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Reddy, Trisan

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WHAT VALUE CAN CULTURAL POLICY HAVE FOR THE FUTURE OF TELEVISION BROADCASTING IN SOUTH AFRICA? THE APPLICATION OF SHALINI VENTURELLI'S POLICY CHALLENGES FOR THE CREATIVE ECONOMY TO THE FUTURE OF SOUTH AFRICAN TELEVISION CONTENT.

Trisan Reddy

A research report submitted to the Faculty of Humanities, University of the Witwatersrand, in partial fulfilment of the requirements for the degree of Master of Arts (Arts, Culture and Heritage Management)

Johannesburg, 2008

Declaration

I declare that this research report is my own, unaided work. It is being submitted for the Degree of Master of Arts (Arts, Culture and Heritage Management) in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in any other University.

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Trisan Reddy

_____day of _____2008

Abstract

This research report considers the use of cultural policy in the broadcasting industry. It looks at the applicability of the policy recommendations made by Shalini Venturelli for cultural policy in the information economy. A brief look at the debates encompassing the use of cultural policy and the history of South African broadcasting is provided. Scenario planning and interviews are used as methodological tools to assist in the analysis of the topic. This report concludes that Venturelli's suggestions are indeed relevant and that a policy framework that is more facilitative, as cultural policy is, rather than regulatory, as present South African broadcasting legislation is, is needed for the future growth of the industry.

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Introduction

This essay deals specifically with the television broadcasting industry and comes at a rather exciting time of transition for this industry. In South Africa new subscription-based and soon free-to-air satellite television broadcasters are being licensed. The current broadcasting system is moving to entirely digital platforms. Internationally the internet is providing opportunities for both experienced film makers and ordinary citizens to make their content available to a global audience. Cultures both old and new have more modes of expression, representation, and communication available to them than ever before. Unfortunately, these new developments bring with them new challenges. As content becomes more freely available what happens to the platforms that carry this content? How do broadcasters, internet video distributors, producers, the government, and ultimately the public deal with these new modes of production and distribution? The answer might lie in a broader policy framework than the broadcasting industry has historically utilised.

Cultural policy is traditionally applied only to arts and culture organisations. In South Africa broadcasting is governed by communications and economic policy. Broadcasting policy and arts policy have largely diverged from each other. As the title of this report suggests, cultural policy does have some value in the context of the strictly regulated South African television broadcasting industry. The question is just how much value does cultural policy have and in what ways can this value be practically translated into the everyday reality of the industry? In order to test

this hypothesis, this report will analyse and apply the cultural policy suggestions made by Shalini Venturelli (2002) and others to this specific context. If these suggestions prove useful then one can reasonably conclude that there is some value in applying cultural policy to this industry.

Broadcasting and culture are closely linked realms because, as South African legislation suggests, broadcasting must reflect the diversity of all of the country's many cultures. Additionally, writers, actors, costume designers, musicians, and others all rely on the broadcasting industry to disseminate their work to the largest possible audience. Thus the policies governing the medium via which their work is transmitted are of relevance to these cultural practitioners. Broadcasting has a responsibility to entertain, inform, and educate. With the advent of digital broadcasting, broadcasters have the ability to perform these responsibilities in exciting new ways thanks to new levels of interactivity and new methods of content delivery.

This research report considers a macro-level perspective of the broadcasting industry and of cultural policy. Rather than looking at one broadcaster, one genre of content, or a single producer it looks at the industry as a whole, on both a national (South African) and international level. Policies for the distribution and production of content are central to this report. It is important to note that this report focuses on television/video broadcasting, rather than radio/audio broadcasting.

This report is relevant in the realm of cultural policy studies research because it speaks directly to suggested interventions made by authors in the field. Shalini Venturelli's policy suggestions, as made in her 2002 piece, *Redefining Culture in the Global Information Economy* are the reference point for this report. The goal is not to prove or disprove her suggestions, but rather to look at their applicability in the specific context of the South African broadcasting industry. Kariithi (2003) suggests that as broadcasting and technology converge the highly regulatory system employed by many African states may have to fall away. This study attempts to facilitate understanding in the application of cultural policy in a South African setting, particularly in the broadcasting industry which often follows ordinary business policy rather than cultural policy.

A study of this nature is highly relevant to South Africa at this time. Policies dealing with the information economy are only beginning to emerge from both the private sector (in the form of broadcasting and information technology corporations) and from the government. An additional question is: Just how much involvement should the government have in the broadcasting industry? Can the current trend of government regulation of the industry continue indefinitely? This study will help illuminate the present and future state of broadcasting. By 'state of broadcasting', this report is referring to the distribution channels and legislation that governs it. It offers suggestions, in the form of recommendations, which can help South Africa create a successful digital broadcasting industry that supports

high quality local content and consequently adds to the value of South African culture.

Chapter One attempts to define what cultural policy is (particularly in relation to broadcasting) and gives an overview of the current effect that cultural policy has on broadcasting. In Chapter Two a basic overview of the South African broadcasting industry is provided: its past, present, and horizons for the future, as well as an overview of video content distribution via the internet. Chapter Three presents a scenario planning exercise that suggests possible avenues for the future of broadcasting and the value of cultural policy to said future. To support the scenarios, interviews with individuals whose interests lie in broadcasting have been conducted to gain their perspectives on the issues. Finally Chapter Four consolidates this analysis and discusses exactly what influence cultural policy might have on the future of broadcasting.

Methodology

By looking at the state of broadcasting and what cultural policy is, one can understand how Venturelli's suggestions might be useful in a South African context. The primary tool of analysis in this report is scenario planning. As very little research on digital broadcasting policy in South Africa is available, a series of interviews with individuals involved in broadcasting has been conducted. The possible future directions for broadcasting offered by interviewees and theorists are used to construct two scenarios of what the broadcasting industry might look like in twelve years. The aim of doing so is to determine if suggestions offered by Venturelli and others can be of use to present day cultural policy makers.

Van den Bulck (2002) suggests that research can be either of a quantitative or qualitative nature. While this report does quote quantitative research for statistics, this research is primarily of a qualitative nature as this tends to be most appropriate for research in the humanities. He notes that there are several approaches to qualitative research but the most useful are content analysis and survey research. Both approaches are utilised in this report: analysis of the content of current policies and interviews with relevant stakeholders.

The Interviews

There are two types of qualitative survey research (van den Bulck, 2002, 69): interviews with single respondents and interviews with groups of respondents. The former is used in this report as there are only a few people in the country with

knowledge of broadcasting policies or the ability to comment on future policy directions. Ideally, interviewing the respondents in a group situation would have been preferable, but asking them all to come to a single location at one time was not possible. Such a situation would have allowed for the recording of their responses to each other's ideas, generating a richer debate on the topic. To mitigate this problem all respondents were allowed to read the first draft of this report and make additional comments.

All interviewees were selected because of their expertise and/or their strategic positions in the industry. They were asked their opinions of how cultural policy might change the landscape of broadcasting, if at all. Six interviews were conducted with the following individuals (in order of the date the interview was conducted):

- Howard Thomas – Runs Busvannah Communications a media-education institute and regular guest lecturer in Media Studies at several universities. He is also a researcher in the field of broadcasting.
- Mike Aldridge - Journalist, producer, and co-author of the book 'Re-visioning Television' for HSRC Press (Interview conducted telephonically).
- Philly Moilwa - Manager of Policy and Regulation at the South African Broadcasting Corporation (SABC) and their liaison to the Independent Communications Authority of South Africa (ICASA).
- Professor Tawana Kupe - Dean of the Faculty of Humanities at the

University of the Witwatersrand and former head of Media Studies at the same institution.

- Sipho Mngqibisa, Mamedupe Kgatshe, and Nozipho Mvulane – All in charge of policy at ICASA at management level.

It is important to note that the opinions expressed by the interviewees are not necessarily the opinions of the institutions that employ them, unless otherwise stated. A complete list of individuals considered for interview is included in Appendix B.

There are limitations to this kind of research: the sample cannot be wholly representative of the opinions of all academics, journalists, and broadcasters. There simply is not the time nor the budget to travel across the country and interview everyone who would have a valuable opinion on the matter. There were also several people who did not want to be interviewed or could not be interviewed due to scheduling conflicts. Every effort was made to speak to a representative at Multichoice or Telkom Media, but unfortunately a suitable respondent could not be identified. An interviewee from either organisation would have been useful as they are most ready to move into the new digital environment. Thus the content of the interviews tends to express the views of the public broadcaster and the government rather than commercial broadcasters. That said, the quantity of valuable information obtained from the above interviewees was enormous; many of their more interesting comments are not included here due to space considerations and a need to focus more closely on the topic at hand. The

number of respondents selected could have been higher but that would have resulted in the generation of too much information that would ultimately reduce rather than increase the depth of focus of the report.

Van den Bulck (2002, 70) notes that there is no single recommended structure for individual in-depth interviews. An attempt was made to conduct most of the interviews in person, only Mike Aldridge's interview was conducted telephonically. The interviews were semi-structured and conducted along the lines of a discussion as opposed to a survey with simple yes or no answers. Hand-written notes were taken during the interviews. A copy of the questionnaire appears in Appendix A. The interviews were central to the construction of the scenarios. The diverse range of opinions expressed created the opportunity to provide several different, current, and specific views on broadcasting and cultural policy. To ensure best ethical practice and to avoid misquotes follow-up correspondence via e-mail was conducted to ensure the most accurate responses possible.

None of the interviewees were familiar with Venturelli's (2002) work which was ideal, as part of the analysis was to determine to what degree her recommendations are valid. This essay attempts to find the commonality between her suggestions and the interviewees suggestions, but is equally looking for the dissonances between the two. Thus the initial goal of the questions was to obtain the interviewees own opinions on what should be done to create a better

broadcasting industry. If they had not covered any of Venturelli's suggestions in the initial conversation then her suggestions were introduced and the respondents were asked whether, and how, they thought the future of broadcasting might change given those suggestions.

These responses were collated under the major headings that emerged from the discussions and from Venturelli's work, which allowed for comparisons between the opinions of the interviewees and from the academic work of various scholars in the field. Maxwell (1996) suggests that data analysis and report writing should be done in conjunction with interviews and not done once interviews are complete. This allows the researcher to refine their understanding of the work, although he notes that this has the potential to create bias as one is writing without all the information at hand. To minimise the possibility of bias, data was only analysed once all the interviews were complete. Maxwell (p. 78) notes that there are three strategies that should be used for data analysis: memos, categorising strategies, and contextualising strategies. This approach was followed in the analysis. Collating information and writing notes, seeking the commonalities between interviews (categorising), and finally using contextualisation strategies to identify the relationships between the interview material and other research that had been collected from books and journals.

Scenario Planning

Once the interviews were complete analysis of the cultural policies of the South

African government began. It was simply not enough to provide the opinions of the interview respondents; a more complex form of policy analysis was needed. Patton and Sawicki (1993, 3) suggest that policy analysis involves five steps:

1. Define the problem
2. Determine Evaluation Criteria
3. Identify Alternative Policies
4. Evaluate Alternative Policies
5. Select the Preferred Policy
6. Implement the Preferred Policy

The above process was used as a guideline for the analysis in this essay, while step six cannot be completed, suggestions are made for implementation. Part of the analysis is to determine if indeed there is a problem and in what areas if so. The problems or areas of concern are defined in the first two chapters. The scenario plan attempts to identify and evaluate alternative policies, where they might be needed. As this report deals with the broadcasting industry as a whole, the solutions presented in the final chapter consist of a range of policy suggestions.

According to Ratcliffe (2000), scenario planning was first developed by Herman Kahn in the 1950's, who coined the phrase “thinking the unthinkable”. The first time the technique was successfully employed was in the 1970's by the Royal Dutch Shell company. Since then scenario planning has been widely employed by a number of sectors from health to finance to telecommunications. Ratcliffe notes

that the primary application for scenario building is to: “... alter the mind-set of decision makers about future possible opportunities, threats and actions, so that they are not caught by surprise.” He suggests that a key feature of scenario building must be analysing the key drivers of change. Ratcliffe suggests that the greatest challenge of scenario planning is quantification, in businesses numbers are often essential in helping to determine the value of the scenario for the organisation. The risk of this is that scenarios are then reduced to simple numbers games. This essay does not go into quantitative detail as the application of the scenarios is for the broader field of policy development rather than an individual company.

Bloom and Menefee (1994, 225) note that scenario planning has the following benefits: it permits rational decisions to be made from a state of preparedness; integrates various dynamics; allows for experimentation; and serves as a guide for monitoring change. Bloom and Menefee (1994, 225) consider the ways in which scenario planning is used. They cite the example of the Los Angeles Department of Water and Power which develops policy based on scenarios for long term demand for water and power.

Illbury and Sunter's (2001, 38) matrix describes the process of scenario planning. It contains four steps:

1. Rules of the game
2. Key uncertainties

3. Options
4. Decisions

Once sufficient background is obtained during step one, scenario planning occurs during step two. The scenario plan provides various options with the goal of providing the best possible decision. Illbury and Sunter consider scenarios to be stories about possible futures or, "...multiple pathways into a future that is unknown" (p. 87), as opposed to forecasting which only looks at a single likely future. They suggest that each scenario have a simple theme and that only two or three scenarios be constructed for any particular situation because any more would make the decision making process too difficult to complete. Thus, while several scenarios were developed, only the two most relevant scenarios are presented in this report. The scenarios were constructed from the future trends that interviewees and the literature in the first two chapters suggested.

Illbury and Sunter note that the objective of a scenario is to reduce the complex to the understandable. This has been accomplished in this report by building a simple narrative description around the possible trends in the industry and grouping related trends together. The key factors that influence the scenario are then presented in bullet point format. Those key points are discussed in more detail with a view to determining how likely they are to happen and what impact they would have on the industry. Finally the outcomes or what can be learnt from the scenario are presented. Scenario planning proved to be the ideal methodology to analyse policy with an integrated approach. The purpose of the scenario plans is

to foresee potential pitfalls in the future of South African broadcasting and look at what can be done to avoid them.

Schoemaker and Cornelius (1992, 41-47) consider the case study of the oil company Royal Dutch Shell (hereafter referred to as Shell) who have been making regular use of scenario planning since 1970. They have since integrated the process into their management and planning structures. They develop their scenarios by selecting the areas of concern, considering the key issues, and then organise and focus their scenarios around the key concepts. Shell discovered that one of the problems to avoid with scenario planning is to not create best and worse case scenarios, they believe the key is not to oversimplify the plan because very little can be learnt from such plans. Once greater understanding of the issues at hand has been obtained from the development of the scenarios a direct policy intervention is made: managers then attempt to refine the strategic vision of their division to compensate for the impact the scenarios might have on the future of the company. Strategic options for management are then developed from all the information gathered and are implemented. There is risk in implementation because it is based on possibilities for the future and this is where the best judgement of the manager plays a significant role. This point highlights one of the limitations of scenario planning: as they are only possibilities for the future one cannot base all of one's plans on them, they should rather be used as guidelines and be used to assist in policy formation, not entirely determine it.

Patton and Sawicki (1993) discuss the different kinds of policy analysis, suggesting that policy analysis can be done before or after a policy is implemented. While some attention is paid to current policies with a retrospective analysis, this report is dedicated to the possible outcomes of the policies suggested by Venturelli and others, thus it is predictive analysis. Patton and Sawicki define predictive policy analysis as: "...the projection of future states resulting from adopting particular alternatives..." (p. 23).

Interviews and policy analysis form the bulk of this report. Additionally the impact of international trends is also a component of the research and as there is a great deal of research available on this topic internationally, obtaining sufficient information was uncomplicated. This report integrates information from newspapers and internet web site reports that describe new horizons for digital content and international policies for digital broadcasting.

Theoretical Framework

Scullion and Garcia (2005) note that there are three interconnected areas of cultural policy research: “the history and historiography of cultural policy; the principles and strategies of cultural policy; and cultural policy and cultural theory/ cultural studies” (p. 122). These can be shortened to history, practice, and theory. The history and theory of cultural policy are discussed in Chapter One, while Chapter Two looks at the history of South African policy specifically. The practice is discussed throughout this report.

Duelund (2003, 13) suggests that cultural policy is about the ways in which art is funded and, “... the clash of interests between the different ways stakeholders – in society in general and in the cultural field in particular – reflect art and culture.” He suggests (p. 20-22) that there are four models by which states support the arts and consequently develop policy, states can be: facilitators, patrons, architects, or engineers. Under the facilitator model the state offers support to the arts via tax exemptions but does not provide direct state funding or regulation. The patron model involves some distance between the state and culture but independent councils are set up to provide funding to select arts organisations. According to the architect model the state provides the framework and overall policy objectives via public debate. While under the engineer model the state owns and controls all artistic production.

Boyd-Barrett (2002, 40) notes that there are three major approaches to studying

the media: effects studies, cultural studies, and political economy. This report focuses on the political economy approach which analyses the media in historical, social, and political contexts and aims to have some sort of social action/application (as research in this approach tends to have). Also relevant to this study is the 'uses and gratifications' approach to media consumption which asks: 'How do people use the media?' as opposed to 'What effect does the media have on people?' This approach is relevant because with digital distribution of video content the focus is placed squarely on audiences: how do they use the content, and where do they find said content?

This report follows a deductive approach. As noted, the central reference for this report is a piece written by Shalini Venturelli (2002). Her work is representative of a new emerging way of thinking that looks forward to the new information economy and acknowledges the role that cultural policy plays in this economy. Miller and Yudice (2002), Adams and Goldbard (1995), and Holden (2004) are other examples of theorists who suggest that cultural policy needs to be redefined and has an important role to play in the future of society. Of these theorists Venturelli was selected because she offers concrete suggestions on how this can be done and her argument takes a broader look at the cultural industries than the aforementioned theorists. Venturelli constructs her argument by first looking at the history of both culture and economics and then looking at the direction in which these two sectors are heading. She logically extrapolates her assumptions from the present cultural and economic environment.

What makes her work different from other academics in the field of policy studies is that she suggests that *cultural* policy has some of the answers for the future of society. The present trend, certainly in the broadcasting industry, is to focus on profits and efficiency. Often the by-product of such an approach is quantity or getting the best possible return on investment, rather than quality or asking how individuals beyond the investors, such as the public, benefit from this product. Venturelli is suggesting that while financial issues are relevant, the same policies that are applied to manufacturing and mining cannot simply be cut and pasted onto a policy framework for the cultural industries.

The locus of her work is the *future* of cultural industries, which is uncommon in the field of cultural policy research. Venturelli suggests that this field of research usually looks at the past rather than the future, for example, it focuses on the preservation of old cultures and cultural products rather than the invigoration of present ones. If audiences wish to see more imaginative, creative, critical work in the future then policy-makers must encourage new cultural work as a policy priority. Venturelli points to the fact that what is needed is a well defined facilitative cultural policy framework.

For Venturelli, the cultural industries play a central role in what she describes as the new 'information economy'. Whereas the previous economy was based on agriculture, and the current economy is based on manufacturing and industry, the

economy that society is moving to is based on information. Venturelli claims that culture is the centre of the new 'information economy' because of the value cultural/creative thinkers bring to this environment which is based on ideas, as opposed to tangible items (like gold, maize, or wood), and for other reasons such as entertainment and education systems.

In order to capitalise on this development Venturelli suggests several policy interventions that need to be put into place for developed countries to remain or become competitive in this new economy. These policy interventions include: the need to reorder education systems, diversifying financial resources to creative enterprises, issues of copyright, and information monopolies (p. 20-22). Her framework is a relevant one as these issues are beginning to emerge across the world and policies to govern them are still at a stage of infancy. These suggestions will be discussed in detail in Chapter Two, with additional commentary from interviewees and myself in Chapter Four.

Chapter One: A Literature Review of Cultural Policy

This chapter discusses literature concerning cultural policy from various academic sources. In his book, 'Television Culture', John Fiske (1987) suggests the following definition of television and culture:

> "... I work with the definition of television as a bearer/provoker of meanings and pleasures, and of culture as the generation and circulation of this variety of meanings and pleasures within society" (p. 1)

Fiske considers the relationship to be a bi-directional one – television informs culture and culture informs television. This definition is a perfectly apt one because it suggests that both concepts are indeed linked and defines them in the context of cultural studies. It is this definition of culture and television that is used in this report.

What is cultural policy?

Professor Kupe, Dean of Humanities at the University of the Witwatersrand (2008), suggests that cultural policy can be defined as the framework for maintaining, preserving, and promoting a particular culture. This is a traditional academic view of cultural policy that uses the past as a reference point. Mr. Howard Thomas, lecturer and researcher in the field of broadcasting (2008), suggests a more practical definition. For him cultural policy encourages people to express opinions and thoughts and is a powerful influence on the economy and the

way in which people live. Thomas also theorises that there are three aspects of culture: national culture which concerns heritage and language; media culture which incorporates arts and literature; and consumption culture which concerns consumer goods and leisure activities.

Miller and Yudice (2002, 1) suggest that culture and policy are connected to each other on two registers: the aesthetic and the anthropological. The aesthetic register regards culture as art or the sum of the creative output of a society, while the anthropological register regards culture as the way of life of a particular society. Venturelli (2002, p. 3-5) would agree but she adds a third register which is an understanding of culture that is industrial and commercial. She suggests that in the modern economy, culture is seen purely as a commodity that can be bought and sold like toothpaste or cars. Her definition agrees with the one presented by Howard Thomas, thus they both suggest that no definition of cultural policy is complete without some acknowledgement of the role that consumption and industry play. Venturelli adds that cultural policy tends to look at the past rather than the present, for her, the true measure of a culture is how actively people participate in culture in the present moment.

With reference to the two above registers, Miller and Yudice define cultural policy as, "... systematic, regulatory guides to action that are adopted by organisations to achieve their goals" (p. 1). Duelund (2003, 14) suggests that cultural policy is "... the political struggle to establish the framework and conditions for artistic self-

realisation in a given historical context." He adds that it is used by governments to stimulate arts and culture. Duelund does not take into account the anthropological register that Miller and Yudice suggest nor does he regard Venturelli's industrial suggestion as central to the definition of the term.

Duelund looks at the history of cultural policy and the various stakeholders involved in the process of making such policy. In addition to the government, Duelund (p. 14) notes that there are other stakeholders who produce and are affected by cultural policy: cultural institutions, the public, artists, the social and education sectors, private companies, and international bodies (like the United Nations Educational, Scientific and Cultural Organisation and the Convention on Cultural Diversity). Historically in Europe the arts have been supported by patrons, such as the church, aristocracy, the bourgeoisie. After World War II, however, governments began funding the arts. Finally private patrons have regularly funded the arts and since the 1960's private companies have also begun to do so. Duelund suggests that the concept of governments producing cultural policy is a relatively new phenomenon. Despite the rise of democracy it is still only a relatively small number of people, usually the most affluent or best educated, who have access to cultural products. Thus, in the spirit of democracy, governments create cultural policy to ensure that more people have access to the arts.

Venturelli (2002) discusses one of the major flaws in present day public policy,

particularly cultural policy: the tendency to look at the past. Her argument goes to the very definition of culture:

> "... the most significant issue confronting us today concerns the possibilities available for most people in a society to participate in originating new cultural forms. Hence, the environmental conditions most conducive to originality and synthesis as well as the breadth of social participation in forming new ideas comprise the true tests of cultural vigor and the only valid basis of public policy" (p. 10).

Venturelli prefers a definition of culture that takes the present and the future into account rather than just the past. Professor Kupe (2008) differs though, as discussed above, he advocates a view of cultural policy that is rooted in the past that will maintain, preserve, and promote culture because he (like most academics) does not consider it the job of cultural policy to deal with the culture of the future nor does his definition deal with the promotion of creativity. Venturelli is correct in suggesting that cultures are constantly evolving and changing and that society needs to ensure that it promotes this continual evolution through policy lest creativity be stifled.

The complexity of this debate increases when applied to the world of broadcasting. Subscription services are only accessible to a few people in South Africa, but the majority of the population, which will be discussed in Chapter Two, has access to four television channels. In terms of audience, this represents many more people than any theatre or art gallery can hope to reach. Furthermore, these four channels are the only place viewers can expect to see content in indigenous languages, with the exception of Afrikaans which is well represented

via the subscription services. Consequently in the case of broadcasting Duelund is not entirely correct, while some are left out it is the majority that have access to this particular cultural medium.

Governments and Cultural Policy

One of the major ongoing debates in cultural policy centres around government control. Landry and Matarasso (1999) discuss the dilemmas that face cultural policy makers in Europe. They suggest that there are two extremes in government involvement in culture: either the government has no involvement at all or all cultural assets are controlled by the state. They suggest that the challenge is to find where policy should lie: exactly in the middle, or towards one direction.

Fullman (2006) and Miller and Yudice (2002) note that there is no unified or direct form of cultural policy in the United States and suggests that the country is none the worse for it. Miller and Yudice seek to transform the social order via cultural policy, they reject the notion that the government should be the primary locus of power in the formation of cultural policy. Their work is relevant because they provide an alternative to the many voices, such as Craik (2007), that suggest only governments can and should make cultural policy. Miller and Yudice suggest that while it may appear that there is no official American cultural policy and that the American government claims to not make such policy, this is an illusion. While there is no formal policy, many policies are made that have either a direct or indirect effect on cultural institutions and products. They note that, for

example, the Justice Department classifies all foreign films and has banned films it deemed 'dangerous', while Hollywood film producers receive tax rebates and incentives, as well as support from state owned film commissions, and Republican governments have tried to shut down the National Endowment for the Arts (Miller and Yudice, 2002, 36-37). These are all examples of cultural policy.

Thus it would appear that governments are always making cultural policy even when they claim not to be doing so. A government need not have an official Department of Arts and Culture (which does not exist in the USA) to make cultural policy. As Miller and Yudice demonstrate, cultural policy can be made by the Justice Department or by financial departments. The consequence of this is enormous, because the public may believe that the government has distanced itself from any kind of control of culture. Governments can thus make cultural policy without consulting the individuals' whose interest is culture because the policy is labelled as 'financial policy' or 'public safety policy', thus reducing the possibility of comprehensive public debate, especially for artists.

The above suggests that the scope of what can be defined as 'cultural policy' is quite broad and is intimately connected to many other kinds of polices. Cultural policy covers areas as diverse as censorship, finance, and politics. No field of policy exists in a vacuum, just as cultural policy is affected by political and financial policy, so too does it affect political and financial policy. This point is further discussed in the final chapter.

Craik (2007) suggests that it is governments who must revitalise their perceptions of the formation of cultural policy and their support for cultural institutions. She believes that it is the job of government and not civil society nor the cultural institutions themselves, which is a concept with limited value. Adams and Goldbard (1995) agree with Miller and Yudice, they believe that ideally the government should have little or no influence over cultural policy, if a comprehensive national cultural policy should exist in the first place. They go so far as to state that they hope politicians, and the government by extension, have nothing to do with creating a comprehensive cultural policy, as the beliefs of those politicians (whom they do not like) would directly impact the kinds of policies developed.

Adams and Goldbard do, however, concede that governments ultimately do make cultural policy:

> "... it is impossible for a government to avoid making cultural policy. No state can refrain from having cultural impact. And that impact, in the aggregate, will always constitute the national cultural policy - whether or not it's explicit and articulate. US. national policy lacks coordination, clear aims and objectives. But it must be realized that every administration will make and implement policy, either as a carefully-considered element of public action, or by default, in bits and pieces, without public scrutiny or participation." (p. 12)

Thus the reality is that cultural policy is unavoidable as much as one may theoretically or philosophically oppose the principle.

Pachter and Landry (2001) provide a fresh perspective on the future development of cultural policy and the role cultural practitioners themselves must play. They argue that cultural policy must be redefined by those who have an interest in culture because it is currently being defined by financial and political policy-makers. These individuals are making cultural policy because cultural institutions and practitioners are unwilling or incapable of doing it themselves. They suggest that cultural institutions need to acknowledge their responsibilities and develop cultural policy for themselves before others do it for them. This is quite true, for example, the consistent focus on the financial results of public broadcasters, which will be further discussed below. The focus needs to be shifted from financial results to creative and informative programming.

Kariithi (2003, 170-171) agrees with Pachter and Laundry; he suggests that it is cultural institutions themselves who should be making their policies, particularly with regards to broadcasting in Africa. Kariithi provides an African perspective on broadcasting policy. He notes that the idea of voluntary regulation is attractive and may become necessary as technology converges and gives broadcasters the flexibility to adopt new strategies. Throughout Africa the converse appears to be true, most states highly regulate broadcasting with legislation, for example, Kenya and Tanzania. The reasoning for this is the growing commercialisation of broadcasters and the fact that broadcasters have an increasing ideological power, thus governments feel it is best to safeguard local content and culture via

regulation. This might indicate that western cultural policy may have limited relevance to the African broadcasting industry at the present time.

As previously noted, Duelund (2003) suggests four models for state involvement in the arts: facilitator, patron, architect, and engineer. In practice a position between the patron and architect models is probably best. The state develops the policies and organisations to get the industry started as it has sufficient capacity to do so, as in the architect model. Thereafter a patron model should be adopted, the state continues its relationship with broadcasters at 'arms-length', providing funding but never exercising complete control over the industry, just enough to ensure diversity and that no single broadcasting company becomes too powerful.

Miller and Yudice's (2002) notion that governments should not make cultural policy is an intriguing one. It is worth noting that American cultural industries, particularly the film and television industries, are well established. This is not so in South Africa. It may be that until these industries are further developed and can be self-sustaining that government intervention is required. The point made by Miller and Yudice could quite possibly become relevant in the future and is worth noting for today's policy makers. It is also worth noting that the government interventions Miller and Yudice refer to, such as financial incentives, can be considered facilitation, while interventions like censorship, can be considered regulation. Is it possible to have government facilitation and not expect government regulation? This is too large a question to answer in this report, but,

as Kariithi (2003) suggests, regulation may not be possible in the future. If that becomes the case then all the government will be able to do is facilitate. This is one of the central points of this report and will be further discussed below.

A cultural policy approach to broadcasting?

The question at the heart of this report is: What value does cultural policy have for the future of broadcasting? This suggests a cultural policy approach to broadcasting rather than a commercial one. Broadcasting is treated more like a commercial business by both the media and legislation than any other kind of cultural industry. The commercial approach is insufficient when faced with the responsibilities that broadcasters are meant to carry out. They have social, educational, and cultural commitments and responsibilities that most businesses and industries do not, because they form a large part of the mass media that is consumed by the majority of the public. As noted in the next chapter, broadcasting was thought to be so powerful by the apartheid government that South Africa did not introduce television broadcasts until 1976!

The Broadcasting Act (No. 4 of 1999) includes the charter of the SABC and makes no demands on the SABC to produce a profit or to break-even. This is important when placed in the context of the print media's emphasis on the SABC's financial results. Most functions of broadcasters are regulated and controlled (either directly or indirectly) by the government. In South Africa the Broadcasting

Act and the Electronic Communications Act (No. 36 of 2005) form the basis of this regulation. It is important to note that there is very little policy around the impact that the internet and other digital media might have on broadcasting.

The primary form of content distributed by television broadcasters are television programmes. These can be locally or internationally produced and globally have significant market value. Bielby and Harrington (2002, 226), however, suggest that a television programme is not simply an asset with distribution rights as some economists claim. They suggest that,

> "Television is a product that embodies cultural substance reflecting interests and values. It originates in the creative process of writers, and it is evaluated by critics and audiences who apply aesthetic criteria that ultimately determine the fate of individual series. Although those in the business are motivated by profit, a central feature of this culture world is the ways collaboration among individuals with disparate understandings about the cultural product shape its production, distribution, and reception globally."

The implication of this is that, as much as television programming is a commercial commodity, it is also a form of art that resonates with individuals in ways that no ordinary commercial commodity, such as pencils, a share in a company, or even a book can.

The argument for financial policy or commercial imperatives governing television content is particularly weak when one considers that individuals can, if they wish, place content on the internet with no intention of receiving compensation for said

content. An example of this is the *YouTube* website where users from all over the world, including South Africa, are not paid for content but nonetheless continue to post their home-made and professional content on the website (Karp, 2007). When faced with these cases it makes sense to have cultural policy rather than financial policy to encourage this kind of work. Cultural policy is broader than fiscal policy and is more productive in relation to artistic/cultural work, where profit is not always the primary goal. Other goals include education, social development, cultural exchange, political and social awareness, and sometimes it is simply art for the sake of art. Directors, writers, and producers may not have financial motives in mind when creating programmes.

Broadcasting in South Africa falls under the portfolio of the Department of Communications and not the Department of Arts and Culture, creating an interesting separation of mandate. The White Paper on Arts, Culture and Heritage (1996), which was produced by the Department of Arts and Culture, defines culture as:

> "...the dynamic totality of distinctive spiritual, material, intellectual and emotional features which characterise a society or social group. It includes the arts and letters, but also modes of life, the fundamental rights of the human being, value systems, traditions, heritage and beliefs developed over time and subject to change."

Broadcasting must fall under the above definition of culture, as it is the largest medium through which South Africa's 'spiritual, intellectual and emotional features' are transmitted. Furthermore, broadcasting serves as one of the largest employers of creative workers from arts industries: employing writers, designers,

cinematographers, and actors. Thus, if broadcasting is a major force and employer in the cultural and artistic industries, then it follows that it must on some level be a cultural institution, and the application of cultural policy in this sector might have some value.

As per Duelund's definition of cultural policy as the framework for artistic self-realisation, broadcasters have traditionally been the only platform for artists working in video and audio to distribute their work to a mass audience. Today that paradigm is shifting: the internet has become a major platform for content distribution and is beginning to threaten traditional broadcasters (Screen Africa, 2008a). Consequently broadcasters and the government have to develop new policies to cope with this phenomenon, lest the broadcasters (or more importantly) their public/social mandates become outdated.

The platforms, i.e. the transmission or broadcast services, are becoming less relevant, but the content they present is becoming more so, indeed this is one of the points that Venturelli (2002) makes. Due to this convergence it might be necessary to look at broadcasting in new terms: as audiovisual content delivered over multiple platforms. The traditional notions and definitions of the term 'broadcasting' may have to be abandoned altogether. The implication is that broadcasting policy as it stands may become outdated because it has no way of dealing with the new methods of content distribution. It follows that the largely regulatory framework that South Africa and many other countries have will

eventually fall away. In such a situation a cultural policy framework that facilitates content might be more useful. This is one of the key points of this report, as such the second scenario in Chapter Three deals with just such a situation.

All interview respondents agreed with the proposition that cultural policy does include broadcasting. Mr. Thomas (2008) suggested that this is so because the industry is regulated, licenses are highly conditional, and tools such as local content and language quotas are employed by the regulator. Mr Moilwa (2008), a senior policy manager at the SABC, suggested that in this context, cultural policy can be defined as the extent to which cultures are reflected in broadcasting. Professor Kupe (2008) suggested that broadcasting must fall under cultural policy because it is a cultural sector: it circulates narratives pertaining to life via a representation.

Venturelli argues that culture and present day cultural policy has indeed become a subject of industrial or development policy:

> "Policymakers have worked from industrial assumptions to decide the fate of the information and creative marketplace, with scant intellectual or empirical grounds to assess how and in what manner the production and distribution of creative ideas and intellectual/cultural products are qualitatively different from the production and consumption of widgets, automobiles, appliances and other industrial products" (p. 6)

She suggests (p. 7) that the need to re-examine society's approach to culture, and consequently cultural policy, has been apparent for some time, as society moves

into the information economy but society has not realigned its policies to match the new economy. Policies developed for an industrial economy cannot be applied to the establishment of an information economy. An example of one such policy is Venturelli's suggestion that information and cultural products are not consumed one at a time, but that these products are used repeatedly by many gaining value over time: a television programme like *Desperate Housewives* is 'consumed' by many people at the same time, it becomes: a shared experience for everyone who has watched a broadcast of the show, a cultural reference (telling us about a particular culture at a particular time), and a source of conversation. The programme is then distributed via DVD and online downloads: now people are willing to pay for 'ownership' of the product demonstrating its increased value.

The Information Economy

Venturelli (p. 7-9) suggests that cultural policy is key to the future of all cultural industries, and in fact for the entire information economy. She notes that society is moving away from an economy in which agriculture and industrial production are the core, to an economy that is based on information and ideas: the information economy. Venturelli suggests that in the industrial economy the value of an item decreases with use, for example cars and toothbrushes, but in the information economy an item's value increases with use, for example a book or film. The reason for this is that the more popular a cultural product or idea becomes the greater its value is. She believes the internet is becoming the mass distributor for all forms of cultural content, which has a potentially huge effect on the current

broadcasting system, a point further discussed in the next chapter.

Venturelli believes that cultural industries play a vital role in the information economy; she goes as far as to claim that they are the very centre of this economy. This is because individuals trained in cultural/arts-based curricula tend to be independent thinkers and individuals with these skills are the ones who drive the information economy, furthermore, a large number of the products the information economy produces are cultural. Examples of these include: blogs (which are akin to diary entries), music that can be shared online, the increasing value of ideas/patents, and the possibility of generating revenue from posting videos online.

Flew (2002) speaks to the notion of the information economy that Venturelli (2002) introduces in the context of the broadcasting industry. His work discusses the ways in which digital broadcasting can be used to encourage and facilitate new forms of learning in the information economy and he suggests that digital broadcasting can be a tool for further learning. Inherently, Flew's arguments support Venturelli's suggestion that cultural industries have a new, important role to play in the information economy. He suggests that the world is moving towards a new level of convergence: structural convergence (p. 52). Structural convergence results in the following changes: Infrastructure migrates from the physical to the digital realm, for example, e-government, e-health, e-education, whereby one could vote, pay taxes, learn from an educator, and get a diagnosis

without having to leave home. Traditional market boundaries are blurred, as companies diversify into other seemingly unrelated sectors. New players can now more easily enter the market. Users can customise the content and services they receive. Finally, service markets become internationalised (where they are delivered electronically).

One of the difficulties with Venturelli's argument in South Africa is that internet access is still very limited and expensive. According to Statistics SA (2007) only 7.3% of South Africans have internet access at home. Thus, a very small portion of the South African population can make use of websites like 'YouTube' and online gaming sites, unlike the American, Asian, and European audiences that Venturelli is writing about. The implication of this may be that while South Africa's present day participation in the 'global information economy' is limited, her theories may appear to have similarly limited relevance, but this is not the case. Policy-makers must consider the issues she raises for South Africa's policies going forward so that the country does not end up in the situations of confusion she describes happening in the United States, particularly around 'fair use' and copyright. After all, it is the function of policy-makers to both anticipate future trends and consider the impact of historical trends.

An additional concern one might raise with Venturelli's arguments is that she suggests an extremely competitive, even adversarial world economy; one in which some countries will fall behind if they do not invest appropriately in the policies

she suggests. She does not make room for the notion of a shared 'global information economy' which proponents of open source software such as the Open Source Initiative (2006), for example, envision. In her world view countries who have cultivated creative thinkers and content will have an advantage over those who do not.

Nozipho Mvulane, a senior policy manager at ICASA (2008), suggests that the government and ICASA are committed to the notion of the information economy. ICASA's vision statement is: “To be a catalyst in the transformation of the country into an information oriented society and knowledge based economy” (ICASA, 2008). This indicates that the government, via The Department of Communications and its statutory institution (ICASA), considers the information society the future of the country. To this end the government created the Presidential National Commission on Information Society and Development (PNC on ISAD, 2008) that aims to find ways of bringing all South Africans into the information society and to use technology to uphold democracy, human rights, and economic prosperity. The government's plan for developing the Information and Communications Technology (ICT) sector encompasses the following: building local capacity within the industry; building infrastructure; capturing a portion of the growing international ICT market; and establishing an enabling policy and support environment for the country (DTI, 2000, 8-10). Venturelli's work speaks directly to the last point.

Luci Abrahams is the director of the University of the Witwatersrand's Link Centre, which is dedicated to the study of the ICT sector. She argues that as South Africa moves into the information economy sufficient capacity must be built in the higher education sector (2003). She also agrees with Venturelli that education systems need to be multi-disciplinary and inter-disciplinary across the sciences and the humanities if South African students are to be made ready for the information economy.

Thus there is local awareness of the information economy and willingness to become a part of it. It would appear that Venturelli's suggestions have some validity in South Africa because the government is positioning the country as an information society and as a product of the information economy there is a reasonable basis to apply her work to television content. Additionally this validates the decision to position Venturelli at the centre of this report, of all the aforementioned cultural policy theorists she is the only one to deal specifically with the information economy, while Flew does so too, his primary concern is education.

Venturelli's Cultural Policy Interventions

Venturelli (p. 18-22) offers four basic interventions/suggestions that she believes must be implemented for any country to be successful in the information economy:

- The current education system must be reordered.
- The financial base for creative industries must be transformed.
- Fair use must be balanced against property rights.
- Competition policy must be prepared to deal with information monopolies.

Education

Her first suggestion is that the education system needs to be reorganised to encourage creative and independent thought. Individuals working in the information/creative economies need a flexible system that teaches them how to be independent thinkers in the manner in which traditional education in the humanities does. She advocates an interdisciplinary approach to education. Venturelli suggests that the current education system (particularly in primary and secondary schools) encourages children to memorise information rather than critically engage with it. This approach suited the industrial economy in which one would do a single specialised task as part of a production line, but this system is insufficient to meet the demands the information economy places on its workers.

Flew (2002) agrees with Venturelli and considers the ways in which the education system is already transforming. His work is relevant to this discussion because he believes that the information economy fundamentally changes the ways in which society is educated. He suggests (p. 49) that in the information economy education must become a life-long pursuit, because technology is always changing and as

such, qualifications can quickly become outdated. He envisions a system whereby individuals obtain an initial degree that teaches basic skills and then they will spend the rest of their lives completing short courses and using distance education to keep up with new technologies. He also notes that distance education becomes more attractive in the information economy because it is more interactive. Video conferencing makes one-to-one interaction possible between a student and lecturer. Additionally, the new multi-channel broadcast environment makes room for channels dedicated to education that will be available to everyone in the country who can access television broadcasts.

Flew believes that there is a greater possibility for 'open learning', whereby everyone has access to education because of increased availability and reduced cost, not just for their careers, but for personal development as well. He notes, however, that there are several problems with this model including: the cost of making broadcast content, broadcast systems offer inflexible time-tables for students, limited government funding, and limited scope for fee-paying courses. Additionally a potential intellectual property issue exists, as the best educators and institutions may want to keep tight control over their methods of education and the content of lessons in order to maintain their commercial viability. The Michigan Institute of Technology (MIT) in the USA (Festa, 2002) offers course materials and video-taped lectures online which are free to access anywhere in the world. The institute believes that it is not a substitute for a degree as they believe the interaction between students and lecturers is integral, but they do believe that

the information should be made available to everyone to expand the common knowledge of society.

Finance

The financial base of creative industries needs to be transformed via diversification and de-centralisation of funding. Venturelli (p. 20) specifically cites the micro loan concept as a viable one for promoting growth and innovation in the cultural sector. She suggests that countries reduce taxes and offer additional incentives for creative risk taking. These interventions are particularly necessary when one considers the present views of culture held by economists and others.

The is another aspect to the financial discussion that must be attended to at this point. The reason why finance has become such a major point of contention is the perceived 'value' of culture and the arts. David Throsby (2003: 59), who is an economist, approaches cultural policy as follows:

> "... as an arm of economic policy – justifying support for the arts, for example, in terms of government's role in correcting for market failure. Such a treatment is consistent with the proposition that over the last twenty years government policy in most western countries has been increasingly driven by economic imperatives; reliance on market processes in the allocation of resources has grown, social policy in areas such as education, health, welfare and so on are more and more couched in terms of economic relationships between government and people."

Throsby is referring to the role that private companies and economic regulators play in the formation of government policy, an example is that the primary method by which ICASA regulates the broadcasting industry is via an economic intervention: the awarding of licenses, deciding which companies can and cannot

enter the market. He does suggest that there are areas of culture that economic theory is incapable of sufficiently dealing with, but he does not make any guesses as to what these might be. This quote is both relevant and significant given that Throsby's point of view is symptomatic of how arts organisations are seen in the press, by the public, and unfortunately by arts practitioners themselves.

Throsby confirms the suggestion of Pachter and Landry's (2001) that economics is defining the value of culture. They note that in recent decades politics and economics have had to redefine themselves in terms of what they mean to the public, while culture has yet to do this. They note that cultural institutions are facing resourcing crises and they suggest that there is a need for, “a profound change of terms and redefinition about what cultural institutions are for” (p. 11). They note that the attitude of cultural institutions and artists in western society is that the government and society 'owe them something'. This is based on the principle that the arts have intrinsic value, which is the notion that arts stimulate society creatively, intellectually, and spiritually. Pachter and Landry note that the modern capitalist system does not take this into account and instead requires that arts and culture produce quantifiable outcomes. The outcomes might be a particular number of people attaining new craft skills or a minimum level of box office takings from a film. They suggest that this should not be the case. Cultural practitioners and institutions need to redefine cultural policy before economists and politicians do it for them.

Holden (2004, 13) also agrees with Pachter and Landry (2001) noting that cultural institutions are now spending more time on budgeting and explaining, in economic terms, how many seats were filled at the theatre or how many people came to the exhibition rather than discussing the intrinsic value in the arts they are promoting. He suggests that non-financial goals are being neglected. Cultural industries are increasingly seeing themselves as businesses with a subsidiary aim of societal development.

Holden's work is relevant to this discussion because he is concerned with the ways in which both society and cultural practitioners determine the 'value' of culture. He suggests that neither the 'intrinsic value of culture' nor the 'quantitatively based economic/social outcomes' arguments are acceptable. He suggests a redefinition of 'cultural value' that takes both views into account but adds that a host of different tools can be used to determine 'value'. Holden advocates that policy-makers recognise that outcomes are not different from the processes that create them; value is not simply the goal, in pursuing cultural value the processes used to achieve it have value in themselves.

Thus Holden is arguing that cultural institutions and artists themselves have to use alternate methods to determine the value they create for society; government cannot do this for them, they then need to publicise their results. Instead of thinking of how many high-income earners watched a particular programme, the focus should be on what those who did watch the programme gained from the

experience. If society redefines the way in which it thinks about value creation in the arts and culture it can move past the simple 'intrinsic value' and 'economic gain' arguments to one that encompasses several views on the value of culture.

Holden (p. 25-27) argues that the language used to refer to the arts should be revised. When compared to economics, politics, or sciences the language used to describe arts and culture is rather negative.

> "Many cultural organisations are charities, where the professional management have to be governed by non-executive Trustees. When Government pays commercial private sector companies for R&D, it enters into a contract resulting in experimentation, but in the cultural sector the same thing is called upholding the right to fail. Terms such as state patronage and private philanthropy conjure images of subservience and the begging-bowl. This language may not be surprising, since historically private patronage preceded state funding, but the master/servant relationship is perpetuated by its use. It is little wonder that many publicly funded cultural organisations lack confidence." (p. 27)

When cultural producers begin seeing themselves differently they will be able to convince funders and financial institutions that their money is not a charitable donation with no 'return', but that there is a 'return', it just may not be entirely financial.

Copyright

Ideas have greater value in the information economy and consideration must be given to the manner in which access to those ideas are granted or denied and how the creation or formulation is supported. The issue of intellectual property rights versus 'fair use' (which implies that one is able to use/copy copyrighted works

under certain circumstances without paying for it) has become a particularly contentious one on the last three years with corporations big and small getting sued and suing for copyright infringement.

Recently Lucent Technologies successfully sued Microsoft over their 'illegal' use of the MP3 music format (Fried, 2007). While Microsoft has threatened to set in motion the greatest challenge for the information economy yet by suing Linux and OpenOffice.org producers and users over infringement of their copyright (Parloff, 2007). Microsoft claims that open source software groups are violating its patents and declared that it can sue for damages (but have since chosen not to pursue that course of action for the present moment). Open source software companies advocate the idea of software and ideas that are free (financially and in terms of their ideas). If this lawsuit ever does go to trial it will have far reaching implications for the future of public domain information technology and will force courts around the world to determine exactly what 'fair use' is and just how far patents should reach.

An increasingly small number of corporations control an increasingly large number of patents and copyrighted work. Venturelli suggests that new information must enter the public domain so that everyone can use it, but those who create the new content/platforms also need to be able to derive some income from their work. She notes that in the present capitalist system American corporations have more information rights than individuals. She suggests that a solution to this

problem might be that governments impose positive obligations on information industries to share some of their information. She cautions against governments imposing negative content regulations (censorship) which will reduce the number of ideas that enter society.

South Africa has copyright law and foreign ownership rules to deal with these issues, whether national law will withstand the new challenges that the information economy will bring remains to be seen. Mr. Mngqibisa (2008), a lawyer by training, suggests that South African copyright law has not been updated since its inception in 1978. Shapiro (2001) notes that the United States faces a similar problem, with the duration that copyright should subsist after the death of an artist, and the Digital Millennium Copyright Act (which has served to further empower corporations) being two of the most contentious issues to which there are no easy answers.

Monopolies

Finally nations need to be careful of monopolisation of content and ideas by an increasingly small number of companies. Venturelli notes that in this area in which global regulators and bodies, such as the World Bank and the International Monetary Fund, have a huge impact on national cultural industries (p. 26). Governments and national courts have very little power over how they adjudicate mergers, acquisitions, and copyright issues and most of these policies are being set by international organisations which it would appear South Africa must assent

to if it wants to participate in the global economy. As Venturelli notes, major corporations wield more power and money than most small countries, which has been a worrying issue with regards to exploitation of workers and now of content. Examples of how a small number of companies have traditionally controlled South African media will be discussed in Chapter Two.

The adversarial nature of the 'global information economy', as Venturelli (p. 36) presents it is realistic, but perhaps it is not countries who are competing but multi-national corporations. She only touches on this trend but it is corporations themselves who are building content platforms and the actual content. If a South African creates a successful website or platform (like Mark Shuttleworth's Thawte security system) an international company can simply buy out the website or idea. In the short term the owner of the website will have more money but in the long term South Africa loses out on a patent or intellectual property that will make American or European dominance of the information economy even stronger. Of course there is little way around this as the global market economy dictates that South Africa must allow international corporations to buy just about anything just about anywhere.

As this chapter has illustrated, cultural policy can and does apply to the broadcasting industry. Now that there is a common basis for understanding what cultural policy is and what Venturelli's suggestions are, the industry itself can be dissected. Chapter Two will look at the broadcasting industry and the kinds of

policy and regulation employed by the South African government.

Chapter Two: A Brief History of Broadcasting in South Africa

This chapter is organised in chronological order. First the events and state of the broadcasting industry are discussed, followed by a discussion of how cultural policy is presently represented in the South African broadcasting industry. Then this chapter looks at likely occurrences in the future of the industry. Finally there is a discussion of the biggest influence on the future of broadcasting: the internet.

The Past: The SABC's Legacy

Tomaselli and Tomaselli (1989, 84) note that television broadcasting only started in South Africa in 1976, much later than in most countries. The reason for this, they state, is that some right-wing members of the National Party (NP) felt that it would undermine the Afrikaans language and the power of television broadcast was initially feared as a potentially negative influence. It was ultimately the Meyer Commission (in 1971) that suggested that television could be beneficial to the country and the SABC began television broadcasts. At this point it was believed by those in the NP and those in the SABC, for they were ultimately the same people, that television broadcast could be used to grow the country's 'spiritual heritage' and serve the 'national interest' as opposed to the public interest. These terms were never defined by anyone at the SABC but it was clear that this 'heritage' and the 'national interest' referred only to those shared by Afrikaners,

and to a lesser degree by those of British descent. At this time the SABC's unofficial policy was to support the National Party. Tomaselli and Tomaselli state that undue emphasis was given to the National Party's views, while opinions from other political parties were only used if they were favourable to the NP, and news that was unfavourable to the National Party would be held back (p. 87).

Louw (1993, 9) discusses the post-apartheid, pre-democratic era of policy making (1990-1993). He suggests that at this time media policy was divided into two camps: the African National Congress 'ANC oriented camp' and the 'NP oriented camp'. Louw describes the NP approach as being centre-right, wanting a diverse media that would not be in the control of whichever government came to rule the country. The ANC approach is described as being centre-left, wanting a mixed economy system which would include some form of state control of some media organisations. The policy debates at this time focused on equality and fairness with the ANC group trying to ensure a racially representative and diverse media, most notably in their protests against the SABC board which only included NP aligned members.

Even at this early stage (Louw was writing in 1993) it was foreseen that the ANC's state interventionist approach to media policy, particularly with regards to the SABC, might result in 'Afrikaner nationalist rhetoric' being replaced by 'African nationalist rhetoric' (p.12). Also at stake were issues of commercial monopolization, at that time all of the country's news media were controlled by

four commercial print-based organisations and the SABC which had strong ties to the NP government. Louw notes that these organisations were concerned that the ANC's approach would wreak havoc on their 'free-market system'. Ultimately the ANC would pursue a free-market system, which initially resulted in a number of new media organisations being formed. Today most of them have been absorbed into larger organisations reaffirming those monopolies.

At this time (1990-1994) there were three television broadcasting organisations:

- The SABC which was directly aligned to the NP government.
- Bop TV which was indirectly aligned to the NP government, but strongly in support of apartheid.
- MNET which was controlled by the aforementioned print media groups which were all aligned to the NP government.

By 1994 the SABC had three television channels: TV1 which catered for English and Afrikaans viewers; CCV which was formed from the merger of TV2 and TV3 and catered for English, Zulu, and Sotho speaking viewers; and TSS which catered for English viewers only (Louw, 1993).

The Present: South African Broadcasting Today

According to recent data from the South African Advertising Research Foundation (SAARF, 2007) there are approximately 27 million adults and children who watch television in South Africa in an estimated 7.6 million households. Out of South

Africa's total population of 44 million, this represents about 61% of the population. As mentioned in Chapter One, compared to other kinds of arts and cultural programming, broadcasting reaches a relatively large percentage of the population. To compare the USA has 113 million television households (Nielson Media, 2008) out of a population of 300 million, while Brazil has 36.5 million television households (Press Reference, 2007) out of a population of 190 million. Thus the USA has a relatively higher television viewing population and Brazil has a relatively lower television viewing population.

As noted in Chapter One, broadcasting in South Africa is governed by two acts of Parliament: The Broadcasting Act and The Electronic Communications Act. The three SABC channels, MNET, and e.tv all presently broadcast on the analogue terrestrial frequency spectrum. The spectrum is maintained and controlled by Sentech, a public company that was split from the SABC via The Sentech Act (No. 63 of 1996). According to a recent article in the *Business Report* (Mochiko, 2008a), the South African production industry is worth about R3 billion, including documentaries, dramas, and corporate videos.

The SABC

The SABC is defined as a public broadcasting service (its charter forms part of the Broadcasting Act). Its television channels are subsidised in part by television licenses which are charged to anyone with a television set in their home, this amounted to 17% of the organisation's revenue in 2008 (SABC, 2008), while the

rest, and in fact the majority, of the SABC's revenue comes from advertising, 78% in 2008. A small percentage of its revenue, only 2% in 2008, comes directly from government to fund specific projects that fall within its mandate, such as voter education. In 1996 the SABC renamed its television channels (SABC, 2007):

- CCV became SABC 1 which targets the youth segment of the population and is South Africa's most watched channel broadcasting in Nguni languages.
- TV 1 became SABC 2 which targets the family market and sees itself playing a 'nation-building' role broadcasting in Sotho and Afrikaans.
- TSS became SABC 3 which describes itself as an 'adult contemporary' channel focused on entertainment broadcasting in English.

The SABC is structured, as prescribed by the Broadcasting Act, into SABC 1 and 2, the public broadcast channels, fulfilling its role as the public broadcaster and SABC 3, which falls within the commercial division and cross subsidises the other two channels. The SABC claims to have 17.5 million adult viewers (or 89% of the adult viewing population) across its three channels. Additionally the SABC broadcasts SABC News International, a satellite channel, on the Sentech Vivid platform.

The SABC's current process for content production, excluding news and current affairs programming, is commissioning (SABC, 2005). The SABC makes a request via its website and press releases that it wishes to broadcast programmes

in particular genres that deal with particular issues (for example, HIV/AIDS) and asks production companies to submit proposals for television shows based on these criteria. They do not generally accept unsolicited proposals. The SABC presently accounts for 90% of all local productions and plans to generate more revenue by providing content to the new subscription broadcasters (Mochiko, 2008a).

Multichoice

MNET began broadcasting in 1986 under a licence issued by the Postmaster General of the NP government (Multichoice, 2007), it is a subscription based commercial broadcaster that derives most of its income from subscription fees and additional revenue from advertising. MNET also operates a second channel called CSN (Community Services Network), which largely broadcasts sports programming. In addition to Sentech, Orbicom also functions as a signal distributor. Orbicom is owned by Multichoice and primarily distributes the DSTV satellite signals (Armstrong and Collins, 2004, 9).

DSTV (Digital Satellite Television) began broadcasting in 1995 and is a subscription based commercial satellite service owned by MNET's parent company Multichoice. DSTV offers both local and international television and audio channels primarily via satellite. DSTV has approximately 1.3 million subscribers in South Africa and an additional 700 000 subscribers across Africa. Several different packages have been launched with different combinations of

channels from R440 to a mid range package of R199 and a low end package costing only R20. In all cases viewers have to buy a satellite dish and decoder to access the services. DSTV now also offers the internet (Vecchiatto, 2005) via its digital satellite platform. This service presently allows Media24 (which along with Multichoice is owned by the Naspers media group) to operate two channels on the satellite service which are regularly updated with news stories, much like the Media24 website.

e.tv

In 1998 (e.tv, n.d.) the first privately owned free-to-air television network was launched, e.tv, which broadcasts primarily news and entertainment in English. e.tv is a commercial broadcaster funded entirely by advertising and sponsorship. Presently it offers the only alternative South African television news broadcast to the SABC and is the most watched primarily English-language broadcaster in the country (it is second overall after SABC 1).

Other broadcasters

Additionally according to Aldridge (2006, 46) there are several community television broadcasters operating in South Africa, most notably: GDTV (Greater Durban Television) and Soweto TV, which has recently received a 1 year community television broadcasting license from ICASA (Soweto TV, 2007). Soweto TV is the only terrestrial community broadcaster broadcasting at the time of writing (March 2008). Sentech also operates a free-to-air commercial satellite

service on the Vivid platform, however, its future is unclear as it does not have a licence to broadcast (Mybroadband, 2007b).

Policy and Regulation in South African broadcasting

The clearest manner in which the government controls broadcasting is regulation. The Broadcasting Act and the Electronic Communications Act govern broadcasting in South Africa. Despite the fact that these are communications policies and laws they contain provisions that pertain to cultural policies. As noted in Chapter One, Miller and Yudice (2002) suggest that cultural policy can be made by a wide variety of government departments and agencies. There is no specific cultural policy document pertaining to South African broadcasting. Recognising that broadcasting technology, telecommunications, and information technology are converging, the government created the Independent Communications Authority of South Africa under the ICASA Act (Act 13 of 2000). According to the Act, ICASA was created from the merger of the Independent Broadcasting Authority and the South African Telecommunications Regulatory Authority. One of ICASA's functions is to regulate broadcasting in the public interest. The Department of Arts and Culture also created the White Paper on Arts and Culture (developed in 1996) which serves as a guideline for that department.

The Broadcasting Act (No.4 of 1999) regulates broadcasters and signal distributors. As the objectives of the Act state, it was created in response to the

need for redress and nation-building that all spheres of South African society were in need of after apartheid. It is worth emphasising that it is a largely regulatory framework. The Act requires that anyone wishing to broadcast in South Africa must first obtain a licence. It separates broadcasters into various classes (such as terrestrial, satellite, and free-to-air). The Act incorporates the charter of the SABC. To summarise it states (Chapter 4, Part 3.10) that the SABC must:

- Make its services available in all official languages.
- Reflect all South African cultures.
- Provide high quality content in all languages.
- Provide unbiased news coverage.
- Provide significant amounts of educational programming.
- Support artistic expression.
- Offer services to women, children, and the disabled.
- Include programming made by the SABC and independent producers.
- Include sports programming.

These demands are clear examples of cultural policy. It is worth noting that these demands can be considered to be 'positive regulation' rather than negative, in the sense that the government is asking the SABC to commit resources to a greater diversity and quality of content rather than restricting the broadcaster's abilities.

According to the Broadcasting Act (Chapter 5, section 30) commercial broadcasting services have similar local content requirements to the SABC but they are not as strict. The Act states that commercial broadcasting services 'when

viewed collectively' must: provide diverse programming, provide programming in all official languages, and must geographically cover the entire country. It requests that free-to-air services provide a significant amount of local programming, include news services, and adhere to high standards of journalistic professionalism. The Broadcasting Act does not go into detail on community broadcasting and states that ICASA must further investigate the viability of the system. Finally, while it is noted as one of the objectives of the Act, the chapter (6) regarding skills development states that this must be dealt with by the Authority (ICASA) and government's national policy. The Act does not provide any kind of framework for the industry to deal with, however other legislation such as the Skills Development Act (No. 97 of 1998), provide such a framework.

The Electronic Communications Act (No. 36 of 2005) is further recognition by the South African government that telecommunications and broadcasting are converging as the Act governs both sectors, in some instances with universal rules (like providing a common licensing framework) and in others with separate rules for each sector (for example broadcasting has its own section). The Act lists regulations for the licensing framework of both sectors and what ICASA can and can not do.

The Act places restrictions on subscription-based broadcasting, restricting such services from acquiring exclusive rights to national sporting events that are 'in the public interest' (Section 60.1). A particularly strong example of cultural policy is

in Section 61, 'Preservation of South African Programming'. This section defines exactly what is recognised as local content, in the context of international co-productions, for example a South African citizen or company must have a 50% financial interest in the co-production and a particular percentage of the production crew must be South African. It empowers ICASA to impose conditions, in terms of section 61(3) of the Act, compelling broadcasters to dedicate a particular percentage of either their broadcasting time or financial resources to local content. This is done by content quotas that ICASA reviews every few years. Bearing in mind the forthcoming multi-channel environment it requires signal distributors to give priority to channels with locally produced content.

The Act limits foreign ownership of commercial broadcasters stating that no foreigner may exercise control over a South African broadcaster and the financial interest of foreigners cannot amount to more than 20% of a broadcaster's shares or capital. Additionally it limits local control of broadcasters, for example, stating that no person may exercise control over more than one broadcaster. Cross-media ownership is also controlled, if one owns a newspaper then there are limitations on whether they may also control a broadcaster. Chapter 10 of the Act deals with competition matters including *inter alia* the interface between ICASA and the Competition Commission. ICASA is given the power to determine if a particular company is being anti-competitive; to determine if there is enough competition in any one sector; and to modify the licence conditions of a licensee to ensure

competitiveness.

Content quotas are one of the most explicit forms of cultural policy that the government has put in place. They were most recently updated via the ICASA South African Television Content Regulations (Notice 154 of 2006). These regulations require that 55% of community and public service broadcasting, 35% of commercial broadcasters, and 10% of all a subscription broadcasters programming content must be local. The regulations require that 40% of all local content broadcasted must be produced by independent production companies. It also creates a complex points-based system that encourages or incentivises drama, programming in African languages, programming made in provinces other than Gauteng and the Western Cape, and reduces the points score for repeats. Kariithi (2003, 17) notes that Australia and Canada presently have similar regulations. It is worth noting that in a recent review of Canadian broadcasting policy (Dunbar and Leblanc, 2007) it was recommended that all regulatory practices be terminated as they make competing in a global market difficult.

Kariithi (p. 162) suggests that there are ideological, economic, and moral reasons for promoting local content:

> "The ideological reasons include promoting national and collective identity, protecting cultural sovereignty, promoting national cohesion, engendering a culture of tolerance through pluralism in opinion and choice, and fostering democracy and democratic values. The economic reasons include promoting local talent, creating economic activities for the local population in broadcasting, and skills and technology transfer

> from developed to developing countries. Moral reasons include protecting the public against negative content that incites public disorder, offends public decency and good taste, or is culturally/ethnically inflammatory" (p. 163).

He advocates local content quotas as the best means of achieving this, as broadcasters will otherwise tend to import international programmes only (as it is far cheaper than producing local programming). Kariithi suggests that the best method of imposing these quotas is during the licensing process, by making the quotas a condition of the license. He notes that the same system, with largely the same goals, exists in both Canadian and Tanzanian broadcast legislation.

He suggests that there are economic reasons for content quotas (p. 166). Developed countries have better resources and saturated markets, while developing countries (like South Africa) have limited resources and large untapped markets. Thus quotas will force the broadcasting industry to commission local content, the 'knock-on' effect is that production companies will have more work and this filters throughout the economy, increasing demand for services like training and catering, and products like lights and costumes. He notes that one of the disadvantages of the system of content quotas is that it is difficult to monitor and enforce these regulations. A larger problem exists with the need for skilled personnel, production equipment, and finances.

Proof of the success of South African quotas can be seen with the current highest rated programmes[1] in the country. *Generations* is routinely the highest rated

1 This data can be accessed from the South African Advertising and Research Foundation http://www.saarf.co.za

programme on SABC 1, *Sevende Laan* and *Muvango* on SABC 2, and *Isidingo* is one of the highest rated shows on SABC 3. These programmes are all locally produced and most of them were developed after the introduction of content quotas, thus proving that South Africans do want to watch local content. The government simply had to provide an initial push to broadcasters to encourage its growth.

As noted above, the Electronic Communications Act 'rewards' broadcasters for broadcasting content in indigenous languages. It is worth noting that South Africa has eleven official languages, one is English, another is Afrikaans (derived from Dutch), and the other nine are completely indigenous to the Southern African region. Hills (2003) notes that:

> "A broadcasting market without regulation would favour the industrialised country exporter of programmes and those in majority languages – English, French, German and Spanish. Programming in minority languages that cannot be exported or re-used elsewhere is expensive. In fact, it was not that long ago in 1998, that the European Commission proposed that minority language broadcasts in Europe should cease because only those broadcasting in the major languages had economically viable markets... However, in Europe because broadcasting is a cultural matter as well as one of economics, this proposal failed." (p.37)

It is important to note that the cost of producing television in indigenous languages is high. Hills advocates regulation as the only means of ensuring that those languages are not under-served. She goes as far as to suggest that only with regulation can indigenous languages in Africa survive. Hills notes that public broadcasters have an advantage in their production of local indigenous language content in that viewers are more likely to want to watch content in their own

languages. This is a service that international broadcasters cannot provide.

South Africa's cultural policy is best expressed in the Department of Arts and Culture's White Paper on Arts, Culture and Heritage (produced in 1996). This policy, which is currently under review, speaks of the need for cultural diversity and among other objectives establishes the National Arts Council. It mentions broadcasting once (Chapter 4, section 42) by noting that the department will encourage broadcasters to commission local writers and provide incentive schemes for South African literary work to enter the mainstream media. It largely discusses the need for redress in the arts and creating a more inclusive arts community and society at large. Practically the document establishes the National Arts Council (in Chapter 4) and points out the need to support art projects that can at least financially break-even. It also points out (Chapter 4, section 30) that the Department of Arts and Culture will work with the Department of Education to fully integrate Arts into the curriculum but does not offer any suggestions as to how this might be practically achieved.

The Department of Arts and Culture has, however, made a direct intervention into the film and television industry by establishing the National Film and Video Foundation through the NFVF Act (No. 73 of 1997). The primary objective of this organisation is to develop and promote the South African film and television industry by providing, usually partial, funding to film and television projects. It's role is similar to that of the NAC but dedicated to motion picture projects.

There is an additional player in cultural policy: international regulators. Venturelli (p. 26) warns that governments are being given less control over their telecommunications and broadcast infrastructure policies. The digital migration process is a result of the standard set by the International Telecommunications Union (ITU) (Armstrong and Collins, 2004, 2) which compels ICASA and regulators across the world to comply with the new reality. Venturelli notes that in capitalist economies state intervention in the form of protectionist policies for mature industries is looked upon negatively by international bodies like the World Trade Organisation who favour open market principles. This is acceptable in developed countries like America where there are vast financial resources, but developing countries like South Africa have limited financial resources to spend on the development of cultural industries when there are more pressing basic needs like electrification and housing.

On similar grounds Venturelli expresses concern that policies promoting pluralism and diversity (such as content quotas) may disappear and foreign companies may take control of a country's cultural industries. This is because regulation against such eventualities would be deemed 'anti-competitive' by international bodies. To alleviate this Venturelli suggests that trade rules must recognise a state's sovereignty and state intervention must not seen as a violation of international trade agreements.

A recent example of this is ICASA's developing trouble with European based free-to-air satellite service Free2View (Gedye, 2008). The service has begun broadcasting in South Africa without a license from ICASA. The new broadcaster claims that there is nothing ICASA can do because it is protected by the ITU's regulations governing 'legitimate spill'. They suggest that their service is not directed at South Africa (and is not broadcasting from within the country's borders) but across the continent, the fact that it is receivable in South Africa is merely coincidental. ICASA have vowed to challenge this and it will be interesting to see whether international regulations will supersede local ones.

The Future: Likely Developments

This is a brief look at what current day broadcasters are planning and serves as a prelude to the scenario planning in Chapter Three. This discussion is limited to what the future of broadcasting might look like in ten years. According to Aldridge (2007) society should expect to see television as a stream in cyberspace and 'television' content to be delivered over multiple platforms. He suggests that the platforms will include:

- Digital terrestrial television.
- Digital satellite.
- Digital data services - from a set-top box making gaming and gambling possible via the television set and remote control.
- Digital mobile - via the DVB-H cellphone standard.

- IPTV - Internet Protocol Television.
- Internet television - video content viewed online, for example, Youtube.com.
- Video On Demand - or VOD which encompasses video content like films delivered to a set-top box.

The General Broadcast Environment

Naylor (2002, 146) saw the future of the BBC (which has become its present) in the following light: "... the Corporation moves further towards an interoperable content environment where all material – text, audio, stills and graphics – is held on centralized databases to be used and re-used, for different audiences in varying combinations in accordance with the chosen delivery platform..." This sums up exactly where the distribution of broadcast content is moving and the multiple platforms that the same content has to serve at once.

South Africa is moving from its current analogue terrestrial system to a digital terrestrial transmission (DTT) starting in November 2008, with the analogue signal scheduled to be switched of exactly three years later. According to Armstrong and Collins (2004, 1) the advantages of the system include: decreased transmission costs for the broadcasters and signal distributors, more efficient use of broadcast frequency spectrum (which frees up spectrum for other uses and allows more channels to be broadcast in the same amount of frequency), higher-quality images, and improved multimedia/interactivity features for consumers.

They also note that the switch-over will be expensive as new equipment and systems will have to be purchased by both broadcasters and distributors and there is to be a double-illumination period lasting several years during which both the analogue and digital signals will be broadcast as individuals begin to switch. Additionally there is a cost to consumers in the form of new set-top boxes that function as digital to analogue converters so that consumers can continue to use their current analogue television sets and take advantage of new digital services will have to be purchased.

Armstrong and Collins (2004) note that the digital switch-over is happening in countries across the world and that the transition has not been a smooth one for most. The UK has had great difficultly in moving to the digital terrestrial platform and there are several reports that indicate that it may be an unnecessary expense at present (p. 7) because the cost is simply too high to taxpayers and consumers and there are other, cheaper solutions for releasing the limited resource that is bandwidth.

According to Armstrong and Collins (2004, 16-27) there are five issues that complicate the digital migration. The first is spectrum efficiency: internationally there is greater need for bandwidth, the move to digital releases a lot of bandwidth that was previously used for analogue television for services such as the internet, emergency/police services, and additional television channels. Interactivity is the second issue, this refers to a return path via which audiences can send replies and

participate with programmes. This is presently provided by cellphones and the internet, unless a return path is made available in the set-top box, cellphones and the internet will continue to function in this manner. The third issue is the increase in transmission costs, but once the analogue signal is switched off these will be lower than present costs. Licence fee collection becomes easier as those who do not pay can be switched off. The final issue is one of citizen access, initially the set-top boxes will cost approximately R700 and the government may offer a subsidy of up to R450 to the poorest households in the country (Mokgata, 2008). The present cost is still quite high and may exclude a large segment of the population from accessing DTT, even with subsidies, additionally it may discourage others from purchasing these devices. It is also worth nothing that digital platforms will increase the access to programming for people speaking different languages as a programme can be broadcast in digital with several audio tracks and subtitle tracks.

Flew (2002, 52-53) notes that digital broadcasting offers users the opportunity to communicate with broadcasters in completely new ways. It also allows for additional text information services (like subtitles and information about the programme) and the ability with High Definition broadcasts to switch viewing angles (which might be useful for sports events). He cautions that the interactivity is limited in the sense that users cannot modify the content and they additionally cannot communicate with each other, which is something that can be done on the internet.

The South African Department of Communications (DOC) set up a Digital Migration Working Group to facilitate the process of migration. The group's research has indicated that of the country's 7.6 million television households, half will not be able to afford a set-top box and have recommended the previously noted government subsidy for these boxes (Digital Broadcasting Migration Working Committee, 2007). About a million of those households have access to DSTV and because it is already a digital system they will not need to purchase this box. Government has set the ambitious target of converting 80% of television households to digital by the Soccer World Cup in 2010, yet basic issues like who will makes these boxes, how the subsidy will be implemented, or if and to what degree the boxes will be interoperable with the services provided by DSTV and the new subscription based channels have not yet been announced (Motloung, 2008).

In August 2008 the DOC's plan for digital migration policy was approved by cabinet (DOC, 2008a), the department's official strategy had not been made clear to the public until this time, just three months before the launch of digital services. The Department still believes that switching off the analogue signal in 2011 is possible despite the fact that the set-top boxes required to access the digital signal have not yet been manufactured. Additionally a new advisory council, the Digital Dzonga, has been established to oversee the next stage of the migration process (DOC, 2008b).

Nielson Media Research (who provide television ratings in the USA, South Africa, and many other countries) predict that over 13 million American households are not yet ready for the switch-over and will be without a television service when the analogue signal is switched off early in 2009 (Gough, 2008). If the wealthiest nation on the planet is not ready and they started this process several years ago, how can South Africa cope if the DOC has scheduled the termination of the analogue signal for 2011? It seems highly unlikely that such a deadline can be realised at the currently slow pace of the transition. The DOC has been exceptionally slow in developing a policy and has not made this clear to the broadcasting industry, let alone the public. Regulations for digital migration are still in the draft phase and free-to-air broadcaster e.tv has expressed concern with the channel allocations, clearly demonstrating that the DOC has not even begun consulting the broadcasters on the migration (Mochiko, 2008b) This will likely result in the process taking far longer than than initially ambitious goal of three years.

The SABC

In 2005, the SABC was granted a license by ICASA, as prescribed by the Broadcasting Act, to provide two regional language based channels (SABC 4 and 5), but ICASA has since decided not to issue this license until the SABC can secure appropriate funding (ICASA, 2005, 5). These new channels would be regional broadcasters with a strictly public broadcasting service (PBS) mandate,

broadcasting in all indigenous languages but not in English (Armstrong and Collins, 2004, 8). Presently there is no budget allocation for these channels and it is anticipated that they may be launched as part of the digital roll-out but there is no official confirmation from the SABC regarding this issue. Armstrong and Collins (p. 13) also noted that the SABC was initially cautious about its migration to digital and is concerned that many viewers will not be able to access the new service due to the cost. According to Mr. Moilwa (2008) this point of view has changed. The SABC is now excited by the prospect of digital migration because it offers new channels and additional ways of collecting television licenses. He also notes that it offers the SABC new ways of meeting its mandate to provide culturally and linguistically diverse content.

e.tv

e.tv has not revealed specific plans for the switch over to DTT, but states in a press release (Vass, 2007) that it plans to develop new channels for the platform. They have rejected the satellite subscription broadcasting license awarded to e.sat and have instead decided to become a content provider rather than a distributor as the licence would allow. This, they claim, is because they do not believe the market can sustain the five pay-TV networks initially licensed. The first channel, a 24-hour news network began broadcasting in 2008 on DSTV, there are plans to launch additional channels on the DSTV platform over the next few years.

Multichoice

Multichoice appears to be excited about moving MNET to a digital platform (Armstrong and Collins, 2004, 11). They feel that because their subscribers have already purchased a decoder to access their service the set-top box required will not be a problem for their viewers weighed against the new services they will be able to receive on the DTT platform.

Recently Multichoice has been testing a service for broadcast to mobile phones (Multichoice, 2006). It uses a transmission standard called DVB-H (Digital Video Broadcasting - Hand-held) to broadcast directly to cellular phones. Additionally DSTV is testing an IPTV-like service (Mybroadband, 2007a). IPTV stands for Internet Protocol television and uses the internet to broadcast television instead of satellite or terrestrial transmission platforms including cable and wireless systems. Apparently the barrier to the success of this service is widespread availability of unlimited broadband services in South Africa. Presently broadband services are too expensive to broadcast high quality video and there is very low broadband penetration in the country, at less than 10% of the population (Scott, 2008, 44). This is not a fully supported service yet, but DSTV has described it as a trial available to their premium subscribers free of charge.

Speaking recently with key individuals at Multichoice, Financial Mail reporter Rob Rose (2008) notes that Multichoice plans to launch a Video On Demand (VOD) service to its premium subscribers in the next few months. It will allow those subscribers with a Personal Video Recorder (PVR)[2] to 'download' films

2 A PVR contains a hard-drive, for the storage of broadcast content to be viewed at a later time.

directly to their devices to watch at their leisure. Additionally, according to Rose, the recent launch of their Web-TV service, www.dstvondemand.com has been relatively successful despite no advertising or education campaign on their part. The site currently offers only local content but plans to offer international content in the near future. Multichoice officials noted that they have encountered two problems with the service: broadband providers place a 'cap' on the amount of content a subscriber can download, and they believe that the complexity of broadband infrastructure will result in a slow uptake of this service in the short term. They believe that both problems will be remedied shortly as access to broadband services increases over time.

DSTV executives are excited about the ability to offer niche content to people that may feel excluded from current offerings. Rose notes that those interested in niche content for which there is insufficient demand to justify a television channel on the satellite service will be able to receive more specific programming thanks to the aforementioned services. Ostensibly channels across the world are beginning to make use of both services, Rose makes note of the UK's Channel 4, which has made a large portion of its content available online. He suggests that Web-TV and VOD are, "... the obvious future of broadcasting."

Telkom Media

Telkom Media have announced that they are planning both a digital satellite offering and an IPTV offering. O'Neil (2007) notes that they plan to offer a

premium and regular package on par with DSTV's pricing later in 2008 on a satellite platform. The IPTV service will initially be quite expensive but will ostensibly offer additional multimedia features. Telkom Media takes the view that content 'wants to be free' and will consequently offer their content over several different platforms. As a subsidiary of a telecommunications company they are not tied down to the notion that video content must be broadcast via broadcasting spectrum, they rather see themselves as a content producer, aggregator, and distributor using all available means to distribute their content. O'Neil suggests that the lines between advertising and content are becoming increasingly blurred and it is the view of Telkom Media that producers should embrace this trend.

Other Broadcasters

At the time of writing nothing was known about the plans of the other two Pay-TV broadcasters: On Digital Media and Walking on Water Media. As suggested by the case of e.tv above, the new broadcasters will have some difficulty as e.tv believes that the market can only support two Pay-TV networks at best.

According to Aldridge (2007) community broadcasters have an uncertain time ahead as ICASA has decided not to deal with these broadcasters until the digital migration is complete, and this could be several years away. Despite the fact that the current prospects for community broadcasters are dim (with almost no support from government or private business) Aldridge et al (2006, 153) are optimistic that new technologies will enable some growth in the industry and they are

particularly interested in the growth of the internet as a platform for broadcasting. They suggest that the internet is likely to become the most effective way of distributing community television as there is no need to wait for ICASA to issue a licence or to provision spectrum. He notes that community broadcasters in New York and other cities are using the internet to broadcast in addition to regular terrestrial broadcasts. He adds that cellular phones also have potential in this regard as some phones can receive video broadcasts via the DVB-H broadcasting platform (currently being tested by Multichoice) and many cellphones have internet access and are capable of receiving streaming video signals via UMTS (or 3G) data signals.

The Internet and Convergence

A particular issue that faces us in the present moment is that of the internet's ability to deliver video content and its reconvergence with broadcasting. Gauntlett (2000, 4) notes that the internet began as a project conducted by the US. Military and the world wide web (the popular face of the internet) was developed by Tim Berners-Lee. The internet was initially just text, then pictures were added, social meeting places (chat-rooms), and eventually video. Gauntlett (p. 8) notes that people are generally not willing to pay for content online because they are used to accessing information for free, the exception to this rule is pornographic websites which are the only websites that successfully make money from subscription based services. Most websites, such as yahoo.com, Gauntlett notes, make money

from advertising. Additionally, Arthur Goldstuck, of internet research firm World Wide Worx presents research that suggests that consumer spending at online stores is also a major source of income for some internet websites, nearly a billion rand was expected to be spent on local goods online in 2007 (Goldstuck, 2007).

Following on the work of Michael Goldhaber, Gauntlett (p. 9) notes that the internet is an 'attention economy'. As content is largely free, money has little value on the internet and content itself is also available in nearly limitless quantities, the scarce resource that drives the web is attention. Individuals have a limited amount of time to browse web pages and a web site has to have high quality content to attract browsers. He notes that established companies, such as publishers have an advantage in that they have the finances, brands, and physical products, such as magazines and newspapers, that can direct readers to their websites, but if the content is not compelling then people are unlikely to return to those web sites. He believes that this gives individuals and small companies the opportunity to be 'relatively empowered' as, even if they have little or no financial resources, if the content is compelling enough they still have a chance to attract browsers. He notes that “attention doesn't just flow to money” (p. 10), but it can provide an advantage.

Naylor (2000, 138) notes that there are two arguments concerning the mass media and the internet to consider. The first, earlier, argument is that the internet allows for the existence of new smaller 'niche-market' organisations to grow causing big

corporations (mass media companies) to dissolve because they cannot provide for the variety of niche-markets that the internet serves. The second, and more recent, argument is that those big corporations are now taking control of the internet with their well-known brands and they are in fact driving new web development. Naylor suggests that the most valuable digital media properties are owned by traditional mass media companies like Time Warner and News Corporation. According to this second argument traditional media organisations are simply finding new ways of presenting their content.

The research in this study is consistent with this claim. These mass media corporations also have the ability to acquire successful new start-up websites with their vast financial resources, for example News Corporation recently purchased the social networking web site Myspace.com (Siklos, 2005). While the internet has created a few new mass media companies, there are still only a few of them. The largest of these is Google, which is following the same strategy, for example, with the recent purchase of the successful online video sharing website YouTube.com (BBC News, 2006). It is worth noting that Google is presently the most valuable mass media company in the world having outpaced the former largest, Time Warner and is now one of the most financially valuable companies listed on any stock exchange, an indication of the importance of new media companies (BBC News, 2005).

One of the best indicators of the direction in which South African broadcasting,

particularly the SABC, may move is the British Broadcasting Corporation (BBC). Naylor looks at the BBC's digital initiatives up until 2001. What makes the BBC different from other mass media organisations is that it is publicly funded. The concern, according to Naylor, is that the convergence of the digital platforms with traditional broadcasting makes it difficult to draw a line between the BBC's public activities (which are funded via television licenses and special grants because they are for the benefit of British society) and the commercial activities (which have to find funding elsewhere). This is a challenge the SABC has to face as it becomes an increasingly commercial organisation.

To briefly digress, it is worth noting the academic approach to new forms of media. Levinson (2001) applies Marshall McLuhan's theories on the future of the media to the internet. According to Levinson, McLuhan's often quoted aphorism, “the medium is the message” is as relevant today as it ever was (p. 35). For McLuhan the very existence of new media was as interesting and worthy of study as the content it could present. McLuhan believed that society should have conversations concerning the very fact that its members can watch the visuals and sounds that constitute 'television'. He regarded this conversation as being more important than the ones people actually have concerning the content of the programmes they watch on television. He wanted to shift the debate away from content to the medium because he felt that people were often seduced by the content and did not look at the bigger picture - the impact that a particular medium has on society. Levinson notes that the internet combines the content of

all the mediums before it – text, audio, images, and video. This suggests that the internet may eventually supersede all other media. He notes that because television and the internet occupy a similar space, namely the screen, television is more likely than any other medium to be replaced by the internet (p. 154).

Levinson also quotes another popular aphorism of McLuhan's, “the user is the content”. This aphorism gains even deeper meaning when applied to the internet. The user can post a blog, video, or picture online forming the content of a website. When others comment on a video on Youtube, for example, they add to the content created by someone else.

It is difficult to predict in which direction the merger of television and the internet is moving because technology moves at a rapid, often unpredictable pace. As discussed above certain programmes from DSTV channels are available to view online at a website, but one can also access the internet via their television and satellite dish as the Media24 partnership proves. New services like World TV (AFP, 2007), further blur the lines. World TV is a website that allows users to create their own television channels online and programme the channels with content from video sharing websites or their own user-generated content.

Caldwell (Everett and Caldwell, 2003, 131) suggests that 'convergence media' should not be defined “... by any new technically induced or determined quality or capacity, but instead defines itself in the ways that networks and studios use

convergence initiatives to implement long-standing industry practices...” He suggests that these practices include: programming, syndication, licensing, branding, and flows. Caldwell is suggesting that new media offer additional methods for developing and distributing content. He presents an example of how this has worked in the past with the police drama *Homicide,* a programme that US television network NBC tried to broadcast in both mediums in 1999. They extended the episodes of the show online with the night shift officers solving cases that would be continued on the televised show. This was ultimately a failure.

Recently (December 2007) NBC purchased a show that has been 'airing' on the internet, 'Quarterlife' (Stelter, 2007). The show was developed and written by Marshall Herskovitz, who had previously developed several shows for broadcast television and was produced for an internet audience. What does this mean for the future of broadcasting? If successful it could provide a new avenue for the generation and distribution of high-quality content. The internet could become a medium for the development of programming, where adventurous viewers can watch new programmes and the most successful will be offered deals with broadcast networks. Much like the system developing with independent bands and singers who get offered deals with record companies when they achieve a critical mass in downloads.

According to a report by Iain Scott (2008, 44), an estimated 1 in 12 South Africans have access to the internet. Estimates reveal that 650 000 South Africans

will have access to broadband services by the end of 2008, but there is almost no broadband coverage in rural regions of the country. Scott interviews Richard Hurst, a telecommunications analyst, who suggests that broadband internet availability in rural areas will only arrive as a result of a push from government as there is presently no business case for investing in these areas. He suggests that the decreasing cost of personal computers and the government's prioritisation of broadband access, via the new state owned broadband distributor Infraco, will result in access for all South Africans in the near future.

It is worth noting that many of the most basic cellular telephones now offer internet access. Applications such as the interoperable Opera Mini make most web pages and services available on most phones (Opera Software, 2008). Additionally most cellular telephones can now operate as modems for computers, with the mobile network provider functioning as the internet service provider. According to Statistics SA (2007), 72.9% of South African households have mobile phones, if more people were educated about developments such as these the number of people with internet access could rise dramatically.

Screenafrica (2008b) recently reported on statistics released by the IDC that indicate that internationally people now spend more time on the internet than any other medium. Nearly 33 hours online, which is twice the amount of time they spend on television (16.4 hours). Unsurprisingly age is also a factor, the younger the respondents were the more they spent time on the internet at the expense of

other media. This is not true in South Africa at present, but they suggest that as prices decrease and broadband penetration increases the trend is likely to emerge in this country too.

Exactly what kind of impact the internet will have on television cannot be fully ascertained. If the present trend continues then more people will log on to websites to watch videos made by: non-professional (home) users, independent companies who cannot or choose not to get their content distributed via the television channels, and present day broadcasters who are likely to make use of the internet for distributing their content. Services like IPTV which both DSTV and Telkom Media claim they will offer further blur the lines between broadcast television and the internet. The next Chapter will look at how these developments might play out in the future.

Chapter Three: The Scenarios

This chapter presents two possible scenarios for the future. The scenarios have been developed using the suggestions made by interviewees and the research presented in the first two chapters. In both scenarios one major variable is changed and in each instance that variable would appear to have a major ripple effect on the broadcasting industry. Both are set exactly twelve years in the future; as Professor Kupe (2008) suggests it takes 10-15 years to determine the effectiveness of new policies.

Scenario One: 300 Channels and Nothing (Local) On

The year is 2020. The digital migration process was completed long ago; the multi-channel environment is a reality. The terrestrial broadcast system has increased to 12 channels from the present 6, while there are at least 50 channels available on each of three subscription based satellite broadcasters and dozens more available free-of-charge. There are hundreds of channels offered by several broadcasters, but there is almost no local content on any of them. The South African broadcasting industry faces a massive skills shortage. Furthermore, there is no one trained in African languages and this kind of content has almost completely disappeared. Due to globalisation most of South Africa's talented producers, writers, directors, and actors have left the country to pursue more lucrative opportunities in the growing Australian and Asian markets. The government has been forced to cut back on content quotas as broadcasters cannot

find enough quality local content to broadcast.

Content is mostly international and in English. Programming in African languages became unpopular several years ago because it was always of such low quality. Consequently English has entrenched itself as the language of choice amongst young South Africans. A stereotype has developed that producing content in African languages must mean low quality therefore young people only watch high-quality (largely foreign) English content and don't bother to engage with and ultimately use their home languages. In successive generations they will not teach their children their home languages and these languages will eventually disappear.

Key Driving Forces:

- Multi-channel environment.
- Availability of skilled labourers.
- Education.
- Linguistic issues.
- Cultural heritage.
- Increased national competition.

Scenario Explanation

The new multi-channel environment is a consequence of South Africa's move to digital broadcasting and presents a complete historical break with the country's broadcasting system, as discussed in Chapter Two. The constant is the relatively low level of local content production. Both Professor Kupe and Mr Moilwa suggest that this will be the biggest new feature of the broadcasting industry in ten year's time. The result will be increased competition. Armstrong and Collins (2004, 16) note that up to six digital channels can fit in the bandwidth previously taken by one channel, thus more than 12 terrestrial channels is a distinct possibility. They note that each broadcaster is likely to be allocated several channels, which has been the case internationally. The introduction of Telkom Media, On-Digital, and possible new players on the digital satellite platform will easily create a vast multi-channel environment with multiple players. Professor Kupe argues that the multi-channel environment might not actually result in new content, but rather a repetition of content, for example the new Pay-TV channels are likely to replicate each others channel offerings to some degree.

This scenario is presented in the spirit of John Fiske's (1987) definition of culture and television. As noted at the beginning of Chapter One, in the present climate television and culture are closely tied together, each derives meaning from the other. In this scenario television's effect on culture is the suggestion that local content is simply not good enough, but this is only the result of culture (in the form of the Department of Arts and Culture and cultural practitioners themselves)

not placing enough emphasis on local content and indigenous languages via education, (ironically) television, and the mainstream media in the first place!

As Hills (2003) notes, the international disappearance of indigenous languages on television can potentially result in the languages being used less frequently in society[3]. She further notes that majority languages like English (or French in France and North Africa or Spanish in Latin America and Spain) have an advantage because they can be exported across the world, and that the potential exists for indigenous languages to be sidelined by this kind of content. Subtitles are a way of bridging this gap but have limited appeal. While presently there is huge demand for programming in indigenous languages in South Africa, evidenced by the success of *Generations*, *Muvhango*, and the fact that DSTV has a channel dedicated to Afrikaans programming, it would appear that the industry is presently unable to provide adequate supply to meet this demand.

A shortage of skilled workers is possible as Venturelli (2002, 18) predicts internationally and Abrahams (2003) confirms is occurring locally. If a curriculum that does not encourage independent, creative thinking is not employed then there will not be enough skilled individuals to work in the information society. As local newspaper *Business Day* (2008) reports, there is indeed a shortage of skilled people to work in the broadcasting industry. The newspaper article notes that

3 See the section on Cultural Policy and Regulation in Africa in the second Chapter for more information.

some of the new subscription-based services are looking to foreigners to fill in gaps in their respective workforces as there are simply not enough local individuals with the appropriate technological skills. According to the article, Telkom Media have even visited the UK to persuade South Africans living there to return. Furthermore organisations like the SABC are losing key experienced staff to other broadcasters who are offering higher salaries as incentives to attract staff.

Mr. Mngqibisa notes that ICASA has an obligation to promote cultural heritage for the benefit of future generations. Thus a possible consequence of not broadcasting content in indigenous languages could be the ultimate loss of those languages, it is unlikely to happen in such a short period of time but the possibility nonetheless exists. What is interesting about this scenario is the shortage of writers and producers producing content in African languages can have a huge ripple effect on the future of language use in the country.

Mr Moilwa, Professor Kupe, and Mr Thomas note that there is still relatively little content in indigenous African languages on South African television. Content on all terrestrial channels is still mostly in English. Mr Moilwa (SABC) suggests that the reason for this is a skills shortage. There are not enough trained, talented individuals entering the industry to produce high quality content. He notes that the SABC does not presently receive enough high quality submissions to its

commissioning briefs and he believes that the trend is set to continue unless all stakeholders in the industry begin to seriously invest in the development of local talent. He suggests that a feature of the future broadcasting industry will be a fight amongst broadcasters for content, as there simply will not be enough supply for the required content and the production industry will be stretched to its limit. Moilwa suggests that the regulator would ideally like to increase local content quotas but in this scenario that becomes impossible.

Mr. Moilwa notes that the linguistic issue arises out of the fact that writers are only being trained in English. The problem is illustrated by the fact that many South African television programmes that are broadcast in indigenous languages are first written in English and then translated as there are not enough writers capable of writing in indigenous languages presently working in the industry. He adds that the problem is compounded by the fact that English is increasingly dominating the school curriculum and most film schools teach students in English, so proficiency in writing in indigenous languages is not gained by new writers. Professor Kupe agrees and notes that most institutions, the University of the Witwatersrand included, do not teach film-making and script-writing in indigenous languages, as English is the preferred language of education. He notes that while it is possible for writers to write in indigenous languages, resources are insufficient for lecturers to adequately judge work in those languages. He adds that the current dominance of programming in English makes the quality of programming in other languages seem poor by comparison.

One of the issues discussed during interviews was why it was important to produce content in indigenous languages. Mr. Moilwa suggested that language carries a great deal of meaning, translation of phrases from Xhosa to English, for example, lose some of the meaning that cannot be easily expressed in English. He notes that young people are particularly sensitive to trends regarding language and if they are only being educated in English they are likely to stop using their own languages or they will not encourage their children to learn them. It logically follows that if the media appears to be confirming the view that only high quality content is produced in English then these viewers will not want to watch content in their own language. Ironically, the only reason there is so little high quality content in indigenous languages is because there are too few people skilled in producing such content!

If there are not enough skilled individuals entering the production industry then while there may be a demand for local content (as there is today), there will not be enough supply to match the demand. Broadcasters will have no choice but to programme more foreign content to fill up the available airtime. The skills shortage would be the result of two factors: insufficient trained individuals and those talented few who did receive training choosing to work in foreign countries that can provide better compensation. Individuals falling into the latter category would have been trained in English, thus they will be easily integrated into the production industries in the USA, Australia, and the UK. Countries like Japan,

China, and India will want writers trained in English to develop their export industry for programmes and if they have a shortage as South Africa does now, they may want talented writers in a commonly understood language so that they can translate into indigenous languages.

Sipho Mngqibisa (ICASA) suggests that there are still a large number of untapped linguistic resources in South Africa, such as traditional storytellers who live in rural areas. He suggests partnerships between screenwriters and these individuals as a means of telling compelling local stories. There may indeed be a large untapped base of creative people who have been ignored by broadcasters and producers possibly because of their lack of knowledge of English or their remoteness from urban areas where most production takes place. More research would have to be done to determine if this is actually the case. Consequently, there could be some potential for the representation of authentic South African stories on television if the right kinds of partnerships are developed.

Mr Thomas notes that per capita income in South Africa is quite low, at least three times lower than the USA for example. He suggests that it costs as much as ten times more to produce local content than to import foreign content. Unless the country experiences a massive economic boom there simply will not be vast sums of money to spend on production of content. Mamedupe Kgatshe, a senior policy manager at ICASA (2008), adds that South Africa's limited financial resources

make it difficult to afford the best skilled national and international individuals.

Mr. Moilwa suggests that South Africa needs to invest in providing skills for the production sector, he notes that one is only as good as the content one produces; he adds that all the money and technology in the world will do the industry no good if there are no individuals with sufficient skills to make use of the resources. He suggests collaborations between the production industry, broadcasters, and schools (secondary and tertiary) to improve the skills base and help solve the linguistic issue. Mr. Mngqibisa notes that the government has developed skills programmes such as JIPSA to cater for the development of skills in the future, but Mr. Aldridge (2008) notes that skills institutions like the MAPP-SETA are having governance issues and will not be of help to anyone until they get their affairs in order. Flew's (2002) suggestion of distance learning and learning via video-conferencing would also be useful here. These tools can provide higher quality education to those, for example, living in rural areas.

While the Electronic Communications Act and the Broadcasting Act both include sections on the need for skills development, neither document suggests how this might be done. It would be foolish to simply rely on the Department of Labour or on the MAPP-SETA to fully address the shortage of skilled workers that the country presently has. There is no indication in either act of how staff could be retained. As noted above the SABC is losing a large a number of its skilled

employees, but there is no plan to fill these gaps. Furthermore, if local organisations are losing employees to other local organisations, what happens when international organisations want South African talent, a situation that is occuring in many other local sectors? If these questions are not resolved then this scenario could indeed become a reality.

The effect on cultural policy in this scenario is that while government might still be making it, it has no effect on the industry because the industry does not have the means to support cultural content. Furthermore there is an effect on language policy, which is related to cultural policy, specifically the need to encourage linguistic diversity in training institutions. A possible solution to this scenario lies in applying cultural policy in the present: encouraging more partnerships between stakeholders to develop more skilled individuals and being able to offer them sufficient incentives to stay in the country. The scenario demonstrates that cultural policy only has any value if there are sufficient resources to carry out its goals; it cannot exist in a vacuum without other policies. A flexible policy that is regularly reviewed and offers effective means of monitoring the impact of the policy on the industry is needed. This will ensure the industry never gets to the state this scenario suggests.

Outcomes

- A skills shortage can have a huge ripple effect not just on the broadcast

sector, but on culture and society as a whole.

- South Africa must further invest in the development of skills in the production sector, if it wants to have a competitive industry.
- All stakeholders in broadcasting need to collaborate to improve skills.
- Untapped linguistic and cultural skills bases could be partnered with for the effective generation of compelling local content.
- Training and sustaining talented individuals.
- Policy must be regularly reviewed and its impact regularly monitored.
- Regulation has limited use, but facilitation can be beneficial.

Scenario Two: All Hail the Great and Powerful Internet

The year is 2020. The internet is now the prime platform via which video content is distributed thanks to a large decrease in the cost of broadband connectivity. All 'television' screens are now directly connected to the internet, consolidating the space the television and the home computer once took up. Providers like Telkom Media offer easy to use packages of bundled services that allow for simple selection of links to popular video websites. Some citizens are left out because they do not have the necessary skills to operate a computer or cannot afford the technology but government could not justify forcing broadcasters to continue using the broadcast spectrum as demand was insufficient. All the current broadcasters have largely migrated to the internet.

Due to the advances in globalisation international broadcasters now choose to directly make their content available throughout the world via the internet. Local broadcasters no longer function as the 'middlemen', and can no longer broadcast international content. In an attempt to ensure diversity of content that is relevant to the needs of South Africans the government has taken full control of the SABC and provides most of its funding. The government did not create new polices and legislation to deal with the internet as access in the country began to increase. They have since given up trying to regulate the broadcasting industry and allows the principle of demand and supply to govern content on the internet.

The SABC has an advantage in the fact that the majority of its content was already local and thus original content. DSTV and e.tv were forced to develop more local programming as they no longer have any international content to distribute. The SABC operates a free service and continues to receive government funding to produce educational, social development, and news programming. DSTV operates a premium service that produces high-quality content for a subscription fee, they now compete directly with similar services across the world such as Time Warner's HBO (Home Box Office) and are pressured to produce content relevant to South Africans to fill the niche left by HBO and others. Viewers from across the world are now able to log onto South African content websites if they wish to do so. Additionally broadcasters now not only have to compete with each other but the growing amount of user-generated content

available via websites like Youtube.com.

Key Driving Forces:

- Availability of the internet.
- Convergence of television and the internet.
- Audiences have more power.
- Greater level of interactivity.
- Increased global competition.
- Quality of local content.
- Decreased government regulation.
- Globalisation.

Scenario Explanation

Chris Moerdyk (2008), a marketer and strategist, suggests that such a scenario is quite likely. He believes that broadcasters in their current format are going to become irrelevant and that the internet will indeed become the place to go for content. He notes that people will have no concern for where the content comes from but will simply go to the websites with the best content. Regulation will become largely irrelevant in such a scenario as short of barring all access to the internet it will be impossible to regulate the World Wide Web. He suggests that all

current broadcasters will morph into content providers and predicts that the cost of producing local cultural content and content in indigenous languages will be high, because it is more difficult to sell to the rest of the world as people tend to choose content in their own languages. As suggested above, Boyd-Barrett (2002) presents the 'uses and gratifications' approach to the media, this scenario is presented in the spirit of that tradition; focus is placed on how audiences use the media.

Mr. Moilwa notes that there will be a contest of foreign versus local content and that for most viewers quality is the ultimate deciding factor. He suggests that high quality foreign content is already expensive and with new broadcasters entering the market the competition for the best foreign content is only likely to increase. In this scenario international broadcasters will not need local distributors as they can sell content directly across the world and secure international advertisers and use product placement to generate revenue.

As noted in the 'Internet and Convergence' section in Chapter Two, the possibility of the internet completely replacing television is quite likely (Levinson, 2001). Gauntlett (2000, 214) also notes that the future of the internet is its integration with all kinds of media, and the possible replacement of television with the internet. Gauntlett suggests that viewers would either have to pay for the privilege of watching video online or the programming would be funded by advertising. Venturelli (2002) agrees that the internet is likely to become the single mass

distributor for all kinds of content. The availability of DSTV content on the internet has already begun as stated in Chapter Two, also noted in the chapter is that Telkom Media are planning to launch an IP-TV service. Thus such a scenario is actually quite a realistic one, and even if it does not happen in South Africa by 2020, it is likely to happen in the future.

Mr. Moilwa suggests that in the next ten years the traditional habits of viewers will begin to change (as they already have begun to). The era of the family sitting in front of the television watching one channel straight through prime-time is at an end thanks to new choices not only in the broadcast arena but new technological choices thanks to the internet. He adds that the youth are watching less television because there are so many other entertainment options available to them. This scenario is borne out of the possibility that the internet supplants traditional television as the centre of video content.

Mr. Aldridge takes a historical view and notes that the trend is to move away from regulation. He notes, as do Tomaselli and Tomaselli (1989), that broadcasting in South Africa was initially highly regulated and there were very few players. Government has since allowed for the introduction of new broadcasters and the legislative framework is designed to regulate converged networks and services. He is concerned with the present lack of bandwidth and the lack of resources for most South Africans to access any kind of internet connection. The idea that some

people will be left out is suggested by Armstrong and Collins (2004). They note that the difference between those who can afford new technology (like set-top boxes) and those who cannot is large and this has been a point of concern for broadcasters as the digital migration approaches.

This scenario envisages an unprecedented level of competition. South African broadcasters face competition not only from broadcasters in their own country, but they face competition from broadcasters across the world. As Hills (2003) notes, local broadcasters do have the advantage over international broadcasters in that they can produce content that is linguistically and culturally specific to their country, something international broadcasters cannot do. Thus the SABC would indeed have a content advantage in that local viewers will not be able to watch content in Zulu or Venda on international broadcasters like NBC or HBO's websites. Additionally, in keeping with McLuhan's (Levinson, 2001) notion that 'the user is the content', broadcasters would be competing with the viewers themselves, who are already able to post their own content, but with increasingly sophisticated technology entering the market, the potential technical quality of user generated content may increase.

Aldridge (2006) suggests that community television will begin moving online. As noted in Chapter Two, this is an emerging trend for community broadcasters across the world. Nozipho Mvulane (ICASA) suggests that community television

has the ability to fill in the gaps left by the public and commercial services, she adds that this is why ICASA has an interest in encouraging these services. Thus websites dedicated to particular cultural groups, regions, or languages are likely to emerge. Potentially government could provide seed funding to get such services running as a means of encouraging cultural content, thus while it may no longer be able to economically (as licences have no meaning in this scenario) or technically (as it is difficult to control content on the internet) regulate local content it could continue to facilitate it. Individuals belonging to that group would be able to post videos made on cameras and on their increasingly sophisticated cellular phones to a website for everyone in a particular community to view. Community television would have the opportunity to grow in ways it has never grown before.

The future of the SABC was suggested by Mr. Thomas. He proposed that the SABC would eventually be fully funded and controlled by the government. He cites the 2007 policy decision by the ANC that the SABC should be directly funded by the government instead of by advertisers as an example of the direction that government policy is heading. One of the initial objectives of the Broadcasting Act was to establish the SABC's charter and determine its social mandate, if broadcasting spectrum did disappear then it is quite likely that the government would retain control of the SABC to allow it to continue meeting that social mandate. Mr. Thomas notes that if the SABC is fully financed by the government then it has a better chance of fulfilling its cultural obligations without

having to balance the programmes that will generate revenue for advertisers against the kinds of content they have a mandate to broadcast.

According to interview respondents in this study, no policy in the converging information technology and broadcast sectors can last for ten years. Mr. Thomas suggests that they be reviewed every year as the media landscape constantly changes, not to mention external issues like the present electricity crisis. Professor Kupe suggested a new review every 10-15 years (roughly a generation) so that the impact of the previous policy can be fully measured. He suggested that this is necessary because culture does change over time, for example the legislation on homosexual marriage brings about new kinds of family units and these should be represented in the media. According to Mr Moilwa there is a need for interaction between the public and broadcasting stakeholders to constantly develop better legislation. Both Mr. Moilwa and Mr. Aldridge noted that the framework that government has created thus far is a sound one.

Ms. Mvulane, from ICASA, noted that ICASA reviews its policies roughly every four years. Sipho Mngqibisa added that ICASA can make recommendations to the government for changes to legislation. He noted that this has been the case in the past, for example the Fédération Internationale de Football Association (FIFA) requested that South Africa make certain technologies available for the broadcasting of the Soccer World Cup in 2010, such as HD-TV and Mobile TV,

while the ITU set the standard and African countries agreed to convert to a digital broadcast system by 2015. Both of these events have resulted in changes in policy and legislation, suggesting that South Africa's framework is in fact a flexible one.

A situation in which the government does not make policy in the broadcasting sector is unlikely because there is a dedicated regulator in this industry and government has proven it is flexible in amending and creating new legislation in this area. Additonally, as Miller and Yudice (2002) state, one way or another governments always make cultural policy (discussed further below). Mr. Thomas' suggestion that a review of some sort be done every year (perhaps a mini-review) as technology can change quite rapidly and government does not always keep apace is a useful one. The review could, for example, examine the current state of the industry and weigh this against the goals of the original policies, looking at whether the goals of the policies can still be realistically achieved or if the goals themselves need to be modified. This is illustrated by the power supply crisis that South Africa now faces, one for which the government has taken responsibility (Du Plessis, 2008). Despite the presence of an energy regulator and studies conducted by the Energy Supply Commission (Eskom) no steps were taken by government until a crisis ensued. Thus 'constant vigilance' is an apt maxim to the future of the broadcasting industry.

Mr Thomas cautions that ultimately the more content that is created, the more the

value of all content is reduced, because it is so widely available (the basic law of supply and demand) thus not everyone can work in the creative industries. He adds that while internationally there is more artistic work than ever before, there is ultimately the same amount of *high quality* art as there has always been - simply because anyone can place their creative writing on the internet does not necessarily mean that it was high quality work that publishers ignored. Indeed, the drawback of the new creative commons that has developed is that everyone can place their content online, undermining the availability of high quality content. For example, there are millions of videos available on Youtube.com but most of these are of low quality and many are not intended for commercial consumption in the first place.

The three interviewees at ICASA find this scenario, of the internet surpassing terrestrial television as the primary distribution mechanism for content, unlikely in the short to medium term in South Africa. One might argue that twenty years ago most people had no idea what the internet was, yet today many people carry the world wide web with them wherever they go on their mobile phones. That said, the overwhelming majority of South Africans do no have access to the internet nor do they have the skills to effectively use it. Thus while this scenario may seem unlikely in the short to medium term, it has been beneficial in determining what could happen in the future, which, after all is the purpose of scenario planning.

The review of Canadian broadcasting policy mentioned in Chapter Two (Dunbar and Leblanc, 2007) suggests the strong possibility of this scenario (Scenario Two) becoming a reality. The authors recommend that government end most forms of regulation, such as content quotas, advertising limitations, licence class distinctions, and others. They note the difficulty that the internet presents in the manner in which it creates nearly limitless international competition. They argue that the Canadian government should not create more regulation for broadcasters (p. xx), but should instead find ways of facilitating the production of local content. Their suggestion is the development of a flexible national policy for digital media that will deal with copyright and fiscal issues and introduce new incentive programmes to facilitate wider availability and production of local content. Such a policy would be beneficial in a South African context too.

This scenario echoes the sentiment that cultural policy must be flexible. It suggests that government will not always be able to use regulation as a means to ensure diversity of content, perhaps a greater focus on facilitation is needed. While Multichoice is quite ready for such a scenario, neither the SABC nor e.tv have made any strides whatsoever in making content available online, which international public broadcasters, like the BBC, have already begun to do (Naylor, 2002).

The patron model offered by Duelund (2003) would perfectly fit this scenario: the

government no longer controls broadcasting but offers assistance to increase diversity. As noted by Miller and Yudice (2002), at some level governments will always be making cultural policy and in this instance it may come in the form of funding for worthy projects or offering free educational content, or it might offer tax incentives to video producing web sites that operate from South Africa – all of these interventions would still be cultural policy but would be vastly different from the regulatory framework in operation today. Government intervention would still be important to ensure Pachter and Landry's (2001) suggestion that economics is defining culture does not become the norm. With no regulatory control the government must offer other interventions to ensure that cultural content is not entirely displaced by popular entertainment It may be that cultural content will survive quite well on this platform, but assistance from the government in this regard can only increase the diversity and quality of such content. This scenario demonstrates how cultural policy can promote facilitation over regulation, particularly when regulation is no longer a viable means of encouraging cultural content. This scenario is ultimately unavoidable but changes in South Africa's policy today could make such a transition easier.

Outcomes

- The availability of broadband internet has the potential to usurp programme viewing from the internet.
- Legislation must be reviewed on a regular basis, with a mini-review

conducted yearly to respond to new and developing issues.

- Those with financial means will always be able to afford high quality content, whatever the platform.
- Wide availability of low quality content undermines the potential reach and power of high quality content.
- The government can still facilitate the production of local content by providing financial support for new websites that encourage and actively produce local content.
- Development of a facilitative framework for dealing with the internet.
- For policy, facilitation has more future potential than regulation.

Some of the weak points in South Africa's present day broadcasting and cultural policy become apparent via these two scenarios. There is not enough flexibility to deal with new developments and regulation is largely the focal point of broadcasting policy. Ultimately the future of this industry cannot be predicted with any level of certainty. Both scenarios illustrate the need for a flexible framework that can mitigate the negative and accentuate the positive effects of said uncertainty.

Chapter Four: Policy Suggestions

The purpose of this chapter is to consolidate the information presented in the three previous chapters. First there is a look at the applicability of Venturelli's cultural policy suggestions. Then this chapter considers possible future avenues for cultural policy. Finally there is an attempt to answer the question: What value can cultural policy have for broadcasting? Various policy suggestions are offered throughout and in each instance this chapter attempts to highlight the most useful ones.

Venturelli's Solutions?

This section considers Venturelli's policy suggestions, paying special attention to the points of view offered by the interviewees, and attempts to determine exactly what value they might have for the future of the South African broadcasting industry. Her suggestions are grouped under the categories: education, finance, copyright, and competition law. Thereafter this chapter considers other issues that have been discovered via the literature review and interviews, these are: diversity and language, content quotas, and audience interactivity.

Education

It would appear that the problem of creating independent and creative thinkers is but a minor portion of a greater skills problem. As the first scenario demonstrates

this is not simply a problem for the future, Mr Moilwa points out that it is a present day problem. He also notes that South Africa's education system needs to place more emphasis on learning indigenous languages. Venturelli is correct in suggesting that countries need to reorder their education systems but in exactly what areas this needs to be done is a difficult question to answer.

Professor Kupe (2008) suggests that the education system needs to extend beyond producers to consumers. Ordinary citizens need to be educated in the production process to demystify it and make it accessible to everyone. He is of the opinion that students are insufficiently equipped to be critical thinkers. An interesting development in this arena is that the Department of Education is placing greater emphasis on science subjects rather than humanities-based subjects. While there are critical shortages in the education of these subjects, some educators feel that humanities-based subjects are falling by the wayside in many schools as the Department seems focused primarily on maths and science (Parliamentary Monitoring Group, 2008). A better policy might be the integration of both spheres of education. What is the use of students knowing equations and formulas if they cannot think critically and creatively to both apply these concepts in different ways and develop new equations and formulas?

Kupe believes that students have to be taught not to accept everything they are told but to interrogate all information with which they are presented. Kupe notes

that degrees in the humanities are especially useful in this regard as they offer non-directive curricula and focus on educating students in critical thinking skills. He envisions a society in which everyone critically engages with arguments. Abrahams (2003) also suggests that South Africans entering the information economy need be trained across disciplines and believes that the sciences and humanities are complementary sectors. Mr. Aldridge suggests that both access and the ability to study are issues that need to be considered at tertiary level, he points to the large drop-out rates at universities as evidence that students are unprepared to deal with education at this level.

Mr. Mngqibisa noted that there is still a wide disparity of resources in schools across the country. While some schools have advanced facilities like video-conferencing there are still many students who have no idea how to use a computer. Mamedupe Kgatshe notes that broadcasting has a role to play in education and needs to present programming that effectively engages with young minds.

Thus the country is moving into a situation in which those entering the broadcasting industry need adequate training, while on the other hand, the broadcasting industry itself must support the education and training of the nation's learners. Venturelli's suggestion that educational institutions need to encourage independent and creative thinking amongst students rather than expecting them to

memorise information is an agreeable one. As the first scenario demonstrates without an appropriately educated broadcasting sector the effects on both the sector and national culture can be catastrophic. In an information economy these skills are more essential than ever before and this is particularly evident in the broadcasting industry.

Finance

All interviewees agreed that more emphasis needs to be placed on effectively financing the creative industries. Mr. Aldridge noted that this is not happening at all; far greater stimulus needs to be provided to get the industry going. On this point Venturelli is entirely correct. There are some arguments that South Africa has more pressing social issues, but providing tax breaks and micro-loans does not undermine these goals with any major effect. Furthermore, the production industry is certainly a new source of employment for South Africans, as noted in the first scenario, broadcasters are already desperately seeking skilled employees, thus investing in the industry helps alleviate those social issues. Not to mention the economic multiplier effect that production creates for catering, costumes, hair stylists, and where shooting is done on location, local tourism benefits. Mr. Moilwa suggests that more funding must come from the private sector as government has limited funds to support the industry, which is a very expensive one. Professor Kupe suggests that the lack of funds for creative people in some ways amounts to censorship. He agrees with Venturelli, noting that reducing interest rates and offering additional tax incentives for the creative industries

would not be too difficult to implement.

The production sector currently gets financial assistance from the National Film and Video Foundation (NFVF) who distribute funds to assist film production, but film is an expensive art form and they have very limited funds, thus they do not generally provide full funding for films. Additionally the Department of Trade and Industry offers an innovative rebate scheme (DTI, 2005) that encourages foreign companies to shoot their films in South Africa and allows South African films and television shows to claim between 25% and 35% of their production expenditure back once the work is completed for productions with a total production budget of R 2,5 million and above. This scheme must be commended as it does encourage production and reduce the costs of producing film, it is very much in the spirit of what Venturelli proposes. However new producers will still have the difficulty of obtaining finance in the first place, as the above scheme only works if one has already obtained and spent the money.

To be fair the government has taken some steps towards financially supporting the production industry. Venturelli is correct in suggesting that more can be done to encourage creative production. Mr. Moilwa's suggestion that it is the private sector (banks and other financial institutions) that have the capacity and for this reason should provide flexible financing to creative producers. The government could certainly go further in encouraging the private sector to further participate,

as Venturelli suggests, by offering tax incentives to financial institutions that encourage creative risk taking.

Copyright Issues

These issues are only beginning to appear in South Africa as most respondents suggested. Mr. Thomas notes that it is difficult to create a policy that would fairly cover this issue and argues that specific issues should ultimately be left to the courts to decide on a case by case basis. Mr. Mngqibisa adds that South Africa's copyright legislation has remained unchanged for over 30 years and may need amendments in the future to deal with issues that may arise.

Mr. Moilwa suggests that these issues were not thought of when South African copyright laws were drafted and that a public debate is required. He does note, however, that the South African Constitution (No. 108 of 1996) is a 'rights based' one and it's society is a capitalistic one, thus property rights should theoretically trump fair use rights. Mike Aldridge argues against this, noting that 'content wants to be free'. He believes that this axiom will ultimately prove to be true and he provides the example of clips from television shows that regularly appear on Youtube.com without the consent of producers, in clear violation of current international copyright laws. Thus producers must find a way to earn sufficient revenue from their work without attempting to exercise absolute control over their content.

Mr. Moilwa adds a different dimension to this issue. He notes that producers of content and artists are often not educated in the area of intellectual property and are often not aware of exactly what their rights are. The public is also unaware or unconcerned with this issue, as piracy (the illegal copying or downloading of content) is rampant in South Africa. Individuals do not understand the effect that piracy has on the production industry. According to the South African Federation Against Copyright Theft (SAFACT, 2006) sales of pirated products had a market share of 50% in South Africa, amounting to the loss of 3 million unit sales! Education is needed for both producers and consumers of content on intellectual property rules.

Yet another dimension is added by Professor Kupe. He notes that the SABC is meant to be a public broadcaster, yet they insist on strict control rights over content that is broadcasted on their channels. Their content should be available for public use; Kupe notes that students have to pay exorbitant sums of money to obtain copies of the SABC's programming, while other media should have free access to the SABC's news archives. He proposes that the reason for this is that the SABC is not purely funded by the public and as such needs to make money from other sources. He suggests that content should be free for public consumption but when other commercial entities wish to make use of SABC's content, they should have to pay commensurate fees.

South African courts, the film and television industry, and policy makers appear to be ill-equipped to deal with the copyright issues that have begun to emerge, a point that is more than adequately reinforced by the levels and effects of piracy in the country. If South Africans so readily consume pirated content, local producers face a difficult battle trying to convince consumers to pay for their content. As noted in the second scenario it is difficult to regulate a space like the internet where copyrighted content can be easily located and freely downloaded.

Venturelli's arguments regarding copyright practice (2002, 20) appear to be wholly applicable as, in the future, this issue is only going to become more problematic. Mr. Thomas is also correct in suggesting that it is difficult, if not impossible, to put a policy in place that would fully address these issues. It should ultimately be decided by the courts on a case by case basis. Public education that accurately and fully explains this issue is needed, simply telling people not to buy pirated DVD's or download copyrighted content from the internet is not enough, the greater ramifications for the industry and the consumers themselves needs to be explained. Additionally tertiary and secondary institutions can certainly do more to educate producers of content about their own property rights before they enter the industry.

Competition Law

With the exception of Mr. Aldridge the interviewees largely agreed that the South African film and television industry is well served by its competition legislation. The possibility of all of South African broadcasting being owned by one or two companies is unlikely and illegal in South Africa. Mr. Thomas noted that this is a problem in countries like the USA, where despite the seemingly large number of broadcasters and production companies most of them are ultimately owned by just seven large corporations, this is not the case in South Africa (relatively speaking). Mr. Moilwa suggested that South African competition laws are sufficient and that the country does not need additional laws that may inhibit growth as the necessary checks and balances are in place.

Mr. Mngqibisa suggests that South Africa's legislation is one of the best in the world in this regard and believes that the competition commission does an excellent job of examining mergers within a particular industry and across different industries. Additionally, ICASA monitors how licenses and diversity will be affected in the broadcasting and telecommunications industries with regard to mergers.

Professor Kupe suggests that large corporate entities are often insensitive to culture. He uses the example of Johnnic's purchase of the Sowetan, before they had purchased it they stated that the paper would remain the same, but Kupe suggests that since then the paper has become a tabloid along the lines of the

Daily Sun, instead of the respected newspaper it once was. He suggests that the South African law and the competition commission need to pay more attention to cultural diversity and the impact mergers and acquisitions will have on it.

Professor Anton Harber (2008) suggests that internationally there are only six major media companies, but that the media in South Africa is largely more diverse now than it was a decade ago. He argues that there are two large media companies: the SABC and Naspers; 3 medium-sized companies, Avusa (which also has interests in film and music), Independent and Caxton; and a large number of smaller media companies. He notes that large media companies do have some advantages. An example of this is the Sunday Times' recent negative reports on government ministers which have earned the paper the condemnation and threat of legal action from the ministers named, but because Avusa (the owners of the Sunday Times) are a well resourced company the government has to think twice before engaging them in legal battles. Harber also suggests that larger companies can experiment more, as Naspers has done online, because the failure of a particular venture will not mark the end of a company.

Based on the arguments presented above, Venturelli's suggestion that all content can ultimately be controlled by a small number of corporations (2002, 21), while applicable to the Western world, seems to have little bearing on South Africa. As far as broadcasters and telecommunications companies are concerned, between

the Electronic Communications Act and the Competition Act (Act No. 89 of 1998) the country would appear to have a stable framework to control media corporations' ownership of the broadcasting space.

Diversity and Language

As noted in Chapter Two, both Hills (2003) and Kariithi (2003) suggest that this is a huge challenge for African broadcasters. Professor Kupe suggested that cultural policy should encourage and reward diverse content. Those who are successful in creating diverse content should be given access to better financial resources. He suggests that there is presently no diversity in the settings and contexts of local programming, most programmes take place in urban locations and focus on the wealthy. For example, local soap operas *Muvhango* and *Isidingo* moved from rural settings to urban ones to make their programmes more appealing to wealthier audiences and consequently advertisers. The creator of *Isidingo* is quoted as saying: “Five years ago the setting shifted primarily to a TV station, the objective being to make the series more aspirational and attract a higher LSM audience” (GFC, 2008). Kupe points out that there are no complex representations of the elderly and the disabled on television. He suggests that cultural policy has to deal with those cultural groups that are under-represented because the commercial system tends to ignore them. Cultural policy should empower people and encourage programming that is interactive in a meaningful way.

Mr Moilwa notes that the digital migration opens new linguistic possibilities for television, as already noted multiple audio tracks are available, making dubbing a viable option, while subtitle tracks in the broadcast stream allow one to watch television with subtitles in various languages. Subtitling is significantly less expensive than dubbing. He notes that this will be helpful for deaf people and that ultimately more language groups can be served by broadcasters. Mr. Thomas noted that the availability of both multiple audio tracks and subtitles will allow people to learn how to read and speak in different languages.

It is clear from the respondents, and the literature reviewed in Chapter One, that it is the role of cultural policy to represent the under-represented. As noted, however, it is preferable for governments to have as little control as possible in the broadcasting industry, but in this instance regulation may be necessary where private broadcasters cannot/will not cater for the under-represented. These kinds of programmes are unlikely to attract the desired demographics, with the attendant disposable income to satisfy advertisers, because, as previously noted with the *Isidingo* example, viewers in higher income brackets appear to prefer 'aspirational' programming about wealthy characters. Also noted in Chapter Two is the fact that South Africa's legislation indicates that broadcasting should cater for everyone's need, but there must be a framework for this to be carried out in an effective manner on television. Mr. Moilwa suggests that the difficulty is in balancing everyone's needs. Also, as discussed in Chapter Two, it is difficult to sell programmes made in indigenous languages to foreign markets.

Mr. Thomas cautions that in a capitalistic system cultural products must be marketable (or self-sustaining), yet if a programme is made to be saleable, can it still be considered a cultural product? It is beyond the purview of this report to determine what value particular programmes have, but one must question how authentic programmes like *Muvhango* and *Isidingo,* which have moved from rural to wealthy urban settings, are. Another side of this argument is that they are soap operas and thus contain an element of escapism. Research needs to be done in order to determine whether these shows have alienated their previous audience in their movement of location or if those audiences welcomed the change of setting.

As the first scenario suggests, linguistic diversity could potentially become a major problem in the future. The solution to the problem is training more writers in indigenous languages. In this way the policies that South Africa has developed, from the Constitution to the Broadcasting Act, that actively encourage linguistic diversity will always be potent.

Content Quotas

Kariithi (2003) notes that content quotas are a useful method for encouraging local content. Mr. Moilwa from the SABC is quite happy with the current content quotas, noting that the decision was made via a public process and suggesting that it is important to safeguard South African content against an imbalance of foreign

content. He adds that there is no scoring system for content from other African countries, it is presently placed in the same category as content from the USA or Europe. He argues that the two types of content are different and as such should be accorded different status.

Mr. Thomas notes that the issue of content quotas is one of balance – what the public wants versus what broadcasters can afford to produce. Professor Kupe adds that if anything the quotas should be increased giving due regard to cultural diversity, but increases are only effective if appropriate finance and skills are available. Mr. Aldridge suggests that content quotas are necessary as a stimulus for the local production industry and an increase in these quotas can only benefit the production industry.

Considering ICASA's most recent content quotas (as discussed in Chapter Two), it is clear that the regulator is performing its mandated functions in the regulation of local content. The production industry would certainly want these to be increased, but ultimately there is still limited capacity in the industry to produce high quality content, as Mr. Moilwa points out. One can also not ignore that there is value in some foreign content, as a means for South Africans to learn about other countries and ways of life. Additionally countries like the USA have the means of production to produce high quality programmes that the South African industry has neither the financial abundance nor the skills capacity to presently produce.

Audience Interactivity

Professor Kupe and Armstrong and Collins (2004) suggest that digital television offers new levels of interactivity. Mr. Mngqibisa suggests that the system will move from the uni-directional (broadcasters to viewers) to a bi-direction system (broadcasters to viewers and viewers to broadcasters). Depending on the configuration of the set-top boxes, a "return path" to the broadcaster might be enabled in the box (although this will likely require a cable or wireless connection), allowing the viewer to participate with the programme (Vecchiatto, 2008). For example, a viewer may be able to vote on a topical issue in a current affairs programme, or make a decision on what direction a storyline might take on a soap opera . This functionality is currently only available via the Short Message Service (SMS) and telephone lines.

Professor Kupe suggests that giving power to viewers has a profound effect on audience dynamics. The possibility already exists for ordinary people to upload videos created on their cellphones to websites like Youtube.com for global consumption. He notes that the possibility exists for children to create programmes from their own perspectives. Cellular telephones have played a huge role in demystifying the production process. If the seemingly daunting prospect of producing ones own content is made simple then the potential democratising effect is huge. Gauntlett (2000, 216) suggests that the most exciting thing about

the future of the internet is participation.

Whether this kind of programming will become popular is unclear but it is nonetheless a huge step in the direction of audience interactivity that digital modes of broadcasting enable. Furthermore it is not necessary for user generated video content to have mass appeal as for many it may simply serve as a means of communication with their families, friends, or communities. Thus policies that encourage education in the production of content have the potential to reveal talented new film-makers and turn audiences from passive viewers to active participants in cultural production.

The Relevance of Venturelli

One of the objectives of this report is to determine how relevant Venturelli's suggestions are to a developing country, particularly South Africa and to the broadcasting industry. The question is: were the issues she discussed at the forefront of the minds of the interview respondents? The answer to this question is not exactly! Before Venturelli's suggestions were discussed, respondents were first asked for their own opinions of what policy changes might result in a better broadcasting industry in the future. Only Mr. Moilwa and Professor Kupe picked up on both the education and finance issues. No one initially mentioned issues of copyright or competition law as salient issues in South Africa's cultural policy landscape at all.

What is interesting is that once Venturelli's suggestions were discussed all the interviewees had some opinions on them. Only Howard Thomas largely disagreed with Venturelli by suggesting that technology would always be at the centre of the information economy and never culture. He adds that while technology may be at the centre of this economy, it is culture that will determine what people will buy/use, thus he does agree that there is some kind of relationship between the information economy and culture. All interviewees agreed that education and finance were major issues that the broadcasting industry still has to deal with. There were mixed opinions on the copyright issue and general disagreement with Venturelli on the competition issue.

Venturelli briefly mentions the issue of cultural diversity and content quotas, but does not pick up on audience interactivity or linguistic issues. Of course these are issues that are particular to the broadcast industry rather than all cultural industries, thus it is unlikely that she would deal with them. Linguistic issues are of less concern in the USA and western Europe, where most people in a particular country speak the same language. Quotas are of no concern to the USA as they have the largest production industry in the world, and as Miller and Yudice (2002) note film and television is a major export business for America.

There is value in Venturelli's suggestions if for no other reason than they

encourage debate around these issues. Professor Kupe noted that these suggestions are useful for the South African economy regardless of whether there is an information economy or not. All developing nations face the issues of education, finance, and copyright to some degree. The issue of monopolization of content and ideas will affect those countries that do not limit foreign ownership of local companies, but for the foreseeable future South Africa is unlikely to have this problem in the broadcasting industry.

The Future of Cultural Policy in Broadcasting

The following section is a look at the points made by the interviewees regarding the future of cultural policy. Howard Thomas suggests that the job of cultural policy is to facilitate or find means of funding culture. He suggests that cultural policy has limited value in South Africa because the funds available for culture are limited and that this situation is unlikely to change in the near future. He also suggests that culture is highly influenced by the marketers of consumer goods.

Philly Moilwa suggests that hard and fast regulation is more useful in the short term. For him cultural policy implies guidelines, while regulation implies “do's and don'ts” which are needed by the industry as a whole. Stability is needed because broadcasting is consumed more than any other kind of media in South Africa and consequently has a lot of power. Cultural policy is needed to guide the industry in issues such as the balance between freedom of expression versus

cultural sensitivities, for example, where the line should be drawn between representing the atrocities of the country's past versus the representation of the rainbow nation. Furthermore, he suggests that legislation is not clear on which cultures deserve representation and how much time should be allocated to each; diversity is difficult to define. He believes that it is the job of cultural policy to make these kinds of definitions.

Mr Moilwa adds that the international trend is towards less economic regulation of broadcasting industries, and in the long-term this will have to happen in South Africa; however South Africa still faces socio-economic and redress issues thus tight regulation is more effective in the short to medium term. He envisions a code of conduct driven by cultural policy becoming key to the future of broadcasting, issues such as: obscenity, cultural sensitivity, and respect for other's culture will need to be clearly defined. Whatever policies develop they must be flexible because of the convergence in the industry, especially between telecommunications companies and broadcasters. He notes that the focus will shift away from technical regulations but move towards cultural issues such as rights and intellectual property.

Professor Kupe suggests that policy is prescriptive. As previously discussed he suggests that cultural policy must do three things: preserve, promote, and sustain culture both the historical and the present. He notes that cultural policy does not

and can not exist in a vacuum. It must exist alongside other kinds of policies (such as financial policy) as they are all related.

Mr. Aldridge suggests that future policies have to look at how the audience can be empowered. Technologies like SMS and cellular telephones have proved popular in allowing a certain degree of interactivity with television. He believes that technology should ultimately enhance the ways individuals communicate with other individuals.

Nozipho Mvulane suggests that the cultural policies that ICASA produces, which are embedded in broadcasting legislation, provide a framework for broadcasters to produce the most innovative work possible. By requiring that broadcasters produce local content they are forced to develop new programming that has a ripple effect on the economy, as previously discussed. All three ICASA representatives see the organisation as both a regulator and a facilitator. They believe that South African broadcast policy is a combination of information technology and cultural policy. Mr. Mngqibisa suggests that the kinds of policies ICASA creates can be divided into market regulations and content regulations. As discussed by Kariithi, Venturelli (2003), and others, content regulations are a way of ensuring cultural content is always available on television. Mr Mngqibisa further cited examples in the current legislation that prove that cultural policy is already present in broadcasting policy: the Broadcasting Act which establishes the

SABC charter suggests that the SABC must promote national identity and culture, while the Electronic Communications Act suggests that broadcasters must cater to all languages and cultures. Several examples of cultural policy in these two acts have been discussed in Chapter Two.

What value can cultural policy have for the future of television broadcasting in South Africa?

The short answer is: plenty.

When the researching and writing of this report began I was not at all certain what the answer to this question might be. My earliest inclination was that cultural policy probably had very little applicability to broadcasting; I had set out to prove just that. Surprisingly, as the research continued, my perspective of cultural policy shifted. It is clear from the scenarios that cultural policy is indeed a useful tool for the future of broadcasting, and there are justifiable reasons for applying it in conjunction with financial/economic policy.

In the process of writing this report I began to wonder: if local cultural content is meant to disappear then surely it will disappear and there is nothing that can be done about it? Holden (2004) also argues that art forms that do not serve anyone will ultimately die. It was Professor Kupe who countered this determinist attitude

by suggesting that while that may be so, audiences must first be given the choice. Programme ratings indicate South Africans do enjoy local content and government regulation and cultural policy is at least partly responsible for the volume and kind of local content currently available.

In the first chapter the suggestion that the South African government's approach should be a mix of Duelund's (2003) patron and architect models was offered. What is needed as the country moves forward is a patron model, the state's role as an architect is coming to an end. As noted in the second scenario, state regulation of the internet is nearly impossible and utterly pointless. What will be needed is a state that supports local cultural production directly and indirectly, providing grants and tax exemptions to continue growing the local production industry. Adams and Goldbard (1995) were incorrect, at least in a South African context, when they suggested that governments should have no involvement in cultural policy; as long as there is always some level of public and civil participation in the policy making process and the policies instituted move the industry and society forward rather than impose new conditions on it. In short the government is needed to help organise the industry and act as a catalyst for growth.

Venturelli's suggestions have indeed proven to be of value to both developing and developed economies. Her suggestions regarding competition have limited applicability in South Africa but the overall validity of all her suggestions is sound

even in the South African context. The steps that have been taken by government, the regulator, and the industry must be acknowledged, they are certainly in the spirit of Venturelli's suggestions. That said, there is still a lot that must be done, particularly with regards to the education and finance issues.

From initial reading, interviews, and discussions I had assumed that cultural policy could only be made by the Department of Arts and Culture and similar 'cultural' institutions. I neglected to take into account the very definition of cultural policy presented by authors such as Miller and Yudice (2002). It is broad, because the term 'culture' is a broad one. The perspective of the interviewees at ICASA reinforces the notion that South African broadcasting policy is not just regulation, but to some degree facilitation too. Broadcasting policy in South Africa is made with due regard to the impact it has on culture and the impact culture has on broadcasting, as Fiske's (1987) definition implies.

From the research presented in this report it would appear that both academics and policy makers need to look at cultural policy in broader terms, it affects and is affected by a range of other policies. A document with the heading 'The Official Cultural Policy of the Republic of South Africa' is not needed. In the case of broadcasting in South Africa cultural policy is integrated alongside financial and information technology policy. Cultural policy is not just made by departments and ministers of arts and culture, it is made either directly or indirectly by various

spheres of government and to a lesser degree by cultural institutions themselves.

Miller and Yudice (2002) noted that the US government makes cultural policy via a wide range of institutions, with no Department of Arts and Culture as such. In the same way all governments make cultural policy but the instruments and institutions they use to do so are varied. Venturelli's very suggestion that issues like finance, copyright, and education can fall under the topic 'cultural policy recommendations' proves that cultural policy has an effect and is effected by a wide range of other policies and that, as Professor Kupe pointed out, they all overlap at various levels. This is a break from the historic view that cultural policy makers and academics held of cultural policy as being made either on an anthropological or artistic register, as Miller and Yudice (p. 1) note is the traditional defintion. Like the word 'culture', cultural policy must have a wider definition.

As noted in Chapter One, Venturelli and Thomas (2008) suggest that cultural policy can be defined along three registers: art, anthropology, and economics. The implication of the inclusion of the economic register is that it does have an effect on cultural policy. Pachter and Laundry (2001) also suggest that cultural institutions are at the mercy of financial policy and economics. To some degree this is not the case in the South African broadcasting industry. The government has created a series of broadcasting policies that have as many elements of

cultural policy as they do financial policy. Here cultural policy is not only affected by financial policy, it has an effect on financial policy.

The fact that the South African government already believes that cultural policy does have value in broadcasting is evidenced by several factors. Firstly the requirement that to have a license a broadcaster must have a particular percentage of local content (which Kariithi, 2003, suggests is ideal). Legislation suggests that content must be culturally diverse. Thirdly, the charter of the public broadcaster makes linguistic and cultural obligations part of the licence conditions of the SABC. Incentive schemes for film and television content are provided by the Department of Trade and Industry. Ownership of media companies within the realm of broadcasting is restricted by regulation. Finally, the suggestion that one of the goals of broadcasting is cultural enrichment (as the Broadcasting Act does) is also an acknowledgement of cultural policy. As Miller and Yudice suggest, a government does not have to formally recognise that it is making cultural policy to actually make cultural policy. The South African government does make cultural policy and it recognises that it does so. This is in spite of pressures Venturelli suggests international regulation bodies place on the country. That said, the government has a fine line to balance between being too prescriptive and protectionist, and being facilitative and allowing innovative work to prosper.

Holden's (2004) argument that cultural intuitions need to redefine themselves also

applies to the public broadcaster and some production companies. These organisations need to reduce their focus on financial results and their attempt to maximise profits, and instead focus on producing quality cultural productions that are stimulating and engaging. Legislation does not demand that the SABC make a profit, even though politicians and economists, such as Throsby (2003), would have us believe otherwise. Cultural policy is useful for such organisations because the first priority of this policy is not maximising the bottom line but maximising cultural value.

As noted by Kupe (2008) and Venturelli (2002), cultural policy traditionally uses the past as a reference point. As the scenario planning suggests, this is not always the best solution. The second scenario suggests, for culture to fulfil its goals in the future cultural policy must be flexible and respond to change in the present. This is an important point, cultural policy is not restricted to the preservation of past cultures, it can be used to ensure the diversity and vitality of present and future cultures and cultural industries.

In any country, anywhere in the world, cultural policy has enormous power because culture has enormous power. What term could be more encompassing than one that can be defined as, 'a way of life'? Cultural policy will always have a role to play in every aspect of human society. This report has presented a multitude of issues that the intervention of cultural policy might be useful in. As

Kariithi (2003) suggests, voluntary regulation by broadcasters may become necessary as technology converges and government regulation becomes increasingly difficult. Cultural policy exists in the South African broadcasting industry in the present and can only be more beneficial to the industry as the country moves forward, no matter what future scenario materialises. Cultural policy has the ability to usher in a new era in broadcasting policy: one in which the state moves away from regulating broadcasters and moves towards providing facilitation for the production industry.

In conclusion cultural policy must have some role to play in the future of broadcasting policy, because it plays a major role in its present. The scenario plan suggests that the government should move away from regulation and towards facilitation, which is exactly what cultural policy does. The recommendations of Venturelli and others are thus proven useful as South Africa moves towards becoming a major player in the global information economy.

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Appendix A: Interview Questions

- How would you briefly define cultural policy?
- Would you say that your definition includes broadcasting?
- Are present day policies: the Broadcasting Act, the Electronic Communications Act, and White Paper on Arts sufficient for the next ten years? If not, why?
- What is most likely to be different about broadcasting in South Africa in ten years from your present day knowledge?
- Ideally what can be done immediately to ensure South Africa has the best broadcasting industry possible? In terms of content and access for audiences and producers.
- It has been suggested that cultural policy tends to facilitate and not regulate (as broadcasting policy does). So is the next step for broadcasting policy to emulate cultural policy? Or is it better to use economic/IT policy?
- Shalini Venturelli (and others) offer the following policy suggestions, what are your thoughts?
    - Reorder education system – for creative, independent thought. Also are enough people being educated in broadcasting, with the right skills to support the industry in ten years time?
    - Balance fair use versus property rights.
    - Broaden access to capital for creative industries. Is enough capital going into the industry now for a broader more diverse, higher

quality content in ten years time?

- Competition policy for information monopolies. Is it possible everything could be owned by fewer companies in ten years time?
- Content obligations and quotas.
- Information infrastructure (affordability, access)
- Language Provision

At the end of the interview respondents were offered the opportunity to further clarify any previous statements or discuss any other issues they deemed relevant to the topic but had not been previously discussed.

Appendix B: Interview Respondents

The following individuals were selected for participation in the report:

- Howard Thomas, owner of Busvannah.
- Mike Aldridge, a Journalist and produce.
- Philly Moilwa, manager of Policy and Regulation at the SABC.
- Professor Tawana Kupe, Dean of the Faculty of Humanities at the University of the Witwatersrand.
- Sipho Mngqibisa, Mamedupe Kgatshe, and Nozipho Mvulane – All in charge of policy at ICASA at management level.

The following were considered for interview but were ultimately not selected as noted:

- Various individuals at DSTV regulatory affairs and content divisions but according to their secretaries they were all away in other countries at the time this report was written.
- Various individuals at MNET but no one was willing to be interviewed.
- Individuals at Telkom Media, but no response was received.
- Head of Regulatory affairs at e.tv, but I was unable to make contact with this individual.