication is used to share experiences, to bring values together and to demonstrate their differences. It includes conversations, print, broadcasting, telecommunications and the Internet.

It is through public spaces that the citizen's perspectives are mirrored. Castells (2009. pp.302) says that "in the network society, the battle of images and frames at the source of the battle for minds and souls, takes place in multimedia communication network". These public spaces can also reflect on perspectives located nationally within the country, regionally within SADC, across the rest of the continent and also globally. The technological changes seem to present opportunities that will enrich diversity and allow South Africans to access news, information and entertainment programming from a range of different sources, both local and international.

Within the national space, for example, South Africa post the 1994 dispensation positioned itself as a rainbow nation. It was during then President Thabo Mbeki's tenure that he articulated his vision by pushing for the creation of the "African Renaissance", a continental agenda, and also for New Partnership for Africa's Development (NEPAD). NEPAD was founded in 2002; its core rationale was for the economic and social revival of Africa involving a constructive partnership between Africa and the developed world.

"We ought to be cognisant of the fact that public broadcasting is not a private right but a public privilege", warned Chalaby & Segal (1999, pp.365). The future of digital television and its interactive capabilities is making the all-time favourite pastime a more interactive experience, giving viewers an opportunity to be more involved in the way they search for and select information. Instead of having one-size-fits-all programmes imposed on them, viewers are now able to make their own home-made programmes, add the authors.

Even in the digital era content still remains king even though its delivery mechanisms have evolved. New opportunities for transporting and availing content have been made possible by the ubiquity of mobile devices and tablets, thus ensuring alternative methods of content delivery. Triple-play services have also enabled multiple viewing options on devices such as the television, computer, mobile handsets, and recently in South Africa the Walka, MultiChoice's innovation, which is a handheld television set with a mobile decoder. The Walka is a portable television and its mobility gives audiences more flexibility, as they can literally watch television anywhere without losing signal or picture.

2.3.4. Political Economy: Access and Affordability

Political economy is the study of the social relations, "particularly the power relations that mutually constitute the production, distribution and consumption of resources, including communication resources" (Mosco, 2010; p.2). Mosco describes the political economy of communication as a social exchange of meaning whose outcome is the measure or mark of a social relationship.

One of the main influences on the development of a political economy approach has been the transformation of the press, electronic media and telecommunications from the modest, often individual or family-owned enterprises, into the large, multidivisional organisations that marked the twentieth-century industrial order (Mosco, 2010, pp.68). Mosco explains that new media deepen and extend tendencies within earlier forms of capitalism by opening new possibilities to turn media and audiences into saleable commodities (2010, p.120). He says that the nature of new media may lead us to call it "digital capitalism", a description borrowed from Schiller's book on new media. Copyright, trademark and patent law constrain people's use of information and ideas that others own (Mosco, 2010, pp.120).

Papacharissi (2012) suggests that from a political economy perspective, "it is inevitable that as information technologies enter the capitalist market they become commodified so as to enter the mainstream or perish at the margins". Chalaby and Segal (1999, pp.355) argue that digitisation increases competition, which increases the level of uncertainty in the broadcasting landscape, while Bekker (2012, pp.27) asserts that competition is no longer like-for-like in the broadcasting arena.

> Broadcasting content is being distributed over traditional telecoms and other platforms (unregulated) so competition is not only between those that have broadcast licenses but with a range of others (Digital Terrestrial Television International, 2013).

It is a matter of record that the internal market, as presently constituted, is hostile to public service broadcasting. Media scholars have ascertained that as new ventures become commodified, they transition from public spaces to commercial spaces and thus compromise their democratic potential (Papacharissi, 2012).

Chalaby and Segal (1999, pp.364) emphasise the point that information is a public good and that the market cannot be relied upon to cover the community's need in this area. In this regard, Anderson and Coate (2000) assert that appropriate regulation of commercial broadcasting is important and that there is a need for economic analysis which sheds light on the ability of the market to generate socially desirable outcomes. Skinner (2008) concurs with Anderson and Coate that "business models to sustain television have become elusive and that the dispersal of advertising revenue has hit production budgets at the very time that new platforms are opening up, demanding new content".

Khan (2011, pp.11) states that in Europe the general assumption is that PSB funding influences content, that there is consensus that PSB needs a secure funding framework and that public funding is an important aspect of PSB systems. Khan further suggests that policy makers should investigate how PSBs can present business models and revenue streams that will influence their viability in light of the emergence of new media broadcasting. This supports the view that new ways must be found to ensure that PSB funding models adapt to new business practices in the digital era.

The cost of digital migration will most certainly have an impact on broadcasters as they make the transition to the digital era.

> The risk attached to broadcasters as a result of the exponential growth and potential of new media broadcasting is increased because broadcasters now have to provide content across multiple platforms, at heightened costs, to reach their target audiences. The volatility of this competitive, yet converged,

environment, poses a challenge especially to PSBs, (Khan, 2011, pp.34).

When looking at the costs of distribution, Bekker suggests that the Internet is an inexpensive distribution technology that is open to all, big and small, producers and content originators: “The cost of the distribution network contrasts sharply with that of satellite, which requires billions in investment capital to launch. The Internet however has made it possible for almost anyone to make video content available online and almost anyone can create their own Internet radio station or podcast for a small investment and reach a global audience”, says Bekker (2012, pp.25).

Table 3: Fact Sheet: The Cost of Funding Digital Migration

Cost	Content
• 7.5 million	• Estimated South African households with a television set
• 5 million	• Poorest households who cannot afford to buy STBs
• 1.57 million	• MultiChoice South Africa subscribers who already receive digital via satellite
• R2.45 billion	• Government subsidy to 5 million poorest households
• R700.00	• Estimated full cost for one STB, 70% government subsidy
• R490.00	• Estimated subsidised cost of STB
• R210.00	• Estimated balance to be paid by households/consumers

Source: The Star, Business Report Research – Thabiso Mochiko, 08 August 2008, p. 1

The political economy of PSB and most importantly that of public broadcasters lies in their funding models, hence public funding becomes necessary and yet it is never sufficient (Kupe, 2012). Limpitlaw (date not mentioned, University of Pretoria)

purports that we cannot hold on to old models of thinking in the light of digital migration, international trends, convergence and new sources of content delivery e.g. cell phones, computers, etc. Gillwald (2009) recommends that policy reform processes be set against twin national policy objectives, namely, affordable access to communications services and accelerated development, to meet the needs of a modern economy.

Most detrimental to the diversity of media has been advertiser-driven public service broadcasting, particularly the SABC, observes Berger and Masala (2012, pp. 92). The authors suggest that various studies have argued that the SABC has ended up with undifferentiated programming, resulting in SABC's programming not being distinctive when compared to private radio and television stations. The authors add that it would seem that the SABC's content mix has been designed for audiences that will attract advertisers, which explains the urban and middle-class audience bias. By adopting this approach, it would seem that the SABC is likely to struggle to meet the ICASA regulations for public digital channels that are distinct from commercial ones (2012, pp. 90).

Table 4 below outlines the SABC's funding mix.

Table 4: SABC's Funding Mix

Source	Percentage
• Commercial Funding	• 77%
• License fee income	• 18%
• Government allocation	• 2%
• Other (including sale of merchandise, studio rental etc.)	• 3%

Source: Berger & Masala, 2012, pp.83

2.4. ICASA's Attempt to Enhance PSB Regulations and Practices in the Digital Era

"As different technologies become interrelated, and even interdependent, it has become increasingly difficult for players, either on the production or regulatory side, to have a grasp of what exactly is going on thus making it difficult to be prescriptive

about tomorrow's network architectures" Chalaby and Segal (1999, pp.358). Flew (2012) suggests that at the heart of the current challenge is the disjuncture between platform-based media regulations which presume a vertically integrated industry and content 'silos', and media convergence that is breaking the link in which media content and services are currently being delivered.

Chalaby and Segal (1999, pp.357, 363) caution that regulatory uncertainties are a growing problem in the digital age; that regulatory bodies are struggling to keep pace with technological evolutions, and that the pace of the digital revolution has led to the view that regulatory change, while essential, should be gradual and responsive to development. In quoting the European Commission in 1997, Chalaby and Segal cite that there three different ways in which regulations can cause uncertainties in the digital era, namely, the scope of current definitions, aging and un-adapted regulatory structures, and decisions on the actual ASO date.

Chalaby and Segal (1999, pp.357) state that as an increasing number of market players operate across frontiers, discrepancies between national broadcasting regulations may hamper their international activities. On aging and un-adapted regulatory structures, Chalaby and Segal suggest that regulators find themselves in confusing situations because the phenomenon of convergence makes gaps and overlaps in the regulatory coverage even more apparent. Chalaby and Segal suggest that this indecisiveness, as experienced in South Africa's digital migration process, increases the investment risk for corporate players. "For as long as the analogue signal is on, the demand for digital services is obviously made more precarious and thus it is more difficult to draw up business plans and predict returns on investments" (Chalaby and Segal, 1999, pp.257).

2.5. The DTT Transition in Africa: The Sub-Saharan Narrative

By 2013, Africa was home to over 1 billion people, with 220 million people in North Africa and 816 million in Sub-Saharan Africa (Beletre and Southwood, 2013, pp.14). As of August 2013, only 8 countries in Africa had launched DTT and close to 2.5 million homes had access to DTT bouquets either on a pay or free basis and it is envisaged that by 2015, Africa's 100 million television households will be able to access many more free digital television channels with better quality than that on

offer at present (Beletre and Southwood, 2013, p.9). In Sub-Saharan Africa, the largest television households markets are Nigeria (24 203 400), South Africa (11 500 000) and Congo DRC (5 000 000).

The DTT process across the continent is one of great contrasts. At the 23rd Ordinary Session of the African Union (AU) which was held on 30 June 2014 in Malobo, Equatorial Guinea, an agreement was reached that the AU would adopt a Common African Position (CAP) where digital migration is concerned. At the breakaway session of the AU's Conference of Ministers of Communication, a resolution was taken that the participation of national and international regulatory entities for the broadcasting sector be directed to take up the issue of migration from analogue radio/television broadcasting to digital transmission (www.summits.au.int). It was at this meeting that AU Member States were encouraged to work in concert to protect the interests of the PSB remit. The Commission in collaboration with the African Union of Broadcasting (AUB) and African Telecommunication Union (ATU) were requested to establish, as soon as possible, an African Technical Committee for the Information and Media Society, to assist Member States in their transition to full digital broadcasting, while at the same time stimulating economic recovery in Africa.

The DTT process further led to the formation of Regional Implementation Steering Committees within SADC, the Economic Community of West African States (ECOWAS), and the Common Market for Eastern and Southern Africa (COMESA). It must be noted, however, that the pace of digital migration in Africa has been slow, and this has been a dark cloud hanging over the African television broadcast market. The transition has been daunting and complex. Regarding the regional bodies – it would seem they are all in varying stages where digital migration status is concerned.

Table 5 (below) is a representation of the state of readiness, or measures undertaken by the various countries across the Sub-Saharan region with regards to digital migration.

Table 5: Digital Migration Regional Status

Region	Digital Switch-On Date	"Scheduled" ASO date
East African Community		

Region	Digital Switch-On Date	"Scheduled" ASO date
• Kenya • Rwanda • Uganda • Tanzania	• October 2013 • June 2013 • December 2014 • March 2013	• February 2015 • January 2014 • June 2015 • August 2013
SADC • Angola • Malawi • Mozambique • Namibia • South Africa	• June 2015 • January 2014 • June 2015 • October 2013 • November 2008	• 17 June 2015 • December 2014 • June 2014 • 1 February 2015 • November 2011
West and Central Africa • Ghana • Liberia • Nigeria • Sierra Leone	• June 2015 • June 2013 • July 2014 • January 2015	• June 2015 • June 2015 • January 2015 • 0n ice, no date pronounced

Source: MCA Africa Regulatory Status and Action Points (2014)

Table 5 suggests that regional bodies have made various commitments that are influencing the timetable for process, including the choice of standards. To drive the digital migration process at regional level, Regional Implementation Steering Committees were established and the setting up of DTT Project Management Office (PMO) was set up. With regards to the standards chosen, the SADC digital task committee selected the DVB-T2 standards, with the exception of Botswana who opted for the Japanese ISDB-T standard. The East African Community and West-Central Committee also opted for the DVB-T2 standards. What the table further demonstrates is that the roll out DTT is in varied stages and it seems like most of the countries are striving to meet the 17June 2015 ASO.

The picture painted above tells us that even though the deadlines and targets are not self-imposed but rather the result of a project driven by the ITU, the region, regardless of the costs, hurdles and pace involved in their finally switching off their analogue frequencies, there is a willingness amongst member states to complete the digital migration project.

Figure 3: How Long Migration Has Taken Some Markets?

Country	Start of DTT	ASO	No. of Years
United Kingdom	1998	2012	14
Sweden	1999	2007	8
Spain	2000	2010	10
Finland	2001	2007	6
Switzerland	2001	2007	6
Germany	2002	2008	6
Belgium	2002	2010	8
Netherlands	2003	2006	3
Italy	2003	2012	9
France	2005	2011	6
Denmark	2006	2009	3
Austria	2006	2010	4
Greece	2006	2012	6
Norway	2007	2009	2
Portugal	2008	2012	4

Source: Laven, DVBProject Office, DVBWorld (2011)

Figure 3 (above) illustrates the number of countries across Europe that have migrated and the period it has taken them to complete their migration process.

2.6. The PSB Policy Successes and Failures and the Various Forms of Relevance: A Conceptual Framework

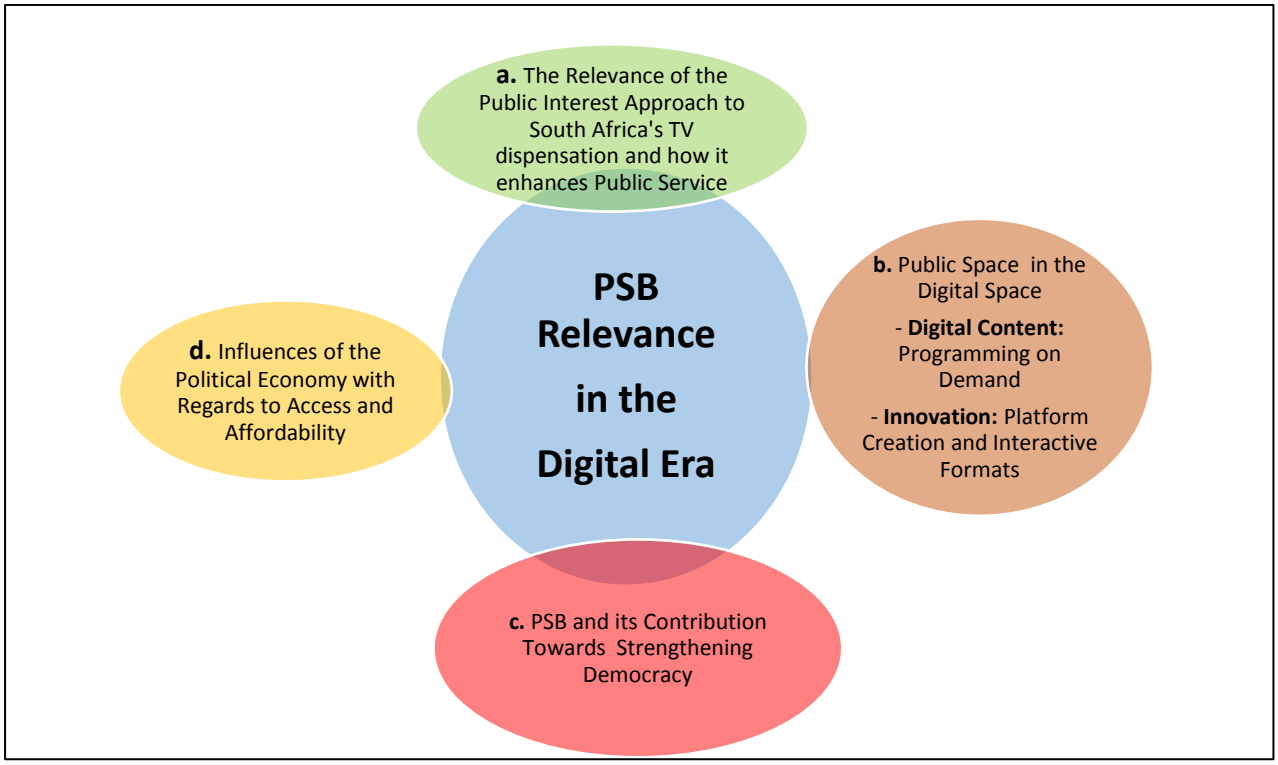
The conceptual framework employed in this research study is based on a dual analytical approach, namely (i) the thematic content analysis approach which is anchored in the four forms of relevance used to analyse the relevance of the PSB in the digital era, and (ii) McConnell's framework which was used to analyse the PSB policy successes and failures (McConnell, 2010).

2.6.1. The Thematic Content Analysis Approach

This approach was used to identify the concepts, assumptions and theories which

depict a common pattern of descriptors clustered into themes of relevance of the PSB in the digital era, as depicted in Figure 5 below.

Figure 4: The Relevance of PSB in the Digital Era: The Four Forms of Relevance



Source: Author, 2013

Figure 4 (above) is a diagrammatic representation of the four forms of relevance addressed in this report. These forms of relevance are critical to understanding the viability of the retention of the PSB remit in the digital era, and to speculating about how the PSB mandate ought to adapt to the new digital realm. For the purpose of this research report, the following variables were used to analyse the relevance of PSB in the digital era:

(a) The relevance of the public interest approach to broadcasting media and how it enhances public service:

This form of relevance explored how the PSB remit in South African TV can adapt and be infused into the digital broadcast media in order to enhance public interest in the digital era.

(b) Public Space in the Digital Space:

This theme explored how the public space phenomenon has located itself and has played a role in the digital space. The public space in the digital space theme has underlying sub-themes, namely: the South African TV digital space, and digital content and innovation.

The sub-theme in exploring digital content focused on the benefits of programming-on-demand content by looking at how the TV broadcasting landscape in South Africa has to date developed its programming services in the Internet-based and multiple media terrain. Furthermore, the research explored how PSBs have digitised, catalogued, re-versioned and repurposed their archived content.

The sub-theme on innovation in creating platforms for interactive formats explored the transportation of PSB programming into the digital interactive space, and how it has allowed new formats to feed into this new realm. By exploring how South African TV PSBs have responded to interactive formats, genres, and content in the context of interactive television (ITV), the sub-theme also looked at how PSBs have readied themselves for the "next frontier" of bringing the online experience to television.

(c) Infusion of PSB into the digital broadcast media towards strengthening democracy:

This theme explored how PSB can contribute towards the strengthening of democracy. It explored how PBS mandate content has contributed to the advancement of democracy in South Africa during the period 2002-2012;

(d) Influences of the political economy with regards to access and affordability:

This form of relevance looked at the influence of the political economy factors on PSB, how TV broadcasters are responding to the issues of access and affordability in the transitional digital period. It investigated the types of

adjustments and resources that have been put in place by TV operators in order to deliver content and operate in the digital TV dispensation. The theme analysed how broadcasters' operating business models were being reviewed, while they are, at the same time, responding to the demands presented by the digital landscape in which they now operate.

2.6.2. McConnell's Framework

The second method of analysis used to examine public broadcasting policies was McConnell's Framework. McConnell (2010) suggests that policy has three realms or strands, namely: processes, programmes and politics. Analysing policy outcomes using these three realms allowed this research study to identify and understand policy successes and failures.

McConnell (2010) points out that there are several important contradictions evident in these three realms of policy analysis including what is known colloquially as "good politics but bad policy" (2010, pp.346).

> Policy protagonists are keen to claim that policy is successful while opponents are more likely to frame policy failures. The reality is that policy outcomes are often somewhere in between these extremes. An added difficulty is that policy has multiple dimensions, often succeeding in some respects but not in others, according to facts and their interpretation. The vision of policy as a science is for it to contribute to the betterment of society (McConnell, 2010, pp.345).

For the purpose of this study, the research focused on the analysis of the digital migration policy as a programme. McConnell's analysis framework referenced in Table 6 (below) shows the variables used to analyse the successes and failures of policies and policy programmes relevant to the broadcasting environment. Following this analysis framework, a policy programme can be found to be successful, resilient successful, conflicted successful, precarious successful, or to have failed in its implementation in terms of set objectives.

Table 6: Policy as a Programme: The Spectrum from Success to Failure

Program Success	Resilient Success	Conflicted Success	Precarious Success	Program Failure
Implementation in line with objectives.	Implementation objectives broadly achieved, despite minor refinements or deviations.	Mixed results, with some successes, but accompanied by unexpected and controversial problems.	Minor progress, towards implementation as intended, but beset by chronic failures, proving highly controversial and very difficult to defend.	Implementation fails to be executed in line with objectives.
Achievement of desired outcomes.	Outcomes broadly achieved, despite some shortfalls.	Some successes, but the partial achievement of intended outcomes is counterbalanced by unwanted results,	Some small outcomes achieved as intended, but overwhelmed by controversial and high profile instances or failure to produce	Failure to achieve desired outcomes.

		generating substantial controversy.	results.	
Creating benefit for a target group.	A few shortfalls and possibly some anomalous cases, but intended target group broadly benefits.	Partial benefits realised, but not as widespread or deep as intended.	Small benefits are accompanied and overshadowed by damage to the very group that was meant to benefit. Also likely to generate high profile stories of unfairness and suffering.	Damaging a particular target group.
Meets policy domain criteria.	Not quite the outcome desired, but close enough to lay strong claim to fulfilling the criteria.	Partial achievement of goals, but accompanied by failures to achieve, with possibility of high profile examples e.g. ongoing wastage when the criterion is efficiency.	A few minor successes, but plagued by unwanted media attention e.g. examples of wastage and possible scandal when the criterion is efficiency.	Clear inability to meet the criteria.
Opposition to program aims, values, and means of achieving them is virtually non-existent, and/or support is virtually universal.	Opposition to program aims, values, and means of achieving them is stronger than anticipated, but outweighed by support.	Opposition to program aims, values, and means of achieving them is equally balanced with support for same.	Opposition to program aims, values, and means of achieving them, outweighs small levels of support.	Opposition to program aims, values, and means of achieving them is virtually universal, and/or support is virtually non-existent.

Source: McConnell, 2010, pp.354

Policy makers change the world by making decisions and by supplying their citizens with much needed resources e.g. legislative mandate, funding for success, (Methods for Policy Research [MPR], 2014, pp.14). Policy formulation may prove to be a daunting challenge. However, the implementation of innovation policy is even more laborious, especially in developing countries where the institutional context is more difficult, resources are necessarily limited and managers are unable to carry out these programmes, and policy measures are lacking (The World Bank, 2010, pp.17). Developing countries are further plagued by governance problems, lack of resources and inadequate infrastructure.

The rationale for using McConnell's framework was to ascertain how the DoC fared in the delivery of South Africa's Digital Migration Policy Programme. McConnell (2010, pp.351) suggests that a policy is successful if it achieves the goal that proponents set out to achieve and attracts no criticism of any significance and/ or support is virtually universal. He goes on to explain that policies fail because they are inadequately implemented, or do not achieve their intended purpose or normative justification, and can therefore be said to succeed when they do not fail (2010, pp.348).

One of the DoC's service delivery objectives is ICT Policy Development. The officials are responsible for drafting legislation, regulations, policy and guidelines that govern the broadcasting, telecommunications, postal and IT sectors, thus ensuring broad based economic development within the ICT sector (DoC: ICT Development, d.n.m, pp.49).

In order to achieve its objectives, post-democratic South Africa's information society process was dependent on the building of a national consensus around its objectives, scope, strategies, policies and implementation (Mbeki, 1996). Central to the policy review process is which critical policy questions were collated and interrogated by the DoC's policy researchers prior to embarking on a policy review process, and formulating the Green Paper tabled in Parliament in January 2014. The Green Paper intends to shape and assist with the policy outcomes. The Green Paper process should include all relevant and key stakeholders in identifying opportunities and issues with regard to the national vision (Mbeki, 1996, pp.14).

Good policy research requires good policy research questions (MPR, 2014, pp.9). The MPR states that good policy questions must be broad enough to encourage a search for more and possibly better solutions. Such questions should be meaningful but focused enough to be manageable given the time and resources you have available. The literature suggests that policy research must be undertaken in a responsible manner since the outcomes of the research can either take the cause forward or hinder it because of their unintended outcomes (MPR, p.5).

The next chapter outlines the research design and methodology that this study employed and discusses the theories of research. The chapter addresses the

methodological aspects of the research paradigm, the research approach, prioritised data collection, analysis and theoretical framework, and finally, the chapter highlights the limits of the study.

CHAPTER 3

RESEARCH DESIGN AND METHODOLOGY

3.1. Introduction

This chapter looks at the main research question and the research methodology employed by this study. The main research question has numerous sub-questions that are structured to mirror the four forms of relevance which adopted the thematic content analysis approach. The thematic content analysis approach is a descriptive presentation of qualitative data. The research also used the interpretive approach,

with a qualitative data analysis, and relied on semi-structured in-depth interviews.

3.2. Research Methodology

Methodology refers to the "theoretical, political and philosophical backgrounds to social research and their implications for research practice and for the use of particular research methods" (Robson, 2011, pp. 528 as cited by Petty, Stew and Thomson, 2012). Methodology is the strategy of an enquiry that guides a set of procedures (Denzin and Lincoln, 2000; Creswell, 2009 as cited by Petty, Stew and Thomson, 2012). The research strategy employed for this particular study included: sources of information, research sample, research instruments and method of data gathering and analysis.

3.3.1 Research Approach: A Qualitative Methodology

The research methodology employed was approached through a qualitative paradigm. The qualitative or "naturalistic" evaluation approach involved the use of predominantly qualitative research methods to describe and evaluate the performance of programmes in their natural settings, focusing on the process of implementation rather than on quantifiable outcomes (Mouton, 2011). Qualitative research is applicable where the researcher wishes to build an understanding of issues, processes or phenomena.

This kind of research uses soft data, in the form of impressions, words, sentences, photos or symbols which dictate different research strategies and data collection techniques, rather than hard data, which is often referred to as quantitative research, i.e. numerically quantifiable data (Neuman, 2011). Neuman purports that "qualitative researchers often rely on interpretive or critical social science, apply logic in practice, speak a language of 'case and context', and conduct detailed examinations of cases that arise in the natural flow of social life" (2011; pp. 151). Neuman further states that "qualitative researchers borrow ideas from people they study and place them within the context of a natural setting. They examine motifs, themes, distinctions and ideas instead of variables, and they adopt the inductive approach of grounded theory" (2011; pp157).

Babbie and Mouton (2009, pp270) describe qualitative research "as a generic

research approach in social research according to which research takes as its departure point the insider perspective on social action".

Broom (2005, pp.72) asserts that one of the strengths of a qualitative approach is that it allows acknowledgement of conflict, on-going struggle, tension and subjectivity, as well as the situated and co-produced nature of the accounts. Broom suggests that "qualitative research is about subjectivity and complexity, that it seeks not to count or reduce, but to represent rich, subjective experience in such a way as to reflect on consistencies and parallels, but also to retain the nuanced nature of the data".

This research followed a qualitative research approach, by exploring the relevance of PSB in the digital era, examining South Africa's 3-tier broadcasting system with a particular focus on the SABC. The research analysed the SABC (PSBs), MultiChoice (pay-TV licensee), e.tv (Free-to-Air commercial licensee) and Association of Community Television in South Africa (ACT-South Africa), (a body representing Community TV licensees) in their efforts towards discharging the PSB remit in the digital era. The qualitative paradigm aided in the process of describing and understanding the research topic.

The interview process relied on semi-structured in-depth interviews (SSDI) conducted with identified stakeholders. The term "semi-structured" suggests a certain degree of standardisation of interview questions and a certain degree of openness of response by the interviewer (Erasmus, 2013). Erasmus states that, "SSDI is a scientific tool that is used to produce new data with a purpose to get a better understanding of reality" (2013). Erasmus further suggests that the tools used for the research have to be as sharp as possible, and that this is crucial for the consistency of data to be retrieved and later analysed.

Broom (2005, pp.66) advises that with SSDI, the researcher ought to have an interview schedule in place with a list of themes and potential questions to ask the interviewees. Broom suggests that this type of interview style is flexible, and allows for an open dialogue that can extend beyond the parameters set by the interview schedule. This researcher concurs with Broom's assertions that SSDI also provides a way of entering into the interviewee's world, exploring their understanding of the

subject matter and thus gaining insight into how meaning is constructed and negotiated within the context of the analysis. This research was seeking to explore the contemporary relevance of the South African TV sector's PSB in the digital era, with a secondary component analysing the role of the DoC in providing policy direction.

The respondents who were interviewed for this study were subject matter specialists and were grouped according to different categories, with the aim of bringing varied and contrasting views in order to provide insights, and also to enrich the body of this work. The study situated itself in the exploratory research approach, where the researcher was seeking to understand the impact of digitisation on the delivery of PSB by PSBs in the digital era.

3.3.2. Qualitative Analysis

The research adopted a qualitative research approach informed by the phenomena of the social constructivist approach. Creswell (2009; pp.8) states that social constructivists "hold assumptions that individuals seek understanding of the world in which they live and work. That the goal of the research is to rely as much as possible on the participants' views of the situation being studied". The following broadcasting institutions were studied: the SABC (a public broadcaster), MultiChoice (a pay television broadcaster), e.tv (a free-to-air commercial operator) and ACT-South Africa (a television community representative body). The qualitative approach analysed how South Africa's broadcasters, each with a separate mandate, have readied themselves to deliver content in the digital era. Also examined were the factors that influenced their implementation strategies.

The qualitative research method that was employed was exploratory in nature. This method of research opens and applies flexible techniques that seek to gain insights into the subject area (Jagun, 2010).

3.3.3. Research Design

The research design was empirical in nature and implemented the use of questions that were exploratory, descriptive, causal and evaluative. The research design led the study to outcomes that responded to the research question seeking to explore

the relevance of PSB in the digital era.

The exploratory research approach aimed at gaining insights on the relevance of PSB in the digital environment, understanding the impact of the delivery of PSB using new media platforms, perhaps unearthing some challenges that may arise, and evaluating how, to date, PSB has been embraced and delivered in South Africa.

The secondary focus of the study analysed the role played by the DoC in providing policy prescripts. The study also explored how the introduction of new digital media has impacted on the delivery of the PSB mandate in the digital era.

3.3. Data Collection Methods

The phrase “research collection methods” refers to the techniques used to acquire and analyse data to create knowledge (Petty, Stew and Thomson, 2012, p.1). There is a wide variety of data collection approaches available. The research design methodology that was employed in this study was collecting and collating data, which was later analysed. Semi-structured in-depth interviews were conducted and official records and documents were analysed. Primary and secondary data collection methods were employed. The following section details the types of data that were analysed.

3.3.1. Primary Data

Primary data are usually raw and unprocessed data (Jagun, 2010). To retrieve this data interviews can be conducted, or observation can be engaged in – a qualitative ethnographic approach.

Blaxter, Hughes and Malcom believe that the interview method can be a useful technique of collecting data which would likely not be accessible using techniques such as observation or questionnaires (2010, pp. 193). The authors suggest that semi-structured in-depth interviews are modelled on the conversation, which is like a social event, and in this instance has two participants with their own interactional rules. This interview process with a social character can constitute a learning process where the participants can discover, uncover or generate new rules by

which they as participants are playing this particular game.

To actualise the data collection methods, a total number of 13 respondents were interviewed for the study and were grouped into six categories. Each of the categories represented the portfolio with which each of the respondents was identified, and qualified them as subject specialists in their field of expertise. The interviews were conducted by clustering the questions that elicited responses according to the four forms of relevance.

Table 7: In-depth Interviews Conducted with Respondents

Parliament	Policy Maker	Regulator	Broadcasters	Industry Bodies	Academics
MP 1	PM 1	R1	B 1-4	IB 1-4	A 1-2
1 *PCC Member of Parliament*	1 *DoC* Chief Director	1 *ICASA Councilor*	4 *Operators:* e.tv, MultiChoice and SABC	4 *Industry Experts* ACT-SA	2 *Academics*

Source: Author (2013 - 2014)

Table 7 (above) depicts the varied categories that the respondents belonged to. The different respondents provided the researcher with varying perspectives. The rationale for the inclusion of broadcasters was that, as operators, they are at the coal-face of adhering to and implementing policy decisions, and are also required to comply with regulatory obligations. Parliament was considered for the legislative role it plays in accounting to the citizens and providing general oversight in ensuring that policy programmes are implemented. The industry bodies play an advocacy role by holding all the actors to account and by providing a voice for ordinary citizens in public participation processes. ICASA is responsible for regulating the ICT sector and it was important to understand its role in the digital environment and the impact of this role. Another key player was the DoC as the policy maker; it was necessary to understand its role and to garner insights about the policy prescripts it has provided in the digital era.

For the purposes of this study, the researcher employed the purposeful method approach by conducting interviews, from which the researcher drew raw data. When

undertaken correctly, methods include purposive, theoretical, convenience and snowball (Petty et al. 2012, p.3). The purposive method seeks out information-rich cases, thereby allowing the researcher to purposively seek out variation to deepen understanding. Interviews were carried out with respondents with extensive knowledge, who are key stakeholders in the broadcasting media landscape and value chain.

3.4. Interview Sample Size

The data was collected by conducting interviews with 13 key respondents; as outlined in Table 8 (below). Robson (2011), as cited by Petty et al. (2012, p.3), suggests that interviews are used extensively in qualitative research as a method of data collection and that they may be structured, semi-structured or unstructured. The SSDI interviewing technique was applied. This involved a few pre-determined areas of interest, with possible prompts that helped guide the conversation. The interviews were intended to provide the most direct evidence of respondents' views and perceptions of the topic (Khan, 2010). Interviews can be carried out face-to-face, by telephone or via the Internet (Petty et al. 2012).Khan and Petty et al. indicate that interviews often take between 30 and 90 minutes to complete and are audiotaped for later transcription. For the purposes of this study, a digital voice recorder was used to maximise accuracy. The recordings were used as a backup mechanism in the event that the researcher was not able to capture all the responses in detail, during the interview.

Table 8: Key Respondents Interviewed (Sample of In-depth Interviews)

- Legislature: Parliamentary Portfolio Committee on Communication (PPCC)
- Policy maker: The DoC
- Regulator: ICASA
- Broadcasters: SABC, MultiChoice, e.tv and Cape Community TV (under ACT-South Africa)

- Industry Bodies : National Association of Broadcasters (NAB), Save Our SABC (SOS), Media Monitoring Africa, Independent Producers Organisation (IPO)
- Academics

Source: Author (2014)

Table 8 (above) is a summary of the sample size of the respondents interviewed and the broad institutions they represent.

3.5. Secondary Data

Secondary Data is processed data and it can come in various forms: journal articles, Acts, policy statements, and annual reports (Jagun, 2010). Secondary data represents data which has been given a great deal of thought in that participants have given attention to compiling them, (Babbie & Mouton, 2009). Secondary Data Analysis (SDA) is the use of existing data and aims at reanalysing such data in order to test hypotheses or to validate models (Mouton, 2011). Petty et al. (2012) suggest that, compared to quantitative research, data analysis in qualitative research can be a very time-consuming and laborious process. The authors further explain that the researcher moves back and forth between data collection and data analysis, that is, it follows an iterative process. There are a variety of ways to analyse qualitative data, and these methods of analysis include thematic analysis, content analysis, constant comparison method of data analysis, discourse analysis, critical discourse analysis, conversation analysis and analysis of narratives. For the purposes of this study the researcher employed a thematic content analysis where SDA was adopted. Policy and other public documents on PSB in South Africa were analysed.

“Content” refers to words, meanings, themes or any message that can be communicated (Mouton, 2011, pp.165). Document analysis usually refers to written documents that may take the form of articles, archives, textbooks, notes, minutes of meetings, etc. (Petty et al. 2012, p. 4). Robson (2011), as cited by Petty et al. 2012, explains that fundamental to the analysis of documents is identifying the context of the document, establishing who wrote it and for what purpose. Some of the documents that were analysed were as follows: South African Digital Migration Policy document, 2008; Government Gazette, Republic of South Africa (Vol.531 Pretoria, 4 September 2009, No. 32553); The Department of Communications, What is Go Digital South Africa, 2012; The Department of Communications, Go Digital

Booklet & Roadmap, 2012; Digital Terrestrial Television Booklet, SABC 2008; The Electronic Communications Amendment Bill, 2012, Government Gazette, Republic of South Africa (Vol.565 Pretoria, 18 July 2012. No. 35525); The Balancing Act Report – Analogue to Digital Migration in Africa, August 2013; The Media Landscape 2012, Reflections on South Africa's Media Environment.

3.6. Methods for Data Analysis

The rationale behind data analysis is to process and interpret data that was collected, identify common themes and to make sense of the data (Van Zyl, 2013). For the purposes of this study, three analytical approaches were employed: qualitative data analysis and thematic content analysis, both utilising the conceptual framework, and policy analysis, where the McConnell framework was applied.

The "central task during data analysis was to identify common themes in people's descriptions of their experiences" regarding the relevance of the PSB mandate in the digital era (Leedy & Ormond, 2005, pp.140). The secondary focus of the analysis was on policy evolution and the role that the DoC played in providing policy direction.

3.6.1. Qualitative Data Analysis

Neuman (2011) suggests that qualitative data, far from being imprecise or deficient, are highly meaningful. He further explains that qualitative data involves documenting real events, recording what people say, studying written documents or observing specific behaviours. The data for this study were analysed using qualitative methods in order to understand how the digital migration process had unfolded, and to ascertain the level and extent of preparedness of affected stakeholders, in embracing and operating in the digital era.

3.6.2. Thematic Content Analysis

Thematic content analysis refers to how the data were analysed according to the selected themes of relevance referred to as the four forms of relevance. This form of analysis is often aligned with content analysis and thematic content analysis. Content analysis is often applied to media texts and engages with various documents where the content is clustered. The analysis is used to identify the

specific characteristics of a body of material. The thematic content analysis is often used on interview transcripts, a common qualitative method involving the identification of common themes (Van Zyl, 2013).

3.6.3. Policy Analysis

Policy Analysis supplies us with the tools for analysing policy (Corbin & Strauss, 1990). The analysis of the data led to the exploration and exposition of insights on the relevance of PSB in the digital era, and the role played by the DoC in providing policies, especially with regards to digital migration. The analysis was based on the researcher's understanding of the concepts, issues and contexts explored in the research. To ensure that there is discipline in the implementation of the study, a research diary was kept.

The researcher further applied McConnell's framework to analyse policy successes and failures. The rationale for the use of McConnell's framework was to ascertain how the DoC fared in the delivery of its policy programmes, and in this case, the digital migration process, and also to ascertain whether the digital migration programme was a policy success or a policy failure. McConnell (2010, pp.351) suggests that a policy is successful if it achieves the goal that proponents set out to achieve and attracts no criticism of any significance, and/ or support is virtually universal. He further explains that policies fail because they are inadequately implemented (2010, pp.348).

3.7. Delineation

3.7.1. The Limitations of this Study & Key Assumptions

At the heart of the PSB contract is the promise of the universal availability of services, in this instance broadcasting services. For the purpose of the research, the study was limited to the four forms of relevance.

This study was located in South Africa, and focused on television as a broadcasting

medium in this country, while and also examining the trends within the Sub–Saharan region, and referring to international broadcasting trends as well. The study unearthed the tensions that exist among scholars, i.e. those who are advocating for the retention of PSB and those who are against its continued existence. Due to its breadth and width of scope, the study did not explore in detail universal access issues and usage principles in the digital era, however issues pertaining to Net-Neutrality surfaced. Then too, the study did not dwell on broadband as an enabler since no major milestones have been achieved in South Africa in this regard. The study suggests that perhaps these matters be taken up further, given the current debates surrounding them.

3.8. Ethical Considerations

Ethical considerations seek to promote ethical behaviour amongst researchers, curb research fraud, protect research participants and to root out unethical behaviour, referred to as scientific misconduct (Neuman, 2011). According to Neuman, *"*ethical research requires balancing the value of advancing knowledge against the value of non-interference in the lives of others*",* (2011; pp. 131). Neuman suggests that "the law and codes of ethics recognise some clear prohibitions: never cause unnecessary or irreversible harm to subjects, secure prior voluntary consent when possible, and never unnecessarily humiliate, degrade, or release harmful information about specific individuals that was collected for research purposes" (pp. 131). For the purpose of this study, the researcher solicited permission from the 13 respondents and consent forms were signed to authenticate the process. The interviewer ensured that the respondents each received a letter of introduction familiarising them with the research topic. The respondents were given the opportunity to agree or decline to participate in the study, to opt for anonymity or not. Of the 13 respondents interviewed only one opted for anonymity.

3.9. Data Request Procedures

3.9.1. Ethical Issues

Prior to their resignation, and while the research study was under way, the

researcher had been in the employ of the SABC on a full-time basis, and issues of ethics had to be applied to avoid bias and subjectivity when addressing issues pertaining to the public broadcaster, especially where relevance and delivery of the PSB mandate in the digital era was concerned. In preparation for the actual interviews, letters were sent out to all the respondents, clearly stipulating that the study was being conducted purely for purposes of academic research study for a master's qualification. On the day of the said interview and prior to the commencement of the actual interviews, interview protocols were explained to the respondents, informing them that the interview was going to be recorded, and a coding system was going to be utilised to protect the identities of those respondents who preferred to remain anonymous. Respondents who provided consent and availed themselves to be interviewed, were required to sign consent forms granting the researcher permission to utilise their responses to further enhance the body of knowledge assimilated.

3.10. Summary

The research question for this research study is: "To what extent are South African television outlets, and the policies that guide them, contributing to maintaining the relevance of PSB in the digital dispensation?"

In addition, the main research question was supported by sub-questions. The sub-questions were informed and structured in such a way that they mirrored the four forms of relevance as outlined in the research guide, and also provided insights into the various themes.

Table 9: Interview Schedule of Thirteen Research Respondents with Signed Consent

INTERVIEWEE NAME & DATE	RESPONDENT NAMING CONVENTION	REASON FOR SELECTION
Ms. Kate Skinner: Academic 19 November 2013, 14h00 -	Academic	To provide academic and theoretical frameworks

SABC Auckland Park Offices	Respondent 01 ***(AR01)***	
Ms. Lulama Mokhobo: SABC CEO 06 January 2014, 14h00 - SABC Auckland Park Offices	Broadcast Respondent 01 ***(BR01)***	Broadcast operator, key player in the broadcast value-chain
Ms. Desiree Markgraaff: Independent Producer Organisation (IPO) Member, 14 January 2014 – Holiday Inn, Hyde Park	Industry Body Respondent 02 ***(IB02)***	Represents a collective body of independent producers, reflects membership views
Ms. Karen Thorne: (Deputy Chair: ACT South Africa & Station Director: Cape Town Community TV) 16 January 2014, 15h30 – Telephonic interview – Cape Town based	Broadcast Respondent 02 ***(BR02)***	Broadcast operator, key player in the broadcast value-chain
Ms. Nadia Bulbulia: NAB CEO 28 January 2014, 10h00 - Hyde Park Offices	Industry Body Respondent 01 ***(IBR01)***	Represents a collective body of all broadcasters, reflects membership views
Ms. Carol Mohlala: Researcher and Campaign Coordinator, 29 January 2014, 10h00 – SOS (Save Our SABC) Coalition: Support Public Broadcasting Coalition, SOS Offices, Parkhurst	Industry Body Respondent 03 ***(IBR 03)***	A coalition of various bodies including Trade Unionists whose vision is to strengthen public and community broadcasting to produce a rich diversity of quality, locally-made, citizen-oriented programming
Mr. William Bird: Director, 29 January, 11h00 – SOS Boardroom, Media Monitoring Africa, Parkhurst	Industry Body Respondent 04 ***(IBR04)***	A non-profit and advocacy organisation that promotes human rights and democracy and acts as a watchdog to promote ethical and fair journalism
*** Portfolio Committee of Communication Member of Parliament Respondent, 31 January 2014, 09h00 - Via Skype	PCMP Respondent 01 ***(PCMPR 01)***	Member of Parliament, provides overall ICT industry oversight
Prof. Tawana Kupe: Academic 06 February 2014, 11h30 - Wits Main Campus Offices	Academic Respondent 02 ***(AR02)***	Provides academic and theoretical insights
Councillor William Currie: ICASA 14 February 2014, 10h00 - ICASA Offices, Sandton	Regulatory Respondent 01 ***(RR01)***	Regulator, regulates the ICT sector
Mr. Aynon Doyle: MultiChoice, 21 February 2014, 10h30 – Telephonic Interview – Cape	Broadcast Respondent 03 ***(BR03)***	Broadcast operator, key player in the broadcast value-chain

Town based		
Ms. Lara Kantor: e.tv, Head Policy, 25 February 2014, 09h00 – e.tv Offices, Hyde Park	Broadcast Respondent 04 ***(BR04)***	Broadcast operator, key player in the broadcast value-chain
Mr. Joe Mjwara: Advisor to Minister, DoC- 6 March, 13h00 – in Hatfield, Pretoria	Policy Maker Respondent 01 ***(PMR01)***	Policy maker, provides policy direction

Source: Author, 2013 - 2014

NB: - Respondent with *** Portfolio Committee of Communication Member of Parliament Respondent, in their consent form opted for anonymity.

- Signed consent was given by the respondents

The table above is the interview schedule providing details of the identity and role of the interviewed respondents, the organisations they represented, dates when the interviews were conducted, the methods used when carrying out the interviews and the rationale for the choice of respondents.

The following chapter is a discussion of the research study's results and provides the findings that this research sought to accomplish. The chapter is divided into two sections: the results from the review of the documents analysed and results from the individual interviews.

CHAPTER 4
RESULTS FROM QUALITATIVE RESEARCH - DISRUPTION AND LACK OF PREDICTABILITY IN THE SOUTH AFRICAN TV DIGITAL DISPENSATION

4.1. Introduction

This study explored and analysed the contemporary relevance of the public service broadcasting mandate in the digital era, including the role played by the DoC in providing a policy direction.

The qualitative framework was structured around four key themes that have been categorised as the four forms of relevance, namely, the public interest approach, public space as digital space, public service broadcasting and strengthening of democracy, and the influences of political economy.

This section is a summary of the results from interviews with the respondents, as informed by the research interview protocol guide. This section further provides a summary of the various documents that were analysed. The respondents who were interviewed and the documents analysed were categorised according to the four key themes which detail the four forms of relevance.

4.2. The Relevance of the Public Interest Approach to Media and how it Enhances Public Services

The public interest approach seeks to ensure that the welfare of the public is kept in the foreground in the formulation and implementation of policy, and that the legal and regulatory environment for the media is underpinned by public interest goals. Public interest goals include government transparency and accountability to the public, enhanced quality of life and participation in public debate, and increased opportunities for marginalised groups to develop and articulate their own views.

The SABC's Annual Report (2006) stated that one of the organisation's values, as adopted, was "broadcasting for total citizen empowerment", which formed part of the SABC's strategic outlook (SABC, 2006, pp.20). "This particular value speaks directly to the relevance of the public interest mandate, it reflects a clear vision for the organisation and suggests that the PSB mission must be defended and protected at all costs" (IBR04). This value of empowerment could be said to be related to the public interest mandate. However, a review of the various SABC annual reports and strategy documents for the period 2007 to 2013 give no detail on the meaning of citizen empowerment.

The SABC is bound by regulations set both by ICASA, and the licensing framework and conditions. It is stated in the 1998 White Paper and the Broadcasting Act that the SABC is primarily responsible for the delivery of public interest goals as set out in the policy (DoC, 2014, pp.58).

The view as expressed by respondents from SABC, MultiChoice, e.tv, selected community broadcasters, DoC, ICASA, NAB and the Parliamentary Portfolio Committee, is that the public interest approach remains valid for various reasons, including the fact that the future of the PSB mandate cannot be left solely to commercial broadcasters. The respondents shared the common belief that there is no guarantee that commercial entities will uphold the duty to inform and educate (BR01 amongst others).

Traditionally, PSB institutions were safe places to get balanced and diverse information, whilst commercial broadcasters did not invest in public interest content (AR01). This view can, however, be challenged because in the 21st century, digital broadcast markets are to a great extent about educating and informing. Public broadcasters are seen as having a crucial role to play. It is also said that they should not be subjected to commercial pressure, that they are distinct from state broadcasters, and are free of vested interest.

> The core remit remains relevant in spite of the prevailing technologies and hence the public interest mandate cannot be eroded. The digital era serves as a perfect opportunity for public broadcasters to repurpose and reorganise themselves (IBR01).

> South Africa is a fledgling democracy and is still going through fundamental growth and the rights of the majority of its citizens are yet to be adequately serviced. The PSB mandate becomes even more critical, because without guarding the public interest mandate the citizens would be even poorer (IBR03).
>
> Audiences switch to a public broadcaster because of its relevant information, relevant debates, and relevant local content. Another challenge facing the SABC is the high rotation of re-runs due to non-commissioning of new content, hence the broadcaster is experiencing audience decline (RR01).

The National ICT Green Paper (DoC, 2014, pp.53) states that the public mandate should ensure that there is access to diverse content for all, including locally produced public interest programming. “This will be a key means to ensure that South African audiences continue to access content that is relevant to them and meets the key cultural, social, linguistic and economic needs identified in the policy objectives” (DoC, pp. 65).

While the mandate is supposed to contribute to and inform robust and focused thinking, a consciousness that is able to build an informed citizenry who are discerning and analytical, IBR03 lamented that the mandate is not implemented as it should be, or adequately monitored. In 2014, South Africa marked 20 years of freedom and democracy and citizens went to the polls for the fifth time on 7 May 2014. The role of the PSB mandate became even more critical in preparation for electoral voter education programmes. In order to educate its viewers, the SABC commissioned a voter educational series called “90 Plein Street”. Terrestrial free-to-air e.tv also lined up similar programmes for its audiences.

It is a general view that the PSB mandate must be retained in the public interest, but as BR03 cautions, the constantly changing media space brings with it fierce competition that undermines the once protected public broadcaster. One suggestion in the Green Paper, is that there must be fair competition between the different content services (2014, pp.53). For its survival, the SABC should consider refocusing and shifting away from entertainment content, and concentrate in areas such as language delivery, especially in a country such as South Africa with its twelve official languages

(sign-language must be added to the official list, according to BR03). However, pay television service MultiChoice offers its live sports coverage with commentary in various languages.

South Africa's 3-tier broadcasting system serves a particular interest and has shaped its audiences as a market, or as the public. "Without the SABC there are no guarantees that programmes with a national interest bias [that] appeal to society – political, health, educational, social and economic commentary – will be catered for," said AR02. BR04 said that PSB exists in order to offer programming that other sectors of the broadcasting markets will not provide, like addressing market failures. Where commercial broadcasters will be ratings-driven, community broadcasters will be more narrowly focused. The public service broadcaster is supposed to cater for all programming and interests that are not necessarily about making money, concluded the respondent.

The PSB mandate, according to AR02, brings advantages to its citizens by providing knowledge and public interest content that can at times interrupt normal scheduling. Accordingly, audiences are able to watch broadcasts of live sports events, or political proceedings with public-interest value. The respondent highlights, for instance, International sports tournaments in which national sports teams like the Springboks and *Bafana Bafana* participate, and notes also the broadcast of the annual State of the Nation Address (SONA) and the Budget Vote. These broadcasts are usually followed by an analysis addressed by subject matter specialists. The respondent maintains that this type of programming is not often provided by commercial entities since the interruption of their set programming schedules might negatively affect advertising revenue.

MultiChoice did, however, display its mastery and skill in attracting and retaining its audiences when the broadcaster went to court and applied to be granted the rights to broadcast the Oscar Pistorius trial which commenced on 3 March 2014, observed MPR01. MultiChoice used the public interest rationale for applying to broadcast the court case live, and this justification could equally have been made by the SABC. Broadcasting the trial live was the broadcaster's masterstroke in ensuring that its audiences had first-hand access to what was happening inside the courtroom,

bringing the processes of justice into their homes.

The general view articulated by most of the respondents suggested that the public interest mandate still has relevance in the 21st century. The respondents held the common view that both public and commercial broadcasters offer public interest programming, whilst being mindful that the majority of viewers only have access to the public broadcaster.

There was a concern that currently the public interest mandate is not working as it should, or monitored the way it ought to be. There was unanimity amongst respondents, who felt that the SABC ought to be reminded of its responsibility to act in the public interest and not in the interest of the government of the day. IBR01 concluded by stating that PSB will always be relevant, and that it should remain at the centre of broadcasting and stay true to the mandate.

4.3. The Public Space Phenomenon: How it Locates itself and Creates Relevance in the Digital Space

The concept of public spaces creates a forum for public debate, for it is the arena for the negotiation of public differences and consensus. The digital space on the other hand suggests that the PSB remit should actually be focusing on content for the broadband world in its effort to build digital relevance. Castells (2009, pp.301) has defined public space as the space of societal, meaningful interaction where ideas and values are formed, conveyed, supported, and resisted, space that ultimately becomes the training ground for action and reaction. Castells concludes by stating that the public space is a contested terrain, however biased towards the interests of the builders and caretakers of this space.

In trying to align South Africa with the national agenda of the time, of building what (then) President Mbeki called the African Renaissance, the SABC took a decision to create what was then called SABC Africa. The channel was meant to provide a narrative that promoted Africa's continental agenda. Similar sentiments are reflected in the SABC's Annual Report (2006, p.9), which reflected the organisation's corporate goals of ensuring that South Africa's story was told accurately, fairly and in a balanced way, whilst reflecting the world, in particular Africa to South Africans. The

report further stated that the SABC had to play a meaningful role in supporting the objectives of the African Renaissance and NEPAD, whose core objectives were to tackle issues such as peace and security, good economic, political and corporate governance, and making the continent an attractive destination for foreign investment (South Africa.info, no date).

In so doing the SABC reasserted its role as an integral part of the African continent with a significant focus on the organisation's on- and off-screen efforts to support President Mbeki's vision. Despite the bold commitments that were made in 2008, SABC Africa folded, creating a gap for commercial entities to seize the now available terrestrial space. This occurred in spite of the advanced plans that were in motion to launch a 24-hour news channel that would feature free-to-air platforms throughout the African Continent (SABC, 2006, pp.24). The (then) SABC's content commissioning was underpinned by an approach aimed at celebrating the African story through the development and enhancement of the broadcasting industry locally and across the continent. Respondent AR02's comment was:

> The use of public in the digital space simply translates to the digital space extending and transporting a consciousness of what seemed to be limited, to what seems to be infinite. However, the critical question remains, what do you then fill this digital space with, where programming content is concerned?

AR02 added that the digital era is relinquishing the analogue broadcasting narrow cast which was once niche, into multi casting where audiences are now able to give their inputs utilising SMS's, Twitter or Facebook, thus allowing for immediate interactive discussions – a situation that PMR01 is however not entirely convinced by. PMR01 was of the view that the said broadcasters are yet to fully utilise what interactive platforms can truly offer.

> The digital space has created a space which is alarming to governments as it disrupts the old, stable and tested ways of doing things and that includes regulation (RR01).

A concern identified by RR01 was that South Africa's government focus has been largely on the technological side of the transition instead of the actual programming

content and that this remains the focal thrust mostly for the public broadcasting value chain.

Historically, public broadcasters had the competitive edge because they single-handedly produced documentaries, soapies, news, and local content, while commercial operators broadcasted movies and various series, remarked BR03. In future public broadcasters will struggle to secure guaranteed audiences because they will be competing with many different kinds of media, on all sorts of different types of technologies with different delivery mechanisms and platforms, said BR04.

BR03 said the BBC has been in the space of online developments and has been successful in exploiting its content by expanding its programme offering into online content platforms. The BBC has further extended its public digital space by creating social television, using what it calls the second screen, which uses devices like the iPod that enable the viewer to access, for example, information about a particular actor whilst watching a programme, said the respondent. The SABC to date has leveraged its broadcast by placing its programming content only on YouTube, which is regarded by the respondent as an ineffectual measure on its own.

In order for the SABC to remain relevant to its technology-savvy audiences, the broadcaster must gear itself up to play in the digital public space, suggested IBR01. It is hoped that the digital migration process will bring along with it opportunities for a multi-channel environment that will, for the first time, allow for the creation of a space for dedicated genre-specific channels added IBR01.

The general consensus that prevailed amongst the respondents interviewed was that the PSB remit is still as relevant in the digital space as it was in the analogue space. The respondents did however caution that the SABC and perhaps other broadcasters, when positioning themselves in the digital space, will render their locus even more complex. This is because they now have to compete with platforms such as YouTube, with audiences downloading content from all over the world and audiences watching content from their laptops or mobile devices, thus making it harder for broadcasters to cater for their audience needs all the time.

4.4. The Democratic Role of Digital Media: PSB and its Contribution to the Strengthening of Democracy

> Democracy is not an event, democracy happens every day and its promotion is not the sole responsibility of the SABC to carry alone. The voice of the SABC is one voice amongst many, hence the rationale behind South Africa's 3-tier broadcasting system aimed towards strengthening the country's democracy. The imperative is for all the broadcasters to mirror what is taking place in society, and the texture of this democracy must be embedded in all these institutions (PMR01).

PSB is a cornerstone of democracy and without democracy, the significance of all other aspects of public service would be compromised. The broadcast media can either promote or hinder democratisation of countries. It can also foster citizen interest in public affairs and encourage them to play a more active and meaningful role in guarding their democracy.

"The risk is that it would seem that the honeymoon of legitimate public broadcasters is waning, and globally we are witnessing many broadcasters shifting away from their public entity status and sliding back to their age-old and comfortable regime of being state broadcasters," lamented AR01.

The independence of the SABC has been in question for a while. The SABC could have done much more to enhance South Africa's democracy, suggested BR02. The institution currently operates like a state broadcaster instead of a public broadcaster, thus undermining the public broadcaster's independence, added BR02. The SABC's current complexion is a complete contrast with its post-democracy glory. The results of a survey conducted in 2009 showed that the organisation ranked second as the most trusted entity in South Africa after the church – a complete contrast with how it is presently perceived added BR 01.

The first 10 years of South Africa's democracy largely focused on the overall shape of content development and production and hence the SABC's initial contributions created a space for News and Current Affairs programming. However, the past ten years of the SABC can be best described as an era of unmitigated disaster, with the gains of the past almost being completely diminished, lamented RR01. "What we are

witnessing now is the crude attempt to control, the SABC interfering with the dynamics of the development of local content and news programmes. The tragedy of it all is the element of production, of bringing new talent and that vision of nascent emerging new PSB powered by a young generation has been dealt a blow,", added RR01.

The SABC carries a public mandate and by extension will therefore have to broadcast some government programmes which are aligned to it, suggested BR01. The treatment and execution of SABC's content hinges a lot on the editorial team, whose conduct is informed and governed by the organisation's Editorial Guidelines. The editorial team should not only be experts in what they do, but should be individuals with integrity. "However, it seems that somewhere down the line the organisation's Editorial Policies have been forgotten by those entrusted to make editorial sign-offs," concluded BR01. It must be noted that at the time of writing this research the SABC Editorial Policies were under review.

"These policies could have assisted in promoting content that supported social cohesion and nation building, but sadly, the country has been plagued with episodes of xenophobic attacks, the creation of a mini Volksstaad in Pretoria and the widening divide between the haves and the have-nots, a redress [sic] from the ideals of Nelson Mandela's South Africa's democratic dream" added BR01. A Volksstaad is a demarcated nucleus area that seeks to form a separate Afrikaner state in a post-apartheid era. BR01 advised that:

> This signals the need for South Africa to create programming that enables the nation to debate issues by being: truthful without being altruistic, authentic without being dogmatic and honest enough to talk about South Africa's failings but also be willing to highlight South Africa's successes.

In support of South Africa's anticipated democracy, even under the apartheid rule pay television M-Net, a bouquet channel belonging to the MultiChoice group, "was initially barred from broadcasting News, the closest the broadcaster got to driving public interest factual programming was through its very popular investigative programme called Carte Blanche", recounted BR03. This was M-Net's closest effort to bringing public value into its programming offering. The programme's investigative

nature and its exposés have since made Carte Blanche a trusted and respected brand.

It is important to carry, on your network, good independent niche news channels whose editorial independence is entrenched, said BR03. The provision of comparative viewing via a selection of news channels afford viewers with the option to choose which channels speak to them, thus giving audiences diverse views and varied angles. This empowers audiences with analytical skills to be able to critique and contrast news reports, and the prevailing views of current events and issues. MultiChoice offers a wide variety of news bouquets such as the BBC, CNN, and CNBC and in South Africa the satellite broadcaster has sealed a deal with commercial terrestrial broadcaster e.tv's eNCA 24-hour News channel. In 2013 other deals were concluded with ANN7 Channel and the SABC's 24 hour News channel, added respondent BR03.

In 1998 e.tv (a free-to-air broadcaster) was issued with a broadcasting license and soon began to compete in the domestic terrestrial space. e.tv was established to perform what it identified at the time as gaps within the terrestrial space, when the SABC ceased to broadcast SABC Africa, whose mission was to narrate the African story. The broadcaster created a vacuum for both free-to-air and commercial players to fill. MultiChoice closed that gap by showcasing on its News platform channels such as Al Jazeera, CNBC Africa and CNN Africa. With the above in mind, AR02 posed a rhetorical question by asking, "Can the SABC reclaim its space and past glory?" The answer was an emphatic yes. However, this can only be achieved if the public broadcaster rethinks its mandate and repositions itself in the digital environment, added the respondent.

South Africa is maturing and as such the SABC is still expected to deliver on its PSB remit in order to strengthen the country's democracy. The broadcaster should strive to preserve an age-old tradition of critical thinkers and be bold to ask the questions that citizens are afraid to ask. The 2006 SABC's "blacklisting saga" of commentators exposed the broadcaster's independence when it chose to bar certain expert guests, who would have pushed forward their independent views in the public interest. This stance laid bare the fact that the SABC opted to ignore the broadcaster's editorial

code and license conditions, said RR01. The prevailing perception is that the SABC is being run from the ANC's Luthuli House headquarters, hence the ongoing interference, the latest example of which is the discontinuation in 2013,of anchor Siki Mgabadeli's "The Big Debate", without any explanation being given. This unpopular decision is alleged to have been sanctioned by the controversial Acting Chief Operating Officer (ACOO), Hlaudi Motsoeneng.

The Big Debate is a hard-hitting current-affairs talk show that travelled the length and breadth of South Africa, holding South Africa's leaders to account, giving a voice to ordinary communities, sometimes being hosted in community town halls. This decision led to a public outcry and was followed by an organised public protest outside the SABC's Auckland Park headquarters, triggered by growing concerns within South Africa's civil society about the suppression of freedom of speech at the SABC (City Press, 13 November 2013). The scrapping of the programme was viewed by many as symptomatic of the SABC's erosion of quality current-affairs programming and unbiased news delivery ahead of South Africa's 2014 general elections.

"For a country to build a strong democracy it needs an informed citizenry that understands how democracy works and how to hold public officials accountable," said AR02. The recent and sporadic protests are symptomatic of a society that is disempowered, that does not utilise the systems that are in place to address their concerns, added the respondent.

Despite the current deficiencies and concerns raised about the state of public broadcasting in South Africa, the respondents hold the common view that the SABC should try to redeem itself by regaining the widespread credibility it once commanded in the past publicly, politically and on the continent. The respondents agreed that the strengthening of South Africa's democracy remains vital, and that prevailing technologies should be utilised to create niche channels like the documentary and history channels to help mobilize the mandate and thus strengthen the country's twenty-year old democracy.

4.5. Public Space in the Digital Space: Benefits of Programming on Demand and the Distribution of Digital Content

> In South Africa the implementation, distribution and consumption by audiences of digital content and exploiting programming on demand content has rather raised more questions than answers. The lack of broadband availability and regulation in non-linear platforms, the skills gap and the cost of retrieving and downloading content are the reasons for the lack of uptake and progress (RR01).

Globally digitisation has presented viewers with opportunities to watch almost any programme at times most convenient to them, making their television consumption pattern a matter of choice rather than fate, said AR01. Audiences' viewing choices are no longer left solely in the hands of broadcasters' schedulers, added AR01.

Enabled by innovative technologies, strides have been made worldwide to force broadcasters to embrace social media. The BBC, for example, has introduced the iPlayer, whilst the SABC on the other hand does not seem to have made many advances where innovation is concerned. Because of its poor broadband capacity, South Africa is yet to yield the real benefits made possible by these technologies, so the potential impact of platforms such as YouTube and Netflix are yet to be realised, said RR01.

Where programming on demand and interactive content is concerned, the SABC is striving to get there, with a long road still to be travelled, admitted BR01. The SABC, it would seem, is taking baby steps in making a transition from its linear programming, and will have to leapfrog not only to Triple Play but to Quad Play. To actualise the above, the broadcaster will most certainly require employees with a particular skills set, hence the call for investment in human capital development, added BR01.

When we look at the progress made by the community television sector that emerged in the era of on-line channels and social media, and was launched at the tail end of the period during which this technological environment came into its own, we see that the channel Cape Town TV has had to turn the situation to its own advantage by participating within this space, remarked BR02. The community

television sector had to quickly adopt and embrace technology wholeheartedly. This accounts for their ability to stream programmes on their website, use social media to facilitate public participation, and introduce video on demand. However, the successful implementation of this segment has been hampered by the lack of broadband availability, complained the respondent. The future strategy for this sector is to provide mobile television and to launch an Internet-based channel to cater for its techno-savvy audiences.

Free-to-air broadcaster e.tv is still in its experimental stage with the roll-out of its programming-on-demand strategy and where the distribution of its digital content is concerned, said BR04. This broadcaster is, however, doing some work to catch up with developments and its programmes are available on their website. On its expansion strategy, on 15 October 2013 e.tv, South Africa's only independent free-to-air commercial television broadcaster, launched four new themed channels on OpenView HD, a satellite offering managed by Platco Digital, its sister company. These channels will go onto the digital terrestrial platform once the digital migration process has been completed, added BR04. These channels are; the eKasi+ Channel (inspirational local content), eAfrica+ channel (African content), eMovie+ channel (movies), and eToonz+ channel (children's programmes). The challenge presented by programming on demand is that this outlet has no guaranteed revenue opportunities, warned BR04. e.tv's sustainability funding model relies heavily on commercial revenues and this innovation can therefore threaten its viability, said the respondent.

Commercial broadcaster MultiChoice already has a social media component to its offering through reality programmes such as Big Brother, Idols and Survivor, to name but a few. Through interactive participation, their audiences are involved and have a say on who gets to stay or who gets voted out from the programme and finally, who becomes the ultimate winner. MultiChoice has a specific platform called DStv Online whose focus is to drive the broadcaster's future into the online environment, said BR03.

In the absence of adequate broadband capacity, MultiChoice has since brought into the market a new decoder called the DStv Explora, whose selling point is a

formidable hard-drive that enables innovative features such as Box-Office and Catch-Up offerings, the store of which has grown incredibly, according to respondent BR03.

Programming on demand and distribution of digital content is a fairly new concept to South Africa and remains one of the new platforms still to be fully explored (AR01 and AR02). Programming on demand makes it possible for audiences to become their own individual programming schedulers. The only challenge is that this type of programme offering is a paid service and in the immediate to long-term future will not benefit the majority of South African audiences. This model is usually taken up by commercial broadcasters as part of their revenue generation stream models, said AR01.

When looking at regulating into the digital future, regulators globally are currently grappling with relevant and legitimate questions which have been posed by broadcasters. ICASA as a regulator is no exception and is facing head-on the disruptive digital shake up, and the unpredictable challenges that have come about because of the Internet, said RR01. The respondent commented that:

> As regulators, we are all confronted with paradoxes and contradictions; the current landscape is not predictable, and as regulators we don't know how the market is going to shift, yet we strive to set minimum standards and try not to chase winners in the digital space.

Web-based content emerging from the diffusion and the expansion of the online public space is another challenge that regulators are faced with.

The concept of programming on demand and the distribution of digital content are still fairly new to South Africa. However, strides are being made by the various broadcasters to enter this digital arena. As a collective all the broadcasters interviewed cited the lack of broadband availability as limiting their capacity to fully exploit the available technologies, thus hindering the audience-user experience from benefiting from programming on demand.

4.6. Innovation: Platform Creation for Interactive Formats

> The Internet has enabled new ways of interacting with audiences through online services. The Internet seems to be driving intelligent devices which is one of the reasons why that 'dumb television monitor' in our living rooms is fast becoming a computer and Connected TVs and Smart TVs are becoming the norm. Smart TVs come with added extras such as motion sensors and voice activation, where users will be able to swipe their television sets the same way they can change pages on a tablet (Bekker, 2012, pp.25).

Today, instead of having one-size-fits-all programmes imposed on audiences, viewers are now able to make their own home-made programmes. The future of digital television and its interactive capabilities in making the all-time favourite pastime a more interactive experience, is now giving the viewers an opportunity to be more involved in the way they seek and select information. Because of connected television devices, content can now be downloaded, shared or accessed using traditional and non-traditional modes of distribution. The future television set will look more like Wii than a TV, says says Bekker.

MultiChoice has been a leader in creating and devising innovative technologies, namely the Drifta and Box Office offering, said BR03. The respondent did concede, however, that the company's innovations have not always been a success. Examples of these challenges include a digital platform that employed a keyboard feature with a range of interactive features and services. This digital platform was a complete flop. The failure forced the company to go back to the drawing board, interrogate what went wrong, and draw lessons from their experiment, said BR03. The company findings were that "sitting in front of a television set with a keyboard was not as easy as sitting with perhaps a tablet and this led to a review of MultiChoice's interactive strategy," added the respondent.

These are some of the lessons that can be shared with the DoC where technology innovation is concerned. For example "…in the space of DTT the government has been talking about and pushing for e-government services, whilst most broadcasters have been warning that the STB in its current form has not made a provision for a return-path. Without a return-path you cannot really engage with the very same STB

as a computer, yes you can push content and information but that is how far you can go, a very limiting option," explained BR03.

Lessons can also be learnt from the SABC, who are doing very well in this regard. The public broadcaster is using M-PEG 5, a middle-ware that will be installed onto their STB so that audiences can engage with interactive programmes such as games, train schedules, etc., added BR03.

MultiChoice has technical expertise on what a STB can do, how STBs work and certainly what purpose they can serve. Their business model has largely been around manufacturing decoders since 1986, writing various submissions to the DoC. They have also sat on all standard bodies in South Africa, sharing the company's expertise in technical matters. However, the company's recommendations have been met with resistance and suspicion (BR03).

> Within the DoC there are a few technocrats with limited broadcasting experience. One of the examples, without undermining the person concerned, is that the DoC's current technical advisor on DTT does not have broadcasting expertise. Yes, the person is an engineer, however an engineer has expertise in telecommunications networks when broadcasting is a completely different field (respondent BR03).

The government has been promising that the STB will give audiences a better picture quality and that this is one of the primary reasons for going into digital broadcasting. The reality is that an STB is not going to give you a better picture on an analogue television set. In fact, an analogue television set cannot process HD, said BR03. Government's initial thinking on STBs was that they were envisaged to be interim devices in a free-to-air market. At the time and perhaps even now, South Africa has a huge population of cathode-tube analogue television set owners which will last for about 10 years, shared BR03. The STB was meant to serve as an interim measure to prolong the lifespan of these cathode-tube television sets and, unless interactivity features are included, the STB will merely be a dumb-box with a loss of opportunities. It is also important to note that some of the television sets currently being used, when sold, came with inbuilt modems.

Previous DoC Ministers sold the aspect and benefits of the STB by citing features that would assist the public, for example, filling in Home Affairs forms and applying on-line for jobs. The facts, however, are that the STB in its current form is not at all suited to provide these services. With the current specifications and without a return path the STB will not be able to provide e-government and interactive services, they will provide a unidirectional service and broadcasting will remain as it was during the analogue era. The only thing that the STB will be able to do in its current form is to air government information in areas such as health, advisory, and public service announcements, said BR03. Real capabilities of STBs may not be known in the immediate future due to the ongoing strife and delays emanating from the Conditional Access (CA) debacle, warned RR01.

When reflecting on the digital migration journey which was first initiated in 1998 with the appointment of the DMWG, "it is really scary that in 2005 the sector knew of the 2015 switch-off deadline that was looming in the horizon and here we are in 2014 and South Africa has still not launched!" exclaimed BR03. Now almost a decade later with all the delays, the digital migration process seems to be replicating the local-loop-unbundling (LLU) debacle, and has become an elusive process that seems as though it is about to unfold but never does, added the respondent.

The one common aspect that remains clear amongst the respondents though is that South Africa cannot afford to be left out in exploiting and creating platforms for interactive formats.

> The advantages of interactivity offering are that they translate into the political space [sic], they too have a role to play in further strengthening democratic participation and conversations. Interactive programming offerings have dispensed the word audience from being a passive receiver of information to being an active participant that can also shape content (AR02).

Interactivity has disrupted the old model of mass broadcasting, it makes 'real' the notion of multiple voices, further promoting and entrenching a free and fair democratic society, said AR02. This method of interaction seeks to promote analytical debate and audiences are dissuaded from participating unless they are

able to think critically, which is what, arguably, many democracies desire.

PMR01, however, had differing views on the optimal use of interactive formats by broadcasters. “South Africa, unfortunately, is limited by its understanding of utilising old technology, the prevailing usage of crawlers on screen by broadcasters is nothing new and can never be defined as interactive,” said the respondent. Currently viewers sms their views and inputs via Twitter or Facebook, but broadcasters do not respond directly to viewer inputs, so there is no real actual interaction taking place and the engagement therefore remains unidirectional, said the respondent.

Interactive forms can perhaps be realised by having a Facebook type of television, where interviews are conducted on face-time and also have multiple participants engaging simultaneously. Most broadcasters are yet to fully realise and seize the real opportunities that have been brought about by interactivity, suggested PMR01. Broadcasters seem to be reluctant to explore the full extent of what interactive technologies can provide. We call it interactivity even when broadcasters cannot respond to viewers’ input in real-time, said PMR01. Similar sentiments were echoed by MPR01 and IBR02.

Where innovation and competition are concerned, Netflix has grown considerably and has forced broadcasters to sit up and take notice. Netflix is in essence competing with broadcasters on very high-end content, especially commercial broadcasters. For example at the moment some of the most successful and current television dramas are sitting on Netflix and are not being driven by big networks. Respondent IBR02 stated:

> This presents future opportunities for content to be driven and created on the on-demand platforms…The model is about building markets and also presents an opportunity for producers to have their content placed on this platform. If public broadcasters are not cautious these on-demand markets will attract both talent and (eye-balls) traffic away from them. Platforms like Netflix are growing faster, are becoming more relevant and are less complicated on their revenue relationships.

Respondent MPR01 noted that:

> South Africa is yet to yield the real benefits of digital technologies and IPTV is not about to be realised due to bandwidth challenges and the lack of the required connection speeds. Until the big-pipes are out there, watching or downloading content will remain but [a] pipe dream"…A lot more can be achieved once the DoC sorts out South Africa's broadband issues.

When addressing the issue of broadband penetration, availability and its effect on the optimal utilisation of the Internet and consumption of Internet Protocol Television (IPTV), PMR01 conceded and said that research tells us that "about 34% of the population has the ability to access broadband. The only prevailing challenge is the speed and price". While admitting that there are shortcomings, the respondent said that we must understand that the state is one of many players. For example, argued PMR01:

> …when concerns are raised about the exorbitant cost of communication, these concerns should be directed at the operators themselves because they are the ones that set these prices. When there are market failures, as government we often find ourselves having to step in to intervene.

Respondent IBR02 suggested that:

> When looking at the actual production value chain, there is no doubt that if independent producers had an alternative platform where they could get their own content broadcasted, as producers they will have an opportunity to create content that can attract as many eye-balls as possible.

This alternative will turn producers into real entrepreneurs who will no longer rely on or be at the mercy of local broadcasters for their survival. This will be a case of, "if broadcasters do not send out Requests for Proposals (RFPs), then as independent producers, we will have alternatives to create our own content and get it shown on alternative mediums," said the respondent.

This alternative will allow producers to start creating their own content, enabling them to start looking for other revenue streams, thus empowering themselves to building stronger business models. Producers will be less prone to the scourges they

are currently subjected to when dealing with local broadcasters. Producers will in future be able to create a healthy ecology in the industry, with audiences benefitting, because competition will provide a varied choice of programming, and this will translate to increased diversity and plurality of voices, added IBR02.

The majority of respondents concluded with advice for the public broadcaster, by suggesting that the SABC remain true to itself, and cognisant of the fact that it now broadcasts to audiences who have an informed view of what these technologies can actually provide. The respondents concurred that unless the broadcaster responds with urgency to the sweeping changes, the SABC will in future struggle to retain its audiences, thus rendering its existence irrelevant. Where interactive forms are concerned, respondents agreed that currently there is no real space for broadcasters to interact with audiences due to the lack of broadband availability.

4.7. The Influences of the Political Economy of Communication: Access, Affordability and The Delivery of the PSB Mandate without Adequate Funding

Public funding is necessary, yet it is never entirely adequate, and the political economy of PSB and most importantly that of the SABC lies in its funding model, said AR02. The 1998 White Paper on Broadcasting tackled the transformation process by considering, among other things, how the SABC mandate should be funded (DoC, 2014, pp. 57). However, by 2015 a solution to the funding of the SABC had still not been found. In line with its policy and regulations, the funding of the SABC's public mandate ought to come from government, license fees, advertising/sponsorship and any other incidental income like the sale of programmes (DoC, 2014, pp.58).

The 1999 Broadcast Act introduced a Charter for Public Broadcasting and made provision for the funding of the public mandate "via license fees, cross-subsidisation of public services by a public commercial wing and government funding" (DoC, 2014, pp.17). The separation of the SABC into public and commercial divisions, as envisaged in the White Paper and the Broadcasting Act, was to protect the public mandate by allowing for cross-subsidisation of the public wing by commercial

services. However, in reality the opposite actually happened where SABC 1 (the public wing) has had to fund SABC 3 (the commercial wing).

> The Draft PSB Bill which was tabled in Parliament in 2008 would have had a huge impact for the SABC's revenue model. Dropping this Bill was a big mistake to be made by (then) Minister Padayachie. The improvements and the fixes that were in that Bill never got to be addressed nor implemented, hence the funding challenges still persist. For example, the aspects that looked at the funding of the SABC were worthy of being an enquiry and a policy debate on their own (RR01).

> A radical rethink and a funding model for the SABC is required in a digital political economy. Commercial broadcasters are pushing to have the SABC funded so that the public broadcaster can free up the commercial revenue it generates from advertising, and redirect it towards their coffers (AR01).

> Since 1994, at every ANC policy conference, proclamations were made that stated that the SABC must be totally funded by government, not 10% or 50% but to be 100% funded so that the broadcaster can be freed from advertising influence and dependence (RR01).

The Green Paper states that despite all the challenges and the suggested interventions and in spite of being asked on numerous occasions, the SABC has not to date published separate accounts for the organisation's various divisions. Similar sentiments were echoed by AR01 and PMR01.

"Traditional broadcasting funding models seem to have remained unchanged and chained to their analogue past in spite of the digital landscape that broadcasters are now operating in," said BR03. Adequate state funding remains one of the biggest constraints in ensuring that there is quality programming content. Without sufficient funding public broadcasters run the risk of not being able to provide diverse programmes, which in turn will undermine democracy and entrench inequalities, added BR03. "Business models to sustain television remain elusive and the dispersal of advertising revenue has hit production budgets at the very time that new platforms are opening up and demanding new content" said IBR02. Hence PSB

requires a secure funding framework and public funding becomes an important aspect of PSB systems.

IBR01 said that government needs to prioritise the funding of the SABC in order to enable the broadcaster to deliver on its mandate. Unless this is done, the SABC may miss the chance to maximise the opportunities presented by new technologies. This therefore means that the SABC's model for the next funding cycle has to look at the revision, re-investment and refocus on how the public broadcaster is funded, said IBR01.

> When looking at the production sector, IBR02 said that "the current independent producer business models are very limiting, and that the creation of content production remains expensive. Currently producers do not have other real alternate mechanisms to get content out to the public except through these collective broadcasters. The critical challenge for the production industry is the lack of additional platforms and lack of broadband availability, added respondent IBR02.

The market in its current form cannot sustain itself. For this reason it requires a complete overhaul of its financing model. The financing mechanisms for creating content cannot exist until the correct frameworks are put in place, said IBR02.

When reviewing the overall total revenue of the advertising spend across media, namely print, radio, television, new media and outdoor advertising, the Green Paper reflects that the ad spend grew by about 35% from 1999 to 2012 (2014, pp.21). The ad-spend on television increased from about R2,8 billion in 1999 to R16,2 billion in 2012. Whilst being cognisant of the changes in advertising spending patterns within television, it must be noted that the SABC in particular had the largest share of total television ad spend. Despite this fact it is true to say that the public broadcaster's market share has since dwindled over a period of time.

Table 10: Audience Share - South Africa's Television Viewership

Broadcaster	No. of Viewers	Market Audience Share Profile %	Respondent Comments (BR04)
SABC 1	27.7 million	78.8% adult audience	Has the largest transmission footprint, but

			channel looking more like e.tv
SABC 2	24.8 million	71% adult audience	Must be freed up to be as innovative as possible
SABC 3	21 million	66.3% adult audience	History not in its favour, currently has no personality
e.tv	23.95 million	68.6% adult audience	Has surpassed SABC 3
DStv	9.9 million	28% adult audience, with a subscription revenue of R15, 2bn	

Source: DoC, 2014, pp.20 & BR04

The table (above) outlines the television broadcasters in South Africa in relation to their market share audience profile. No data were available to reflect the performance of community TV.

"Funds will be needed to realise the objectives of the digital migration process, the reversioning of content from analogue to digital formats, and the creation of digital libraries will require deep pockets in order to be able to actualise the process," said BR01. BR01also observed that another challenge is the optimum usage of the limited funds; there are too many institutions with similar mandates doing similar work with limited resources, e.g. the Media Development and Diversity Agency (MDDA), Broadband Infraco, Universal Service and Access Agency of South Africa (USAASA).

There were, however, conflicting views amongst the respondents on the proposal that some of the institutions be dissolved.

> The thing that is eating into the public purse is that South Africa, even though it is supposed to be operating in a converged environment, is actually still behaving like it operates in a divergent analogue space…There are agencies for everything, the agencies or institutions in question are: USAASA, SABC, MDDA, Sentech, and Broadband Infraco, hence they must be reconfigured and streamlined. The

> realignment of these institutions will not only save the public purse but will allow for efficiencies and operational agility (IBR01).

PMR01 was cautious about the suggestion, but partially agreed that perhaps a merger of institutions such as these agencies, including the National Film and Video Foundation (NFVF), should be considered in order to respond to the converged landscape:

> My take is that not all of these agencies can be collapsed into one entity. However, the decision taken about their future must be evidence based. The suggested merger will have huge ramifications and will have to address change management functions," added PMR01.

According to a political economic analysis, reducing government involvement would lead to increased influence over content by the private sector and, presumably, declining relevance for PSB. Respondent MPR01 suggested that South Africa should in fact be striving towards an environment where there is less government involvement and all these entities should be sold off to dynamic enterprises,. The respondent warned that "most mergers usually don't work due to the clash of cultures, turf wars and the fact that they are a far more cumbersome process to get right and implement (MPR01)."

In order to make the rand stretch further, BR01 suggested that the community television sector should possibly become the localised version of the SABC and be treated as a community satellite of the SABC. At present the community television sector is being paid to be part of the MultiChoice bouquet. This model has somehow corrupted the intent and principles of community broadcasting, added the respondent. Because the sector now sits on a universal platform, it tends to carry content not directly informed by localised news, thus compromising their mandate, added BR01, a sentiment that was echoed by BR02.

4.7.1. Funding South Africa's Digital Migration

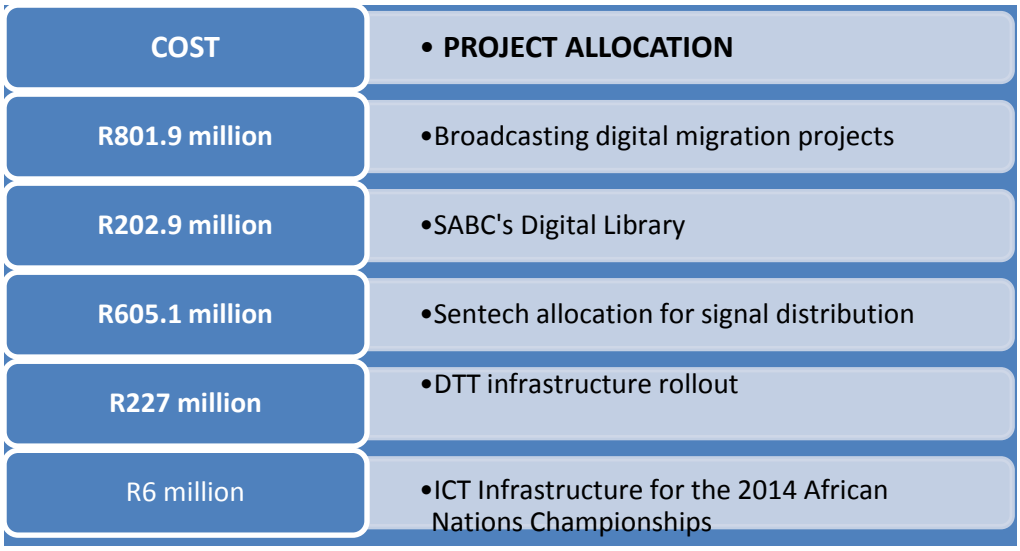
> The costs for the transition to digital broadcasting are substantial and these will be incurred at the early phases of digital switch over, particularly during DTT

rollout and while transmissions are simulcast (Plum, 2014, p.1).

When determining the cost of digital migration, the DoC has costed their side of the value chain and operators are expected to determine their plans and cost them accordingly, said PMR01. Respondent PMR01 argued that the DoC cannot determine operator costs as its mandate is to ensure that once the digital migration process is completed, all the citizens of this country remain connected,.

The DoC has budgeted R2.5 billion for the project, thus ensuring that indigent groups are catered for, said the respondent. Below is the cost outline:

Figure 6: DoC's Costs of Digital Migration



Source: DoC, Strategic Plan 2013-2018 and Annual Performance Plan 2013-2014, pp. 30

The DoC's initial articulations were that the department had forecasted that the retail price for an STB would be about R700.00. However, being mindful of South Africa's demographics and citizens' socio-economic status, the DoC had to put in place an incentive scheme known as the Scheme for Ownership Support (SOS) for STBs. The incentive is meant to subsidise the 5 million poorest households, 3 million of whom are on government social grants, and a further 2 million households earning less than R3 200.00 a month (Mochiko, 2008, p.1).

The SABC unveiled its implementation plans and articulated the estimated costs that will be required to help the public broadcaster migrate. It was at the SABC's PBS and PCS Television and Radio Programming Summit that Richard Waghorn (Waghorn, 2010) stated that in preparation for digital migration, the SABC's enterprise-wide backbone needed a complete overhaul. Waghorn said that the system will comprise the following elements and will be costed as outlined in Figure 7 below.

Figure 7: SABC's Enterprise-wide Backbone: Costs of Equipment

COST	• EQUIPMENT
R58 million	•New single digital production and play-out system
R280 million	•Archive and content management system – digital library (currently thousands of hours of SABC's content are still on Beta-cam tapes
R60 million	•Storage Area Network
Not Costed	•IP content management server, at the time of writing were still to be costed

Source: Author, 2010

To enable the SABC to exploit the prevailing new digital market opportunities resulting from technology innovation, Waghorn (2010) said that the organisation will need the following systems, which will cost the SABC a further R150 million:

- Scheduling and Metadata Management System
- Production System: TV-BMS

4.7.2. Funding the SABC into its Digital Future

> Currently it costs the SABC just above R5 billion to run its platforms and I think we should stop dreaming that government will come on board to fund the organisation. Investment in SABC channels ought to be trebled in order to turn the broadcaster around (BR01).

We should devise innovative ways to generate revenue streams outside advertising, for example by partnering with philanthropic organisations, something that the SABC is already doing though on a small scale, said BR01. Alternative funding initiatives have been actualised through the SABC's Business Development division, and strategic content production partnerships were forged with institutions such as Johns Hopkins, Sanlam, Cadre, Old Mutual and the Kellogg Foundation. These partnerships have made it possible to produce programmes such as InterSEXions, Soul City, Yizo Yizo and Takalani Sesame, said BR01.

The broadcasting sector is moving into tough terrain where policy and regulations are concerned, both economically and politically. Old-school type funding models will die, hence the call for resilience and flexibility where funding models are concerned, suggested BR02. The community television sector has had to learn to be survivalist; even though the advertising pot is diminishing, the sector generates its revenue from close to 10-12 resources, Table 11 (below) bears out this view.

Table 11: Cape Town Community TV Sector Revenue Reservoir

• Advertising • Fundraising • Crowd sourcing (kick- starter support)

- Membership fees, R1K per year to view
- Grants and donations, e.g. Open Society Foundation (OSF)
- MDDA and MICT SETA assisting with the training fund
- CSI for educational programmes
- Advertiser Funded Programming

Source: Broadcast Respondent 02

4.7.3. Threat to Future Funding Models

> Though it does not have the rights to broadcast in South Africa, Netflix and other OTT platforms can be perceived as the next future threat to overall broadcasting funding models (BR03).

OTT services imply that future programming content will not be watched on a traditional television screen. Other, larger groups operating in the OTT space are: Google, Amazon and YouTube. At present, telecommunications companies are also gravitating towards, and entrenching themselves in the content space. For instance, even though BBC saw SKY as a competitor, the reality is that British Telecoms has instead become their number-one threat, by employing their broadband infrastructure to deliver content and rolling out their terrestrial online services.

The current era calls for the remodeling of business models for the digital age and e.tv has no choice but to ensure that every business plan of theirs works, that the company is cost effective in order to realise their return on investment (ROI), said BR04. The SABC faces a tough time ahead because it is expected to be a public broadcaster, while at the same time it is required to fund itself commercially. Funding of the public broadcaster should not be an SABC problem, and it would seem that there is no political will on the part of the state to fund the SABC, added BR04. This is the reason why all the ANC policy conferences' proclamations have not yielded any results in resolving the SABC's funding challenges, observed the respondent.

The logic for creating funding for the SABC led to the corporatisation of the institution, which saw the former GCEO Peter Matlare introducing the Public Broadcasting Services (PBS) and Public Commercial Services (PCS) portfolios within the SABC. The PCS portfolio led to the commercialisation of public stations

and this, unfortunately, forced social content to take a back seat, thus allowing the broadcaster to be captured by the advertisers. It was under Matlare's watch that the SABC, for the first time, boasted about the super-nominal profits it had made, said AR02. "I think it is short-sighted not to provide adequate funding to enable the SABC to fulfill its public mandate," concluded AR02.

4.7.4. Funding the SABC Post the Migration

The SABC must respond to the changes it is currently presented with. Respondent PMR01 asserted that:

> It is interesting to note that outside the license fee, Google is funded using the same model as that of the SABC. The difference between the two entities is that Google understands its audience. As an entity, if you remain relevant you will not be confronted with challenges about where your source of income comes from, money will simply come your way simply because you have an attractive proposition.
>
> …the SABC is yet to present to the DoC its business case, that is linked to its strategic outputs. How do you fund an entity that is not able to provide you with a true picture of its real operational costs? Every business should be able to cost its operations and reflect its input costs against its profit margins. However, the SABC is yet to state clearly how much funding it requires. For example, let us say funding is made available for content that is directly linked to the mandate, the SABC is yet to provide evidence on how much it costs to produce educational programming… entertainment is part of the mandate, but tell me, who would want to fund a programme like "Jika Majika"? I doubt if there would be funders lining up to pay for this type of programme.

Jika Majika is a dance entertainment programme, which showcases the latest dance trends. The respondent argued that the programme does not reflect South Africa's various and varying indigenous dances from the different traditions that make up South Africa's rainbow nation.

> As policy makers, we are here to ensure that the PSB remit is retained. However, there has got to be a business case in place. I am in favour of funding PSB and as government we understand our responsibility, that where there are market failures, we have to step in to address those failures and not abdicate our role, added

PMR01.

Advancing a contrary view, MPR01 said,

> I am not entirely convinced if government needs to fund the SABC, especially when SABC 1 and SABC 2 can survive on advertising. Public broadcasting can survive, if the content is compelling and engaging. Programmes such as Soul City and InterSEXion which are research bound with a strong bias towards developmental communications are such perfect examples…These programmes are produced and funded independently of the SABC, and are licensed by the public broadcaster. My take is that the SABC has the money. What is crippling the broadcaster is its huge wage bill, the broadcaster is sucking the money instead of investing it on quality programme production.

4.7.5. SABC's Governance and Management Dysfunction

One respondent (MPR01) argued that the SABC is seen as a job creation factory where people without skills are given tenure. This assertion was also reflected in the Public Protector's Report titled "When Governance and Ethics Fail". The Public Protector unearthed the fact that the SABC's ACOO Motsoeneng has cost the SABC R29 million in unauthorised salary increases, said the respondent. When contrasting the SABC with Malawi's public broadcaster, who relies on the European Union (EU) to fund its operations, IBR02's view was that the SABC challenges were not monetary, but rather about how the allocated budget was spent and whether or not it was accounted for.

The Price Waterhouse Coopers (PwC) Skills Audit Report, presented in Parliament on 4 February 2014 and described by MPs as reflecting a dire situation, affirms this view. The PWC Report revealed that 60% of decision makers at the SABC actually should not be occupying the positions they currently fill. The current broadcasting picture calls for a complete overhaul and upskilling of its personnel, said MPR01. Similar sentiments were shared by BR01 during the research interview prior to the actual release of the Audit Report. The question you then pose is what do you then do with all these people, questioned BR01.

IBR01 suggested that the SABC's failures were at a number of levels, namely,

funding, inappropriate skills sets and lack of cohesion between the Board and its executive. Going forward, in its next cycle, the SABC must look at its cost containment and reexamine its operating model and structure, added the respondent.

Table 12 (below) depicts the leadership turnover at the SABC from Board level to the Group Executives during the period 2004 – 2014.

Table 12: The South African Broadcasting Corporation (SABC): Leadership Timeline Changes (2004-2014)

Chairpersons of the SABC Board	Group Chief Executive Officer (GCEO)	Chief Operating Officer (COO)	Chief Financial Officer (CFO)	Group Executive (GE) News & Current Affairs
Mr. Eddie Funde (2004-2008)	Adv. Dali Mpofu Aug 2005-2008	Mr. Solly Mokoetle (2001-2006)	Mr. Robin Nicholson (2009-2010 October)	Dr. Snuki Zikalala (April 2004-May2008)
Khanyi Mkhonza (December 2008-July 2009)	Mr. Gab Mampone (Acting) May 2008-Dec 2009	Ms. Charlotte Mampane (Acting: 2006-2010)	Mr. Rob Nicholson (2009-2010 October)	Mr. Amrit Manga (Acting: May 2008-May 2010
Irene Charnley (Interim Board: 2009)	Mr. Solly Mokoetle January-September	Ms. Charlotte Mampane	Mr. Rob Nicholson (2009-	Mr. Phil Molefe (June 2010-July

	2010	(Acting: 2006-2010)	2010 October)	2011), then appointed as Acting GCEO
Dr. Ben Ngubane (2010-July 2013)	Mr. Rob Nicholson (Acting) Sept 2010-2011	Mr. Hlaudi Motsoeneng (Acting: 2012-February 2013)	Mr. Robin Nicholson (2009-2010 October)	Mr. Mike Siluma (Acting: July 2011-March 2012)
Ms. Zandile Tshabalala (Interim Board: July-December 2013	Mr. Phil Molefe (Acting) July-Dec 2010	Mr. Mike Siluma (February-March 2013)	Ms. Gugu Duda (February 2012, currently on suspension since September 2012)	Mr. Jimi Mathews (Acting: April 2012-2014
Ms. Zandile Tshabalala 2014-current	Ms. Lulama Mokhobo January 2011-February 2014	Mr. Hlaudi Motsoeneng (Acting: 2013-current)	Mr. Tian Olivier (Acting) 2012	Jimi Mathews 2012-current), official appointment

Source: Author (2014)

The timeline (above) depicts a public entity that has been riddled with leadership instabilities from Board to Group Executive (GE) level. The other critical factor is that, the SABC has been operating without a permanent GE: News & Current Affairs since the suspension of its GE Phil Molefe in 2012.

Table 13: SABC Group Executive Timeline Changes (2004-2014)

SABC Board and Group Executives	Number of Times Leadership Changed
Board	x five (5) times
GCEOs	x six (6) times
COOs	x four (4) times
CFOs	x three (3) times
News and Current Affairs	x five (5) times

Source: Author, 2014

The purpose of the timelines (above) is to foreground SABC's leadership turnover from 2004 to 2014. Some of the appointees listed above include acting positions. The SABC is the only broadcasting entity mandated to deliver the PSB mandate and its leadership

stability becomes critical in determining whether it can fully discharge the organisation's policy objectives.

The fundamental problem at the moment is that most of the existing frameworks are structured so that the funding flows through the public broadcaster, said IBR02. This funding anomaly could have been addressed by the then proposed PSB Fund as was reflected in the now aborted Draft PSB Bill which called for the funding of the public mandate. With the PSB Fund, anyone with a watertight business case could have accessed funding, provided that they were creating relevant PSB content. In addition, the current flows of funding are regulated and unworkable, where the public broadcaster manages all the financial flows for the industry. This impractical model was exposed in 2008 when the SABC went bankrupt, and was no longer in a position to commission new work able to pay producers outstanding amounts that were due to them, said IBR02. The SABC's bankruptcy crippled the industry, leaving a number of producers without work, and forced many production houses to close down, added IBR02. IBR02 explained that, the independent production industry is structured in such a way that as a sector, they constantly go back to all the broadcasters to get their next "hand-out" in order to be able to produce their future productions.

Even if the sector had ten other free-to-air channels, this would not translate to content being readily available. Independent producers will still require financial resources to independently create their own content, without any financial injection received from broadcast operators, and this might prove to be a challenge. The review of the financial models should also factor in IP rights issues which are currently under contestation by independent producers, added IBR02.

Another challenge is that the SABC is trying to hold on to all its programming content resources because it sees them as a potential revenue stream. The broadcaster does not however have the manpower or the tools to optimally utilise archived content. Unlike the BBC which pays very well for licensing content, the same cannot be said about the SABC, so it would seem that going the licensing route is still not a viable option for local producers, said IBR02. Often content sits locked in the SABC archives and the economic potential and flows remain trapped because the current system is a caved one, operated by broadcasters, added IBR02.

The common thread that seems to prevail amongst the respondents interviewed and the documents analysed, where access and affordability are concerned, is that, for as long as the SABC's funding challenges are not addressed, it will be impossible for the public broadcaster to implement and deliver on the set PSB mandate. The broadcaster has been lambasted for its negligence where its cost-containment is concerned.

In conclusion, as suggested by some of the respondents, the researcher is of the opinion that the SABC is in a position to secure funding but will only be able to do so once it broadcasts relevant and compelling content. One of the ways that would enable the SABC to generate funding would be through the commercial exploitation of its content that currently sits locked in the broadcaster's archives. IBR02 suggested that both the producers and the SABC could possibly maximise and exploit commercially the archived content, but that for the producers, this can only be realised once the IP rights issues are finally resolved. The next chapter (Chapter 5) will be analysing the data that was outlined in this chapter.

CHAPTER 5
ANALYSIS OF THE RESEARCH FINDINGS

5.1. Introduction

This chapter provides an analysis of the findings presented in Chapter 4. The purpose of this study was to analyse the contemporary relevance of the PSB mandate and also to investigate the role of public policy in fostering PSB in the digital era in South Africa. The research tried to make sense of the respondents' "perceptions, perspectives, and understanding" of the research topic (Leedy & Ormond, 2005, pp. 139).

The research sub-questions were structured to mirror the four forms of relevance around which the conceptual and the McConnell frameworks were arranged, as

referenced in Chapter 2 (Figure 4 and Table 6). The sub-questions followed the thematic approach and each of the questions was tailor-made for the respondents, based on their area of expertise, thus enriching the body of the work. The data were then analysed in terms of the themes from the analysis framework, which follows the same structure as the research sub-questions and the interview protocol.

The findings of this study were used to answer the research questions detailed in Chapter 1. The findings are presented in the following sections, under two (2) main themes: the relevance of the PSB mandate during the turbulent transition, and policy issues and the McConnell Framework.

5.2. The Relevance of PSB during the Turbulent Transition

5.2.1. Public Interest Approach

The literature revealed that there is a school of thought that asserts that public broadcasters no longer have relevance because their mandate is also being offered by commercial entities. BR03's question was, "Does the SABC in its current form still have relevance?" The documents analysed and the majority of the respondents confirmed that the PSB mandate and the public interest rationale do still have relevance in this rapidly evolving digital TV broadcasting media environment, but that its implementation is in question. Also, that the mandate remains valid even in the digital era and should be defended in the interests of citizen empowerment.

It was acknowledged that commercial broadcasters in South Africa have stepped in and are carrying the mandate to a certain extent. In spite of their intervention, the views expressed by the majority of respondents emphasised that the PSB mission must be defended at all costs in order to protect the public interest. The SABC must contribute to and inform robust engagement by entrenching a consciousness that will build an informed citizenry. In spite of the current deficiencies and concerns about the state of public broadcasting in South Africa, there is a general view and consensus by respondents that the SABC should try and redeem itself by regaining the kind of credibility it once commanded – publicly, politically, and across the continent.

As observed by the respondents, there was general agreement that the public

interest mandate was not being implemented as it should, or monitored appropriately. There was also a concern that the SABC was experiencing audience decline because the public broadcaster no longer provided content that has relevance for, and resonates with its viewers. The SABC, an entity entrusted to fully discharge the PSB mandate, was reminded of its responsibility and was further advised to act in the public interest and not in the interest of the government. The 2006 “blacklisting saga” (Inside the SABC Blacklist Report, 2006) and the 2013 withdrawal of the “The Big Debate” (http://www.news24.com-The Big Debate moves to eNCA), a hard-hitting current-affairs programme, were amongst some of the examples that were cited by respondents, where the SABC failed to uphold its editorial independence and discharge its PSB mandate in the public interest.

The findings further revealed that the SABC’s Editorial Policies have been somewhat forgotten by those entrusted to make editorial sign-offs, and this has deprived South African citizens of access to content that is relevant, altruistic and authentic. Hence the period between 2002 and 2012 was described by AR01 as “a period of meltdown within the SABC; a meltdown in governance, the banning of commentators, SABC Board and Group Executive’s high staff turnover. In fact, the organisation was more often the subject of news reports than the reporter of the news, according to respondent AR01. These incidents and developments have led to a weak PSB with collateral damage, asserted the respondent. In order to restore its public mandate a call was made that the SABC’s governance framework be strengthened.

In spite of the concerns foregrounded, the findings revealed that in South Africa the most popular programmes are those that air locally, produced and broadcasted by the SABC. Perhaps the real reason why the SABC’s local content is the most consumed media in South Africa is because the majority of South African citizens come from disadvantaged backgrounds and cannot afford to pay for subscription television channels. Audiences are therefore left with no choice but to gravitate to SABC channels.

Repositioning the PSB mandate through Content Development

The importance of any public broadcaster is its relevance with regards to its

programme offering. Audiences watch the SABC for content and information that is relevant to their quality of life. Contrary to the needs of its consumers, as suggested by the respondents and documents analysed, the SABC is on high rotation of repeats, which means that the content and information is not current and therefore does not stimulate current debate and the articulation of public views. Because of this vacuum the SABC is viewed as failing to promote public interest aspirations and wellbeing.

There are also claims that the current state of affairs in the SABC is pushing audiences with deep pockets towards commercial broadcasters. With the advent of the multi-channel environment and the prevalence of social media platforms, there is a risk that these audiences could be lost forever, thus placing the SABC as a vehicle for the public interest, under severe scrutiny.

The respondents, without exception, have called for a PSB relevance survival strategy that is mindful of its audience needs. There was consensus amongst respondents that the current status quo in the SABC is a matter for grave concern. In the absence of relevant programmes the SABC will struggle to attract funding from external sources and will continue to place a burden on the fiscus.

The findings suggest that commercial broadcasters have gained a competitive advantage over the SABC due to the public broadcaster's poor content delivery. To reverse this, the SABC, with the support of the DoC, should formulate strategies that can make the PSB mandate indispensable. Going into the digital future and due to audience decline, the SABC face the risk of losing its relevance completely and thus its public interest value.

In spite of the SABC's being lambasted for its constant rotation of re-runs, the public broadcaster reported in its 2013/2014 annual report that it has delivered and complied with its local television content quotas. However, the public and various stakeholders are of a different view, as stated in the Green Paper (2014, pp. 58). Notably, the annual report claims are yet to be validated by ICASA, who do not seem to have adequate monitoring systems in place. The fact that limited new content has been commissioned points to a possible contravention by the SABC of meeting the local content quotas imposed by the regulator. Another question that was asked is:

When last did South African audiences get relevant content from the public broadcaster, which was also on par with the programming they received between the period of 1994 and 2004?

Commercial broadcasters, it seems, have since risen to the challenge by making the SABC seem irrelevant, because they too are offering content that was once solely provided by the public broadcaster. A call has been made for the SABC to redeem itself, suggesting that the broadcaster should strive to differentiate itself from other broadcasters. A case in point is that in South Africa soapies are currently being broadcasted by the SABC, e.tv and MultiChoice. There is, however, no clear distinction or differentiation in the product offering by any of the players involved, be they public or commercial.

In the past the SABC used to broadcast titles with great popular appeal, such as the weekly 24-minute "50/50", a niche environmental programme. At present, MultiChoice is offering a standalone bouquet called Discovery Channel, which broadcasts environmental content 24/7, by contrast with the SABC's "50/50", which was necessarily limited in scope and airtime. In the past the SABC was seen as a strong player in public broadcasting, but this no longer holds; thus it has lost the position it once commanded. Though the content offered by MultiChoice seems to be appealing, it can only be viewed by a select few because the majority of South Africans cannot afford to subscribe to their service.

A vacuum was further created by the shutdown of SABC Africa Channel's operations which has since been occupied by commercial platforms who sit on the MultiChoice bouquet, namely CNBC Africa, Al Jazeera, and CNNA. Since then audiences have been denied the credible voice that was once commanded by the SABC Africa Channel. In 2013 SABC's 24-hour News Channel was launched and was also carried on the MultiChoice bouquet of channels, but it would seem that the new channel does not carry the same ethos of promoting Africa's continental agenda.

What is currently being witnessed is that during the process of digital evolution some values have acquired new meaning. For instance, the meaning of universality in the digital era will be different from the meaning of universality in the analogue era. The respondents' advice to the DoC was to best view PSB and convergence in the digital

era as a form of continuity and that the PSB values should be more anchored during the transition phase.

5.2.2. Public Space as a Digital Space Phenomenon

On the topic of how the public space has located itself in the digital space, the findings reveal that the transition of the PSB mandate to digital platforms is possible, and that this will enhance the PSB remit in the digital era. Digital platforms can be utilised to strengthen South Africa's democracy by exporting content to all available platforms, thereby transforming what seemed to be limited platforms, into limitless ones. This is the concept of the old adapting to the new, "from the box into digital spaces" such as Facebook, YouTube, Twitter, and other social networks.

In spite of the prevailing opportunities, the digital space, it would seem, has created a phenomenon which is alarming to governments, as it disrupts old ways of doing things. New methods and processes, driven by the digital imperative, will have an impact on policy and regulations, and adversely affect how PSB policies are presently formulated and regulations enforced. Nevertheless, some of the respondents believed that the disruption should not cause alarm since the evolution of technology is nothing new. They have, however, challenged the DoC to adapt to, and create relevance within this digital era, and ensure that policies create an enabling environment for regulation.

More channels are presenting audiences with more choice, disrupting viewing patterns. Broadcasters will in future no longer have the stranglehold on audiences that they once commanded. The findings suggest that audience viewer patterns are migrating from the known family viewing generation to a digital native generation. Time shifted television viewing patterns are completely changing audience viewing behaviour. The digital future therefore calls for content with a cross-generational appeal.

Furthermore, the research confirms that the digital era presents a perfect opportunity for the public broadcaster to repurpose and reorganise itself. In order for it to remain relevant to technology-savvy audiences, the SABC must gear itself up to play in the digital public space, suggested IBR01. The digital migration process, it is hoped, will

bring along with it opportunities for developing a multi-channel environment which will allow for the creation of a space for dedicated channels. However, it must be noted that a multi-channel environment becomes meaningless unless there is quality content on screen, and guaranteed funding is secured to commission virgin content.

In order to reclaim its past historical glory of being a trusted entity, the SABC will have to commission relevant content that appeals to audiences, more particularly to younger audiences. This is a strategy of capturing and retaining audiences while they are young, or else, stand to lose them completely to the digital wonderland.

5.2.2.1. Digital Content and Programming on Demand

In an examination of the benefits of programming on demand and the distribution of digital content, the findings revealed that there aren't as yet significant benefits that these offerings have brought to the PSB mandate. The mismatch between technology and infrastructure is cited as one of the reasons for the lack of progress. Programming on demand and the distribution of digital content has, however, brought some developments from in the service area.

MultiChoice is beginning to see benefits emanating from programming on demand and the distribution of digital content. The broadcaster has launched an on-line interactive platform called DStv Online, whose core focus is to drive audiences into the online environment. However, broadband constraints have hindered the seamless implementation of the broadcaster's strategy, and have almost made new options of distributing content over Internet protocols impossible. To mitigate this constraint, MultiChoice, a company well known for investing in research, development and innovation, has since introduced a decoder called the DStv Explora. The advantage of this decoder is that the device has a big hard drive, with a bigger storage capacity which allows for the recording of vast amounts of content.

In spite of some of the challenges that have been experienced by broadcasters, the academic respondents were in agreement that efforts which have been made by the broadcasters to date where programming on demand and the distribution of digital content is concerned, should be commended. This is in light of the fact that this mode of content distribution is still a fairly new concept in South Africa.

On this score the public broadcaster acceded that only now has it begun to respond to time shifted viewing programming. “The SABC is striving to get there. However, there is still a long road,” admitted BR01. The SABC, it seems, is taking baby steps in making the transition from its old traditional linear programming, and has to leap-frog not only to Triple Play but to Quad Play. To actualise innovation within the digital space, the SABC will require a particular skill set in employees and must therefore invest in human capital development, added the respondent.

This follows the findings presented in the PwC skills audit report, which revealed that 60% of the SABC’s executive and senior managers did not meet the minimum strategic thinking skills for executives, 56 % were not able to demonstrate adequate levels in problem solving and making decisions, 15% demonstrated only marginal competence in strategic thinking, and 35% of the group did not consider the financial information provided to them as a skill set test during the audit (Maunder, 2014, p.9).

These results paint a bleak picture for the future of the SABC’s ability to deliver the much anticipated relevant digital and online content in the foreseeable future. This means that the SABC will need to restructure, reorganise and reengineer itself on the technology front as well as the human capital front, and this calls for a transformation of organisational culture and visionary leadership.

Most respondents were mindful of some of the challenges confronting the DoC, ICASA and all the television broadcasters where programming on demand and the distribution of digital content is concerned. All the affected parties, it would seem, remain committed to see South Africa thrive where technological innovation is concerned and are keen to contribute meaningfully to the knowledge based digital economy.

5.2.2.2. The Role of innovation in Creating Interactive Formats

Audience participation and interaction has become a key driver in digital broadcasting. Broadcasters are now operating in a conversation prism which has an array of communication applications such as Facebook, YouTube, Twitter, blogs, etc. Broadcasters are reminded that broadcasting is about audience consumption and network societies that are currently confronted with abundance with regard to the sources of their content, what has been termed binge content consumption by

audiences. The findings have revealed though that the core tenets of the PSB mandate are viable and can be transported into the innovative and interactive digital space by broadcasting relevant programming.

The findings further revealed that the retention of audiences by broadcasters in the digital era will prove to be a challenge, resulting in audience fragmentation. Broadcasters will now have to compete with different kinds of media on different types of technologies and will have to adapt to emerging communication technologies. Today's reality is that audiences spend most of their time in front of a screen, be it a computer, smartphone, tablet or television, but they may not necessarily be watching television programmes. They may be but using the screen for other pursuits, like surfing the Internet. Audiences utilise the same screens to access a variety of services in order to engage in different kinds of activity, for example, read e-books, conduct research, read on-line articles or even do online banking. This audience behaviour pattern implies that broadcasters must shift from being the disrupted, embrace digital technologies and move towards mastering the digital domain.

When we consider the milestones undertaken by broadcasters to date, programming on demand and the distribution of digital content, the findings indicate that the broadcasters are aware of the available innovative applications, but that they seem to be at differing stages of their use. South Africa, compared to the United Kingdom's BBC, is lagging behind and is yet to yield the real benefits of the services brought about by innovative technologies. This is chiefly due to its poor broadband capacity.

The SABC does admit that it has not taken optimal steps to advance and gravitate towards the new mode of content distribution. By contrast, the community television sector seems to have outrun the SABC in their efforts to utilise the new modes of content distribution. This they have done through online streaming and by introducing VoD services. Despite their efforts, the successful implementation of these services has been constrained by the lack of broadband availability. Free-to-air broadcaster e.tv revealed that whilst efforts were being made to fully embrace programming on demand and the distribution of digital content, this particular innovation poses a threat to them as a commercial entity since it does not guarantee

commercial revenues and may threaten their survival.

The research findings further show that interactivity has most certainly disrupted the old model of mass broadcasting. It has created a platform for multiple voices, and is promoting analytical debates, thus encouraging critical engagement amongst participants. Interactive platforms have created a space for audiences to be more involved in these experiences than before. The findings reveal that innovation in the interactive sphere has necessarily transformed the television set into an intelligent device that is fast becoming like a computer; smart television sets are becoming the norm. It seems that the Internet has enabled and made provision for non-linear programming and the distribution of digital content.

MultiChoice is trying to stay ahead of the curve by creating relevance for the company, but it has in the past experienced some failures, admitted BR03. The company was able to learn from its misfortunes and later introduced innovative products and services such as the Drifta and Box-Office. On the innovation front, the SABC has also been commended for developing M-PEG 5, an innovative technology. This is middleware that they say will be included in their STB; it will enable interactivity with, for example, games, train schedules and other services.

When the public broadcaster and perhaps other broadcasters locate themselves within the digital space, their position becomes even more complex because they now have to compete with OTT platforms like YouTube. Broadcasters now have to contend with audiences who are downloading content from all over the world, audiences who are watching content from their laptops or mobile phones. The challenge for many broadcasters here is reaching their audiences wherever they, are all the time. It will even be much harder for public broadcasters who are lagging behind with technological advances, and are less flexible than they might be because of the regulatory license conditions imposed on them. But this does not mean that their remit becomes less relevant.

The findings prove that when it comes to innovation, some broadcast operators have invested in research and development, and have been able to develop interactive technologies. It is believed that, used effectively, these interactive offerings can be transported into the online political space and can play a role in strengthening

democratic participation and conversations amongst citizens. Interactive formats have enabled a shift from a unidirectional, to a multidirectional form of engagement, enabling audiences to move from being passive receivers of information to becoming active participants who contribute meaningfully towards shaping content, utilising platforms such as YouTube or Facebook.

Nonetheless, the DoC was of the view that broadcasters are yet to fully seize the real opportunities which have been brought about by interactive offerings. The DoC suggested that innovation calls for revolutionary interactive services, “which perhaps can be realised by having a Facebook-type of television, where interviews are conducted on face-time and also have multi-fold of participants engaging”, recommended PMR01. The absence of a direct and immediate response to audiences by broadcasters does not translate to actual engagement, said the respondent. Interactivity can only be claimed as such once broadcasters are able to respond to audience input in real-time instead of their current use of screen-crawlers, added PMR01.

Some of the suggested interventions, as pointed out by the DoC, are not likely to be realised without clear policies, broadband availability and the reduction of communication costs, in order to actualise the Facebook-type television as suggested by PMR01. Addressing and resolving the policy vacuum challenges will ensure that citizens have universal access to the available digital technologies and platforms.

Innovative and interactivity offerings have also had unintended consequences emanating from the on-line digital space, in that they have allowed for competition to creep in. The surfacing of OTT services such as Netflix, YouTube and Amazon has forced most broadcasters to sit up and take notice, and to rethink their strategies. These platforms are competing with broadcasters on the very high end of content and this may threaten the relevance and survival of traditional broadcasters as we know them. Competition, the proliferation of viewing platforms and new content distribution platforms in the broadcasting landscape are increasingly fragmenting audiences. Telecommunications companies are also making their presence felt by throwing their hats into the broadcasting ring. These developments have been

welcomed by some of the respondents who believe that competition will create a healthy ecology within the broadcasting sector, make provision for alternative diverse content, and promote the plurality of voices, thus benefitting audiences.

Commercial operators seem to be ahead of most public broadcasters because of their innovative edge and willingness to test new ground. Currently pay television operators seem to be experimenting with PSB content. However, there is no guarantee that in the future they will still carry the mandate. In spite of these developments, the findings suggest that the future of the PSB remit cannot be left solely in the hands of commercial broadcasters, because delivery of a public mandate is not core business for them.

On 29 January 2014, as a researcher I observed three events of national interest unfold almost simultaneously. I heard on Radio 702, a commercial radio station, the presenter of a midday show, when signing off, say to the listeners, “Let’s take our discussion to Google Hang Out.” By utilising converged technologies available to them, Radio 702 was able to take the discussions online and continue discussions with their audiences long after the radio broadcast programme had ended.

The very same afternoon MultiChoice announced that it was going to add Channel Plus to one of its bouquets, to broadcast live the murder trial of Oscar Pistorius. The trial was a public interest story which ordinarily would have been carried by the SABC, a public broadcaster.

In contrast to the events which were unfolding on that day, the SABC was managing one of its many crises and announced the resignation of its GCEO Mokhobo. Mokhobo’s resignation was GCEO resignation number six since 2008. These events reinforce the view that entities with focused leadership and stability display their accomplishments by ensuring that they deliver relevant and compelling programming content that appeals to their audiences. In reflecting on these events, one can conclude that whilst the SABC was grappling with its ongoing challenges, commercial broadcasters seized the moment and displayed their mastery by broadcasting key events and also exploiting the use of innovative technologies.

Another example where a commercial entity seems to be taking the lead in carrying

the mandate is MultiChoice's ability to offer a standalone Parliamentary Channel in one of its bouquets. The channel broadcasts live Parliamentary proceedings, including the SONA address in its entirety, followed by commentary and analysis. By offering a Parliamentary channel, MultiChoice has in fact gone beyond what the SABC was actually able to provide. For instance when Parliament is in session MultiChoice is able to broadcast live on a daily basis Parliamentary proceedings, something that the SABC is not able to do because it is limited by its three channels. This will, however, change once the digital migration process has been completed because the SABC will be in a position to utilise the 80% spectrum that it has been allocated on Multiplex 1, and will be able to carry up to nine channels on a single multiplex.

Innovation means that future programming content will not be watched on traditional television screens. Furthermore, television will not be the only device that audiences will get their content from and this we are already witnessing with the advent of the second screen and OTT services.

There was, however, a view suggesting that broadcasters were yet to push their boundaries where innovation and interactivity was concerned. The prevailing usage of on-screen crawlers is said to be nothing new and can never be defined as innovative or interactive. The current practice of audiences sending or SMSing their views to the platforms concerned without getting instant responses from broadcasters instantly cannot be viewed as compelling either, said PMR01.

With this in mind one can then deduce that the delivery of PSB has been turned on its head by online presence shaping audience viewing behavior patterns. Where real interactivity is concerned audiences have also become drivers and co-designers of content with their user-generated content.

Another concern as articulated by the respondents was that the SABC is most likely to be unsuccessful in the multi-platform digital environment. It is the position of the author that the public broadcaster may not be able to deliver compelling content or be in a position to exploit the soon-to-be-available additional digital platforms.

With the ushering in of OTT services, Netflix is arguably a big threat to the SABC, as

well as to commercial and community broadcasters. Netflix, over the years has been able to swallow once large and thriving businesses such as Blockbuster.

5.2.3. PSB Contribution towards Strengthening Democracy

The majority of the respondents felt that the current climate prevailing at the SABC threatens the delivery of the mandate and has hampered the empowerment of citizens. The findings suggest that with the insurmountable challenges that continue to confront the SABC, the broadcaster's contribution towards strengthening democracy can no longer be the sole responsibility of the SABC to carry alone as an institution. Some of the respondents added that the voice of the SABC is one amongst many and that this is the reason for South Africa's 3-tier broadcasting system. The inference is that commercial entities should in future also carry the mandate, and also add to the plurality of voices.

Some of the documents analysed suggest that private media has somehow stepped in to fill the gaps in the terrestrial space. The analysis suggests that commercial entities are perceived to have a reputation for refraining from interfering with editorial independence. It is also mentioned that these entities offer a variety of channels including a selection of news channels, and continue to provide audiences with diverse and alternative views in the interest of public affairs and public opinion. We can then deduce that, whether intentionally or otherwise, these entities are, to some extent, playing a role in strengthening South Africa's democracy.

However the underlying message from some of the documents analysed reveals that, even though commercial entities can be commended for their efforts in offering an alternative voice, in comparison with the SABC, their reach is limited to a minority of viewers who can afford to pay their monthly subscription fees. The case of e.tv, South Africa's free-to-air terrestrial commercial company, is rather different. Unlike the SABC, e.tv's footprint and reach are limited. Generally the respondents agreed that the strengthening of South Africa's democracy remains crucial. They believe that the PBS mandate has not waned completely, and remain optimistic that it could still be reclaimed by locating it in the digital social media space. The respondents were of the view that the prevailing technologies and new platforms can be used as an extension to further promote, support and entrench the country's democracy and the

PSB mandate.

The SABC was reminded of the role that public service broadcasters globally continue to play by focusing on education, nation building and by offering diverse programming. Nostalgic reflections were shared by the respondents about the critical role that was once played by the SABC with the advent of South Africa's democracy when it broadcasted and promoted a critical analysis and education for democracy in the country.

BR01 conceded that the SABC is neglecting the mandate, is no longer vigilant in discharging its remit, and that its editorial oversight has not ensured that programming is aligned to the PSB mandate. This has weakened the mandate and reduced audiences' ability to critically scrutinise and interrogate public discourse. When questioned on whether the SABC does still have relevance, the answer was an emphatic yes from the majority of respondents. A suggestion was made though that, going forward, the SABC should rather focus on niche programming and support marginalised languages by producing content that has audio tracks in different languages, an enabling solution that has been made possible by digital technology applications. For example, Disney channel provides viewers with an option to select a language of their choice.

While this research was under way the SABC's Editorial Policy and Governance was under review. The broadcaster conducted public hearings with stakeholders and the public in order to solicit their input into the broadcaster's editorial policy. These policies are meant to serve as a guide for the SABC in discharging its mandate, and are also meant to provide a framework for the editorial staff and inform their decision making. Once completed, this process will hopefully result in a renewed policy focus and restore the organisation's editorial independence.

The respondents agreed that the strengthening of South Africa's democracy is still vital and much needed. In light of the prevailing digital technologies the respondents observed that these technologies can provide a platform for a bouquet of channels which in future can be exploited to create niche channels such as factual, documentary and history channels. These channels could be used to offer education for democracy. These types of programmes will be able to take South Africa to its

third decade of democracy and safeguard the relevance of the PSB mandate. The findings strongly suggest that the SABC is not contributing as mandated towards the strengthening of South Africa's democracy.

5.2.4. The Influence of Political Economy: Reorienting Policy Governance, Leadership and Financial Stability

The growth and penetration of the Internet has advanced opportunities for the commodification of media, bringing to the fore the political economy of communication phenomena. Owing to the rapidly evolving technology-driven media environment, broadcasters are under pressure to review their funding models. The findings reveal that broadcast funding models seem to have remained chained to their analogue past in the manner they conduct business. There is now an appeal for a radical rethink of current funding models in preparation for a multi-platform digital era. The respondents interviewed made a call for the prioritisation of the funding of the SABC, an institution charged with fully discharging the PSB mandate. They called for clear policy prescriptions, emphasising that the funding of the public mandate should be drawn from a public purse.

A further appeal was made by some of the respondents calling for the revival, review and inclusion of the dropped Draft PSB Bill into the current DoC policy review process. The Draft PSB Bill had made provisions for a PSB Fund. However, there seems to be little faith by respondents that this will materialise. The majority of the respondents were skeptical of the likelihood that the DoC would step forward and address the SABC's funding challenges. The DoC was further lambasted for failing to secure adequate funding to pay for the PSB mandate, a historical challenge that has plagued the SABC from the onset, when the institution transitioned from being a state broadcaster to becoming a public broadcaster.

The respondents were also of the view that there was no political will to resolve the SABC's financial woes, considering that the SABC's finances have been under the department's control for a number of years. This, despite the numerous ANC Policy Conference pronouncements urging that the SABC be funded, on the following occasions: Stellenbosch (2002), Polokwane (2007), and Mangaung (2012). To date, this call is yet to yield any results. The majority of the respondents were advocating

that true public broadcasters ought not to worry about where their revenue comes from, and that they should implement their mandate no matter what.

The SABC's mixed funding model was identified by some of the respondents as one of the reasons that was apparently compounding the organisation's financial challenges. These respondents were referring to the corporatisation of the SABC, and the splitting up of the institution into PBS and PCS portfolios. The corporatisation of the SABC, the research revealed, has forced the social content to take a back seat while allowing advertiser capture to take hold of the organisation; advertising, therefore, is taking precedence over the mandate. Some respondents believed that the SABC challenges are not only monetary. They feel there are problems at a number of levels: policy governance, leadership instability and lack of cohesion between the board and its executive management, inappropriate skill set, lack of accountability, and mismanagement of funds.

The SABC was further embroiled in allegations of nepotism, was reported to have a bloated top structure and an organisation wide head count, with 60% of its decision makers without the requisite qualifications or skills to lead the institution. The findings by the Public Protector further revealed that SABC's ACOO Motsoeneng cost the organisation R29 million in unauthorised salary increases. The SABC's content diet was also highlighted as not being healthy enough to attract funding partners or be consumed by viewers, resulting in the organisation's gradual audience decline.

In its next cycle and going forward, the SABC's current financial model requires a rethink and must be reconfigured, suggested the respondents. SABC 1 and 2, which are public broadcasting channels, are supposed to be funded wholly by the public purse, but SABC 1 is currently self-funded through the commercial revenue streams. SABC 3, a PCBS service channel, which should in fact be raising its own funds, is unable to generate revenue and is now cross subsidised by the other two channels. This is an indication that the funding model and the corporatisation of the SABC is not working as it was intended to, hence the need for a review.

There was also another view, that the SABC should change its business model to become platform agnostic, and broadcast content licensed by independent producers. The majority of the respondents were also of the view that the funding

model requires a complete overhaul, since the television broadcasting landscape in its current form, seems unable to sustain itself.

On the issue of the exploitation of content, IBR02 expressed the view that where content ownership was concerned, local broadcasters are still stuck in the analogue consciousness. There is also the feeling that these broadcasters still want to own it all, to keep the content to themselves, and that they are not allowing the producers to use it, thus creating dead content. IP and ownership issues to exploit content are said to be the stumbling block. The sole reliance on the SABC by independent producers was also cited as a risk for the production sector, and this was borne out in 2009 when the SABC plunged into bankruptcy and had to be bailed out by Treasury. This led to the shutdown of a number of production houses due to non-payment by the SABC and the non-commissioning of new content.

As broadcasters make their transition into the digital future, it seems that it is not just the SABC that will be faced with funding challenges. The findings suggested that business funding models to sustain the entire television broadcasting industry have become elusive, especially in an era where the proliferation of content and the distribution modes outside the traditional television screen model have become prevalent. Currently advertising still remains the biggest source of media funding in South Africa. Broadcasters continue to derive the bulk of their funding from the same advertising pot and new digital on-line platforms are also feeding off the same source. This therefore means that the advertising reservoir will at some stage in the future be depleted, and will no longer be sufficient to service most of the available platforms that depend on it for survival.

This concern is also in light of the fact that advertising spend has been shrinking since the 2008 economic downturn, and is yet to make a full recovery. Some of the respondents remained skeptical that the media advertising spend will ever catch up with the fast growing pace of new media platforms. This therefore means that digital television funding challenges may intensify, hence the call for resilient alternative funding models that will adapt to the new and complex digital era.

OTT platforms such as Netflix, Google, YouTube and Amazon were also cited as being the next future threat to the TV broadcasting funding models. Outside the OTT

platform space, telecommunications companies such as British Telecom have also been identified as potential threats to broadcasters. Telecommunications companies are utilising their broadband infrastructure to deliver content and they are also rolling out their terrestrial services.

While the broadcasting industry grapples with issues of funding and sustainability, the digital migration process, it would seem, will further complicate the many challenges confronted by the sector. Costs for the transition to digital transmission, as revealed by the findings, are substantial and funds to realise the objectives of the digital migration process will be needed. The SABC, by its own admission, will need an enterprise-wide backbone overhaul that will cost an estimated R526 million. This cost, as articulated by Waghorn, will cater for a number of systems; some of them are: digital production and play-out system, the digital library, Storage Area Network, and the IP content management server. The above cost is outside the investment of R383 million that was made available in preparation for the 2010 FIFA World Cup broadcast, where the SABC acquired four Television High Definition (HD) Outside Broadcast Vans.

The above mentioned costs exclude the amounts that are still to be incurred by the organisation, to reversion and repurpose the organisation's archived content, and to build a digital archive library. The SABC's content translates to thousands of hours of the institution's television footage dating back to 1976 when television was first launched in South Africa. These costs exclude radio, whose historical broadcast can be traced back to 1923. The SABC's footage is still stored in its formative Beta-cam analogue archives. The cost further excludes the virgin content that must still be commissioned in preparation for the multi-platform digital environment, or be acquired from external parties.

From the human capital side of the business, upskilling and training of personnel across the business enterprise, in the usage of new technologies and the actual delivery of digital content, will also require funding.

The DoC, as part of its effort to fund the digital migration process, had in 2008 allocated R2.45 billion. The department had at that time made provision by putting in place an SOS for STBs to subsidise indigent households.

There have been contradictory messages from the DoC on the payment of license fees and the acquisition of STBs by households, the findings revealed. The DoC is happy to admit that there are 5 million indigent households that cannot afford STBs and yet the very same households are expected to pay for their licenses annually. Some of the respondents said that the matter of funding the SABC should have been addressed by the government long ago, rather than transporting a model from the apartheid era and adapting it to South Africa's democratic SABC.

5.3. Policy Issues and the McConnell Framework

Policy makers are attempting to contrast digital television with the previous analogue era of broadcasting in terms of market structure, consumer behaviour, regulations, and policy formulation. Where policy is concerned, one of the DoC's service delivery objectives has been described as seeking to provide economic analysis, market modeling, and research responsible for economic analysis of the broadcasting, telecommunications, postal and IT sectors, in order to determine trends and make growth projections (DOC: Strategic Plan 2013-2018 and Performance Plan 2013-2014).

5.3.1. Evolution of Policy Making in South Africa and the ICT Policy Review Process

Policy has multiple dimensions, often succeeding in some respects but not in others. The following are the three policy realms: processes, programmes and politics (McConnell, 2010). The Triple Inquiry Report (TIR) was described as a policy process that was undertaken by the DoC, towards formulating post-apartheid policies. Digital migration in this context can be labeled as a policy programme with political repercussions.

Globally, policy makers are grappling with providing policy directives in what has been termed the "era of ever-morphing technologies" hence the call for innovative policies. The policy making process, especially in the ICT digital era, is a complex process and calls for streamlined regimes that will nurture this dynamic market place. PMR01 explained that drafting new laws takes long, and where Internet governance is concerned, requires persons who are knowledgeable about the sector. In spite of this acknowledgement, the DoC has taken the baffling step of

appointing a chief advisor with telecommunications expertise to oversee digital migration, someone who lacks the required broadcasting engineering skills (BR03).

PMR01 expressed the view that, “the easiest part about policy making is writing it. However, its implementation may prove to be a cumbersome exercise.” This confirms McConnell’s assertions that the reality of policy outcomes often falls somewhere between the extremes of policy successes and policy failures. The respondent further explained that “at the end of our five-year tenure in office, as policy makers, a question we often ask ourselves is: Did the policy trigger the intended outcomes, and that is my worry for 2019, and this is the aspect of my job that gives me sleepless nights,” said PMR01.

When reflecting on the evolution of the policy making processes in South Africa, the TIR process is still regarded as the sector’s bible. The respondents concurred that with the TIR process, the policy objectives at that time were clearly outlined with no ambiguities, what in McConnell’s “spectrum from success to failure” can be viewed as a policy programme whose implementation was in line with its objectives. As cited in some of the documents analysed and suggested by the majority of the respondents, the TIR remains as one of the best documents ever to be produced by the IBA, a participatory process that was based on open democracy.

While the DoC policy review process that led to the formulation of the Green Paper was under way, it was revealed that the process had been boycotted by key stakeholders such as the IPO, a stance which was vehemently opposed by AR01. McConnell suggests that processes will be boycotted when deliberations and public engagements are viewed and criticised as little more than an exercise in the legitimation of dominant power. AR01 cautioned that, “the dilemma of non-participation is almost detrimental to self because decisions will be taken on your behalf by others.”

The reason for non-participation by the independent production sector, lamented IBR02, was that over the past ten years, during the various consultative processes, the IPO had tried on all levels to ensure that there were mechanisms for the sector’s collective voice to be heard. However, their contributions were often ignored. This validates McConnell’s view on the criticism of public engagements. The boycott is

not limited to the DoC, but extends to ICASA as well, added the respondent. The IPO is of the view that the processes undertaken are superficial and that the centralisation of these processes, i.e. having to go through one or two institutions, has proven to be ineffective. The IPO also questioned how big a role the public played in the recent DoC Green Paper process, and what kinds of inputs the public made.

Other respondents were of the view that, with concerted effort, policy making and regulating in the public interest can still be attained. This was achieved in 2010 with the glide path approach that was adopted by ICASA for mobile termination rates, which saw mobile phone operators being issued with a directive to reduce their interconnect rates, thus bringing down (slightly) the cost to communicate. The reduction of charges presented an opportunity for rural communities in South Africa to get connected and be introduced to the digital age.

5.3.2. Regulating In the Digital Era

While the prevailing technologies and the possibilities that they present are to be welcomed, regulating in the digital landscape is proving to be a challenge for most regulators. Regulators continue to be confronted with paradoxes and contradictions by having to regulate in the unpredictable web-based landscape. Another challenge that the regulators are said to be grappling with is the setting up and the enforcement of local content quotas on non-linear platforms, a core function that ICASA struggled to enforce during the linear analogue programming era.

The current legal and policy framework anomalies are part of the work that needs to be reviewed, suggested BR04. For instance, there are areas of the law that deal with competition. These are weak and may present big challenges for the regulator, especially when it comes to dealing with OTTs. Where competition matters are concerned, ICASA's hands seem to be tied, and they do not seem able to do much, unless the policy is changed. Another area that needs to be reviewed is the SABC Charter, which was described by respondents as weak. Areas that look at subscription services dealing with sports rights and the must-carry rules also have to be revised during the DoC's policy review process, suggested BR04.

The findings called for a legislative review that will put instruments in place to further strengthen the delivery and monitoring mechanisms of the PSB remit. A further call was made to regulate commercial entities, to ensure that they too must carry on their platforms PSB mandate content, though without stifling competition.

5.3.3. Reflections of South Africa's Digital Migration: A Call for Policy Changes

DTT, a policy programme, needs to happen and it needs to happen promptly; the longer the delays the more irrelevant the new platforms yet to be launched become. The DTT process was first initiated in South Africa as early as 1998 with the first DMWG appointed in 2005. At the time South Africans knew of the 2015 deadline and today as a country, almost a decade later, and a few months away from the DSO date, we still have not launched. This lack of progress results in what McConnell has described as conflicted success and precarious success, because the programme has generated substantial controversy and even its supporters are questioning the future of the policy. "The programme has been stifled by a number of delays, lack of progress, more like a repeat of the LLU process, which to date has still not been resolved," said BR03.

These delays have cost South Africa as a country, and the DoC potential revenue, with increased costs over the years of actualising the digital migration programme. But the delays cannot be blamed solely on the DoC, they were also as a result of broadcasters not agreeing on the STB CA. The DoC cannot decide for the operators which technologies they should employ, and the DoC cannot afford to allow this impasse to go on any longer, asserted PMR01. The DoC then made a decision that by the end of March 2014 it would take a stand and make a pronouncement on the standards going forward, said the respondent. However, by the time of submission of this paper in April 2015 the CA impasse had still not been resolved and the DoC was yet to act on its pronouncement. This inaction by the DoC is a glaring example of the policy maker showing signs of an inability to take decisions and provide decisive leadership, leaving broadcasters to fight over STB specifications and causing further delays. McConnell suggests that process failures occur when the government is defeated in its ambition to make a decision.

In their own defense, some of the broadcasters provided opposing views,

emphatically stating that they have long been ready to start broadcasting in digital formats. The operators, however, postulated that the question of the broadcasters' state of readiness should perhaps be directed at the SABC. It would be in the public interest for the SABC to indicate its state of readiness and the total number of channels that it would be able to fill with content once it has fully migrated, they added. What South Africans have witnessed is an ongoing blame game between the DoC and the operators. This impasse will not take the country forward, further denying citizens from yielding the desired benefits that they could have derived from the digital economy.

Though efforts have been made by some broadcasters, the findings reveal that the DoC is viewed as the weakest link of all the participants involved in the digital migration process. The DoC's delay in making a statement on the STB standards the findings revealed has sent the sector into panic mode. The STB conditional access debacle and stand-off the findings indicate is one such example that dates as far back as 2008. At the time the reason that was provided by (then) DG Shope-Mafole indicated that as government they needed to hear the views of all the stakeholders concerned, and it would seem that by early 2015 the DoC was still consulting these stakeholders.

Some of the respondents added that the choice of final architect of the STBs will have profound consequences for the entire sector. Clarity was also being sought to ascertain whether the box will have inbuilt applications that will allow for interactive services or not. The DoC was also reminded about its initial articulations regarding the STB standards, that the box would make provision for additional services such as e-government on-line services. However, the current STB specifications do not have a return path feature. The STB in its current design is unidirectional, does not have a return path, and provision has not been made for interactive services, thus rendering the STB a "dumb-box", which is why it is said to have remained in the analogue era.

5.3.4. Policy and Regulatory Challenges

When reflecting on the complex ICT ecosystem and investigating the policy and legal frameworks in South Africa, as a researcher one can deduce that the PSB mandate

and its delivery has been partially constrained by the limited enforcement of policy and regulatory instruments. New media broadcasting has developed in an unregulated environment largely influenced by the ever morphing technological advancements. The response time of ensuring that the PSB mandate is deeply embedded in the changes arising in the digital world has been slow as compared to the technological and societal advances, thus forcing regulators and policy makers to play catch up. The main obstacle to progress is policy legislation, and here the SABC is especially liable, and responsibility for the lack of progress can be placed on the broadcaster's organisational structure and policy governance.

When we examine South Africa's policy reforms, we see that this is the one concept that has been uncovered though not fully unpacked. As revealed by the findings, this concept is the extension of the PSB mandate to Public Service Media (PSM), a shift which resulted from digital content. The migration from PSB to PSM calls for the reconfiguration of policy, a definitive role of the PSB mandate in the new context and society. The shift to PSM shows the validity of the dictum: Disrupt yourself or become irrelevant. The original role of the PSB mandate was for traditional media to have a national agenda setting, whilst the PSM locus is digital and has positioned itself more on a global stage. It is on this global platform that for the first time public opinions have begun to shape content and have become a new point of reference. However, it is important to note that PSM as a content provider is also dependent on other aggregators and content distributors such as Facebook or Google, to name just two.

Some of the respondents suggested that the policy review process under way during the writing of this report, deliberate on the importance of promoting access to public interest content in a converged environment. For it to ensure easy access across all platforms and devices, this extension becomes even more critical.

5.4. Conclusion

This chapter analysed the findings generated from primary sources and the outcomes indicate that though under threat, the PSB mandate does still have relevance. However, in order for the four forms of relevance to manifest, the policy maker has to enhance the broadcasting policy governance framework to support the

PSB's continued existence.

The next chapter is the report's conclusion and recommendations chapter. Its objective was to collate all the themes and the four forms of relevance, analyse and draw conclusions on the relevance of the PSB mandate in the digital era. Chapter 6 provides a detailed account of the findings, looking at: (i) PSB policy programmes - between resilient and failure, (ii) the weakening of the PSB mandate and its effect on public Interest, (iii) unavailability of Digital Content Limits Public Space as Digital Space, (iv) political economy and funding the digital transition, (v) unregulated competition, (vi) improved policy governance and leadership for PSB in the digital era, and (vii) realignment of the PSB mandate.

CHAPTER 6

CONCLUSION AND RECOMMENDATIONS

6.1. Summary of the Key Data and Key Analytical Points

This chapter provides conclusions and recommendations drawn from the research findings and data analysis presented in Chapters 4 and 5 of this research study. Primarily, this study sought to explore the contemporary relevance of PSB in the transition to the digital era, and as a related matter, the policy evolution from analogue to digital migration in South Africa with respect to the role of the DoC and its policy successes and failures. This research study was able to explore the continued relevance of the PSB mandate during the transition to the digital era using thematic content analysis of the four forms of relevance.

The findings revealed that the PSB mandate undoubtedly still has relevance in the digital era despite the fact that the mandate was not being implemented and enforced effectively. However, respondents cautioned that the future of the TV broadcasting dispensation will be complex, because of the competition presented by the multi-channel/platforms environment and OTT services such as Netflix. The findings suggest that it will be harder for the SABC to compete in this space because the broadcaster has less flexibility than its competitors, due to the license conditions imposed by ICASA, and the policy governance framework. However, this does not mean that the SABC's mandate becomes irrelevant.

In order for the PSB mandate to remain relevant, the findings revealed that public spaces can be transitioned into digital spaces. Though fairly new to South Africa, programming on demand has largely been driven by commercial broadcasters, but the success of its delivery and implementation has been hampered by the lack of broadband availability, thus limiting audience capacity and the full exploitation of available technologies. This therefore means that South Africans will not be in a position to fully derive the real benefits made possible by the prevailing technologies, or participate in online interactivities, until broadband constraints are removed. In order for the SABC to remain relevant, to retain its audiences and to attract future audiences, it must refocus and ensure that it provides viewers with relevant and

compelling programming content.

The findings suggest that the lack of investment in funding the mandate is a major factor threatening the delivery of the PSB mandate. The mandate has in the past been, and will continue to be compromised unless its funding is secured. Funds will be needed to commission and procure programming content that will safeguard and build a strong democracy, thereby helping to educate an informed citizenry. The strengthening of South Africa's democracy remains vital and the prevailing technologies should be used to extend the delivery of the PSB mandate.

The data revealed that true public service broadcasters should not be worrying about where their operating revenues come from and this is why the SABC's revenue funding streams must be secured. In the future, a multi-channel and competitive TV broadcasting landscape will further shrink the commercial advertising pie on which the SABC so heavily relies. Another threat highlighted by the findings was that advertising revenues have been declining since the 2008 global economic downturn. The findings indicate that this has had an impact on the SABC and will continue to do so in the future, further prohibiting the institution from delivering the PSB mandate in the multi-platform digital era.

The findings further suggest that, for the DoC to be able to provide successful policy programmes, it will have to give attention to the following areas: improving its policy governance and leadership role, enhancing PSB content programming, increasing PSB funding, enhancing the uptake of new technologies, and defending and protecting the PSB mandate against competition through appropriately designed regulations. These improvements will justify the continued existence and relevance of the PSB mandate and consequently strengthen South Africa's democracy through public participation.

6.2. Conclusions of the Research

PSB Policy Programmes: Between Resilience and Failure

This section reflects on the fact that the issues identified and often referred to as the four forms of relevance, namely public interest approach, public space as digital space, strengthening of democracy, and influences of the political economy are not catered for in existing policy.

Insights gleaned from the use of McConnell's analysis framework indicate that the policy governance and leadership within the DoC has been rudderless for a number of years, and that this continuing crisis has been the result of the high turnover of Ministers, Deputy Ministers and senior executive management. The use of the framework however suggested that the DoC was successful in launching and commencing with the pilot of the digital migration programme in Gauteng, KwaZulu-Natal and the Western Cape, in line with the set objectives. It also succeeded in meeting the switch-on date of 01 November 2008. There was, however, a policy programme failure with regard to the implementation of the entire digital migration policy programme, in that the DoC failed to meet its self-imposed 2011 ASO date. The policy programme, as the findings revealed, was a precarious success because the digital migration programme generated considerable controversy, almost forcing government into defense mode due to its substantial time delays, resource shortfalls, and communication failures, and also because it failed to fulfil most of its policy programme objectives.

6.2.1. The Weakening of the PSB Mandate and its Effects on Public Interest TV Broadcasting: The SABC's Policy Governance and Leadership Vacuum

The data revealed that the period between 2002 and 2012 was a period of meltdown within the SABC. The acute crisis in policy governance and leadership resulted in a high staff turnover at Board and Senior Executive Management level. The leadership vacuum created ample opportunity for funds to be squandered, and 2009 saw the SABC plunge into bankruptcy and having to be bailed out by National Treasury. This episode was then followed by a sequence of other events, including the approval of R29 million in unauthorised salary increases by ACOO Motsoeneng as was revealed by the Public Protector's findings. This instability at the top has left the SABC's

credibility in question.

Concern was also raised over the SABC's ability to adequately prepare for the transition and to operate optimally in the multi-platform digital environment. The data revealed that this was as a result of the dearth of skilled personnel at all management levels. The PWC report findings revealed that 60% of the SABC's executives and senior management did not meet the minimum strategic thinking skills for executives, 56% were not able to demonstrate adequate levels of problem solving and decision making, and 15% demonstrated only marginal competence in strategic thinking (Maunder, 2014, p.9). These findings indicate that the SABC's ability to operate in a multi-platform digital environment is seriously compromised.

The blacklisting of commentators did further harm, and the editorial oversight intended to ensure that the public broadcaster's programming content was aligned to the PSB mandate, was neglected. These incidents and developments resulted in the weakening of the delivery of the PSB mandate, causing damage to the relevance of the PSB and compromising the delivery of the PSB mandate, thus weakening the delivery of the mandate.

6.2.2. Unavailability of Digital Content Limits Public Space as Digital Space

Broadcasters will be required to have a large stock of digital programmes available for broadcasting when the digital deadline approaches. If this is not the case, the DTT infrastructure could be in place but little content would be available on the digital channels (Beletre and Southwood, 2013: pp.111).

The unavailability of a digital production environment means that it is not possible to explore the creative challenges brought about by the interactive public shared content, which have been made possible by digital media. The absence of digital technology and the deployment of adequate infrastructure were also cited as factors contributing to the lack of progress in digital TV broadcasting. The unavailability of broadband in South Africa has prohibited consumers from enjoying the benefits made possible by the prevailing technologies. VoD, content online streaming, innovation and interactivity have also been hampered by the country's poor broadband capacity.

It is hoped that the digital migration process will not only be about technology, and clear and crisp quality pictures enabled by digitisation, but will also be about relevant content that will safeguard the PSB mandate.

6.2.3. Political Economy and Funding the Digital Transition

6.2.3.1 Political Economy of Subsidised Infrastructure and Digital Content Production

Currently the SABC cannot fund the PSB mandate. The DoC has been criticised for failing to provide adequate funding to pay for the mandate, a challenge that has not been resolved since South Africa ushered in democracy in 1994. The failure to find a solution to the SABC's funding challenge has been viewed as a lack of political will by the DoC, to resolve the SABC's current crisis and find a viable alternative to its schizophrenic funding model.

Compounding the SABC's financial challenges is the organisation's mixed funding model which arose from the corporatisation of the institution. This relegated the social PSB content to the back burner, whilst allowing advertising imperatives to dominate operations in the organisation.

It must be noted that on the eve of the digital migration transition, the SABC still has thousands of hours of content and footage that needs to be digitised. Once reversioned and repurposed, this archived programming content is earmarked for broadcast across the nine future channels that the public broadcaster will acquire. Currently the SABC is struggling to commission, fund and broadcast content across its three television channels. The question that remains is, once the country has fully migrated, where is the SABC going get funds from in order to operationalise the nine possible channels that the public broadcaster is meant to broadcast? The multi-platform digital TV environment will become meaningless to audiences unless there is quality and relevant content being broadcasted.

Thus, while PSB remains relevant in the digital era, the SABC cannot advance the PSB mandate in digital formats, partly due to its funding constraints. There is therefore a need for government to create a mixed funding model that will assist the institution to fulfill its mandate.

6.2.3.2 Digital and Competitive Environment

Competition creep has been identified as being one of the unintended consequences of innovation and has been enabled by the Internet, the data has revealed. OTT content providers like Netflix, Amazon, and YouTube are threatening the survival of traditional broadcasters, who will have to adapt to the emerging competitive environment. Competition in the digital era is increasing exponentially, bringing along with it the fragmentation of audiences, proliferation of viewing devices and new content distribution channels. New digital online platforms are also feeding off the same advertising reservoir which will at some stage run dry.

Telecommunications companies such as British Telecom have also found their way into the content space. These companies are utilising their broadband infrastructure to deliver content and are also rolling out their terrestrial services.

As a true public broadcaster, for its future survival in the competitive environment, the SABC must distinguish itself as a contender. The SABC should position itself by offering niche content that promotes marginalised languages with audio tracks in different languages.

It must be noted, however, that competition will at the same time yield positive spinoffs, since it will create space for alternative and diverse content, thus promoting the plurality of voices.

6.3. Recommendations of the Research

Based on the research findings and conclusions drawn from this study the following recommendations are made in 2015, with the objective of promoting resilient success in the next policy phase beyond 2015:

6.3.1. Improved Policy Governance and Leadership for PSB in the Digital Era

The DoC needs a stable and coherent policy governance framework to enhance the effectiveness of its leadership and outputs. The DoC must provide policy leadership that will ensure accountability and transparency within the department, thus creating an environment for PSB in a digital TV dispensation to flourish.

In order to combat the challenges cited as the key inhibitors restraining both the SABC and the DoC from operating optimally, clear and realistic policy governance strategic plans must be put in place. Stability of top management must be prioritised, retention strategies must also be introduced and enforced in order to attract and retain the right talent. Skilled personnel with requisite expertise, more so broadcasting engineers must be appointed to execute the digital programme.

6.3.2. Realigning the PSB Mandate for the TV Broadcasting Digital Era

The digital era presents a perfect opportunity for the public broadcaster to repurpose and reorganise itself in order for the SABC to regain the credibility it once commanded. Clear strategies must be employed to adequately prepare the institution to operate optimally in the multi-platform digital environment.

The SABC's policy governance framework must be strengthened in order to restore the PSB mandate that in fact the public broadcaster is obliged to honour. Stability at the top remains crucial to ensure that the institution is well managed, and the appointment of competent executives and senior management with strategic thinking skills is recommended.

Up-skilling of personnel at all management levels for the effective running of the institution in the digital era remains crucial. New forms of executing the mandate must be adopted, and strategies to attract and retain the digital natives in new media as well as interactive based networks must be employed.

The SABC must ensure that its editorial independence and oversight in programming is enforced. The public broadcaster must further ensure that the institution's programming content is aligned with the PSB mandate, and must be geared towards strengthening the delivery of the PSB mandate across all available digital platforms in the interest of public affairs.

6.3.3. Fostering Digital Content and Construction of Technology Infrastructure

The SABC must push boundaries in order to safeguard its relevance as a public broadcaster, and also provide, across all the available digital platforms, compelling and relevant content to its audiences, more especially the digital natives. The

broadcaster must also commission new content and refrain from operating on full-mode of programme repeats and re-runs.

In order for the SABC to operate in a multi-platform digital environment, it will be required to have a large stock of digital programmes available. To ensure that sufficient programmes are available post the migration process, the SABC must digitise its archived content. Once digitised, in the absence of adequate funding, the broadcaster must repurpose its content for digital rebroadcast.

From the point of view of technology, the SABC must be restructured and reengineered. Regarding human capital, there is a call for the transformation of the organisation's culture, and for the appointment of visionary leadership.

The DoC must also take a stand on the STB conditional access impasse that has stifled the digital migration programme progress.

6.3.4. Secured Funding for the Digital Future

The current SABC funding model needs a rethink and must be reconfigured to meet the needs presented by the multi-platform digital TV environment. In order to be able to safeguard and to deliver digital diverse content, funding of the SABC and that of the PSB mandate must be prioritised and must be budgeted for. This could be done through a mixed funding model which includes the public purse as a component. A call was also made for the review and revival of the now abandoned Draft PSB Bill, which had made provision for the PSB Fund. The corporatisation of the SABC must be reexamined, especially after failing to succeed in delivering on its intended objectives.

Funds must be ring-fenced to digitise, reversion and repurpose the SABC's archived content. The SABC must provide a budget outlining the costs of the mandate, and real costs associated with the entire digital migration programme including digital content production. The SABC must further provide a detailed budget, outlining funds that it will require as an institution to commission new, diverse, relevant and compelling content for the digital era.

The DoC has also been challenged to show its political will and to finally resolve the

plight of funding the PSB mandate. The DoC must further provide solutions by addressing the SABC's current mixed funding model once and for all.

6.3.5. Operating in a Digitally Competitive Environment

The advent of OTT operators like Facebook, Netflix, Amazon and Google has changed the broadcasting landscape, resulting in the unintended consequence of competition creep. These global OTT operators offer content over the Internet, with no regulation, no licenses, and without having to report on revenues. They do not pay taxes and have no local content obligations to meet. Telecommunications companies are also finding their way into the content terrain.

For their survival, broadcasters must adapt to this emerging competitive environment. They must formulate strategies that will assist them to compete head-on with online platforms contending for the same advertising pie. If this is not done, television will lose advertising revenues to these platforms as they continue to cannibalise the market share which was once dominated by broadcasters. The SABC should set itself apart from the prevailing competition by offering niche programming and promoting marginalised languages.

Conclusion

A PSB survival strategy in the TV broadcast dispensation must be formulated, to create greater relevance for the PSB mandate in the digital era. Current laws that are weak and ambiguous must be reformulated. The SABC Charter must be revisited to address aspects that the findings have found to be lacking. The extension of the PSB mandate to PSM, reconfiguring the current policy framework, must be considered.

The DoC must provide clear policy prescriptions and must revisit the processes that were undertaken during the Triple Inquiry Report (TIR) process, a policy process which is still lauded for its transparent and consultative approach. The TIR process was commended for its vigour and for being able to set clear and unambiguous policy objectives.

In light of the current ailing SABC, and in order to retain the PSB mandate, clear policy articulations must be prescribed, extending the PSB mandate to be shared collectively by all license holders, including commercial broadcasters. Finally, a call for a revised mandate that makes provision for the four forms of relevance and renders them more explicit within the policy framework must be undertaken.

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APPENDIX A:

INTERVIEW RESEARCH GUIDE: ANALYSING THE RELEVANCE OF PUBLIC SERVICE BROADCASTING WITH RESPECT TO SOUTH AFRICA'S DIGITAL MIGRATION

Introduction

I am a researcher at the University of Witwatersrand completing the Masters in Management in the field of ICT Policy & Regulation (MM ICT & PR) and as such conducting research on the topic "Analysing the Relevance of Public Service Broadcasting with Respect to South Africa's Digital Migration". This interview is designed to elicit responses from various respondents who have a deep understanding of the above topic. The responses gathered will be used for research purposes and confidentiality is guaranteed.

The purpose of this study is to explore and analyse the contemporary relevance of the public service broadcasting (PSB) mandate in the digital era, the evolution of South Africa's broadcasting and electronic communications policy including the role that the Department of Communications (DoC) the policy maker has played in providing a policy direction.

Participation as a respondent is entirely voluntary. You can decide not to participate at any point in this study without suffering any consequence. Respondents do not need to take part in this research as part of their job. It would be appreciated if you would offer your views on the topic under study, however controversial, any limited personal information collected about you will be kept confidential. Anonymity of all respondents is guaranteed and names will not be listed in the published report. The anonymised data generated in the course of the research will be kept securely in paper or electronic format for a period of 5years after completion of the study.

You are invited to participate in this study by responding to a number of questions for the purposes of the Masters research. The interviewer would like to conduct a one on one interview that should take a maximum of one hour. The researcher would like to use a recorder for the interviews if you are agreeable. The benefit of participation is that the research findings could inform future policies concerning PSB in the digital era and thus contribute to the public discourse on digital migration.

Consent and Guarantee of Confidentiality

All the information provided by respondents in this research is treated confidentially. To protect respondent confidentiality, a respondent coding system will be utilised, and unless permitted, no information about respondents will be recorded in the research findings. The records will only be used for the purposes of this research and for the writing up the report.

Part A: Consent Form

(To be signed by all research respondents)

I ……. have consented to participate as a respondent in Nomonde Gongxeka Master of ICT Policy and Regulation research. I understand that the data collected and analysed will form part of the main body of the Research Report to be submitted to the Graduate School of P&DM at the University of Witwatersrand. I also understand that the research report will be used for educational purposes. I further understand that I will be guaranteed anonymity (through the use of pseudonyms/code system) during the actual research process as well as in the final research report.

I expect to be given a copy of this consent form to keep.

Signed …… Date ……

Part B: Guarantee of Confidentiality

I **Nomonde Gongxeka**, hereby guarantee anonymity and confidentiality to all research respondents. This confidentiality will be guaranteed during and after the research process as well as in the final Research Report.

…….. **Friday, 21 February 2014**

Signed Date

Interview Protocol

Respondent Information	
Name: **Naming convention:** **Company:** **Designation held:** **Date:**	

The following questions (within the identified themes) will guide the interview.

Public interest approach:

1. What is your understanding of the issue of relevance concerning the public service broadcasting mandate?
2. How do you think the PSB remit adapt in order to enhance its public value in the digital era?
3. How do you think the public interest approach can be infused into the broadcast digital media/digital age?
4. When reflecting on the evolution of policy making in South Africa post the country's democracy, which era can you describe as being best where the DoC was able to show areas of strength when formulating policy?
5. Over the past years, the DoC has been accused for being rudderless in providing a clear policy directives in the digital era, is this a fair statement? Why/not?
6. How have the current policy implications affected regulations in South Africa and in assisting ICASA's transition to regulate in the digital era?
7. What oversight role do you think the Parliamentary Portfolio Committee on Communication (PCC) can play concerning the above, and also safeguarding the PSB mandate and the independence of ICASA in the broadband digital era, if necessary? What instruments should it put in place to remedy the challenges if any?

Public space as digital space:

8. How do you think the public space phenomenon is/should be holding ground in the 21st century and also in the digital era?
9. How does TV content in South Africa inform and broaden our concept of public space, for example programming that promotes an understanding of being South African, or participating in the global economy?

10. How does the transition to digital TV promote the digital space as a space of public engagement?
11. In your view, is there still relevance for PSB in the digital era? Why/not?
12. With the ICT Policy Review underway, should South Africa consider to move from the concept of PSB to Public Service Media (PSM)? Why/not?

Public service broadcasting and strengthening democracy:

13. How has PSB content and its regulation thereof contributed to the advancement of democracy in South Africa during the period of 2002 – 2012?
14. How do you think is the broadcasting industry namely: public, community and commercial strategising to bring further advances of PSB in the digital TV era?
15. What public value contributions has MultiChoice a commercial operators made in safeguarding the relevance of content to viewers in its attempt to promote democracy?

Benefits of programming on demand – digital content:

16. How is MultiChoice developing its programming offering in the Internet based and multiple media terrain?
17. What do you think local broadcasters regard as the benefits, strengths, weaknesses and opportunities of programming on demand?

Innovation to create platforms for interactive formats:

18. What innovation is taking place at MultiChoice in developing interactive formats?
19. How has MultiChoice and other local broadcasters have responded to interactive formats, genres and content in the context of interactive television (ITV)?
20. What does MultiChoice regard as the benefits, strengths, weaknesses and opportunities for interactive formats?
21. How do you think local broadcasters, MultiChoice included have readied themselves for the “next frontier” of bringing the online experience into the television screen?
22. How will/does the Internet and broadband availability affect the consumption of television of TV?

Influences of the political economy (access and affordability):

23. How is MultiChoice responding to the issues of demographics, access and affordability in the digital transient period?

24. What sorts of adjustments and resources did MultiChoice have to put in place to ready itself to deliver content and operate in the digital landscape?
25. How MultiChoice reviewed its operating business model in order to respond to the demands brought upon by the digital landscape that it operate in - investments and innovation to retain its competitive edge?
26. The SABC the public broadcaster who is expected to carry much of the PSB mandate is expected to fulfil a public mandate without public funding, what would you describe as the future challenges for the SABC's current funding model in a digital multi-channel environment?
27. What future implications do you foresee in addressing issues of universal access and the digital divide in the digital era?

Is there anything else that you would like to share regarding the subject?

Would you be willing to respond to a short e-mail follow up, if required?

Ends

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