

Abstract

This research report assesses the readiness of the independent television (TV) production industry in South Africa to produce sufficient local content for the free-to-air (FTA) TV broadcasting sector in the digital environment. The research focuses specifically on the TV broadcasting services of the South African Broadcasting Corporation (the SABC) and e.tv. The research assesses the state of the South African independent TV production industry, the availability of adequately skilled human capital within the industry, and whether there is an enabling policy and regulatory framework to support the industry. The research employs three pillars of the digital transformation analytical framework developed by Hanna (2010), namely: industry, human capital and policy.

The research design used in this research is case study. The research design is supported by data analysis of secondary literature, documentary analysis of policies, legislation, regulations, stakeholder submissions to policy, legislative and regulatory processes, and other stakeholder documents. This is further accompanied by semi-structured interviews conducted among key stakeholders in the three spheres of focus of the research, namely the independent production industry, the television broadcasting industry and the policy-regulatory sphere.

The research finds that there are core elements in place for fostering the creation of independently produced local content, although with shortcomings. These elements include the availability of training institutions to equip personnel in the independent production industry with the requisite skills. The research finds however that there are still key positions within the industry which are difficult to fill due to the lack of qualifying skilled personnel. The research further finds that there is availability of a policy framework to enable the participation of historically disadvantaged individuals (HDIs) in the independent production industry through broad-based black economic

empowerment (B-BBEE) policies and funding initiatives through government-run funding institutions.

It is also found that the Digital Migration Policy is one of the cornerstones for the future of FTA TV and is a catalyst to stimulate the demand for the production of local content. However, the policymaking process has been marred with policy developments that were either never completed, or that are taking years to complete, thereby delaying the achievement of policy intent. Meanwhile, the Regulator has, since its inception in 1993 post the apartheid era, strived to lay a regulatory framework that fosters the preservation and promotion of local content produced by the independent production industry. Yet the Regulator continues to experience difficulties with the monitoring of SABC and e.tv compliance with their obligations. The emergence of the COVID-19 pandemic has also created a challenge for the industry, including the total stoppage of production activities during the alert level 5 of lockdown.

The research also identifies potential interventions to address the identified shortcomings in support of the production of independently produced local content for the SABC and e.tv in the digital environment. These interventions primarily relate to policy realignment, ranging from human capital training and development, to creating a framework that spurs the independent production industry by introducing a pay-or-play principle for local TV content as an alternative to a quota-based compliance system. The research further finds that the 2020 Draft White Paper on Audio and Audiovisual Content Services Policy Framework introduces policy interventions that could positively shape the future of the independent production industry.

