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Beyond Broadcasting:
the future of state–owned broadcasters in Southern Africa

By Guy Berger

with contributions from Fackson Banda, Jane Duncan, Rashweat Mukundu and Zenaida Machado

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CONTENT

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PREFACE

This report is the output of Prof Fackson Banda, Rashweat Mukundu, Prof Jane Duncan, Zenaida Machado and myself. We thank the interviewees who gave their time for this research. Thanks also to Reg Rumney for technical editing. The cover is thanks to my daughter Vanessa Berger.

We are also grateful to Rolf Paasch, director of Fesmedia Africa in the Friedrich Ebert Stiftung, and Arlindo Lopes, Secretary General of the Southern African Broadcasting Association (SABA).

The pages that follow convey the complicated changes facing state-owned broadcasters in Namibia, Mozambique, Zambia and South Africa. These are changes being wrought around the digitisation of production, distribution and consumption of public interest news and current affairs. While this is not light reading, it is significant knowledge that needs disseminating.

The findings can be grouped into trends and challenges in three areas: (a) technology and new platforms; (b) the broader environment; (c) the meaning of the changes for the historical 'project' of public service broadcasting, and for state-owned broadcasters in Southern Africa in coming years. The four country studies in this report each follow this structure in their presentation.

Thus, in each country's sub-report, the first part (technology) reviews the landscape of media players in that given nation. It deals with who is doing what with public-interest content – within the mix of satellite-distributed, terrestrial, Internet and cell-phone mass communication services. Attention is given to planning for Digital Migration. Also touched upon are the issues of audience participation, staff training and Content Management Systems.

The second part of each country study (environment) looks at regulation of digital communications, with an eye to public-interest licensing requirements. It also picks up on further aspects of the broader environment – such as whether the culture is conducive to convergence, how the changes affect government control, and where the youth fit in. Particularly important is economics: who provides, and who pays for, public interest communications.

In the third part of each country chapter (future) the authors look at changing conceptions of public service in that nation, and they reflect upon scenarios into the future.

In all, this is a weighty meal. It is hoped that it will not only nourish you, the reader, but inspire your own "cooking" and "consumption" in this particular cuisine. That way, you will not be lacking when it comes to energy supplies in being an actor in the unfolding digital drama of this era.

Guy Berger, Grahamstown, September 2009.

The Friedrich Ebert Stiftung (FES) has a long record of support for public interest communications worldwide, and especially for the institutions set up to be public service broadcasters.
Over many years, and in partnership with the Southern African Broadcasting Association (SABA), we have worked to facilitate top-level discussion among, and expertise for, broadcast leaders in southern Africa countries.

This report was conceived at a symposium the FES arranged in Cape Town in March 2009, which recognised the need for systematic information to be collected and disseminated about the transitions taking place in broadcasting. Two presentations made there are published here as Appendices.

There is still a need to continue the historic task of transforming government broadcasters into public service broadcasters, in line with the provisions of the Declaration of Principles of Freedom of Expression, as adopted by the African Commission on Human and People's Rights.

Progress – or the lack of it – is captured regularly in the Africa Media Barometer (www.fesmedia.org), which is a partnership between the FES and the Media Institute for Southern Africa (MISA).

In recent years it has mainly been the lack of political will of governments to relinquish political control which has prevented the transformation of state into truly public broadcasters. But there are also new complications in the reform efforts to give African democracies the public broadcasting services they deserve.

State-owned broadcasters increasingly exist in a context of many other broadcasters, which raises new questions about their role and business model in a pluralistic environment.

In addition, these – often hollow – giants in the African media landscape are now struggling to find money and capacity for Digital Migration, the shift of television to digital production, transmission and reception. Not least, new technologies have brought non-traditional players into mass communications, and enabled audience participation as never before.

With all this happening, no state-owned broadcaster can continue as if it is business as usual. This publication is a snap-shot of the changing environment in four African democracies, with special focus on public interest communications.

The report is not the view of FES, but we are pleased to have supported its production as a resource to enrich the ongoing debate about the future of public broadcasting.
With that, this text is commended to the reader in the certainty that your time spent in these pages will be well rewarded.

Rolf Paasch, Director, fesmedia Africa, Windhoek, Namibia. fesmedia@fesmedia.org

1. Introduction: Beyond broadcasting
By Guy Berger

1. Introduction

You've probably heard that there's something called "Digital Migration" beginning to impact on broadcasters in African countries. It's a mammoth effort that will phase out the existing system of analogue TV broadcasting. What's less well-known is that this switch-over is just one part of a vast change affecting the media as we know it. This report is your guide to what it's all about, why it's so important for anyone interested in mass communication, and what media in four Southern African democracies may look like five years from now.

The wider transformation is *made possible* by changing communications technologies. It is *driven by* global trends in economics, politics and human behaviour. It is the big picture of which Digital Migration is just one part. For some people, the switch-over in broadcasting is just a more efficient transmission technology and a way to squeeze more TV channels onto the airwaves. But it's going to be a lot more than that – and at the same time it's a change that in time could even be dwarfed by other changes.

Here's a glimpse of what's coming up. When 2015 dawns, what we experience as television content will certainly no longer be limited to linear and non-interactive transmission to our TV sets. First, many of us are as likely to get audio-visual content on cell-phones as on TV sets or online computers. Same goes for radio – expect to listen on your phone or via a TV set as much as on a traditional radio set. All kinds of audio-video content will also be available through newspaper websites. TV and radio websites will also provide you with news in text format. In that way, each will move into "turf" that was the originally preserve of the way the other has generally communicated. Getting your cell-phone to read you text in audio-format, in a decently-rendered human voice, will happen. In this way, content becomes fungible. Meanwhile, many phones will double up as GPS devices as well. And often you'll be able to interact with all this digital content – responding to it, copying and sharing it, mixing it into other formats. In short, an age of people being *receivers* **of** *mass information* is expanding into one where they are *participants* **in** *mass communication.*

Why look to what seems like a distant future of five years away? The answer is that anyone driving a vehicle needs to look at the road ahead if they want to avoid going into a ditch. But good driving also involves looking in the side-mirrors. It's not just that someone may overtake your media vehicle coming up from the right-hand-side – there is the also potential for the completely unexpected: something dramatically speeding past on the left. And don't think all these things are going in the same direction: like Lagos, some will be coming straight towards you, even steered by passengers rather than licensed drivers. Journalists, in their role of informing, educating and guiding the public, and in their role as direct stakeholders in the media environment, need to be especially up-to-speed on all these issues.

Only some institutions in the business of "transporting" messages will make the journey into the future. Many will wake up one day and find themselves left behind with broken technology and seized-up business models, stuck on empty back-ways and with no clue as to which direction to take. As happened to the titans in the collapse of some of the USA's mega-banks, even some of Africa's state-owned institutions that today seem so big and powerful will find themselves increasingly without fuel to continue. Amongst these casualties, there will be several state-owned broadcasters.

Several scenarios, all plausible, can be predicted. Which ones materialise for which media will be a function of the Darwinian mantra – successful adaptation to changing conditions versus certain extinction.

2. Where we come from

Much of Africa inherited the British model, where a state-owned broadcaster funded by public resources was supposed to produce public service broadcasting. This service was defined in a paternalistic way, and it was consistent with this when post-independence Africa expanded this mission to include the delivery of development information. But the theoretical correspondence of public ownership, public financing and public service was never quite there from the start. Under colonialism, the "public" part of "public service broadcasting" meant a tiny minority. As post-colonial and white-dominated regimes gained strength, "public service" came to mean "service to the government". Public funding was phased out in favour of advertising-driven economics.

The consequence is that today, most state-owned broadcasters in southern Africa are financed commercially (including some donor sponsorship). They deliver mainly government service content, with patches of public service content in varying degrees. In most African countries, these institutions remain the biggest players in broadcasting, and they are formidable forces in contributing to – or at the other extreme, working to counter – progress in democracy and development.

These inherited broadcasters often retain a monopoly on national transmission, even when other broadcasters have been licensed. This is because they are supposed to be custodians of public service broadcasting, which indeed they sometimes are, in areas such as cultural programming. However, their existence as institutions that should be dedicated to public service doesn't mean that private and community broadcasters do no public broadcasting. In some cases, these non-state broadcasters are legally required to carry kinds of public service programming as a condition for receiving a licence – for example, news or local language quotas. In other cases, they deliver public service for reasons related to their business or community concerns.

What this means is that we need nowadays to separate out Public Service BroadcastERS (actual, partial or ought-to-be), and public service broadcastING. The institutions and the practice can be de-linked. Indeed, some state-owned broadcasters are actually very poor at public service broadcasting of news and current affairs (where their service is really to government rather than public). Some private broadcasters on the other hand do meet public service broadcasting standards in providing impartial news and current affairs.

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To complicate things further, public service broadcasting in varying degrees is now beginning to be done by non-broadcast players in the communications sphere. Thus, cell-phone companies, bloggers, non-media institutions like political parties, parliaments, NGOs, universities, etc. can also be factored into the picture. In many countries, including in Africa, traditional TV channels have historically worked with a fixed concept of quality in deciding what programming to put on air. Today, content which they traditionally rejected for poor production values or other reasons often finds an outlet on sites like YouTube. There it sometimes attracts audiences even larger than the "quality content" on the broadcasters. Some of this alternative content isn't really what could be called public service in character – for example, footage about families or imitation USA pop music videos. Of course, entertainment content can be part of public service, but at the very least it should be distinctive in the sense of having a local content flavour and wider public interest characteristics. And some of it does meet these criteria.

Almost every African now has a choice of media – even if millions still do not have a single provision in their own mother tongue. Though still limited, the choice is much greater than it was, and it will become greater still.

South Africa provides an example of how public interest "broadcast" content can appear on non-traditional platforms. One case involved an audio clip of the then-ANC spokesperson Jesse Duarte brow-beating a journalist, which appeared on the website www.saelections.co.za (and which also attracted 106 responses on the sister www.thetimes.co.za site by end August 2009). The other was a video programme on satire that was commissioned by the SABC but then canned. A version was leaked and then published on the website of the *Mail & Guardian* newspaper, as well as on video-sharing site Zoopy.com. By August 2009, 2 189 of the total volume of viewers had taken the trouble to rate it, and 56 comments were made on a related article.

All this has led to the argument that public service broadcasting can no longer be seen as if it existed in a stand-alone and sealed-off world. Instead, it needs to be located within a wider context of public service media rather than exclusively the domain of broadcasters. The issue becomes one of scanning the entire communications horizon as to where public service content is made available to the public, and also recognising that it can exist in diverse formats: audio, audio-visual, still-image, graphic and text.

The defining characteristics of public service media are many. For instance, the concept includes the classic features like universal service (meaning widespread and free availability); nation-building; children's and minority-interest programming; educational, cultural and language development, etc. But one especially noteworthy feature is news and current affairs. This is particularly relevant for democratic practices like elections, accountability of governments, and people's participation in civic affairs. The future of this particular area of public service communications is the focus of this report. At the same time, not all news counts as public interest news. For example, we can leave aside that which is celebrity gossip or simply regurgitates press releases ("churnalism"). The major concern in this report is what all the changes mean for *public interest journalism*. In practice, many news and current affairs offerings in Southern Africa combine elements of public interest news with other kinds of news (like trivia or government

service news). But it's important – for the evolution of African democracy – to highlight the public interest components. This report is interested in where and how we can expect to find this kind of content as the future races relentlessly towards us.

3. Where we are going

2009 is no longer your mum's experience of broadcasting. Indeed it's not even the same as your childhood experience. Two words sum up the changes in media: more, and interactive.

3.1 More media

Almost every African now has a choice of media – even if millions still do not have a single provision in their own mother tongue. Though still limited, the choice is much greater than it was, and it will become greater still. That's the result of democratic struggles that have opened the doors to new players in the media space, as well as the effect of cheaper technologies to make and distribute media. Choices such as satellite TV may benefit mainly the elite, but that's still a highly influential sector that now has alternative channels to state-owned broadcasters. Although unevenly distributed, more media means a change for state-owned broadcasters who no longer have the field to themselves.

This plurality is part of the context for understanding Digital Migration. We're talking about the change from analogue signal distribution to digital terrestrial (as opposed to satellite) distribution. We're also talking here mainly about television channels at stake, rather than analogue radio which is generally expected to have a much longer phase of transition. Finally, we're also talking about Digital Migration as a very expensive process. For a start, broadcasters have to tool up to produce digital product for transmission. Then come the extra costs of distributing this at the same time as keeping analogue transmissions going for several years at least. (This is duplication period is known as "dual illumination"). Then the signal distribution infrastructure has to be renovated across the country, and that's also a huge cost.

There's even more at stake. One issue is the willingness and capacity of citizens to get the technology to view the digital transmissions. That means buying either a new digital-capable TV set, or a set-top box that will convert digital signals for viewing on old analogue TV sets. Another issue is digitising not only the initial full production processes within the broadcasters, but also their archives. Ultimately, the aim of the Digital Migration is for all audio-visual content to be born digital, and to stay digital through to archiving and re-use. And the reason for all this, you may ask? Primarily because a lot more channels can be packed into the airwaves with digital (where it's easier to compress content), and the International Telecommunications Union says it won't protect any analogue broadcasting from international interference after 2015.

Accordingly, once Digital Migration is completed, there is the possibility of many more TV channels, some of which will deliver audio-only, in other words, a kind of radio service. At that future point in time, many cell-phones will also be receiving digital broadcasting supplied on an always-on basis (and not to be confused with user-pulled 3G broadcasts). Filling the airwaves in this scenario will be a lot of cheap imported content, including religious programming. More

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importantly, state-owned broadcasters will then be just one option amongst many available to listeners and viewers. They may still predominate in analogue radio, but in the course of time, the name of the game will be digital – whether audio streams on digital TV or cell-phones, or on Digital Audio Broadcasting to new digital radio sets (such as in cars). And, ultimately, the more media there is, the more fragmented the audiences will become across diverse media.

3.2 Interactive media
The other emerging change in media is interactivity, linked thus far to the widespread dispersal of cell-phone access. From talk radio call-ins, through to SMS contributions, African audiences are responding to media content in ever-increasing numbers. And we "ain't seen nothing yet".

What this particular change portends is merging the distinctive role of community media into mainstream media. Community radio traditionally is intended to give ordinary people access to the airwaves. Now this function is becoming part of many other broadcasters (as well as newspapers). One effect is to transform the concept of "public service" to mean not just delivery of content, but also provision of a platform where members of the audience can contribute to the content mix. The

> *There is now the potential to expand beyond " public service broadcasters" doing "public service broadcasting" – and into "public service media"*

expectations from "service" are expanding in this way, and many in the public are taking advantage of this change to make comments, or send in photos. In due course we'll see a flood of citizen video as well. The provision of information in the form of public service news does not change, but it nowadays is being supplemented by providing for input into, and dialogue around, this content. Not all participatory input can be counted as "public service news" – like audience SMS votes for "reality" TV shows. Yet, there is a portion that does have strong public interest qualities.

Summing up, what all this means is the potential to expand beyond the concept of "public service broadcasters" doing "public service broadcasting". First, broadcasters and broadcasting are becoming just one component in a wider context of "public service media". Second, the idea of a one-way service that informs an "object" called the public is being complemented by the rise of an active audience. So it makes sense to talk of the total context as evolving into "public interest communications". State-owned broadcasters need to orientate themselves and their gamut of informational communicational activities within this emerging whole.

4. What it takes to survive … and thrive
Overall, public interest news today has to find ways to deliver a new but still distinctive contribution to democracy. If the state-owned broadcasters are not already supplying public service news, they will need to do so – or lose audience as other players produce product that is simply more professional in doing so. Two other dynamics will impact on communication around public interest news in 2015: *economics and regulation.*

On the first, economics, it is clear that advertising ultimately will go where the moneyed audiences are. Conversely, lost audiences mean lost revenue. One thing is certain, the audiences

will fragment along many lines – of age, income, language, taste, or region. That poses a huge challenge for public interest news to convey public issues to audiences with alternative and niche options. State-owned broadcasters that lose mass audiences will also find it hard to lay claim to public funds.

Regulation may hold back the tide of new media players, and protect state-owned broadcasters for a while, but not indefinitely. The real question is what licence conditions will be applied to newcomers, and how these conditions relate to public service. If they lead to non-state news that wins audiences, this competition may compel state-owned broadcast-ers to drop pro-government bias in order to increase the appeal of news on these channels. Bu if licences require private broad-casters to have a percentage of local content in news, that could also have impact on the shape of more competition. If the licences do nothing to affect state-owned broadcasters, the public may simply deepen its scepticism, and even avoidance of, partisan or irrelevant news coming from these mouthpieces.

> *Ultimately, broadband interactive Internet channels will probably become the primary means of mass (and individual) communication. Broadcasters will need to be part of that world.*

On the other hand, if the broadcasters open up to the pressure for participation, regulation may find it hard to police the range of audience interactions and contributions. Much of the emerging communication such as online or via cell-phone falls under the regulatory radar or escapes easy control due to its speed and participatory quality.

Regulation is especially significant in shaping the impact of Digital Migration. It decides which TV broadcasters get onto a given Multiplex signal, with how many channels and under what conditions. This ties in with the idea of "incentives" – of new channels being granted to compensate broadcasters who have to pay for "dual illumination" (transmitting both the old analogue and the new digital over a transitional period). There is also the question of incentives for audiences to buy set-top conversion boxes to be able to convert digital signals to show on their old analogue TV sets. On the one hand, government policy needs to decide if and how subsidies might be offered. On the other, regulators need to rule if broadcasters have to introduce new digital offerings (eg. simulcasts in several languages) that would encourage public uptake of boxes.

There is also regulation about Electronic Programme Guides and Application Interfaces on the set-top boxes. These relate to language and usability, as well as to standards compatibility between different boxes. The kind of Conditional Access built into the receiving devices is another – and refers to whether some viewers can receive premium content at a price, or be switched off for failure to pay subscriptions or a licence fee. Whether the boxes are connectable to the Internet or to computers and printers (eg. for receipt of government forms via the system) is also an issue.

As if all this was not enough change in the air, there is also the matter of the Internet. In South Africa, estimates are that three million people access the Internet only on their cell-phones. Another five do so on desktop computers (mainly at work), and another two on both computers

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and phones. That makes a fifth of the population that has some Internet access. Available to them is a mass of content, of which local public interest news is a miniscule option. This range of choice lets them be highly selective. And, as they engage more and more in the interactive social networks of Web 2.0, so too there will be a further shift in the balance of communications power from broad-casters/publishers and in proport-ion to the growth of choice and creative contributions by the users.

What this raises for state-owned broadcasters is how they deal with websites and .mobi sites. They also have to decide how to deal with customised content for these new platforms (as distinct from shovelling radio or TV content in direct and unchanged form onto the websites). In addition, they have to figure out how they deal with audience participation online. While they're at it, there's also the need to re-think SMS – not just to receive input, but also as an output channel – especially to youth who typically are not huge consumers of public interest news.

Ultimately, broadband interactive Internet channels will probably become the primary means of mass (and individual) communication. Broadcasters will either need to be part of that world – or risk remaining in a digital broadcast space that is increasingly overshadowed by wired and wireless Internet.

5. Re-inventing public service news
We're living in a time of re-defining public service broadcasting. In general terms, drawing from the classic BBC model, the (a) purposes and (b) features of public service broadcasting retain some validity:
(a) the purposes and rationales remain – namely, to inform impartially, to educate, and to reflect national culture/s and diversity.
(b) the characteristics to fulfil these purposes should be that public service needs broadcasting to be of high quality, original, innovative, challenging, engaging and widely available.

But while these constants endure, they do not capture the profound changes in the communications environment. Until recently, the following definitions would have sufficed in scoping the meaning of public service broadcasting:

- Public – meaning the nation with a commonality of concerns; a concept meaning the general interest of everyone;
- Service – meaning the provision of something to waiting recipients; and
- Broadcasting – meaning mass-scale transmission mainly of audio and of audio-video, through the airwaves.

These concepts are now in transition.

•   Public – there is growing communications pluralism that is forming fragmented and shifting publics, with a common public sphere shrinking in comparison to evolving dynamic "sphericals" of micro-publics.

•   Service – the idea of a broadcaster being like a waiter bringing a fixed menu to your table is now adjusting to the audience wanting not just a wide buffet for self-service, but access to the kitchen and even the chance to set up a rival restaurant next door! According to analyst Karol Jakobuwicz[1] : "The concept of participation is very amenable to a new idea of Public Service in that it encourages citizens to become users rather than viewers of content: active participants who produce, modify, comment on, judge and repurpose content rather than act as the passive (though grateful) recipients of broadcast information and entertainment."

•   *Broad*casting – this is now being complemented by *narrow*casting content to fragmented audiences, and it is not just via broadcast spectrum (whether analogue or digital) but also along other wireless systems as well as telephone and fibre-optic cables.

The idea of "technology neutral" public interest communication is now being recognised around the world. Jakubowicz[2] has interpreted "public service media" with a mathematical formula: "PSM = PSB + all relevant platforms + Web 2.0". This is insightful, but "communication" is nowadays wider than "media" in the sense of media as a social sector, industry or institution. Media increasingly exist in a web of mass communications generated by many other players who are not "media" in the core-business sense of the term.

This evolution tells state-owned broadcasters that they need to shift from the notion of a passive and singular audience towards acknowledging more assertive individuals and collectives. For institutions that are still government-controlled, the imperative is thus not only to transform into a "public service broadcaster" (as per the Charter of Broadcasting and the African Commission Declaration on Principles of Freedom of Expression). It is not even to stop at becoming "public service media" with output on platforms besides broadcasting (eg. the web and cell-phones). It is, rather, to transition even further into a "public-interest communications agency" that includes a service of public interest news, but also which goes beyond that, into communication that impacts on the news service itself.

6. What's happening in developed countries

Each country is unique, but state-owned broadcasters in Southern Africa would be stupid to turn a blind eye to trends in the developed world. After all, cell-phones have spread around Africa like a bushfire. In the UK, the regulator Ofcom has noted one such trend: "A wide range of commercial, voluntary sector and publicly funded organisations already make a growing contribution to provision of public service content across platforms." [3]   Ofcom lists, besides the public service broadcasters, several commercial broadcasters as well as public bodies like

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[1] Jakubowicz, K. 2008a. Participation and partnership: a Copernican revolution to re-engineer PSM for the 21st Century. RIPE, Mainz, October 9, 2008.
[2] Jakubowicz, K. 2008b. The role and future of public service media, in particular with regard to e-democracy. Paper written for presentation during Workshop 5: "e-Democracy from the Grass Roots", Council of Europe Forum for the Future of Democracy, Madrid, Spain, Municipal Congress Centre, 15-17 October 2008
[3] Ofcom. 2008. Ofcom's Second Public Service Broadcasting Review. Phase One: The Digital Opportunity.

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museums, international institutions like NASA, commercial web publishers, academia, libraries, government, charities and NGOs. Ofcom declares: "Public service broadcasting will need to embrace … new digital platforms or risk declining relevance" and adds that "… public service content should be available across all digital media, not just linear broadcasting".[4]

As background to these injunctions, one can note that the UK has to date had a model of varying suppliers of public service broadcasting:

- Publicly owned, publicly funded institutions (BBC);
- Publicly owned, but partly or wholly commercially funded institutions (Channel 4);
- Commercial institutions with statutory public-service remits (ITV, Five); and
- Commercial institutions without remits but which nonetheless provide some content that meets public purposes (Sky).

However, Ofcom now believes that this multi-faceted model is:

- Inflexible, and already struggling to adapt;
- Too focused on a specific set of services delivered over one specific platform;
- Dependent on unsustainable commercial funding models; and
- Therefore, not fit for purpose in responding to the opportunities and challenges that lie ahead.

This conclusion comes despite the fact that, for some time to come, it is expected that audiences in Europe will still spend more time on traditional linear broadcast TV than non-linear audio-visual content transported via the Internet. Yet Ofcom is no doubt aware that audience viewing of Internet video is growing at a faster rate than that for traditional TV. It is the trend that is important in planning for the future. And, as shown by the impact of recession on the USA's newspaper industry, things can move very fast when intense pressure is suddenly put on old media business models.

According to Ofcom, "… no form of television news in the UK currently pays its own way…", adding that the economics are especially stark for regional specialised news. It continues: "Television news cannot be taken for granted on any commercial channel after digital switch-over, because revenues generated from advertising around news programmes do not appear to cover costs of production." [5] Ofcom also reports research that Google secured more advertising spend in the UK in 2007 than did the major ITV broadcasting company (which has public service obligations built into its licence).

A body of thought in the UK seems to be that commercial TV providers now need to be freed from having to meet public service obligations – because of the costs of these, and also because of a view that Digital Migration means that the frequency spectrum they use is no longer so scarce as to justify public benefit conditions on licencees. But relieving other

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[4] Ofcom. 2009. Second Public Service Broadcasting Review: Putting Viewers First.
[5] Ofcom. 2007. New news, future news.

licensees of public interest obligations would leave the BBC as the only surviving provider of public-interest news.

As this scenario would reduce plurality in public service provision, there are also proposals to cut back the BBC and redeploy some of the licence fee to subsidise others to deliver public interest content. The thinking is to incentivise, rather than compel, private players, and especially those media players which might be better able to win over under-served youth and ethnic minority audiences. The counter-argument is that such incentives could lead to paying private companies for doing something that they might have done anyway for purely business reasons.

> *The benefits of new media strategies for a public broadcaster should not be for that institution alone, but for national cultural industries in general.*

The incentives debate aside, however, private media companies increasingly want to see a cut-back of public service institutions which they see as unfairly subsidised competition cramping their potential market-share. If they had their way, institutions like the BBC would not exist, and indeed there are also British consumers who complain that they would rather use the money paid for BBC licences to buy subscription broadcast services from the commercial marketplace.

Already, in Germany, successful lobbying has ensured that public broadcasting has had to retreat from exploit-ing online, so as to leave commercial interests with lesser competition in that sphere. In response to the threat of being downsized in similar ways, the BBC has suggested an alternative of partnerships to support other players who are investing in public service content. This would be through sharing:

· Production infrastructure: especially in regional news;
· Distribution capacity: making its "iplayer" software available to others;
· Exploitation: helping to generate secondary revenues eg. through selling others' content via BBC Worldwide Sales; and
· Enablers: offering access to BBC's training and its audience research.

More recently, the BBC has also offered to share news content with newspapers, and to encourage more online linking to their sites. In addition, there is a move to create a platform called "Democracy Live" which would provide live and on-demand video coverage of the UK's political institutions and the European Parliament.

These attempts by the BBC to retain relevance and resources in the new era correspond with a growing notion that public service broadcasters in European countries should become central to the evolution of their national "culture industry" more broadly. The idea is that the benefits of new media strategies for a public broadcaster like the BBC should not be for that institution alone, but for all media institutions. That means a role that promotes the sector as a whole – including competing broadcasters and even newspapers. In more detail, this role is seen as being fulfilled by expanding access and audiences for new industry-wide digital services, setting standards, and promoting a technologically up-to-date sector. In the UK, this whole thrust also envisages the BBC promoting "Digital Britain" which involves encouraging the uptake

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of broadband Internet. At the two poles of possible scenarios, things could go either way. At one extreme, the venerable BBC could be drastically shrunk; at the other, it could become the engine of many players working to digitally deliver public interest communications in the UK.

In all this, the BBC has come under pressure to justify its operations in any given service and especially ones in the new media environment. Its response in 2004 was to construct what it calls a "Public Value Test". This test is supposed to assess whether the broadcaster's activities generate what it designates as both consumer value (to the *individual*) and citizen value (to the society as a whole). Such value is elaborated as:

- Democratic value: supporting informed citizen-ship;
- Cultural and creative value: enriching the national creative life;
- Educational value that helps to extend horizons;
- Social value: connecting and uniting communities; and
- Global value: supporting the UK's role in the world.

Spelling out these characteris-tics is aimed at redressing what the then Director-General Gavyn Davies described in 1999 as a situation in which: "Too often the BBC in effect behaves as if public service broadcasting is everything the BBC chooses to put out."[6] (South Africa's broadcasting law similarly defines, in a circular way, public service broadcasting as being what the SABC does). How the BBC operationalises the value test is by looking at factors of reach, quality, impact and value for money. The indicators for these tend, however, to be largely at the level of audience tastes and perceptions – to the exclusion of whether BBC activities also contribute to general and public interest. This therefore seems to miss an important dimension of public interest communications. As with the changing nature of public service broadcasting, so too here it might be more appropriate to assess not only the value of services delivered to the public, but also value to other institutions as well as value to citizens in terms of them creating content and contributing to communications around public interest content, and especially public interest news.

This notion of a Public Value Test has been taken up by the Independent Communications Authority of South Africa as a means for deciding how to allocate channels in the new Multiplexes of Digital Terrestrial Transmission. This has been interpreted in terms of issues like the level of educational programming, provision of different languages, and promotion of cultural diversity. Such a formulation should go a lot further if it is to encourage exploitation of the wider potential for value to the media sector as a whole (especially including the independent audio-visual production sector), and value to citizen participation.

7. Scenarios
In looking at what might exist in 2009, we can draw from Ofcom consultants[7] who have pinpointed that change (at least in the UK) depends on three drivers:

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[6] Davies, G. 1999. In Collins, R. *Public Value* and the BBC. A report prepared for The Work Foundation's public value consortium.
[7] See Ofcom 2008. Ofcom's Second Public Service Broadcasting Review. Phase One: The Digital Opportunity.

(a) Speed of uptake of new platforms and services on the production side;
(b) Speed of audience uptake of these, and resulting fragmentation;
(c) Business capacity to sustain these new platforms and services.

Extrapolating from this, it seems that the BBC could go four ways in terms of these variables:
- Consolidate as the major player – making major strides in (a) above;
- Become just one of several large players – this relates to the sector's overall performance in (c) above;
- Become one player in a very fragmented market – where (b) becomes the main driver;
- Stagnate – where none of the three drivers kick in.

Overall, however, the view is that public service output in the UK will decline as a proportion of all originated output. Looking at Europe more widely, Jakubowicz describes a number of scenarios:
- Attrition model: public service broadcasters are stopped from developing new digital platforms or channels, and the commercial broadcasters come to eclipse them. (This is an outcome akin to the stagnation scenario noted above).
- Distributed model: public service programmes can be offered by any organisation either by mandate of a regulator, or by contested public funding to provide this service. (This is similar to the scenario of one player in a fragmented market).
- Pure public service broadcasters: The public service broadcasters are able to exploit all the new possibilities for mission-oriented content. (This would be when a state-owned broadcaster leads the three drivers noted above).

In Southern Africa, two additional drivers need to be taken into account. First, governments are a much greater direct influence in broadcasting than is generally the case in Europe. Second, the state-owned broadcast institutions in this region are particularly commercialised and subjected to market-driven pressure such as audience-ratings and advertising income. In this context, the following scenarios suggest themselves for state-owned broadcast institutions in Southern Africa:
- Demise: For reasons of control or under-resourcing, state-owned broadcasters fail to catch the wave and reduce to being narrow providers of government service broadcasting, or they wither or get privatised. Public interest communications are then dependent on what private and community broadcasters, and non-broadcast players, supply.
- Diversity: State-owned broadcasters make a partial transition, but as just one of many players who occasionally deliver public service programming in a plural contex; (perhaps also providing a narrow government-focused service within this).
- Driving change: State-owned broadcasters lead – and grow – the entire communications field in terms of reinventing public service and exploiting new technology.

The parallels with the UK and European scenarios are evident in some of these options. Which ones will materialise will be especially affected by how Southern African governments shape the communications environment in the coming years. What the governments do (or don't do) depends in turn on what they hear from society. That in turn is related to social knowledge and media coverage.

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8. Conclusion

The emerging environment impels state-owned broadcasters to throw off the mantle of being conservative and archaic institutions. The chance to lead the field, and to assist the cultural industries more widely to exploit digital technologies, is huge. In the emerging explosion of content, lies the unique possibility for promoting communications around public interest matters and journalism – as distinct from types of "user-generated content" which makes no positive difference to society. The challenge is to promote communications that are centred on public interest news and current affairs. In this way, today's state-owned broadcasters can update their role and relevance – and become forward-looking vehicles that set the pace and create a slipstream for society on the journey to deeper democracy and meaningful development.

2. Namibia – moving amidst uncertainties
By Rashweat Mukundu

1. Summary

Namibia has a plural and diverse media that ranges from the print to broadcast media. While the state dominates the broadcast media through its ownership of the Namibia Broadcasting Corporation (NBC), this is increasingly being challenged by emerging and technology-savvy commercial radio stations, mostly based in major urban centres. The use of new technologies is a growing phenomenon in Namibia, driven by commercial interest, including the need to stay ahead of competition. Noticeably there is an absence of consistency and consensus about government's role in and coordination of movement towards an ICT-based broadcasting and telecomm-unications sector. While the government is doing "something", private players say this is not enough and funding for projects such as Digital Migration is miserably lacking.

This chapter captures the voices of varying media players in Namibia. Specifically it looks at the usage of ICT in the broadcast and other media such as newspapers and news agencies. This usage or lack thereof is tied to government policy and other challenges such as a lack of skills and resources. The chapter also looks at the relevance of the broadcast and other media to the information needs of the people of Namibia, and especially at the question of the future of public service broadcasting.

2. Summary of players and emerging/potential players

Namibia's broadcasting players that have a policy mandate to offer public service broadcasting are the Namibian Broadcasting Corporation (NBC) and community broadcasters. In this research, two of the service providers, NBC and Base FM (formerly Katutura Community Radio station) were interviewed. Base FM is a community radio station set up through a Trust, and licensed by the Namibia Communications Commission (NCC). Base FM is in the process of revamping its operations after a brief closure due to financial challenges. Base FM says its mission is to offer community information that is relevant to the lives of its poor urban listeners. One Africa TV, Radio Wave and Radio FM 99 are commercial television and radio stations respectively. They are adamant that the purpose of commercial TV and radio is to make a profit. "Ninety-nine percent of radio is about music and talk. You can't please all listeners and radio is all about numbers," says Radio Wave station manager Robin Thompson . [8]

Other players in the Namibia media include print newspapers, with *The Namibian* newspaper as the leading publication. *The Namibian*, while profit-oriented, says its vision is to provide access to information, and to fight for social justice. The interest of the newspaper in using ICT

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[8] Thompson, Robin, Station Manager, Radio Wave. 2009. robin@radiowave.com.na. Interviewed July 17.

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(mobile phone, SMS, websites etc) is, according to the IT Manager, an attempt to inculcate a culture of citizen journalism and participation. This philosophy is markedly different from that of state-owned news agency Namibian Press Agency (Nampa) which says it is a commercial entity and its interest is to service its clients efficiently. Nampa, however, relies on state coffers for survival.

New media linkages and relationships are developing as a result of the convergence in broadcasting, print and telecommunications technology, resulting in strategic alliances between the print, broadcasting and telecommunications sectors. These relationships are mostly out of shared interest and mutual benefit of reaching a wider audience and market. MTC and Cell-one, the two mobile phone service providers, are increasingly collaborating with radio stations as a way of maximising the usage of SMS and increasing call time by listeners.

All sectors of the media in Namibia agree that ICTs must be adopted and that the digitisation of the broadcasting media is unavoidable. But there seems still to be no coherent strategy on how this will be tackled. The broadcasting and telecommunications regulator, the Namibia Communications Commission (NCC), is tasked with bringing the industry together and agreeing on a digitisation strategy, especially in light of the ITU 2015 deadline. This process is hamstrung by a lack of resources and to some degree a lack of expertise. As a result there is scepticism in the industry that policy coherence will be worked out to direct this process and that this deadline will be met.

In Namibia, TV websites are used for marketing and not yet as a platform to distribute news, even in text form. Audience participation remains confined to the broadcast platforms.

3. The "specialised" institutions that are supposed to be public service broadcasters

The NBC operates under the Namibian Broadcasting Corporation Act 9 of 1991 (NBC Act). The Act spells out the mandate of the NBC as a state broadcaster. In this regard the board of the NBC is wholly appointed by, and answerable to, the Minister of Information, Communication and Technology. The Corporation's function is to inform, entertain and contribute to the education of the people through its radio and TV services. These services cover Namibian events, national and local, as well as African and international news. The NBC runs one TV channel, and nine radio services, which reach 90% of the Namibian population. TV is accessible in 60% of Namibia's geographical area. The national radio broadcasts in English (the official language) and provides a 24-hours service. The other radio services broadcast in: Afrikaans, Damara/Nama, German, Lozi, Oshiwambo, Otjiherero, Setswana, and Rukwangali. These radio stations broadcast 10 hours per day, on FM, Short Wave (SW) and Medium Wave (MW).

NBC is still on analogue terrestrial distribution and also uses fixed telephony provider, Telecom, for microwave links to distribute content. NBC also has its own signal transmitters throughout the country, though the broadcaster says these are not enough to cover every geographical space. NBC TV and some radio stations are also on Multichoice DStv satellite broadcasting. The state broadcaster says it is in the process of Digital Migration with the

assistance of Chinese companies. According to Clive Smith[9] , the Technical Manager with NBC, the station is aiming at a complete switchover by 2015. This will be undertaken through a dual illumination process, with a temporary overlap of analogue and digital broadcasting. NBC says the challenge of digitisation cannot be tackled by the NBC alone and that NCC is coordinating efforts to help all broadcasting players in Namibia. Of the 11 national language stations that the NBC runs, nine are already digital in terms of production, according to Clive Smith. While the NBC has its own master plan and has started implementing its migration plan, the national plan is not yet complete, meaning that the NBC might wait longer and miss its deadlines due to lack of resources and absence of a clear plan and deadlines from the NCC. At the time of writing this chapter, the NBC says it is not ready for digital transmission as the infrastructure is not yet in place. The broadcaster says it plans to test its migration plan and technology by 2013 and continue carrying out these tests for the next two years to 2015. The NBC says its current capacity to broadcast digitally is 30% in terms of the implementation of its migration plan. Not all equipment is in place, while there needs to be training to use the equipment. NBC says that suppliers are obligated to provide technology-specific and equipment-specific training to its staff, as well as support services. NBC therefore does not have a consistent training programme, but this is done as and when there is a changeover to new technology.

The broadcaster is not using Internet-based social networking platforms such as Twitter, YouTube and Facebook. There is neither a plan nor policy on how these can be used in its broadcast or newsroom work. NBC is also not broadcasting via the web. Its website is used for advertising its programmes and to share new developments such as the appointment of new staff with audiences. NBC has no text news on its channels or on its website. The corporation is, however, hopeful that a recent change in management will result in new strategies that will take into account the need to utilise the new technologies to increase its reach. The institution is in the process of revamping its Content Management System (CMS) which is still partly manual. The NBC is investing R32-million in a new digital archive system which allows desktop access. At the moment, journalists have to look for archive material physically and then put it on the production server for use. With the new system, journalists will have direct access from the newsroom. For feedback, NBC relies on an annual survey that is carried out by an independent research institution. A company called "The Media Matrix" does research and assists the corporation in planning its programming. Apart from this, NBC has an active audience that constantly sends feedback via SMS, e-mail and phone-in programmes. This feedback helps NBC gauge which programmes are popular, and the data is used for internal planning purposes as well as selling advertising space.

Competition to NBC TV is provided by One Africa, a private TV station, the only such commercial station in Namibia. While One Africa says its programming is aimed at profit-making by attracting advertisers, its news programmes offer a public service that provides alternative information to citizens. Started in 2004, One Africa broadcasts in English. One Africa says its content is determined by advertiser support. The station says it is expensive to produce local content, hence it imports much of its content – such as cheap soap-operas from the USA. The soapies are popular with viewers and they receive sponsorship from companies in Namibia

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9 Smith, Clive, Technical Manager, NBC. 2009. csmith@nbc.com.na Interviewed July 17.

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such as mobile service provider MTC. One Africa uses existing infrastructure owned by MTC for its transmitters.

One-Africa's broadcasts are analogue. The station says like all other broadcast players in Namibia it is preparing its digitisation plan and hoping to switch over in 2015. IT Director, Madryn Cosburn[10] says the digitisation plan depends on the government and as a station they are planning towards it. The station believes the digitisation switch-over will result in improvements in the quality of its broadcast and not so much in content. One Africa uses its website to advertise its programmes but does not broadcast via the web. SMS, e-mail and phone are used for feedback. This feedback helps One Africa know which programmes, especially soaps, are popular and this information is used to sell advertising time and to look for sponsors such as cell-phone company MTC, which is already sponsoring some of the popular soaps. Apart from this form of feedback, One Africa commissions annual research by an outside company. This research is used to gauge audience views on its programmes. The station says it receives a lot of commendation from viewers and believes it is ahead in terms of advertising revenue as compared to NBC TV.

One Africa has 28 transmitters throughout the country. With new legislation coming up, the station will have access to sites on high ground to put up transmitters, especially in remote areas. One Africa has a website which it uses for information purposes, i.e. advertising the station and programme information, but not for broadcasting or even text-based news. The station says research and training is ongoing. The station trains its reporters and staff upon recruitment and also on the new ICT systems that it uses.

4. The other players

Base FM is a lone voice in Namibia's growing FM radio broadcast media. As the only community radio station, Base FM has to remain relevant to its poor urban listeners and survive a harsh and competitive advertising environment. It says it is independent of any political players and commercial interests and is loyal to the interests of its urban poor base. Base FM says its political coverage is impartial and any political party that wants space outside the news content will have to pay. Its content, according to Station Manager, Sandra Williams[11] will "never be determined by who is paying us". The content mix is dominated by community news that includes stories on HIV-AIDS, council delivery issues, education, and women's and youth programmes. As part of keeping in touch with its audience base, Base FM relies on its journalists to gather views when they go out to write stories as well as community feedback through SMS, phone and e-mail messages. The station says it has no resources to carry out focus group discussion or extensive audience research.

With regard to its CMS, the community station has developed a simple computer-folder-based system. Base FM says by law it has to keep programmes in archives for three months. Williams says the computer-folder-based CMS is not working well and the station needs to develop a system that allows easy access to archive material. The station has an IT-coordinator who trains all staff in new technology and develops policies and strategies around training. Williams

[10] Cosburn, Madryn, Technology Director, One Africa TV. 2009. E-mail madryn@oneafrica.tvb. Interviewed July 29.
[11] Williams, Sandra, Station Manager, Base FM. 2009. E-mail kcr@iway.com.na. Interviewed 22 July 2009

says she is content with recruiting community members who have never received training in broadcasting or journalism, but who show passion and are keen to learn. This, she says, is one way in which the station maintains its linkage with the community. Base FM says it is aware of the digitisation deadline and is buying equipment that is digital compliant. On whether the station will be immediately affected come 2015, Base FM says no information is forthcoming from government on what its status will be. Base FM is still on analogue and says its only hope of broadcasting via satellite is through partnerships with big players such as One Africa TV or the church-based Trinity Broadcasting Network.

Base FM has a Facebook page that it uses to communicate with its fans and also get tips, feedback and requests on music and related programming. The use of SMS is also widespread, with the station receiving a minimum of 1 000 messages from listeners every day. Base FM says the use of SMS and social networking platforms such as Facebook help it know what its audience wants. These facilities, plus e-mail, are also used by audiences to make requests for music, give tips on stories, complaints and comments on news broadcast. The use of SMS has created a large following that Base FM now identifies as part of its citizen journalists. As a result of costs involved, Base FM says it cannot carry out audience surveys and has not been able to participate in the annual Media Matrix survey. However, the station says it has at least 15% of the market from the last research it carried out in 2007. Base FM is also accessible on mobile phone, at least for those mobile handsets that have technology that receives FM signals.

Of the commercial radio stations, Radio Wave and Radio FM 99 were interviewed. The two stations are based in the capital Windhoek. The two are on analogue broadcasting and use FM frequencies via NBC infrastructure. NBC distributes the content nationally through its transmitter points. Radio Wave is the leading private/commercial radio station in Namibia, with a 60% share of the commercial radio market. Just like Base FM, the station says it is not clear on whether the 2015 deadline applies to radio stations, as there is no adequate information coming from government. But it says it is ready at the touch of a button to go digital, as it has installed digital-compliant broadcasting equipment. Radio Wave says it is the first to have done this in Namibia but is sceptical that the digitisation plan will be achieved, as the NCC has no money. The station says policy discussions have not achieved results. This statement found resonance with Radio FM 99, which says Digital Migration is an ongoing issue that the regulator NCC has been talking about.[12] They say this process will not affect the station as it is already installing digital-compliant equipment. Radio FM 99 says its worry is the ability of its listeners to move over to the digital radio. Both Radio Wave and Radio FM 99 agree that the government has to put a lot of resources as well as grant digital licences to the commercial radio sector to facilitate the migration. Radio Wave says a digital-compliant radio costs close to R3 000 while an FM receiver costs around R300.

Unlike other stations that are confined to Windhoek, Radio Wave covers all major urban centres in Namibia. Apart from its FM analogue signal, Radio Wave is also on Multichoice DStv Satellite channel 167 and is also streaming via its website, www.radiowave.com.na. The website allows Radio Wave listeners to access the station from any part of the world. The station also uses

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[12] Jacobie, Gert, Station Manager, Radio FM 99. 2009. gert@namfm99.com. Interviewed July 29.

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social network tools such as Twitter and Facebook to connect with its listeners. Using Twitter, a listener can send a message which is immediately received by the station, be it a comment or feedback or request. As a competitor to Radio Wave, Radio FM 99 does not have Internet broadcasting yet, and is designing a website through the holding company (Democratic Media Holdings). Radio FM 99 says Namibia has no capacity to make increased use of new technologies as Telecom has limited bandwidth. The station makes use of SMS to keep in touch with its listener base. However, it argues that the lack of bandwidth has affected the use of Twitter and other social networking tools. The station uses software called Audio-Boss which it says suits its operation.

Both Radio Wave and Radio FM 99 say they participate in the Media Matrix research to gauge audience views. This research is used to adjust programming to suit the needs of audiences. Radio Wave says it has over 1 100 advertising clients and it also carries out its own research, talking directly to its clients so that their needs are met. Radio Wave also holds informal focus group discussions with its clients, by sending out invitations to social events where short discussions take place. The use of SMS is also entrenched in the day-to-day broadcasts of Radio Wave, and the station has an agreement with mobile phone service provider MTC to maintain its SMS database and facilitate easy SMS communication.

Radio Wave uses the 'SIMEON cool edit' for production, and the 'ACT- BY Search" for its Content Management System. This allows the station to immediately call and use any programme as well as access musical and advertising records and programmes. These CMS functions can be accessed from anywhere by the station employees through the station's website. Radio Wave says it tries to stay ahead of the game all the time and training is an ongoing process. Radio FM 99, however, says training is problematic since there are no advanced and technologically-sound training institutions in the country. Therefore the station says it has to rely on outsiders and self-teaching. The station says it tries to stay up to date with technology as much as possible.

The Namibian newspaper is an interesting example of how a print media organisation combines and uses the opportunities offered by the new technologies to expand its reach and interaction with readers. The newspaper is published five days of the week and is the leading privately-owned newspaper in Namibia, with a print run of 30 000. The newspaper says it reaches at least 100 000 readers every day through copy sharing. The newspaper has one whole page, and some days two pages, devoted to SMS messages sent by readers discussing and commenting on various topical issues. The SMS messages have aroused the anger of the ruling party and senior government officials who accuse the newspaper of publishing messages that denigrate its leadership. In early 2009, the National Assembly even talked of investigating the newspaper and mobile phone companies to establish the legality of the SMS pages. *The Namibian* is also the newspaper of choice for political, economic and social commentators. Every week the newspaper runs a supplement aimed at youth, titled 'Youth Paper,' focusing on HIV-AIDS, education and entertainment.

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[13] Pate, Chris, IT Manager, The Namibian newspaper. 2009. Interviewed July 17.

Chris Pate[13], the IT manager with The Namibian says that, apart from the SMS forum, the newspaper relies for close to 30% of its stories on public tip-offs through SMS. Apart from letters to the editor sent by email, the SMS page/forum has become the foremost feedback mechanism used by the newspaper in interacting with its readers. The newspapers says it is working with cell-phone provider MTC to have an SMS news flash programme that allows readers to receive headlines of the day and decide whether or not to buy the day's newspaper. This news flash programme will also be used to encourage citizen journalism, where citizens can send pictures with captions on events of interest and even short stories. The newspaper is concerned that mobile phone service providers may be intimidated by the govern-ment and refuse to participate in this programme.

The Namibian uses open-source software, Typo-3, for its content management as well as its website. There is a training policy for its reporters, but according to Pate, journalists are conservative when it comes to new technology and this is a drawback to the full realisation of an e-based newsroom. He adds that The Namibian is developing virtual newsroom policies that allow journalists to file stories from outside locations. The paper is looking at developing its website to offer more new services. These, according to Pate, will mostly remain text-based stories and no plans exist to offer audio and video news content. This process is especially being developed in preparation for the end-of-year (2009) general election. The Namibian says it is still to develop any meaningful usage of social networking tools such as Twitter and Facebook. The newspaper, according to Pate, is struggling to integrate the social networking platforms in its newsroom work as journalists, "tend to spend more time talking to their friends rather than doing work". The newspaper says it is developing policies on how to use social networking tools. Pate says the newspaper sees the value of the tools as being that they can cut cost of interviewing sources. The newspaper is afraid, however, of the drawbacks of the social networks as a "time waster" in the newsroom.

The Namibian Press Agency (Nampa) is the sole news agency in Namibia and is wholly owned by the government though the Ministry of Information and Communications Technology. Nampa was established by an act of parliament, the Namibia Press Agency Act, Act 3 of 1992. Nampa distributes content through Internet and e-mail and it has contracts with suppliers of news content all over the world, including Reuters and Agence France Presse. Nampa acts as an agent of these international news agencies while also generating its own news – mainly local news from its reporters stationed throughout the country. Nampa distributes its content to subscribers through its website. Nampa advertises its lead stories through e-mail teasers and through its website to potential and existing clients. Some full news content is also distributed directly via e-mail to those subscribers who cannot visit its website. Apart from text-format news, Nampa also re-distributes images and video from its suppliers.

Nampa says it has already taken measures to upgrade its production systems to digital, as it needed to comply with systems of its content suppliers such as Reuters, AP and AFP. Nampa has an archive system (npeas) which allows clients to text and request either a story or an image from news agencies. The stories and images are stored on Nampa's website (www.nampa.

[13] Pate, Chris, IT Manager, The Namibian newspaper. 2009. Interviewed July 17.

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org). This archiving system is updated every minute depending on information received from other news agencies outside Namibia and news being generated from its newsroom. Nampa keeps international content for 14 days and local content indefinitely. However if a client requests access to international content that is older than 14 days, Nampa has to request it from providers and seeks to re-distribute it to clients within eight hours or less. Nampa does not have a clear-cut policy on training and when the need arises staff is sent on short courses to catch up on new technology.

The news agency is planning to provide video content online when its website has been upgraded to Web 2.0. It is also planning to have a dot.mobi site in the future to target a new group of clients. Nampa is currently in the process of enhancing its website to enable clients to download multimedia content directly from the

> *Cell-phone company MTC does not see news as its core business, and it also has restrictions on its licence in terms of distributing content.*

website. Social networks such as YouTube and Twitter will only be looked at in the future as determined by client needs, says Kevin Fisch[14] , the IT manager. Nampa uses facilities like FTP, SMTP, and RSS feeds to transfer data to other news agencies. The agency does not carry out any polls, arguing that its main clients are newspapers, TV stations, radio stations and these communicate directly when querying the services of Nampa. This will only change when its client base has shifted.

Nampa says its content is not necessarily distributed to all sectors of society or vulnerable groups but to its clients. News according to Nampa is anything interesting that would have taken place in Namibia and the world and of news value to its clients. While its content is for commercial purpose, Nampa has not been able to generate enough revenue to sustain its operations. The bulk of its funding comes from state coffers. This essentially means that Nampa is limited in its independence from political control. Many people believe that Nampa acts to represent government positions. Going forward, the agency says it will continue to be guided by its slogan, which is "Keeping the Nation Informed".

MTC is the leading mobile phone service provider in Namibia. MTC has been operating for 14 years – most of that period as the lone mobile phone service provider. MTC operates mobile voice and data services. The company says it views Digital Migration as making more frequencies available and allowing for more flexibility in spectrum management by the NCC. "At the moment there is a serious drought of frequencies because the regulator cannot allocate more than its capacity," says Albertus Aochamub[15], General Manager Corporate Affairs. MTC says the training of its technical staff is consistent with changing technology. The service provider says its digitisation process is being run by well trained staff. The other service that MTC provides rather indirectly is access to FM radio through supplying hand-sets that are FM-enabled. This, says Aochamub, raises issues around licensing as only those citizens with stand-alone radio sets are licensed for accessing NBC radio stations, while those accessing the same service via mobile phone radio are not licensed.

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[14] Fisch, Kevin, IT manager, Namibia Press Agency. 2009. Interviewed August 3.
[15] Aochamub, Albertus, General Manager Corporate Affairs, MTC. 2009. aochamub@mtc.com.na Interviewed August 10.

MTC has gone into partnership with the Ministry of Education and is supporting many schools with connectivity in a programme called X.Net Programme. MTC provides monthly educational data in a variety of subjects to schools, whichcan also use this platform for educational research. MTC conducts annual surveys to get feedback on the relationship between quality and pricing of its products, and also carries out research on the quality the receptivity of its mobile services. This, says Aochamub, is line with MTC service slogan, "Value for money for all services provided".

Looking ahead, Aochamub says that mobile phone technology is the fastest growing industry in the world, adding, "If you are left behind you will not be able to catch up on some services". He says Wi-MAX is still in use in Namibia though it is already outdated in some parts of the word, indicating the slow pace of technology adaption. He notes that MTC already "introduced 3-G broadband in 2007, because we were looking ahead". However, MTC does not offer much on content distribution as there are restrictions on is license. In addition, "offering news and announcements is not our core business," says Aochamub.

With regard to social networking tools MTC says all people who have the latest mobile technology can utilise social networks as long as they are connected on 3-G. However, it says it is not really pushing the use of social networks, although some of its clients are using their cell-phones to access these. MTC says SMS, MMS and WAP are some of the popular tools used by its clients. In addition to such services, MTC further provides video conferencing services using 3-G. MTC says it is hoping that with time many of its clients will appreciate these services. User participation is enabled by SMS, and this is done as part of advertising MTC and its services. Some of MTC's clients, including radio and TV stations and newspapers, use SMS services to connect with audiences. MTC also provides downloads for music of local and international artists and this is done in partnership with a South African company Exact Mobile.

Cell-One is the second mobile service provider and is privately-owned. Cell-One operates its network in the 900 GSM, 1800 GSM and 3G Bands. It has a presence in all 13 regions of Namibia with all its base stations having EDGE, and 3G (HSDPA) available in certain areas of Namibia. Cell-One also has full VSAT capabilities that can be used for both voice and data. While not distributing or generating any content, Cell-One is active in the use of SMS, often providing incentives and even cost-free SMS use. This in turn has increased the usage of SMS by citizens communicating with radio stations in Namibia. Cell-One is a relatively a new player in the Namibian mobile phone business and NCC regulations so far are neither clear nor supportive of new players. There are alleged attempts by the competitor to squeeze Cell-One out of the market, and the company has also shut down its Walvis Bay office because of lack of business and high operational costs.

Election coverage is an upcoming news issue for Namibia's media. While Base FM and *The Namibian* say they are preparing for wider coverage using 3G cell-phones as well as citizen journalists, the commercial radio stations say their participation will be based on news reports gleaned from the Internet and news agencies. *The Namibian* has said it is also prepared for possible power cuts, having installed a heavy duty UPS to guarantee power for at least six hours in the event of loss of power on election day. Commercial radio stations such as Radio Wave are clear that their content is mostly music and Internet-downloaded news. Radio FM 99 relies on news generated from sister news organisations such as The Sun newspaper.

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5. Regulatory environment

Broadcasting and telecommunications regulation in Namibia is a mandate of a government agency, the Namibia Communications Commission (NCC). The NCC is established under The Namibian Communications Commission Act, 1992 (Act 4 of 1992) to issue broadcasting licenses, control or supervise certain broadcasting activities and program content, and to provide for matters incidental thereto. In March 2009, the Ministry of Information and Communications Technology (MICT) adopted the ICT Policy which provides a broad framework of the government's policy objectives as they relate to telecommunications, broadcasting, postal and information technology. The NCC and the Ministry are the custodians of the Namibia ICT Policy whose vision on broadcasting in Namibia is to:
• Entrench freedom of expression, pluralism, diversity and competition;
• Protect media users, and particularly the vulnerable, against unwanted and involuntary exposure to offensive and harmful material;
• Foster provision of services to all Namibians in appropriate languages; and
• Foster economic development of the electronic media and tradeable information sectors.

The NCC operates as an implementing arm of the Namibian government's Ministry of Information, Communications and Technology. The Ministry takes centre stage in discussing and directing policy, while the NCC implements. The Ministry is enacting a new law, the Communications Bill. Under this new law the regulation of broadcasting and telecommunications will be done by an independent body, the Communications Regulatory Authority of Namibia (CRAN). CRAN will replace the NCC. The Communications Bill is also intended to bring about a phased liberalisation of the telecommunications sector, leading to full competition by 2010. The Communications Bill also creates a code of conduct for broadcasters. The Bill states that broadcasters are expected to "comply with generally accepted journalistic ethics and that coverage of news and current affairs is fair, objective and impartial". Government IT issues and the Digital Migration approach are now dealt with by the Office of the Prime Minister. However, the ICT Ministry, through the regulator, the NCC, is setting in motion a Digital Migration task team and national switch-over plan. This relates to spectrum and broadcasting migration for the ICT industry, initially. The NCC envisages that more space will be opened up for radio and television channels. There is however no discussion at the moment about introducing new players, but reports say NBC is proposing getting a second TV channel.

The ICT Ministry is newly-created and is finalising its organisational structures that provide for specific units for ICT research, innovation, promotion and access for citizens. "Our current programmes include support in setting up multi-purpose community centres in the regions", says Henry Kassen[16], the Director of Communications in the Ministry. Kassen says the government includes citizens in ICT-related campaigns and shows. In this regard, the government believes its broadcasting and IT policy regime is conducive to digitisation and ICT development. Kassen says youth involvement in ICT usage and promotion is an important focus for the Ministry. Once its new organisational structure is operational, youth involvement should be more apparent.

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[16] Kassen, Henry, Director of Communications: Ministry of Information, Communications and Technology, Government of Namibia. 2009. hkassen@mib.gov.na Interviewed July 15.

Looking ahead, he says the government is investigating creating a neutral licensing system for the regulation of broadcasting and telecommun-ications services. This will be done through the new ICT Policy and Regulatory Framework under the proposed Communications Bill. The government says it is considering subsidising set boxes for poor urban and rural families as part of the Digital Migration plan.

The Namibian government also strives to use ICTs in its work, having set up websites for most key Ministries such as Home Affairs, Trade, and Finance and making it a policy that all professional staff have access to Internet and phone. ICT budgets in govern-ment are implemented by the ICT Ministry. In addition, "this Ministry generally provides for funding coordinating activities and promotion of ICT in the industry," says Kassen.

> *All broadcast players in Namibia are looking to government to pay for the digitisation process.*

The Namibian government has had no discussion on state funding for private players. So far the NBC is the key institution that receives state funding, and all resources are targeted at capacitating the NBC. In its support of the NBC, the government says it expects the state broadcaster to give priority to developmental reporting as well as equal access to disadvantaged groups including the disabled, women, youths and rural communities. While other players will fall under the proposed Communications Bill and reapply for licenses, the NBC, according to the government, will continue operating according to the NBC Act. The government argues that because of its precarious financial position, NBC will not be put under the same requirements as commercial broadcasters.

The ICT Ministry would like to see the introduction of broadband services, availability of electronic commerce and e-government services. Through the Communications Bill, the government anticipates that more operators of both broadcasting and telecommunications services will be compelled to share infrastructure. Among other things, mobile service providers will be compelled to work more closely with each other and allow clients to migrate their phone numbers between service providers. The planned law will also create a universal access fund which will facilitate the rollout of ICTs to disadvantaged communities. Once passed into law, the Communications Bill will result in a review of all licenses – be they mobile phone, telecommunications, or broadcasting. A key feature to note with this proposed law is that state-owned Telecom will be allowed to venture fully into mobile phone service provision while current service providers can also provide fixed line operations. A majority stake of investment in the Namibian telecommunications sector will be reserved for Namibians at 51%.

Base FM says that while it is regulated under the same law as commercial stations, it feels community radio broadcasting is not a priority for the NCC and government. Base FM says it wants to expand its reach by broadcasting into other towns but this is being resisted by the regulator. By expanding into other towns beyond Windhoek, Base FM hopes to increase its listenership, hence advertising revenue and thereby help to guarantee its own financial sustain-ability. Another area of contestation between Base FM and the NCC is on the overflow of its signal – an issue the NCC often cautions the station about. The NCC is reportedly working

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on technology that stops the overflow of Base FM signal beyond Windhoek. Base FM sees this as part of unnecessary restrictions on its reach.

One Africa is managed by NCC in terms of frequencies. In terms of content, One Africa is self-regulatory. "Everything is determined by the profit motive and audience research," says the station's Cosburn. Like everyone else, One Africa is waiting for the new Communications Bill that is being debated in parliament. One Africa says there is no interference from the government, but at times they face discrimination in accessing national events. The state sometimes prefers the state-owned media at the expense of One Africa.

Radio FM 99 says business is good and the station welcomes competition, which has even resulted in NBC improving. Radio Wave says it is happy with the NCC regulation and that Namibia's regulatory environment is fair.

While the law says all stations must broadcast 40% local content, the NCC has no capacity to monitor this and statements made by most broadcasters talked to in this research indicate that this requirement is neither being met nor enforced by the regulator.

Mobile service provider, MTC, says it is hoping that the new proposed regulator will have more teeth, adding that the NCC is under the heavy control of the state. MTC says the new law will result in relaxation of licensing, arguing that the state cannot continue restricting mobile technology only to mobile phone service in the era of convergence. "There is more that MTC can do and the licence can be expanded to allow us to operate our own international gateway rather than rely on Telecom," says Aochamub. MTC says under the proposed law it will be allowed to provide fixed and mobile services to create a level playing field. MTC is happy with the proposed law in this regard.

6. Economics

All broadcasting players in Namibia look to the government to pay for the digitisation process. On the other hand the government has just started serious discussions with them over this and no figures in monetary terms have been committed. While commercial radio stations talk of economic challenges in muted voice, community broadcaster Base FM says its financial base is stressed by the fact that it has to produce content that is relevant to its listeners. Resources have to be put into production. Base FM is concerned that while it is a community station, it is regulated like any other station, without due regard to its special needs and challenged financial base. The government is not even talking of subsidising community broadcasting and so far it is not clear how the proposed Universal Fund in the Communications Bill will assist community broadcasters.

As part of reducing costs of production, Base FM is negotiating a deal with One Africa TV to share content. Base FM also has agreements with *The Namibian, Informante* and *New Era* newspapers to have its programmes such as the 'Youth Debate' advertised for free. FM 99 says it relies solely on advertising, which income source is under pressure because of the economic downturn. "All future plans will rely on the dynamics in the economy," says Gert Jacobie[17] of Radio FM 99. Radio FM 99 and Radio Wave add that because of the economic downturn most

companies are cutting back on advertising. Radio Wave says it targets the 17-37 age group, stating "these tend to listen to radio longer than other age groups."

Participating in annual surveys in Namibia is an expensive undertaking, costing close to R100 000. Only the big players such as commercial radio and TV stations can afford this. Telecommunications players, especially the two mobile service providers, MTC and Cell-One, see the broadcasting sector from the viewpoint of advertising and enhancing their reach to present and potential customers. As a result of licensing restrictions, it looks like it will be some time before they consider venturing into content distribution.

Mobile service provider MTC says 92% of its clients are prepaid and 8% are on contract. MTC says contract clients are more profitable as some are corporate clients. MTC has 1.2-million active subscribers.

7. Changing conceptions of public service

One Africa believes that its licensing is important in enhancing media pluralism and strengthening democracy in Namibia. The station has access to over 90% of Namibia's geographical area, where electricity is available. While noting its relevance as an alternative source of information, the station insists that its focus is profit-making. This translates into feeding its viewers a constant diet of American soap operas and a brief news bulletin every day. The station says it does not envisage any change to this programming unless the licensing conditions change. The station does not cater for the deaf and disabled and for diverse languages. It does not believe it is not in its mandate, as the NBC is already doing that.

While the NBC is mandated to play a public service role, its programming is often linked to government activities. There is an unofficial acknowledgement in Namibia that this state of affairs will remain so, and that the NBC will remain a state broadcaster for a long time to come. The government says the NBC cannot be transformed into a public broadcaster as long as it is not financially sustainable, according to Minister of Information, Communicat-ions and Technology Joel Kaapanda in an interview with local magazine, *Insight*. The drawback is that there is no such sustainability policy/plan that has been put in place and the NBC remains reliant on government support. The NBC is so far doing a good job in broadcasting in all of Namibia's languages as well as broadcasting a spectrum of programmes on farming, health, and education. Most of the criticism directed at the NBC is about political coverage and alleged bias towards the ruling party and government. While it is not in their licence requirements, private broadcasters in Namibia do not see the need to 'bother' themselves with public service broadcasting – preferring instead to pursue profit. This situation points not only to weak regulation of the broadcasting sector but also political expediency in policy making in that the government seem happy with its stranglehold on the NBC which articulates its own issues and leaves the rest of the broadcasting industry in a policy jungle, especially as regards public service communications. Apart from news programmes, commercial FM radio stations say they play a public service role through youth programmes and health announcements, among other programmes.

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[17] Jacobie, Gert, Station Manager, Radio FM 99. 2009. gert@namfm99.com. Interviewed July 29

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Radio FM 99 says it relies on news content generated by its sister organisations that include *Republikein* and *The Sun* newspaper. Radio FM 99 tries to be as diversified as possible and to also offer 'helpful' information, especially around health. The station says it has run programmes on the recent swine flu health epidemic. The station also says it allows different views to be aired, even on political issues.

One Africa covers Namibia events in its news programmes but says producing other public service programmes is expensive. One Africa says it wants to keep the state broadcaster on its toes; this is, however, not supported by its programming which has remained confined to a 30-minute news bulletin focusing on urban-based news events. NBC in contrast covers a significant part of Namibia, including some rural news events. Nevertheless, One Africa argues that, since its launch, the quality of broadcasting on NBC has improved because of competition.

All broadcasters interviewed for this study say they have no resources to fully cover such events as the 2010 World Cup or the coming elections. Base FM as an example says it is seeking partners in the corporate sector to give away tickets to the World Cup as part of enhancing listener interest in the station. The station says while it is not possible to cover the World Cup directly, it will nevertheless follow the event closely and give constant news updates to its listeners, and allow discussion. One Africa says it is looking beyond 2010, saying this is just a month's event, and that there is more to broadcasting than the World Cup. As a private station, One Africa will not be able to buy the rights to broadcast all the 2010 soccer show-case but is negotiating for rights to some events. Radio FM 99, like One Africa, is negotiating for rights to cover the tournament, but the station is sceptical it would cover the games live. The station says it will do updates though partnerships with sponsors.

8. Conclusion: country scenarios in 2015

While most broadcasting stations in Namibia are content with the current regulatory environment, there seems to be no discussion about the concept of public service broadcasting. The overarching assumption is that public service broadcasting is the "baby" of the NBC. It is interesting, though, that despite its small resource base, the community broadcaster Base FM says it is striving to expand its community broadcasting services beyond Windhoek, and give an alternative to NBC radio. "We want to be the voice of the voiceless and expand our services by creating resource centres where the community can do its own recordings and access information beyond the broadcast," says Sandra Williams, the station manager. The expansion of broadcasting media in Namibia is premised on profit-making and this means that little effort is being made to create a sector that is not only financially sustainable but also relevant to citizens. Commercial radio and independent television stations make no secret of the fact that they are purely profit-oriented and will minimise content production costs as much as possible to maximise profits.

It remains to be seen how the government's various policies – the Telecommunication Policy, Information Technology Policy, Broadcasting Policy and the Licensing Policy framework – which are meant to facilitate the implementation of the Communications Bill, will address the issue of public service broadcasting. The same goes for the new ICT policy and Regulatory Framework that should be developed by CRAN once the regulator comes into existence. While the policies all talk of the need for universal access and public service, the challenge for the regulator seems

to be in elaboration, implementation and enforcement of the policies. Namibia, in a way, is a "free-for-all" environment. However, these policies do at least provide for broader objectives such as:

- The government will create an equitable, fair, just and competitive environment based on the principles of a free market and open unfettered access to products and services;
- Competition will be further harnessed by encouraging privatization of the state-owned Enterprises (SOEs) in the telecommunications sector;
- The government will encourage participation of foreign entities in the telecommunications, broadcasting and ICT sector;
- The government is committed to move towards a service and technology-neutral licensing approach;
- All service providers will be required to participate in the provision of universal service to ensure the achievement of the Namibian government's developmental goals;
- The government will take initiatives to increase broadband penetration for the provision of Internet, including in the underserved and marginalised areas; and
- Established "legacy" users of Namibia's radio frequencies will be licensed on a "grandfathered" basis for a period of five and eight years for radio and television, respectively, after which the spectrum will revert to the government.

Talking to broadcasting players in Namibia, it becomes clear that while everyone appreciates the need and pressure to digitalise, there is a lack of leadership from the regulatory authority as well as a lack of resources. The Digital Migration process is being played out in small pockets without clear national guidelines, which is still being developed.

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3. Mozambique – progress by many players
By Zenaida Machado

1. Summary

Since 1998 with the introduction of the Mozambican ICT Policy Commission, established to supervise and lead the preparation of ICT Policy, Mozambique has registered significant positive changes in the media and communication environment. It has also faced many challenges in ensuring that the population has access to basic communication infrastructures and information. Currently, the major challenge is Digital Migration.

This chapter looks at how Mozambique approaches the process of digitisation and how communication and media players are using new media technologies to best communicate and interact with the public. The study starts with a summary of the role of media players and potential players. It then looks at Radio Mozambique (RM) and Television Mozambique (TVM), the two specialised Mozambican institutions that are supposed to be public service broadcasters. It also focuses on other Mozambican broadcasters, newspapers, a multi-media initiative, and cell-phone companies and their role in providing access to information and communication.

In addition, the chapter provides insight into the Mozambican regulatory environment, focusing on the National Communications Institute of Mozambique (INCM), established by the government in 1992 as the regulatory authority for the postal and telecommunication sectors. INCM is the government body leading the process of Digital Migration. In Mozambique, telecommunications and broadcasting licensing is not a converged process. While INCM has the legal mandate to regulate telecommunications, the Office of Information (Gabinfo), created in 1995 to replace the previous Ministry of Information, deals with issues related to press registration and the licensing of radio and television stations. Gabinfo also ensures correct implementation and observance of the 1991 Press Law. That law is being updated, and both INCM and Gabinfo are working on a draft of a new Radio Broadcasting Law, which will take into account different aspects of radio broadcasting, including the role of the community radio stations.

This chapter will also look at the economic and financing characteristics of Mozambican media players. However, the people interviewed during this research did not feel comfortable talking about the finances of their institutions. Therefore, this chapter does not go into the details of project budgets or financial costs of the institutions involved.
At the end of the chapter, the report addresses the idea of changing the concept of public service broadcasting in Mozambique.

2. Summary of players and emerging/potential players

The Mozambican Press Law is based on the principles of press freedom and right to information and the right to establish new media, and it allows the country to have a diversity of media players besides Radio Mozambique (and its all channels) and TVM (and its all channels). Currently, there are several private media outlets, from TV stations to provincial fax newspapers and community radio stations. These include radio stations like 9fm, Miramar, sfm, kfm, radio Terra Verde, progresso, CRV, N'thiyana, and Top. There are also private TV stations like Miramar, Ktv, Mana, Stv, TIM, etc.

Mozambique also receives the free open signal from Portuguese Radio and TV (RTP), the BBC World Service and Canal France International (CFI). The radio services are available on FM, while the RTP Africa TV signal can be picked up on any TV set in the country.
The number of community radio stations is also increasing, providing better information in local languages. There are over 60 community radio stations all over the country, including radio Buzi, Voz Coop, Mbumba, Thumbine-Milnage, Lago, Homoine, GESOM, Cuamba, Ngauma-Massangulo, Xinavene, Vembe de Chockwé, etc.

Radio continues to be the most dominant medium. Nonetheless, the mobile phone is becoming more and more popular in both rural and urban areas. Currently there are over four-million mobile line subscribers out of a population estimated at 20 million; about three million of these are with Mozambique Cellular phone service known as MCel, and one-million with Vodacom. Citizens can now use their mobile phones not only to make phone calls and send SMSs (interacting with media), but also to access e-mail and the Internet. In some cases the old radio set is also being gradually replaced for listening to radio stations by cell-phones with built-in radio receivers. In 2009, the two mobile phone companies (MCel and Vodacom) introduced new services including 3G which allows the integration of voice, data, video and TV. Tito Tezinde[18] of MCel hopes that the introduction of 3G services will contribute to more public access to Internet, especially in areas where Telecomunicações de Moçambique (TDM) – the national telecommunications network – has not yet reached.

Another important move towards digitisation in Mozambique is the expansion of undersea fibre optic cables. Since middle 2009, all the Mozambican provincial capitals have been connected with the fibre optic cables. The new technology provides better and faster Internet access which is also more reliable and much cheaper.

3. The "specialised" institutions that are supposed to be public service broadcasters:

Radio Mozambique (RM) and Television Mozambique (TVM) are the two Mozambican institutions with the legal mandate of providing public service broad-casting. Radio Mozambique was created in October 1975 following independence in June. But the station had been there since 1930's during Portuguese colonial regime, under the flagship of Radio Clube de Moçambique. The National Press Law n.º 18/91, from 10 August, established that national radio broadcasting is public service media. Under the law n.º 17/91, from 3 August, Radio Mozambique – RM – was

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[18] Tezinde, Tito, Marketing Director, Mozambique Cellular, Mcel. 2009. Interview by author. Maputo. August.

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transformed into a public company with administrative and financial autonomy. RM activities are financed by the state budget, tax payers and advertising. TVM was created in 1982. Under the law Nº 19/94, it was designated as a public service broadcaster also with administrative and financial autonomy. TVM activities are financed by the state budget and advertising. Both RM and TVM are managed by a board of directors and a chairman/CEO appointed by the prime minister. As public broadcasters, the two institutions are legally expected to:
- Promote Mozambique's national culture, diversity and unity;
- Broadcast news and current affairs programmes which shall be comprehensive, impartial and accurate;
- Provide a diversity of programming for all sections of the population regardless of race, political party, ethnicity, gender and religion;
- Promote and create programmes that provide information, entertainment and education;
- Promote audience participation in radio/TV programmes in a way that cultivates freedom of expression among Mozambican citizens.

3.1 Media platforms
Between 1995 and 2003, Radio Mozambique invested in modernising its transmitters. Through Medium Wave (MW), Radio Mozambique currently covers 94% of Mozambican territory during the day, and 100% at night, with a frequency of 580 KW. There are 40 transmitters in total – 11 medium wave, and 29 FM. RM has 10 provincial radio channels broadcasting in local languages, two urban channels (Beira and Maputo), one sport channel and one English Channel. The signal of the main RM channel, Antena Nacional can be heard in all 10 provinces. Some community radios capture the Antena Nacional signal through satellite and re-broadcast the main news programmes.

RM has 10 production centres and over 50 studios, 10 of them totally equipped with digital equipment. The RM signal is a mix of terrestrial and satellite broadcasting. The signal of the main channel (Antena Nacional) is distributed via the same satellite used by TVM. The local channels' transmitters distribute their signals "freely" terrestrially.

Television Mozambique was the first Mozambican TV channel to broadcast to all Mozambican territory. The signal of TVM is distributed via satellite and can be received in Mozambique, Africa and Europe. The satellite is INTELSAT 906, 64.0° East, frequency of 3654.2 MHz, band C, digital receptor, module MPEG-2, with an Audio PID: 512. It hosts TVM on channel 1 and RM's Antena Nacional on channel 2. TVM has 19 transmitters throughout the country.

3.2 Digital Migration planning
Both Mozambican public broadcasters are aware of the fact that Southern Africa Development Community (SADC) Ministers of Telecommun-ications, Posts and ICT decided that SADC will migrate from analogue to digital broadcasting at least by end of December 2013. However, very little has been done so far. The main reason is that Mozambique has not yet approved a broadcasting Digital Migration policy.

The INCM is the state institution with legal mandate to lead the process of Digital Migration. It is a body in the Ministry of Transport and Communication. Like RM and TVM, it is managed by a board of directors with a CEO appointed by the Minister. It is still in the process of creating

a special committee which will have the task of elaborating a draft policy to be sent to government for approval. The role of INCM in this process will be further elaborated on section 5 of this Report.

Radio Mozambique has acknowledged that time is becoming short, but financial constraints are forcing the company to move slowly. However, it has been taking some steps forward, anticipating that in five years' time its actual analogue equipment will become obsolete. This is the view of the station's technology advisor, Luis Loforte[19]. Radio Mozambique accordingly recently bought new transmitters capable of distributing digital signals. However, the company still has to decide which technology to apply: Digital Radio Mondiale, which provides the possibility of receiving digital signals and redistributing them in analogue ways, or moving totally to DAB, Digital Audio Broadcasting.

TVM also experiences financial constraints in Digital Migration. However, the broadcaster is making strides according to technical director Tomas Novela[20] and technical engineers Manuel Ngwenha and Luis Pires . It has set up a committee at the Department of Projects, which will have the task of coming up with the best solution for the Digital Migration, considering the company's limitations. TVM is already making local tests of digital broadcasting, using transmitters of 50 KW and set-top boxes. It is also considering upgrading its network of analogue equipment so that it can receive digital signals.

3.3 Audience participation

The culture of having audience participation has always been part of the history of both RM and TVM. The fact that both media companies have the mandate to provide public service forces them to promote audience participation in their radio/TV programmes, in a way that cultivates freedom of expression among Mozambican citizens. Thus, ever since the two stations were created, the public has been allowed and encouraged to express opinions either using telephone or letters, in the different Mozambican languages. RM broadcasts not only in Portuguese, but also in 19 Mozambican languages. TVM has a variety of programmes suitable for the different language sections of the Mozambican population.

> *Cell-phones in Mozambique have brought about a new phenomenon, causing a revolution in audience participation.*

In recent years, however, the mobile phone has brought about a new phenomenon causing a revolution in audience participation. The main RM and TVM studios are equipped with a computer with Internet and SMS receiver facilities. Both TVM and RM also have contracts with the two mobile phone companies, Vodacom and MCel, which involve the companies supplying them with numbers to be used by their audience to send messages during radio/TV shows, at the normal cost of a regular SMS. The revenue from the SMS system is shared between TVM/RM and Vodacom/MCel. Emails and Internet are also used, but these have has not yet become as popular as SMS (present) or letters (in the past).

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[19] Loforte, Luis, IT and New Technologies Adviser, Radio Mozambique.2009. Interview by author. Maputo. July.
[20] Tomas Novela, Technical Director, Television Mozambique, TVM; Ngwenha, Manuel, technical engineer, Television Mozambique, TVM; Pires, Luis, technical engineer, Television Mozambique, TVM. 2009. Interview by author. Maputo. July.

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3.4 Technology systems (CMS)

The Internet is becoming more and more popular among Mozambican media, although very few are using it to maximize interactivity with audience. Radio Mozambique has one website (www.rm.co.mz) built with Dreamweaver, with online streaming of the main channel, Antena Nacional. The site contains relevant information about the company and text news updated every day.

Due to limited resources to build different websites, RM encourages its other channels to use blog technology to interact with audience. When this chapter was being written in August 2009, the company was restructuring its portal, giving it a modern design which would combine news, online streaming and platforms of interactivity such as surveys and discussion forums. TVM has one website (www.tvm.co.mz) built up in Joomla CMS. The site is essentially made up of text news updated every day, a discussion forum and a survey. It also contains information about the company and its professionals.

3.5 Research and Training programmes

RM and TVM do not have any training plans as such in place. However, both acknowledge that their staff will need technical and marketing preparation for Digital Migration.
Nevertheless, the lack of financial resources makes it difficult to send employees for training. In order to prepare for Digital Migration, technicians from TVM and RM participate in regional forums and conferences on how to organize their companies to face the process.

4. The other players

For the purpose of this research, three non-state players that provide potential public service were researched:

* *Verdade* newspaper: a new and revolutionary newspaper with both physical and online presence;
* Radio Voz Coop: a community radio station; and
* MCel: the largest mobile phone company in the country.

This section will also look at a private media company, Soico Group, which combines online, radio, TV and a newspaper. The group is growing fast and has become very popular. Its TV station is a strong competition to the public broadcaster TVM.

4.1 Media platforms in more detail

Verdade ("the Truth") is a weekly newspaper launched in August 2008. The print and online (www.verdade.co.mz) versions were launched at the same time. The idea was to provide "more elaborated" stories on a weekly basis in the print version, and short stories on a daily basis on the website, says Erik Charas, the MD of company[21]. The print version of Verdade is distributed for free.

According to Charas, the "whole idea behind *Verdade*, is to provide free information to public". Its source of income is advertising. Other newspapers with sites are zambeze.co.mz, savana.

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[21] Charas, Erik, Managing Director, *Jornal Verdade*. 2009. Interview by author. Maputo. July.

co.mz, opaisonline.co.mz, and jornalnoticias.co.mz. There is no audio or video editorial content on any of the newspaper sites, although O pais has a video advertisement.

Radio Voz Coop is a community radio station set up in July 2002 under a UNESCO project which also created other Mozambican community radio stations. The station has as its main audience women, youth and farmers living in the northern districts of Maputo Province. Its transmitter tower can emit signals in FM able to reach distances of 250 km. The station has two studios with digital equipment.

MCel is the largest mobile phone company partially owned by the national tele-communications operator, TDM, and which is covering the country with broadband, something made possible by fibre optic cables which now connect the whole country. MCel's Tezinde says the company reaches more than 100 Mozambican districts and that it has recently introduced 3G technology which will provide users with services such as e-mail, Internet, voice calls and Internet radio/TV.

4.2 Degree of cross-platform collaboration and convergence, including culture.
Various players have different degrees of cross-platform convergence, reflecting in part the digital divide that exists between the majority of the Mozambican population in rural areas and a minority living in the big cities.

The online version of *Verdade* has contracts with the mobile phone companies, which involves the companies supplying it with numbers used by visitors to send SMSs that are shown on the site in a 'SMS forum'. Revenues are shared between the two companies. On the other hand, the managing director of Voz Coop community radio, Domingos Mazoio[22], says the station is using very few technological platforms due to lack of financial resources. The station doesn't have, for example, a platform to receive SMS.

MCel is converging media and communications technologies as a way of making profit. The mobile phone company has partnerships with the majority media groups to promote its new services such as 3G, mobile Internet, MMS, etc. One of the main partners of MCel is the Soico Media group. Thus, the Soico TV and radio station, STV and Sfm, have introduced radio/TV programmes in partnerships with both mobile phone companies, MCel and Vodacom. These programmes are based on the use of new technologies such as MMS and SMS and other mobile phone services. Essentially, what MCel does is to maximize profits by creating interactive programmes for the Stv audience. According to MCel's Tezinde, private media companies such as Stv are more likely to respond positively to initiatives involving new technology. "Unlike public broadcasters, private media companies are driven by profits. Because of that, they are very fast in looking for new ways of keeping their audience… that includes offering new services and using technology to allow interactivity," says Tezinde.

4.3 Digital Migration planning
With the advent of Digital Migration, *Verdade* plans to focus on the online version. "At one stage, the newspaper will have to disappear. It will not be in a near future because the majority

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[20] Mazoio, Domingos, Managing Director, Radio Comunitaria Voz Coop. 2009. Interview by author. Maputo. August.

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of population does not have access to Internet yet. But our plan is to capitalise the online version of the paper," says Charas. *Verdade* has plans to start sending news to its subscribers' mobile phones and to start online broadcasting. The newspaper is also in negotiation with the mobile phone companies to see the possibilities of having user-generated content (video, audio, images) on its website. At the time of this study (August 2009), Voz Coop Community Radio had not developed a plan for Digital Migration. MCel is already functioning on a digital basis, using satellite and fibre-optic cable.

4.4 Audience participation

No matter what degree of technological convergence, the potential players all agree that audience participation is crucial for the success of public service. Internet and SMS have opened space for a new era of audience participation, although now these technologies are only accessible by a minority of the population. For Voz Coop community radio station, audience participation consists of giving the community in rural areas, which makes up the majority of the population, the opportunity to talk. In order to have more audience participation, Radio Voz Coop privileges interpersonal contact.

Another way of interacting with audience is by phone. Community members can, for example, file stories to the station, from a football game field, using a mobile phone, according to Mazoio of Radio Voz. The station has a computer with Internet, but it gets very few e-mails from listeners.

> *Private media argue that today's reality forces all players to provide accurate and impartial news and to have more audience participation in their programmes and content, which is in the end the essence of public service.*

Verdade focuses on SMS's and online social networks for audience participation. The newspaper is also on Facebook and Twitter. Soico Group was the first media house, through its TV channel, sTV, to introduce SMS opinion polls. In every news bulletin, the 'anchor' asks the audience to answer, via SMS, a certain question regarding public issues reported in the news.

4.5 Technology systems (CMS)

Verdade online edition was built on Joomla CMS. The system provides the possibility of having text news, surveys, forums, images and audio. At the time of this study (August 2009), Radio Voz Coop did not have a website.

4.6 Research and Training programmes

Verdade has a training program that seeks to improve the capacity of its journalists to work as online journalists. Its editors and reporters learn to make video, audio and edit images to go with their stories. It is important to point out that at the time of this study, radio Voz Coop was not yet aware of Digital Migration. In fact, in Mozambique very few steps have been taken in terms of building public awareness about Digital Migration. The next section (5) will look at what has been done so far.

5. Regulatory environment:

Two important documents, among other government policies on ICT, regulate the media and communication environment in Mozambique. There are:
- The Press Law, from 1991, and
- The Telecommunications Law, 2004.

The Press Law is being updated to meet the demands of the advent of technology and new media. A draft of a new radio broadcasting law linked to Gabinfo, and dealing with ethics, practice and content, as well as taking into account community radio, is also in discussion. Recently, government approved radio communications regulations for INCM, which allow new mechanisms for licensing radio communication equipment, considering that the current equipment is increasingly becoming obsolete. INCM is the regulatory authority for the postal and telecommunication sectors, under supervision of the Ministry of Transport and Communications. Its responsibility is to:
- Draft the necessary laws and regulations;
- Regulate the interconnection of networks and the interoperability of public telecommunications services;
- Regulate the tariffs and quality of public telecommunications services;
- Safeguard consumer interests and implement government policies;
- Inspect the operators, for example Internet Service Providers (ISPs); and
- Allocate frequencies to comm-unity or private radio stations.

Mozambique has agreed with the SADC decision to migrate from analogue to digital broadcasting, at least by the end of December 2013. However, the government has not yet approved a broadcasting Digital Migration policy. It is the responsibility of INCM to guide the migration from analogue to digital systems and that includes proposing guidelines to government.

To ensure that Mozambique keeps its commitments in terms of Digital Migration, the Director of Radio Communications and Technologies at INCM, Hilário Tamele[23], says the Institute is:
- Creating a multi-sector working group, including radio and TV operators, business people and civil society, to plan the digitalisation process;
- Preparing proposals and taking decisions regarding the licensing of new operators;
- Preparing proposals for new standards of broadcasting quality and cost;
- Creating strategies to minimise the costs of Digital Migration for the general public;
- Establishing a timeframe under which Mozam-bique will have to adopt the necessary steps towards Digital Migration;
- Preparing a massive campaign of dissemination of information about Digital Migration and its challenges. A conference and series of workshops are set to start by November 2009.

There is no deadline established by government for INCM to develop a policy, but INCM is aware that it should be done as soon as possible. The current digital tests and acquisition of equipment that TVM, s.tv and RM are making are on their own initiative and responsibility.

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[23] Tamele, Hilário, Director of Radiocommunications and Technologies, INCM. 2009. Interview by author. Maputo. July.

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6. Economics:

It is clear that that Digital Migration is very expens-ive and involves costs not covered by media com-panies' budgets. The two main issues are:

Who will bear the costs for public access to new equipment?
The analogue radios will have to be replaced by digital radios, which cost an average of US$120 each (that amounts to twice the minimum wage in Mozambique). Analogue television sets will need a set-top box costing around US$75, or will have to be replaced by a new television set costing more than US$2000. The media and communicat-ions players interviewed in this research are unanimous in considering that government will have to create conditions to protect consumers.

Who will bear the costs of digital transmission?
The parties interviewed in this study were also unanimous, suggesting that each organisation should look for better ways of financing their own costs. One of the ways is to establish commercial partnerships, to support the process of modernisation of their equipment as a start.

Another issue in this process is that Mozambique does not have a Multiplex operator, as confirmed by INCM's Tamele and TVM's Novela. Here it has been suggested that media players could share the same infrastructure – appointing an independent operator to manage the Multiplex, with the media players being responsible for production of media content, which is in fact, their primary role.

7. Changing conceptions of public service:

The idea of changing the concept of public service does not seem to have a consensus among media players in Mozambique. Private media argue that today's reality forces all players to provide accurate and impartial news and to have more audience participation in their programmes and content, which is in the end the essence of public service. "Today, the only difference between what is called public broadcasting service and private media is the fact that one group is financed by the state to provide information, while other has to look for money in order to be able to provide the same quality of information", says Jornal *Verdade's* Charas.

However, RM and TVM argue that while private media is driven by making profits, the public service broadcasters will continue, as a primary goal, to provide service to the public. According to Amelia Muchanga[24] of the National Media Council, "Public service broadcasters have their role in society. No matter what, they should always serve public interests. They do not produce quality content only to get more audience and consequently, more financial partners." RM is the largest producer of news and programmes, reaching almost 100% of Mozambique and broadcasting in 19 Mozambican languages.

RM and TVM, as public broadcasting services, have the legal mandate of promoting and ensuring political fairness and impartial elections coverage. However, the expansion of the media sector

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[24] Muchanga, Amelia, member, Conselho Superior de Comunicação Social (National Media Council), CSCS. 2009. Interview by author. Maputo. August.

has shown that other media (the private Soico group, for example) have also been able to demonstrate capacity to be impartial and accurate. Nonetheless, the public broadcasters also have the responsibility to give free and equal airtime to all political parties. The quality and fairness of political coverage is regulated by the National Media Council (Conselho Superior de Comunicação Social).

8. Conclusion: country scenarios in 2015
In the past decade, Mozambique has achieved a diversified media environment that guarantees freedom of media and access to information. The country has also been able to successfully face many challenges in politics, economics and ICTs, even though some of these challenges involved substantial financial investment. However, the greatest challenge ever will be the change from analogue to digital broadcasting. By 2015, every Mozambican citizen ought to have access to a mobile phone, computer, Internet and digital radio and television. As we move towards this, we begin realizing how difficult the task is. This is especially so in a country where ICT is not a priority, as evidenced by the fact that:
•   Although the "switch off" is only five years away, Mozambican civil society is not aware of this process and its implications;
•   The media players have done very little to ensure that Mozambique keeps to its regional commitments; and
•   The process of creating and approving mechanisms to regulate the process of Digital Migration is moving too slowly.

However, the process of digitisation is irreversible and Mozambique must be ready to follow the rest of world if it does not want to be isolated. Two scenarios can be predicted:
1. Changing the concept of the public broadcaster such that its future is left to market funding rather than public subsidy: the issue of financing the Digital Migration process will not be dependent on government funds. All media players, public or private will have to bear their own costs.
2. The actual concept of public broadcasting remains the same in regard to public funds to support it, but extends this support beyond RM and TVM: as part of its obligations, government will have to bear the financial costs of digitisation for a range of media houses doing public interest communications.
3. In any case, Mozambican media players (public and private) are already partnering with local distributors to prepare their technical infrastructures for the 2015 "switch off". However, government cannot avoid its responsibility for protecting the consumer and the citizen – the public. It is the government's task to act rapidly to create a market and social environment to allow citizens to face digitisation and Digital Migration without any exorbitant costs.

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4. Zambia – teaming up for public interest communication
By Fackson Banda

1. Summary

Zambia has registered phenomenal growth in its media and communication landscape, providing more interpersonal and public communication spaces. An important feature of the growth of the sector has been the process of digitisation, creating in its wake even more multi-media digital opportunities. This chapter, based on in-depth interviews with key media and communications companies, summarises the major trends in the use of new media technologies to facilitate the communication of public-interest content in Zambia. As part of the analysis, the study attempts to make sense of how digitised media platforms, often associated with interactivity and audience participation, are reconfiguring the notion of public-service content.

The report is structured as follows: Firstly, it summarises the key players in the media and communications landscape, arguing that conventional media are increasingly being complemented and supplemented by new media companies, such as cellular telephony companies, in their production of news and other genres of content. Secondly, it focuses on the Zambia National Broadcasting Corporation (ZNBC) as the legally mandated body dedicated to provide public service broadcasting. Here, the key argument is that ZNBC, while its news programming is generally biased in favour of the ruling elite, is increasingly becoming more amenable to audience participation. Such audience involvement is principally confined to programmes other than news. A key aspect of this trend is the corporation's use of new media technologies and the associated commercial spin-offs.

In terms of Digital Migration, the study establishes that ZNBC has more at stake than others, because its telecommunications and broadcasting infrastructure is more widespread. Migrating into the digital environment will entail spending close to US$13,255,187. Its phased approach to the matter suggests that it will prioritise television in urban centres. Such prioritisation means that rural areas will remain largely analogue for the foreseeable future. It is here that government leadership and support is needed, starting with a clear policy and legislative map to guide the process into 2015.

Thirdly, this chapter analyses the roles that other media and communication actors are playing in the provision of public-interest content services. Here, the focus is on a community television station, Muvi-TV; a newspaper with an online edition, *The Post*; and a cell-phone company, Zain Zambia. Both Muvi-TV and *The Post* are in varying degrees of digital convergence. There is also evidence of high levels of audience participation in both cases, spurred in part by both companies' strategic alliances with Zain Zambia, select internet services providers (ISPs) and other cell-phone companies to facilitate audience participation-on-demand through text

messaging. In fact, text messaging has become a hall-mark of audience involvement across all media services in the country.

Fourthly, this chapter discusses the regulatory regime governing telecommunications and broadcasting, focusing on the Communications Authority of Zambia (CAZ), which is mandated to lead the process of Digital Migration. A key finding is that CAZ is pushing for a unified, technologically-neutral licensing regime. To this end, it has submitted three Bills to Parliament, focusing on:

- Electronic communications and transactions;
- New information and communications technologies (ICTs); and
- Postal services

Telecommunications and broadcasting licensing regimes are still separate, demonstrating that Zambia is still some way from telecommunications-broadcasting policy and regulatory convergence. Also important here is that the Independent Broadcasting Authority (IBA), provided for by law since 2002, is not yet operational. As such, there is a legal and administrative impasse in the licensing of broadcasters, with that role now usurped by the Ministry of Information and Broadcasting Services.

Fifthly, the chapter considers the economics of public-service content. A key finding is that, if public-interest communications is defined in a more inclusive and less legalistic way, the question of financing such content transcends traditional views that stress non-commercial funding as a precondition. In any case, as the study establishes, ZNBC is itself already involved in commercial activities that lock it into all types of strategic business formations with other content providers and distributors. As such, sub-questions concerning the financing of public-interest news services are answered partly by the market, and partly by citizens and the state. The trend is that media houses are partnering with content movers or distributors, signalling that these multiple strategic partnerships might be the route towards sustaining such public interest content in the post-2015 digital future.

Finally, the chapter addresses the changing definitions of "public-service" content. A key finding here is that the plurality of media outlets, and the increase in ICT companies seeking to aggregate content for profit, has meant a relook at what "public-service" content is. Some of the content pushed by such aggregators is of an entertainment nature which can have a "public-interest" character (though not necessarily). However, many of them are also in the business of pushing "news" content, which is in principle more likely to meet the criterion of "public-interest" content that directly plays into the public sphere of Zambian democracy.

As such, public-interest content and communications services can no longer be treated as the exclusive preserve of legally mandated bodies, such as ZNBC. Progressive broadcast policy and legislation must look to the private sector as a complementary "publisher" of public-service content and communications. This means creating an even more enabling environment for private media to thrive, including allowing them to grow *nationally*, as opposed to the current deliberate strategy to keep such media services provincial. Such a policy will also satisfy the government's universal service needs. The evolution of participation will mean the widening

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of institutions engaged in the provision of public-interest content services into the realm of becoming public-interest communications agencies with the caveat of being limited to those who can afford to participate.

2. Summary of players and emerging/potential players

Since 2000, Zambia has registered phenomenal growth in the provision of general media and information services – radio and television broadcasting, print media, and new information and communication technologies (ICTs) . Since the BBC World Service Trust (2007) study of the media development sector in sub-Saharan Africa, many more media and information players have emerged. Newer broadcasters include Zambezi FM, Hot FM, Youth Anthem Radio, CB TV, CBC TV, and My TV (a satellite subscription-based service). Alongside these media services, it is evident that the newer forms of media – relying on new media technologies – are becoming increasingly interested in providing both personalised and public information services. Facilitated in part by technological convergence and profit maximisation, cell-phone companies, such as Zain Zambia, Cell-Z and MTN, are rolling out strategic business alliances with conventional media companies. These teaming arrangements, as this study demonstrates, present a double-edged sword. They are at once democratising and costly. Democratising, because they afford citizens an opportunity to interact much more with the media service providers in the production of content: costly, because the media companies and cell-phone companies charge much more for such "participation-on-demand" than even the average cost of making a cell-phone call.

Technological convergence extends to several other media houses in Zambia. For example, Radio Phoenix has a live audio-streaming capability on its web site. Its newsroom is linked to the radio station's online news service. Radio programme schedules, along with Disc-Jockeys' schedules, are online. But, as Phoenix's chair Errol Hickey and producer Luchi Hanbote state[25], the station's live audio-streaming capability is constrained by low bandwidth, such that web-listening is often intermittent. Newspapers such as the *Times of Zambia* and the *Zambia Daily Mail* also have an online presence, with their news content posted on their respective web sites.

Clearly, then, it is evident that there has been phenomenal growth in the number of potential conventional providers of public service content. However, it is also clear that some radio broadcasting services, especially those of ZNBC, will continue on analogue platforms beyond 2015, the digital switchover date set by the International Telecommunications Union (ITU). The possibility of facilitating public-interest communications has been enhanced by the emergence of ICT companies which, although their core business is rolling out communication infrastructure, are now realising the gains to be made from a more strategic partnership centred on the content-distribution nexus.

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[25] Hickey, Errol, ChairmanRadio Phoenix & Hanbote, Luchi, Radio Producer, Radio Phoenix. 2009. Interview by author. 15 July. Lusaka.

3. "Specialised" institutions that are supposed to be public service broadcasters

The ZNBC is legally mandated to play the role of national public service broadcaster. It draws its authority from:
- The Zambia National broadcasting Corporation (ZNBC) Act, 1987;
- The Independent Broadcasting Authority (IBA) Act, 2002;
- The Zambia National Broadcasting Corporation (ZNBC) Amendment Act, 2002; and (indirectly)
- The Telecommunications Act, 1994.

A more detailed discussion of these pieces of legislation is given in Section 5 of this study. Suffice it here to note that section 7 of the ZNBC (Amendment) Act 2002 empowers ZNBC to, among other things:

(a)   Provide varied and balanced programming for all sections of the population;
(b)   Serve the public interest;
(c)   Meet high professional quality standards;
(d)   Offer programmes that provide information, entertainment and education;
(e)   Contribute to the development of free and informed opinions and as such,
(f)   Constitute an important element of the democratic process;
(g)   Reflect, as comprehensively as possible, the range of opinions and political, philosophical, religious, scientific, and artistic trends;
(h)   Reflect and promote Zambia's national culture, diversity and unity;
(i)   Respect human dignity and human rights and freedoms and contribute to the tolerance of different opinions and beliefs;
(j)   Enhance the protection of the environment;
(k)   Contribute to the realisation of equal treatment between men and women; and
(l)   Broadcast news and current affairs programmes which shall be comprehensive, unbiased and independent, and commentary which shall be clearly distinguished from news.

3.1 Media platform

The ZNBC media platform is a mix of terrestrial and satellite broadcasting. Prior to 2004/5, the broadcaster was largely dependent on the distribution capabilities of the state-owned Zambia Telecommunications (Zamtel) company, carried as a free-to-air signal via analogue-terrestrial infrastructure. Zamtel is scheduled for partial privatisation, aimed at restructuring its services to compete favourably with the burgeoning private-sector telecommunications companies. With the advent of digital satellite broadcasting services provided by MultiChoice, ZNBC entered into a partnership with the South African-owned company, resulting in its signal beamed first to South Africa via PAS 4 for 'backhauling' in C-band. The signal is then beamed to PAS 710 for redistribution in Ku-band back to Zambia. In theory, then, the ZNBC signal is digitised and can cover the entire country. To some extent, this is true even in practice. The signal beamed back to Zambia via satellite can, using the ZNBC transmitters spread throughout the country as a result of its "rural television" project, be captured off DStv and terrestrially redistributed. ZNBC has about 63 such transmitting sites located throughout the country. But there are technological limitations, not least the fact that the supply of electricity is erratic, making it impossible for

all such sites to be powered all the time, according to ZNBC's Frank Mushota and Malolela Lusambo[26].

3.2 Digital Migration planning

ZNBC's equipment, as noted above, is capable of producing digital content, but this is then redistributed largely through analogue transmitters to households that themselves have analogue TV sets and radios. Indeed, even with the Multichoice DStv partnership, it must be underscored that the household decoders, while able to capture digital signals, decode these for viewing on an analogue TV monitor. However, some of the ZNBC transmitters are digital-ready, suggesting that they can easily "migrate" into an all-digital media environment. According to ZNBC, such transmitters are fitted with an 'exciter', which can easily be replaced to receive, decode and retransmit digital signals.

In terms of institutional digital preparedness, ZNBC has set up an internal Digital Migration committee. The institution has opted for a "phased" approach to Digital Migration, which encompasses television platforms initially, before ultimately moving to radio platforms. The approach, according to ZNBC's Mushota and Lusambo, entails the following steps:
- Line-of-rail digitisation, whereby ZNBC has installed Toshiba transmitters in Lusaka, Kitwe, Livingstone and other towns along the line-of-rail. These transmitters are digital-ready.
- Provincial digitisation, whereby ZNBC will, upon successful digital trials along the line of rail, move to cover the nine provincial centres in the country, including Solwezi, Chipata, etc.

ZNBC is the largest broadcaster in the country, making it more amenable to any long-term changes in the wider technological-regulatory environment. It operates one television channel and three radio channels. There are plans to establish a second television channel which will be based more on business and entertainment. The assumption is that creating a second television channel will make room for more public-service content.

It is understandable, then, that the corporation is keen to influence the wider, societal process of Digital Migration. As such, it has developed an internal plan that links its migratory processes to consumer issues, government-regulatory imperatives, and anticipated changes in broadcasting practices. According to the corporation's position paper on the programme of migration from "analog to digital terrestrial television broadcasting with reference to the 2015 switchover deadline", which is expected to cost a staggering US$13,255,187, there are three key issues that Digital Migration will entail, namely:
- **Technical infrastructure cost:** ZNBC will need to replace the transmitters and also provide these transmitters with digital video formats from the studios. This task sounds straightforward for broadcasters who are only in one broadcast area with one transmitter. For broadcasters like ZNBC, with a wide coverage area and a chain of old analogue transmitters, this issue suggests that the success of the migration is centred on the financial ability to replace all incompatible transmitters before 2015. The money for Digital Migration is likely to come from the state, alongside the licence fee and other commercial activities ZNBC is involved in.

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[26] Mushota, Frank, Director of Technical Services, ZNBC & Lusambo, Malolela, Principal Engineer –ICT, ZNBC. 2009. Interview by author. 15 July. Lusaka.

- **Reorientation of programming and marketing strategies:** Digital broadcasting unveils many new programming possibilities which were not possible on the analogue platform. This means a lot of competition among broadcasters, thus requiring more creative and forward-looking approaches in programming and marketing planning.
- **Need for early migration to avoid adverse effects of a 'late riser':** The broadcaster and the nation in general need to migrate earlier than 2015, or by 2015, not only because the ITU is compelling but also because there are associated consequences for continuing the use of analogue technology beyond the 2015 deadline. Such consequences include the fact that ZNBC transmitters along the line-of-rail and the provincial centres have run for over 25 years. Spare parts have already become scarce. Almost all of them, according to the corporation, are emitting below half of the rated power output. By the 2015 world deadline, these transmitters must be replaced. It is imperative that replacements be digital.

ZNBC's position paper also highlights "consumer awareness", adding: "(A) very cardinal component of the migration process in that the consumer is the final target of all endeavors in the switchover. Accurate information on the implications of this technological change must reach the consumer timely and efficiently. It is emphasized that awareness campaigns commence immediately after the stakeholders agree on the national way forward." To this end, ZNBC plans an internal campaign on:
- Period of migration;
- Switchover dates for different regions or coverage areas;
- Set-top boxes and other receiving apparatus;
- The difference between analogue and digital services;
- Policy issues;
- Financial implications;
- Quality of service;
- Reception problems;
- Coverage and recording alternatives; and
- Benefits to the consumer.

But the issue goes beyond ZNBC. In the absence of a clear, coherent and comprehensive policy framework, there have been general statements by the Ministry of Information and Broadcasting Services about the need for end-users to be vigilant and buy digital-ready TV receivers. There is evidence of a supply of such receivers on the market. But it is not clear if the government will subsidise the cost of buying set-top boxes – an issue that is yet to be thrashed out as part of the agenda for a Digital Migration policy. For its part, the Communications Authority of Zambia (CAZ), says Patrick Mutimushi[27], its director of technical services, is readying itself for a public campaign on Digital Migration, which is part of consumer awareness.

On the next page is a Gantt chart showing the timeline for ZNBC's proposed Digital Migration:

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[27] Mutimushi, Patrick, Director of Technical Services, Communications Authority of Zambia (CAZ). 2009. Interview by author. 16 July. Lusaka.

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ID	Task Name	Start	Finish	Duration	2009	2010	2011	2012	2013	2014
1	DIGITAL MIGRATION LAUNCH	8/3/2009	8/3/2009	1d						
2	PUBLICITY CAMPAIGNS	8/3/2009	12/31/2014	1413d						
3	LINE OF RAIL DIGITAL SWITCH-ON	7/1/2010	7/1/2010	1d						
4	LINE OF RAIL SIMULCAST	7/1/2010	7/1/2011	262d						
5	LINE OF RAIL ANALOG SWITCH-OFF	12/1/2011	12/1/2011	1d						
6	PROVINCIAL CENTRE DIGITAL SWITCH-ON	7/1/2011	7/1/2011	1d						
7	PROVINCIAL CENTRE SIMULCAST	7/1/2011	6/29/2012	261d						
8	PROVINCIAL CENTRE ANALOG SWITCH-OFF	12/31/2012	12/31/2012	1d						
9	LUSAKA SERVER BASED STUDIO SYSTEM IMPLEMENTATION	7/6/2009	3/31/2010	190d						
10	KITWE SERVER BASED STUDIO SYSTEM	7/1/2011	3/30/2012	196d						
11	LIVINGSTONE SERVER BASED STUDIO SYSTEM	6/29/2012	3/29/2013	196d						
12	RURAL TV DIGITAL MIGRATION	4/1/2013	12/31/2014	458d						

3.3 Audience participation

The advent of cellular telephony companies such as Zain Zambia, Cell-Z (Zamtel-powered) and MTN has meant greater audience involvement in the production of ZNBC's news and other genres. It is important to underscore that at ZNBC the news genre – while now more open to audience participation – is still defined in terms of political power. In a word: the ruling party is still the primary definer of news. However, programmes of an entertainment nature – and increasingly those focusing on discussion of public affairs – are clearly benefitting from the availability of newer communication technologies that make it possible for more members of the public to air their opinions on a range of political, economic, social and other issues.

The most important new medium that has facilitated such a robust audience activity is the SMS text messaging service. The use of SMS by the audience to communicate with ZNBC studios occurs via short codes supplied by cell-phone companies. In turn, cell-phone companies apply for such codes from CAZ. A broadcasting studio needs to be connected to the internet in order to receive text messages, which are displayed on a computer screen for the announcer to read.

ZNBC has signed a contract with all the three cell-phone companies – Zain Zambia, Cell-Z and MTN – which involves the three companies supplying ZNBC with short codes that are used to facilitate text-messaging by the audience during live or recorded productions.

Using such a text-messaging system, however, costs more than the average price of sending a text message. Herein lie the profit motives behind the partnerships. The contracting companies – ZNBC and the cell-phone company – split the profit between themselves.

In effect, the cost of participation is shouldered by the citizen who decides to participate in any such programming. Clearly, democratic participation becomes a *transactional* matter, usually at the expense of the individuals that seek it. This is not to say that this innovation has not afforded the citizenry a greater sense of active involvement in media production – it has. Arguably, if citizens are prepared to pay for their participation, it can be concluded that they are exercising their democratic right of choice.

It could be argued that by Zambians already having to pay a TV licence fee, they already do not, as a right, *receive* public-interest audiovisual content, and that there is not a new principle at work when it comes to *interacting* with public-interest content.

At the same time, questions of universal service and access are raised by this – not least because Zambians are entitled to receive national radio services without paying any licence fee, but have to pay if they contribute to these via SMS or call-ins. The question of which public voices are then reflected in public service communications therefore comes to the fore.

The Internet is another technological platform that seems to have resulted in a semblance of citizen participation in ZNBC, although not to the same level as text messaging. ZNBC has one web site, which is lacking in either audio-streaming or video-streaming. It is limited to news tit-bits in text form, and with no social networking functionality. The corporation's online "discussion board" does not appear to be active, suggesting that two-way communication between the broadcaster and the audience is limited within this realm.

In any case, argue the ZNBC's Mushota and Lusambo, the level of Internet usage in Zambia is limited. There do not appear to be any immediate plans to upgrade the Internet. They both concede, however, that there is need, in preparing for Digital Migration, to embrace all new forms of technology in a more robust fashion.

3.4 Technology systems (CMS)
The corporation does not have a comprehensive content management system (CMS). It does, however, have a text-based news archiving system in place, set up in 2002 with support from Reuters. The news archiving system is called "News Manager".

ZNBC is "partially converged", according to Mushota and Lusambo. As regards distribution of content, the fact that the corporation is operating on a mixed media platform means that not all its operations can be pulled together on to one converged platform. In part, this is a reflection of wider technological and cultural issues.

While young people may be inclined towards greater technology use, the lacklustre adoption of technology by the majority of Zambians – due largely to economic constraints – means that the corporation must be careful to converge in concert with the ability of the majority of Zambian communities to access its convergent services. For example, there is little point in insisting on video-streaming Parliamentary proceedings when most Zambians do not have access to the internet. On the other hand, this might be useful for diasporic Zambian communities eager to follow the political goings-on in the country.

A related issue here is that the regulatory environ-ment is itself not converged with, broadcasting and telecommunications still operating poles apart. In addition, ZNBC is not licensed with regard to its broadcasting services. This is because the IBA is not yet operational (the IBA will require ZNBC to apply for a broadcasting licence, like any other broad-caster). ZNBC is currently licensed by CAZ with regard to its use of frequency spectrum.

Another related issue is technological-infrastructural. The roll-out of newer, more powerful technologies, such as fibre-optic cable, does not appear to be well-coordinated. For example, lament Mushota and Lusambo, it is not clear who is coordinating the laying out of fibre-optic cable in Zambia. Zamtel and ZESCO (Zambia Electricity Supply Corporation), both of which have been laying out fibre-optic cable, have seemingly not "converged" their own infrastructure-development efforts.

 Arguably, this might be a feature of the liberal market structure which allows for competition between two parastatals, nevertheless there is need for a measure of national coordination. This reflects a general culture of uncoordinated, un-converged regulatory and infrastructural regimes in the country.

3.5 Research and training programmes

At the time of writing, ZNBC had not elaborated any specific plans for training in preparation for Digital Migration, but its position paper on Digital Migration makes general statements about the need for training, re-training and multi-skilling. More specific-ally, given the convergence imperative, the corporat-ion spells out its "staff skills upgrade" as follows:

The change of technology will require reequipping technical personnel with new maintenance skills and techniques applicable in the digital environment. Most of the operations on the digital platform including fault diagnostics will be software based thus requiring increased training in ICT techniques. All test instruments for measuring of various operating para-meters will be very different from those used in analog testing, demanding the need to train system operators on the effective use of such instruments.

Training will not only be required in technical but also in programs and marketing. In programs the new and wider playing field will bring in very tight competition requiring ingenious and advanced production skills befitting a highly competitive market.

As for marketing, the new television products that are bound to arise on the digital arena will require development of appropriate marketing skills so as … to get maximum benefit from such products.

There does not appear to be clarity about what ZNBC executives' thinking is concerning multi-skilling the content producers so as to serve web and mobile platforms, as well as radio and television broadcasting. The ZNBC document on Digital Migrat-ion approaches the issue of training from a largely technical and commercial-marketing perspective.

4. The other players

In this section, we focus on an aggregative analysis of the key features of the following providers of actual and potential public-service content:

- Muvi TV: Community-based television station.
- *The Post*: Newspaper with both physical and online presence.
- Zain Zambia: Dominant cell-phone company.

4.1 Media platforms

Muvi-TV broadcasts on a digital terrestrial platform. It operates one channel, although it has applied for more broadcast licences, according to Albert Tembo, Angel Phiri and and Edward Mwango who are senior staff at the station.[28] For its part, the online edition of The Post uses a satellite link to the outside world. However, the newspaper is seriously considering investing in fibre-optic cabling via Namibia.

Zain Zambia operates on a digital platform, made possible by submarine fibre-optic cabling, via Tanzania and South Africa. It is also satellite-powered, interconnected with several receiving base stations in the country. Zain Zambia is thus already digitised and, according to marketing director Evans Muhanga[29], is experimenting with third-generation (3G) services.

The introduction of 3G technologies and services have been held back by a court injunction sought by Vodacom Zambia Limited to restrain CAZ from issuing any licence to a fourth mobile phone company. After the interview with Zain Zambia, it was reported that CAZ had authorised Zain Zambia to offer 3G services, whereupon Vodacom threatened to commence contempt of court proceedings against Zain Zambia over the 3G licence awarded to it by CAZ. CAZ's response was that such an interpretation of the court order would affect national security by endangering, among other things, the economic growth of the telecommunications sector[30].

It can be concluded that the development of the telecommunications and ICT sector is indeed a function of many factors, including administrative action, court cases, etc. It is important, therefore, to analyse how the current legislative environment can impinge upon the development of the sector.

4.2 Degree of cross-platform collaboration and convergence, including culture

The media and communication companies under review exhibit varying degrees of technological convergence. The Post, for example, seems reasonably converged, using its WiMAX (Worldwide Interopera-bility for Microwave Access) technology to power its web servers as an ISP as well as its online news services. However, there is currently no audio-visual content on its web site. It is important to note, however, that the newspaper plans to incorporate audio-visual elements into its new web site, according to the paper's managing editor, Joe Kaunda[31]. At the time of the interview, the newspaper had just taken the decision to suspend its subscription service. Prior to that, users were required to subscribe to the online edition of The Post to access content. It had built up an online subscription base of 4 000 subscribers.

WiMAX equipment has capabilities that can facilitate cellular-telephonic communications, enabling The Post to apply for a licence to operate as a fourth cell-phone company. However, due to the Vodacom-CAZ case, considerations for the issuance of such a licence have been suspended. But if The Post were to be given the licence, the use of WiMAX would facilitate interoperability with cellular-telephonic communications.

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[28] Tembo, Albert. G, Director of Administrative and Corporate Operations, Phiri, Angel, Technical Director & Mwango, Edward, Sub-Editor, Muvi-TV. 2009. Interview by author. 16 July. Lusaka.
[29] Muhanga, Evans, Marketing Director, Zain Zambia. 2009. Interview by author. 16 July. Lusaka.
[30] The Post, 2009, August 11.
[31] Kaunda, Joe, Managing Editor, The Post Online. 2009. Interview by author. 16 July. Lusaka.

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The WiMAX technology also enables The Post to operate as an internet service provider (ISP). Kaunda says the reason CAZ awarded *The Post* an ISP licence in the first place was because of WiMAX technology's capability to reduce the cost of transmission. WiMAX base stations can transmit signals up to 20-25km, without the need for a repeater transmitter. But such convergence includes inter-company convergence, centred on shared profitability. For example, according to Kaunda, *The Post* was, at the time of the study, considering strategic overtures from Zain Zambia, with a view to supplying the cell-phone company with content.

For its part, Zain is integrated into the main providers of content, facilitating the distribution of that content through SMS suites. For example, working with the Zambia National Farmers Union (ZNFU) and Africonnect (an ISP), Zain has been involved in facilitating, through short codes given by CAZ to access certain types of content-on-demand, the provision of vital developmental information for small-scale farmers, such as commodity prices, weather warnings, etc. According to Evans Muhanga, Zain Zambia's marketing director, largely because this was a trial, Zain Zambia provided both handsets and sim cards, to stimulate and boost initial demand for the service.

It would appear that Zain Zambia is locking into business alliances with many of the content suppliers in the country, including Muvi-TV. Muvi-TV is itself a part of a network of content suppliers and distributive platforms, powered by Zain Zambia's network of cell-phone users who participate in a variety of pieces of programming designed by Muvi-TV. Such programming includes *Kids and Teens*. In turn, such programming is linked to one of the two web sites run by the television station – *Z-Kids*. The content for such programmes is generated by the youths themselves, providing an important space for young people's experimentation. The young producers interact with their viewers via SMS and email. This interaction helps them to develop some of their story ideas. There is also a more organic form of interaction that involves Muvi-TV inviting Lusaka-based schools to take part in some of the activities undertaken by *Z-Kids*.

Although these Muvi-TV web sites do not offer social network-ing, they are interactive, facilitating an ongoing discussion of issues flagged on television programmes. The interaction takes place through standard emails and blogs on specific topics.

4.3 Digital Migration planning
Various players exhibit varying levels of awareness about what Digital Migration entails. Muvi-TV is a digital-terrestrial broadcaster, with all its transmitters digital-ready. Zain Zambia is powered by satellite and fibre-optic cable, clearly digital-ready.

Muvi-TV thinks of itself as "partially ready" for Digital Migration, linking this to getting "well-trained people from colleges and universities". It also appears to have lined up training opportunities for its employees, counting on such sub-regional bodies as the Southern African Development Community (SADC), and such international broadcasters as Radio Deutsche Welle and Radio France Internationale, for staff attach-ments. As for *The Post*, although its web site does not provide for interactivity for reasons which we shall specify in Sub-section 4.4, it has a more developed structure for Digital Migration should it ever be able to expand into digital terrestrial or satellite TV. The online edition of The Post, as already noted, was launched

on a digital platform, so it is digital-ready. For instance, its online edition is being redeveloped to allow for smoother functionality in terms of live video-streaming of Parliamentary proceedings.

Such audiovisual streaming as is anticipated by *The Post* is not clearly provided for in Zambia's broadcast policy and legislation. This explains why there is a move on the part of CAZ to "unify" frequency spectrum licensing in terms of (i) network, (ii) services, and (iii) content licensing, applying the policy notion of "technology-neutrality", according to Patrick Mutimushi, CAZ Director of Technical Services). For a more expansive discussion of the regulatory environment, see Section 5. Suffice to say here that such a unified technology-neutral licensing regime will ensure that the often unpredictable uses or services to which new technologies are amenable are not hampered by rigid licensing rules and regulations.

4.4 Audience participation

The integration of new technology into the production of news and other content has clearly made it possible for greater audience participation in media and other information services. To take *The Post* first: it has initiated weekly opinion polls, using three short codes provided by Cell-Z, Zain Zambia and MTN, to solicit audience perceptions of public issues. For example, one such opinion poll, undertaken in the immediate aftermath of a press conference by President Rupiah Banda, asked: "Has Rupiah Banda managed to address pressing issues during

> *The online version of The Post is preparing for live video-streaming of parliamentary proceedings.*

his last press conference?" The question is carried in the newspaper, urging readers to text their responses. The responses can be followed up, with the newspaper then seeking out some of the respondents for a more nuanced analysis of the question. This then constitutes a news story, complete with multiple other sources of information.

It is important to mention here that the state-owned Cell-Z had initially refused to be part of this tripartite business alliance, obviously because it felt that the majority shareholder – the government – might disapprove of its connection with a newspaper seen as overly critical of the government. But, in the end, due to business considerations, and assurances that the opinion poll was not politically motivated, they joined in. An important conclusion, then, is that technology might be influencing decision-making away from party-politics to the marketplace. Clearly, Cell-Z's decision was based more on economic rationality or pragmatism than party-politics.

The Post's online edition has a simple e-mail facility to facilitate a degree of two-way communication with users. However, according to managing editor Kaunda, exploiting such interactive features as social network-ing sites, blogging, etc. requires balancing legitimate and constructive criticism against the newspaper's journalistic practices and "insults" often hurled by those who would wish to see the newspaper silenced. This makes it difficult to technologically open up the newspaper to an all-out participation by people.

For Muvi-TV, apart from live programme phone-ins, text-messaging has become an integral part of its broadcasting culture, making it easier for mainly Lusaka-based viewers to actively

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participate in its programmes. As noted above, Muvi-TV, like ZNBC and *The Post*, has an agreement with the three cell-phone companies to facilitate such text-messaging for participation-on-demand. The phrase "participation-on-demand" is put forward because it points to the fact that people must choose if they wish to pay more than the average cost of sending an SMS, in order to participate in programmes.

In addition to its text-messaging system, Muvi-TV boasts two web sites – a generic one and another one for its young audiences. Z-Kids is linked to an international organisation, Kids News International (KNI), which seeks to promote active participation by children and teens in producing news content. As noted elsewhere in this study, Muvi-TV web sites act as stimulants for news ideas, some of them scoured from audience responses to the organisation's opinion-poll questions posted on its web site, as well as responses to programme producers' own blogs not necessarily hosted on the station's web site. Access to the web site content is free. This creates a kind of news-generation convergence between the comp-any's broadcasts and its online presence.

But even here, as readily admitted by the Muvi-TV's Tembo, Phiri and Mwango, there are problems of the bandwidth of Internet connectivity, making it difficult to seamlessly converge into digital platforms. This is especially so for the childrens' web site, which is supposed to be more interactive. So whereas Muvi-TV might want to move faster into the digital environment, its consumers are unable to move at the same pace. This places 'cultural' constraints on the broadcaster, by which we mean that the technological character of the broadcaster reflects that of its cultural milieu.

For Zain Zambia, as a cell-phone company, its vision is to aggregate as much content as possible to strengthen its subscriber base. This means innovative teaming arrangements which might extend into the news-distribution arena. As we have already noted above, Zain Zambia's alliance with ZNFU and Africconnect has resulted in real-time participation by small-scale farmers in the marketplace, with agricultural information readily available through their mobile phones' SMS suites. Providing short codes to broadcasters also facilitates audience participation, as do Zain Zambia's voice chats online. According to Zain's Muhanga, these can extend personal chats to include discussions of the key news items for the day, thus providing more contextual background to the news.

Zain Zambia, says marketing director Muhanga, is also considering plans to enhance audience participation in broadcasting via the following, among many other possibilities:

- Facilitating the texting of election results by polling officers to the command centre, especially in remote areas; and
- Facilitating imaging, via Multimedia Messaging Service (MMS), as a way of encouraging "citizen journalists" or "I-reporters" to contribute to news production. This, if broadcasters could secure a server on their premises, would readily facilitate effective outside broadcasting.

4.5 Technology systems (CMS)

The Post reports no content management system (CMS) in place, but undertakes to invest in such a system. Nevertheless, the company has a way of managing its content, albeit not as systematic as CMS software would probably make it. Its online edition has a rudimentary electronic archiving and retrieval system. For its part, Muvi-TV also has a rudimentary content management system – CDS/ISIS for Windows – a browser-based system that aggregates databases. Although it is not fully functional, there are plans to align it with the company's move towards digitisation.

4.6 Research and training programmes

In preparing for Digital Migration, Muvi-TV describes itself as "partially ready", seeking to build its digitisation scheme on its college and university graduates. It also has, as noted earlier, a training programme aimed at exposing its staff to training opportunities nationally, sub-regionally and continentally.

For its part, *The Post* has a training programme that seeks to integrate Digital Migration into the totality of the newspaper's life, building on its interconnected business as an ISP and a potential cell-phone company. As such, it envisions an integrated newsroom, with staff capable of seamlessly blending into the digital environment. Initially, editors are targeted for multiskilling, before extending this to reporters and other newsroom staff. Managing editor Kaunda says an important plank in the newspaper's training strategy is to twin with newspapers in the developed world. For example, it has identified key newspapers to work with in Sweden, resulting in staff exchanges.

5. Regulatory environment

For our purpose, there are three pieces of legislation which govern media and telecommunications services. These are: (i) the Independent Broadcasting Authority (IBA) Act, 2002; (ii) the Zambia National Broadcasting Corporation (ZNBC) (Amendment) Act, 2002; and (iii) the Telecommunications Act, 1994.

The IBA Act has not come into full operation, because the state has not yet facilitated the ratification of a board to oversee its operations. An earlier attempt to set up boards for both the IBA and ZNBC resulted in a protracted court case, which ended up with the Supreme Court ruling that the minister responsible for information and broadcasting services has a say in the selection of board members before their names can be ratified by Parliament.

The Telecommunications Act, 1994 regulates the provision of telecommunication services to, from and within Zambia. It provides for the establishment of a communications authority, the functions of which include:

- Taking all reasonable steps to extend the provision throughout Zambia of telecommunications services (including, in particular, emergency services, public call boxes, directory information and maritime services);
- Promoting the interests of consumers, purchasers and other users of telecommunications services (including, in particular, those who are disabled or of pensionable age) with regard to prices charged and the quality and variety of services and apparatus;

- Promoting and maintaining competition and efficiency in the provision of services; and
- Promoting research into telecommunications and the development and the use of new techniques.

In terms of this Act, CAZ manages the frequency spectrum. This means that it is the authority which licenses ISPs, cellular telephone providers, and other ICT-related activities.

Although the Act does not specify any structural relationship between CAZ and the Ministry of Information and Broadcasting Services, there is a functional relationship between the two entities. The authority, under the Radiocommunications Act of 1994, is responsible for the overall management and administration of the frequency spectrum so it, like the ZNBC, sits on the screening committee set up by the ministry for the purpose of determining the suitability of applicants for radio and television licences. In the absence of the implementation of the IBA, the ministry continues as the *de facto* issuer of broadcasting licences. In effect, then, broadcasting and telecommunications are not converged and they also remain under government control. However, the country's ICT Policy proposes a cautious approach to a converged ICT regulatory regime.

The ZNBC (Amendment) Act, 2002 had a dual intent: to transform the state-owned ZNBC into a genuine public service broadcaster and to introduce television licences for the viewing public to help fund the corporation's public service mandate. The Act reformulates the public-service mandate of ZNBC and includes the following directives:

- Providing varied and balanced programming for all sections of the population to serve the public interest;
- Contributing to the development of free and informed opinions and, as such, constitute an important element of the democratic process;
- Reflecting and promoting Zambia's national culture, diversity and unity;
- Respecting human dignity and human rights and freedoms and to contribute to the tolerance of different opinions and beliefs;
- Contributing to equal treatment between men and women; and
- Broadcasting news and current affairs programmes that are comprehensive, unbiased and independent, and comment-ary that is clearly distinguished from news.

Although the above reformulation of the public mandate of ZNBC appears generally in sync with democratic values and principles, the way they work out is often a source of contention and contestation. For example, while it might be agreed that "the public broadcaster should cover the activities of all political parties without bias because these parties represented all Zambians who were also tax payers," as the Africa Governance, Monitoring and Advocacy Project (AfriMAP) puts it, this does not work out in reality. Although the "provisions of the Electoral (Code of Conduct) Regulations, 2006, which stipulate how political parties should be covered during election campaigns, were generally regarded as fitting and easy to comply with"), evidence suggests that ZNBC does not live up to its commitment.

In terms of statutory regulation, ZNBC is currently unlicensed, operating at the mercy of the ministry. The IBA is meant to license ZNBC's broadcasting services. CAZ allocates frequencies

to ZNBC. For its part, CAZ – according to Mutimushi, had at the time of this research in August 2009, facilitated the tabling of the following Bills before the National Assembly:

- **The Electronic Communications and Transaction Bill, 2009,** to regulate all electronic communications and transactions, including monitoring transactions and ensuring the security of online payments;
- **The Information and Communication Technologies (ICTs) Bill, 2009**, to update the Telecommunications Act, 1994 and protect the public from potential harmful effects. This involves a degree of media literacy, such as campaigns about children and the use of the Internet conducted by CAZ; and
- **The Postal Services Bill, 2009**, to regulate courier company competition, among other things.

> *The Zambian government is said to be forming a national working group to progress Digital Migration.*

Mutimushi says that a key feature of the new regulatory regime is to push for a unified licensing regime, cutting across (i) network, (ii) services, and (iii) content categories. Such a licensing regime would result in a degree of specialisation. For example, where one applicant would obtain a licence to be a signal carrier, another would opt for a content-provision licence. In the process, he argues, this will lead to more players in the telecommun-ications sector. To this end, CAZ has succeeded in obtaining a total of 444 digital frequencies from the ITU. While many of these will be used for other purposes, those used for digital broadcasting have such good compression capabilities that they could carry at least 10 channels. This again reinforces the fact that Zambia potentially has many more technological-communication opportunities ahead for its citizens.

Related to this, and central to ensuring universal access, the CAZ board often sets aside funds to accelerate rural access, such as establishing telecentres in Chinyunyu and Macha to connect the rural centres. Mutimushi says it has also built sharable base stations which any GSM provider can use in remote rural areas, but at their own maintenance cost. In other words, CAZ has laid out the basic infrastructure that any GSM provider – or broadcaster – wishing to reach rural areas can use almost for free.

In terms of Digital Migration, CAZ reports that the government is in the process of forming a national working group, tasked to address issues related to: (i) policy formulation; (ii) content; (iii) licensing; (iv) technical planning; and (v) migration. These reflect the Digital Migration plan by SADC and the Communications Regulatory Authority of Southern Africa (CRASA), according to CAZ's Mutimushi.

An interview with Emman-uel Nyirenda[32], the Permanent Secretary in the Ministry of Information and Broadcasting Services confirms that the government is on the verge of setting

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[32] Nyirenda, Emmanuel, Permanent Secretary, Ministry of Information and Broadcasting Services. 2009. Interview by author. 15 July. Lusaka.

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up such a committee to prepare for Digital Migration. He confirms that many of the private-sector broadcasters have secured digital-ready equipment, but that what is needed is a policy framework to work towards the acquisition of set-top boxes or TV sets with inbuilt digital receivers, etc.

Both CAZ and the ministry agree that there is need for a broad-based consultation, which should bring together all the stakeholders, including the ministries of finance, home affairs, etc. CAZ argues for a leadership role in this process, and was, at the time of the study (August 2009), planning a national Digital Migration workshop to raise public awareness about the issue and organise stakeholders' inputs. CAZ is also keen on raising the profile of Digital Migration by suggesting that the President should appoint the people to constitute the national Digital Migration committee.

6. Economics

It is clear that paying for the cost of Digital Migration and the related public-service content is a matter largely for the market. There is already evidence that the strategic alliances emerging across content suppliers and signal distributors are indicative of how new technologies are affording such players opportunities to stimulate demand for the new media services. It is clear, then, that ordinary users of media, internet, and cellular telephony are increasingly becoming an important ingredient of financing content production. *The Post*'s weekly opinion polling – via costly SMSes – is an example of such economic teaming arrangements.

Another important feature of the economics of digitised public service provision is advertising, and it promises to continue as such. On all broadcasting stations in Zambia, the main news bulletins constitute prime-time for advertising. In fact, the news bulletins are themselves often sponsored by any one of the major corporations. The ZNBC news bulletin is so sponsored. Concerns about over-commercialisation appear to pale into insignificance beside consider-ations of financial survival. What this means is that, in Zambia at least, the idea of a state-funded public broadcaster is an ideal that is unlikely to be realised. Perhaps, as we shall demonstrate in Section 7, the commercial imperative does not necessarily tamper with what people might regard as "public service". In Zambia, privately owned, commercial media, such as Muvi-TV, seem to serve their geo-sociological publics more than does the legally mandated public service broadcaster – the ZNBC. For example, Muvi-TV is enamoured of the idea of innovative programming – much of it in the vernacular – that can capture a sufficiently large segment of the potential audience to warrant sponsorship by the corporate sector. Muvi-TV cites such programmes as *Banja, The City,* and *Emergency Response Team (ERT)* as having built a large enough following to warrant corporate sponsorship, according to the company's Tembo, Phiri and Mwango.

Here, an important question concerns advertisers' influence on editorial content. To what extent can advertisers, an important element in financing content production, influence journalistic output? Muvi-TV illustrates their adherence to even-handedness in their coverage of issues affecting their advertisers. Tembo, Phiri and Mwango relate that the station reported on careless, and environmentally damaging, effluent discharge by a brewery client. Although the client was angry with the station and threatened to withdraw its advertising contract, the television station reasoned with the brewery, arguing that there was need for both to be

"objective", and learn lessons from the incident. The client understood this position and did not revoke the advertising contract. The television station then set out to report on the positive corrective measures that the brewery had taken to avoid further environment-al damage.

Related to Muvi-TV's idea of innovative programming as a hook for corporate advertising and sponsorship is the organisation's involvement in producing local movies. One such movie, released to critical acclaim, was The Lawyer. The production of local films also becomes an important part of wooing audiences and selling them to advertisers for possible sponsorship. Such a technique is becoming a way of ensuring financial sustainability to produce more local content that in turn woos more local audiences.

In terms of infrastructure development, the state is clearly – and is perhaps increasingly expected to be – a key financier. Although CAZ is arguably charging licensees what some might consider exorbitant fees, it uses some of its funds to finance technology infrastructure development in the remotest parts of the country. The Radiocommunications (Licence Fees) Regulations, 2008, provide for an annual fee and inspection fees. The annual fee depends on the type of station and frequency applied for, while the inspection fees depend on the category of inspection. As noted in Section 5 above, CAZ is financing some infrastructure development in rural areas, as part of the government's universal service obligation. Clearly, then, it can be argued that the state has some role in laying out infrastructure for would-be public-content providers and distributors.

7. Changing conceptions of public service

7.1 Changing nature of publics, and services to them

ZNBC serves different publics within its public service mandate.

The representatives interviewed for this chapter seem unanimous in their endorsement of the idea of multiple publics, given the politically-pluralistic nature of Zambian society. Community television, for example – which is what Muvi-TV views itself as – is reflective of a particular community defined geographically as Lusaka. Even then, there is a clear appeal to the ordinary folk, with the lingua franca of such people becoming the language of Muvi-TV broadcasting. As such, Muvi-TV sees public service in terms of: cutting across illiteracy; facilitating access to centres of help within the community; voter and civic education; free-to-air broadcasting itself; and socio-political commentary, such as popularised by the programme *Dikiloni & Difikoti*.

It is evident that there is no homogenised public – what is considered to be a public for public service broadcasting is, in fact, a fragmented one. ZNBC's Mushota and Lusambo asked: "Whose interest are we serving?", noting further that it is not clear if ZNBC news is doing enough to serve such a fragmented public. As such, they contend that judging their public-service role must be extended to the totality of ZNBC's productions. Here, they argue, it is possible to see how ZNBC is serving different publics – young people, the disabled, political parties, etc.

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7.2 Universality of service of news (e.g. reach, language, disability)

It is clear that ZNBC has a more national reach than many other news suppliers. In theory, given its satellite-powered distribution capabilities, and its rural television project, it can reach the remotest parts of the country. It is also clear that ZNBC offers a potential platform for forging a national identity, given the fact that it broadcasts in the seven main vernacular languages, apart from English.

For the main ZNBC news bulletin, sign language has been incorporated, making the news more accessible to the disabled. However, this is not yet a regular feature of the privately owned media outlets. As such, on this score, ZNBC emerges as truly national, and therefore stands a better chance of forging a national identity. Arguably, although it does not appear to fare well in terms of reporting on the plight of the disabled, the use of sign-language is a communicative point of contact between the corporation and the deaf – a particular public.

A disturbing phenomenon, however, according to ZNBC's Mushota and Lusambo, is that some members of the public have complained against the use of sign-language, as it tends to visually "distract" them. This demonstrates that the technical democratisation of news presentation can sometimes clash with the aesthetics of television consumption. Forging a national identity, however, means a broadcasting mission that runs counter to such tendencies.

More communitarian forms of television broadcasting – such as Muvi-TV – are exploiting the vernacular languages to become more universally accessible within their geo-linguistic locales. On the contrary, the online edition of *The Post* may well be treated as an elitist medium, more readily available to those with access to an Internet connection. This is, however, different from its physical edition, which is the most read newspaper in the country, with a circulation of about 47 000 copies (AfriMAP, [forthcoming]).

7.3 Common national public sphere concept of PS news

The traditional notion of public service as a *national* public sphere remains an ideal, if national suggests something of a homogenous public sphere. Clearly, the emergence of private, commercial media outlets, including cell-phone companies carrying content of one sort or the other, has resulted in the emergence of public sphericules, defined in terms of geography, interests and tastes, age, gender, etc.

For example, Muvi-TV, because it is located in Lusaka, seems to have become a "crowd puller" in that part of the country. This does not mean that other parts of the country are not interested in its programming; indeed, there have been calls for Muvi-TV to decentralise its operations, resulting in the company setting up a news-gathering bureau on the Copperbelt. But due to licens-ing limitations, they cannot broadcast all throughout the country.

So, while it is evident that there is a national yearning for the content produced by Muvi-TV, and while the company has the technical capability to cover much of the country, policy-regulatory restrictions stand in the way.

For its part, *The Post* points to its "editorials", "issue-led reporting" and "investigative pieces" as symbolic of its role in forging a national public sphere. More importantly, it evaluates its

national public-spherical role in terms of the effects of its investigative news reports on society at large. For example, according to the paper's managing editor Kaunda, the fact that some public officials have been prosecuted as a result of its reportage demonstrates its national engagement and how it provides a melting-pot of political public opinion.

But even here, it is clear that *The Post*'s supposed national public sphere is a fragmented one, pitting one political shade of opinion against another. The fact that it is a privately owned newspaper has meant that some members of the public have imputed partisan agendas to its news reportage.

Yet even such criticism, often carried online on social networks or in chat rooms, is indicative of the robustness of debate that has resulted from the newspaper's reportage. Arguably, this is a measure of passionate democratic discourse.

7.4 Political fairness (e.g. guidelines on covering elections)
As a legally mandated public service broadcaster ZNBC does not appear to weigh in very well on the scale of political fairness and impartiality.

Although ZNBC is often biased in favour of the ruling party, there are instances in which its muted coverage of certain issues and events is justified on the basis of what could be seen as "public interest", by which is meant a type of journalism that promotes national peace by being less inflammatory, according to the corporation's Mushota and Lusambo. However, they concede that there is need for the corporation to become more competitive with the private-sector media by injecting more local interest into their news menu. Interestingly, such a response is prompted by the fact that Muvi-TV seems, in the estimation of the respondents, to have become a "crowd puller". They readily agree that ZNBC focuses more on "government activities", before moving to other issues.

However, the respondents are quick to point out that ZNBC's stature as a national broadcaster needs to be judged beyond its news function. Given the fragmented public, it has become increasingly important to speak to different "interests" in society, but at the same time, it is important to handle information "maturely". What this means, according to Mushota and Lusambo, is that broadcasters or content suppliers must be sensitive to the possible effects of information on the wider community. This principle of caution in handling information seems to guide the corporation, such that, if there was a potentially explosive story, newsroom staff would rather err on the side of political caution.

7.5 Diversity of views and news sources (e.g. rural areas, poor, women, youth)
The trend seems to be that the private, commercial media services are more inclusive of marginal groups and voices. In part, this is facilitated by their use of new media tools, especially cellular telephony. In addition, the use of local languages, at least in as far as Muvi-TV is concerned, has enhanced interactivity.

Even ZNBC has benefitted from the use of such new media tools – sending text messages during live programmes has become a regular feature of broadcasting. Such text messages are read out and – infrequently – streamed live on TV. This has opened the corporation to

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contributions from often marginalised groups and voices. However, as already noted, ZNBC's news menu still remains a largely closed affair, mostly open to the ruling political elites.

An additional aspect of ZNBC's production nexus is its reliance on independent content producers, such as Hone-TV, etc. While these "independents" must adhere to ZNBC's producers' manual, their involvement in generating content for ZNBC indicates a level of public participation, but it must also be noted that ZNBC often gets external content that is not politically sensitive.

ZNBC's presence in most of the rural centres makes it more amenable to represent rural voices, especially through its vernacular-language sections. This is not necessarily so for the urban-based private media services. What makes them distinct, however, is that they reflect more of their immediate communities than does ZNBC. Muvi-TV seems to show the most evidence of diverse media content, with youth participation fully institutionalised via its *Z-Kids* platform and *Kids News* genre. As already noted, its use of the vernacular has become a feature of local interactivity, drawing in calls and SMSes from communities hitherto marginalised from mainstream broadcasting on account of their inability to speak English. Such text messages are streamed live on TV or read out, depending on the situation. Text messages are also used to solicit people's views in opinion polls. The company's web site is also used for such opinion-polling purposes.

The Post sees itself as amenable to inclusivity, given its structural independence from the state and journalistic autonomy. As such, it views its news fare as "public service content", which is aimed at the people and ensuring that public officials are accountable to those people. Its opinion-polling data, albeit unscientific, becomes a useful source of diverse opinions, often becoming an ingredient in the newspaper's news dish, according to managing editor Kaunda.

7.6 Distinctiveness from news that is not per se public service
From the above analyses, it is evident that ZNBC is not seen as a genuine public service broadcaster, largely because its news menu is dominated by the government. However, its other programmes – especially those directly sponsored by civil society organisations, such as NGOs – appear to reflect a degree of diversity (according to Mushota and Lusambo). That ZNBC news is not seen as distinctively public-service has led some to contend that there is need for ZNBC to share its licence fee with private-sector media organisations which have a more distinctively public-oriented news menu.

An anecdote by the Muvi-TV respondents to illustrate the "popularity" of the television station concerns the fact that the-then Minister of Information and Broadcasting Services, Mike Mulongoti, was "compelled" to use Muvi-TV to clarify the confusion that surrounded the death of former Zambian president Levy Patrick Mwanawasa in July/August 2008. This followed a barrage of text messages from Lusaka dwellers to the television station, wanting them to verify the rumours. It would appear that Muvi-TV was imbued with greater "believability" that ZNBC, according to Tembo, Phiri and Mwango.

7.7 Distinctiveness of public service participation, if any

For all the media houses interviewed, as well as for the cell-phone company, audience participation is a key feature of public service. As already suggested, extending a platform for participation is not necessarily an altruistic democratic inclination on the part of some media executives; it is economically profitable, as evidenced by the strategic teaming arrangements between media and cell-phone companies. But an economic gain can also be a democratic gain.

The economic value of such techno-economically induced participation has meant that even ZNBC – ordinarily seen as averse to public participation – has incorporated into some of its general programming aspects of active audience involvement. As such, it cannot be concluded that such participation is a result of purposeful consideration of the need for a distinctive public service. Rather, it is a reaction to what has become a trend in private-sector media productions. Therefore, it can be concluded that this is a general tendency among all media services in the country – a feature largely of techno-economic determinism. That this is a feature of techno-economic logic does not make it any less democratis-ing. The fact is that a class of public people can now choose to pay for their participation in the programme genres on offer – talk shows, games and quizzes, etc. In this way, the media houses begin to move into the mode of being potential public-interest communications agencies, albeit at a price to the citizens.

The payment provision is akin in a sense to the TV licence fee, with the difference that the fee is compulsory, while the decision to spend personal money on sending an SMS or making a voice call is voluntary. Perhaps such a view of the evolution of a user-pay public interest communications is more realistic than the democratic altruism that is often factored into discussions about the public-sphere role of media organisations. The development of the public-interest communications agency function requires citizen participants to have the money to put where they want their mouths to be. However, aside from the universal service and access issues this raises, there is also the question of the character of citizen contributions to mass communicat-ions – a great deal all of which is not of public interest. This is something to monitor going ahead.

8. Conclusion: scenarios for 2015

Zambia has registered phenomenal growth in its media and communication landscape. While conventional media services are on the increase, their work is reinforced and enabled by developments in the area of ICTs. The establishment of cell-phone companies, along with ISPs, has meant that media services have become more accessible to their intended audiences.

A particularly important feature of this audience involvement has been the gradual movement from analogue to digital platforms, creating more digital opportunities for audiences to participate in media production. Although many of the new media institutions seem to be becoming more digital-ready, the behemoth of national broadcasting – ZNBC – is yet to migrate to fully digital platforms. But it is evident that internal planning is underway, suggesting that there is an acute awareness of the process of Digital Migration and convergence. (This is not the case for radio in general for reasons discussed at the outset). The problem is that small progress within TV should also not obscure that there is also room for lots more work around public education, and the issues of set-top boxes and satellite dish alternatives.

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Thus, while industry players seem to be aware of their digital obligations, and some are indeed already digital-ready, there are very real problems that must be confronted:

• Slow policy and legislative processes on Digital Migration;
• Low levels of awareness among the general public about the implications of Digital Migration for the structure of media consumption;
• Slow uptake of digital technologies by citizens, compounded by low growth in the ICT sector as well as by general economic constraints.

It is clear that the process of digitisation is under way, but it will certainly be completed at different points in time. ZNBC has more at stake, because its telecommunications and broadcasting infrastructure is more widespread. Migrating into the digital environment will entail spending huge resources and it is as yet unclear how this burden will be shared amongst media players, government, Zamtel, and private consumers of content

Progressive broadcast policy and legislation must look to the private sector as a complementary " publisher" of public interest news

(who are also increasingly contributors). ZNBC's phased approach suggests that it will prioritise television in urban centres. Such prioritisation means that rural areas will remain largely analogue for the foreseeable future. It is here that government leadership and support is needed, starting with a clear policy and legislative map to guide the process into 2015.

The plurality of media outlets, and the increase in ICT companies seeking to aggregate content for profit, has meant a relook at what public-service content is. As such, public-service content can no longer be treated as the exclusive preserve of legally mandated bodies, such as ZNBC. Progressive broadcast policy and legislation must look to the private sector as a complementary "publisher" of public-service content – and not least in news and current affairs. This means creating an even more enabling environment for private media to thrive, including allowing them to grow *nationally*, as opposed to the current deliberate strategy to keep such media services provincial. Such a policy will also satisfy the government's universal service needs.

If public-service content is defined in terms suggested by this study, it means the question of financing such content transcends the public funding formula often associated with public service broadcasting throughout the world. In any case, as we have established, ZNBC is itself already involved in commercial activities that lock it into all types of strategic business formations with other content providers and distributors. As such, sub-questions concerning the financing of public-interest news services are answered partly by the market, and partly by the state. As noted, the trend in Zambia is that media houses are partnering with content movers or distributors, thus signalling that these strategic partnerships might be the route towards sustaining such content in the post-2015 digital future. As the actors in media move more into playing the role of agencies facilitating public-interest communications, and not only unidirectional delivery of public-interest content, so it also appears that this comes at a price to the citizens – and that it is of greater significance to those enjoying relative wealth and urban status than other Zambian citizens.

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South Africa – migration underway
By Jane Duncan

1. Summary

This section focuses on the South African electronic communications landscape in the main, as these services are regulated for public service objectives. It summarises the main players and the emerging/ potential players in relation to public interest communications, and the extent to which they are regulated for public service objectives.

The section then considers the existing media platforms of the public broadcaster, the South African Broadcasting Corporation (SABC), and identifies significant steps in its news and current affairs division towards digital media usage. The SABC's use of mobile media and the Internet is also discussed, especially its use of Web 2.0 properties. It notes that the SABC is experimenting with different forms of audience participation, and reviews its progress towards Digital Migration. Two other players in the multimedia landscape are also reviewed, in an attempt to check what other public service content and communications possibilities exist beyond those offered by the SABC.

The section ends with a set of scenarios for public broadcasting in the next five years.

2. Summary of players, emerging/potential players and regulatory environment

Radio remains the most accessible medium in the country, reaching 94% of the population by 2008. Overall, listenership has stagnated of late and has even declined in the lower income brackets, although there is evidence of growth in the middle income brackets. Free-to-air television's reach has grown steadily to 84% of the population, while newspapers reach under half of the population, with the *Daily Sun* having the highest penetration. Subscription television reaches just under 10% of the population.

Just over 8% of the population has access to the Internet, according to the South African Research Foundation(SAARF). However, this figure may underestimate the numbers given that millions of cell-phone users access the Mxit chat platform without realising they are interfacing with the Internet (albeit a walled-garden section thereof). Disparities in Internet access are stark. Fourteen percent of the population in the highest income bracket (using the SAARF's Living Standards Measure, or LSM, 9-10) account for almost two-thirds of those with Internet access, while 22% of the population, which falls into LSM 1-2, records a 0% penetration. Forty-eight percent of the population falls into LSM 4-6, yet accounts for just over a tenth of usage. Cell-phone penetration continues to grow, with almost 70% of South Africans having cell-phone access, and the largest growth being in LSM 5-7. Almost half of the population in LSM 1-4 has access to cell-phones, three-quarters in LSM 5-7 and approaching 90% in LSM 8-10

Given these media access trends, it is hardly surprising that the SABC remains the dominant player in the broadcasting sector, as its African language stations are the most accessed mass media in the country. The SABC is licensed by the Independent Communications Authority of South Africa (Icasa) to provide public service content in two categories of services: public services and public commercial services. The SABC's public service television stations, SABC 1 and 2, are the most watched stations. SABC 3 is licensed as the broadcaster's "public commercial service" TV channel. Licences for two new stations, SABC 4 and 5 have been granted, but they have not been set up yet owing in part to a lack of clarity about their sources of funding. All three existing TV channels are required to carry some of public service programming, including news and current affairs.

Community radio's share of listenership is growing and is estimated to be 22% (Biz Community. com 2009). In addition to community radio, there are 16 commercial radio stations, which are either regional or local in nature. Six of these were originally SABC services, which were sold off in 1996. Radio 702's licence was 'grandfathered' from the apartheid era and eight new metropolitan commercial radio stations have also been licensed since 1997 as well as several stations in secondary towns. While these stations do have requirements to air public service programming, including news and current affairs, as well as a diversity of programming content, their obligations are less than those of the SABC.

E.tv was the first free-to-air television channel launched in South Africa, and the station claims it now reaches 80.5% of the population. According to the SAARF, by 2008, its audience share was the third largest after SABC 1 and 2. E.tv has local content obligations of 45% of all content during prime time, as compared to 55% for SABC 1 and 2 and 35% for SABC 3, as well as obligations to provide news, current affairs and sport. There are ownership constraints on private broadcasting, limiting the extent of foreign ownership and cross-media owner-ship.

The two subscription television services on air are both owned by Naspers, namely M-Net and MultiChoice's DStv. M-Net offers its content on both a subscription satellite service and a subscription terrestrial broadcast service, but its viewership has declined over time, according to the African Media Development Initiative. DStv offers a number of bouquets, ranging from a full range of channels for upper income earners to a "Compact" service for middle income earners. Four additional TV subscription services were licensed in 2007, namely e.sat (owned by e.tv), On Digital Media, Telkom media (South Africa's first Internet protocol television service) and Walking on Water. Of these, only e.tv's service is broadcasting, albeit in modified form as the station decided after the awarding of the licence to launch a 24-hour news channel on the DStv platform rather than as an independent service. Subscription broadcast services are subject to 'must carry' regulations, which require them to also deliver the SABC's channels as part of their public service obligations.

The mobile cell-phone operators – namely MTN, Cell-C and Vodacom – are significant emerging or potential players, given the increasing penetration of data-enabled handsets. Mobile television is already available via demand-driven data streaming on 3G cell-phone signals at a cost to subscribers. However much of the content they offer is non-South African entertainment, and there is relatively little that is news orientated. Mobile broadcasting is a significant government and regulatory priority ahead of the Fifa World Cup in 2010. Vodacom,

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MultiChoice and MTN have also separately been developing plans for digital broadcasting to cell-phones through always-on transmission (not to be confused with the 3G services). However, the licencing framework for DVB-H (Digital Video Broadcast-Handheld) has been delayed by the regulator, to the frustration of the industry. Even when it is in place, specially-enabled cell-phones will need to penetrate the market for there to be substantial uptake.

All electronic communications services require licences from Icasa.[33] Licences for all the above mentioned services are being converted to licences issued in terms of the Electronic Communications Act, which makes provision for issuing multimedia licences. However, if any such service is to be distributed mainly in unilinear mode on the airwaves, there will also need to be a frequency licence in place for an operator to do so. If delivery is by wireless interactive Internet, it seems that a special content licence will not be needed, but Internet Service Providers will need frequency licences (except for hyperlocal distribution such as provision of wi-fi hotspots).

3. The "specialised" institutions that are supposed to be public service broadcasters

3.1 The SABC's media platforms in more detail and convergence possibilities

3.1.1 Television and radio
The SABC broadcasts on four television platforms. The first platform is the analogue free-to-air platform, which consists of SABC 1, 2, and 3. Around nine million homes receive analogue television. SABC 1 and 2 are just north of 90% coverage, and while SABC 3's penetration is less than that. [34]

The second platform is the DStv subscription platform. SABC 1, 2 and 3 are available in all its bouquet portfolios, which DStv is obliged to carry in terms of Icasa's 'must-carry' obligations. The same 'must carry' provision will likely apply to all new terrestrial pay television services. If the current licensing conditions continue, then public service broadcasting will be universally available on terrestrial digital services, including subscription ones.[35] Whether SABC should be paid for this content, or whether the carriers should be paid by SABC or the state for carrying these channels, is an unresolved debate.

The third platform is Vivid, which is offered by Sentech, and is free-to-view once the set-top box is purchased. Vivid is a digital service via satellite, but it has not been marketed effectively. According to the SABC's Chief Technology Officer, Richard Waghorn, Vivid has 60 000 users, as opposed to the DStv's one million to two million users[36] ; however, the *Mail & Guardian* estimates the reach of Vivid to be 50 000 households, "a pathetic 0.5% of South African

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[33] It should be noted that repeated attempts were made to secure an interview with Icasa over a six- week period for this research project, but to no avail.
[34] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[35] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[36] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.

television households," according to a report in the *Mail & Guardian* newspaper. SABC News Internation-al has been available only on Vivid.

The fourth platform is digital terrestrial television (DTT). Trials are being undertaken involving a single multiplex of all four channels plus test channels consisting of different content formats. The SABC aims to have a 60% DTT penetration by 2010. According to Richard Waghorn: "As a public broadcaster, the principle is that our services are available free to air and you don't have to pay a subscription…We need to ensure that, going into the future, public broadcasting services will be accessible." [37]

The SABC's five national and 13 regional radio stations cover the spectrum of South African languages, and are broadcast on an analogue free-to-air basis. The SABC has also toyed with the idea of establishing a 24-hour radio news and current affairs radio station. However, Icasa has refused to entertain this possibility and has told the SABC that it should transform existing stations rather than being granted even more spectrum. To this end, there has been some discussion inside the SABC about transforming Radio 2000 into a 24-hour news and current affairs station, using content generated by other stations. This content could then also be made available on a cell-phone data stream. [38] Delivery of radio (and enhanced services) by digital transmission is a prospect that awaits Icasa developing a policy position on Digital Migration for radio – something that has not been a regulatory priority.

> *SABC is re-organising its websites and experimenting with a number of converged possibilities.*

3.1.2 Mobile media

The SABC was initially one of the first news organisations to distribute news via cell-phones, through wireless application protocol (WAP) text services as part of the SABC commercial offering, but this initiative was not very successful. The one successful project is via telephony in general and not limited to cell-phones, namely the Newsbreak audio news service. Initially, Newsbreak was confined to English-language news, but has now developed to include weather and matric results, as well as news headlines from the isiZulu-radio Ukhozi FM. There are also plans to launch a proper mobile version of the news site SABC news.com, and discussions are under way about using MMS to send viral messages related to news content, or a clip of an upcoming show. [39]

The SABC is also considering using mobile services to increase the outreach of radio, given that even the cheapest cell-phones often have FM radio capability. (In Pakistan, according to Corinne Ramey[40], listening to analogue radio via receivers built into cell-phones has become

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[37] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[38] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.
[39] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 Juy 2009.
[40] Corinne Ramey, 2000. When FM radio meets the mobile phone in Pakistan. http://www.pbs.org/idealab/2009/08/when-fm-radio-meets-the-mobile-phone-in-pakistan224.html

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common). In addition, the SABC is also exploring the use of radio data services, so that radio can be accessed via data streaming rather than via conventional antenna to receive analogue broadcast signal. In fact, the Head of News Research, Izak Minnaar considers radio via cell-phone to be "the next big thing".[41]

Richard Waghorn also considers mobile to be central to the SABC's technology plans, and estimates that mobile growth is going to bypass personal computer growth, and in the process become a complementary service to radio and television. Broadband services are constrained by high cost and lack of penetration, but if broadband 'takes off' – he argues – then the SABC needs to ensure that audiences can access content through Internet streaming or downloads. He also notes that the BBC has agreements in place with independents to produce multimedia content, and the SABC may need to consider a similar arrangement. [42]

3.1.3 Internet

The SABC has a disparate number of sites with over 100 URLs. However, only about 40 of these are content sites, which are not linked together very well. A key consideration for the SABC is that most South Africans with Internet access still only have narrow-band access, so SABC sites need to be available to them too, and not only to broadband users. However, the SABC does recognise that this approach may change once new undersea fibre-optic cables are rolled out, and once domestic broadband connectivity becomes cheaper. [43]

News, sports and education are the three major substantial content sites, and each of them has other sub-sites. Some radio stations offer a mix of content and reference sites. Social networking has also been created around some sites, with links to Facebook where audiences interact with presenters. Twitter is also being used as a 'push' medium to tell listeners about the station's lineups and other plans. But on occasion, Twitter is also used interactively by programme presenters to get feedback from audiences. The SABC is now attempting to reorganise and realign the Corporation's websites, so that they can be accessed from a single portal entry site, and it is auditing the unused domains and websites: a process that it estimated would take five months from the time of interview in August 2009. [44]

The news site, SABC news.com, is updated continuously over 18 hour cycles worked in shifts.[45] It has a large percentage of inter-national traffic, which has meant that it has raised the international profile of SABC. South African content is of interest internationally, possibly to South Africans who are travelling or expatriate South Africans, and SABC news is exploring ways of growing this audience even more. [46]

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[41] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.
[42] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[43] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[44] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[45] Interview with SABC person involved in new media, 28 June 2009.
[46] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.

In spite of these initiatives, the SABC faces significant challenges in providing a current and topical web offering. Significant disparities are apparent between SAFM, RSG and the African language station's sites. Website content is still sparse on some SABC sites, and in some instances out of date. At the time of writing, Umhlobo Wenene's news content dated back to March 2008.

The SABC's web presence is notable for its dominance of English, including the web presence of African language stations. An exception is the Tshivenda-medium Phalaphala FM, which is attempting to provide content on its site in Tshivenda, but at the time of writing (August 2009), very few pages were populated with Tshivenda content. The news section was empty. Thobela FM gives website users an option to switch into Sepedi, but the link merely directs the reader back to the English site.

The SABC has expressed a concern that its sites are not accessed enough: in fact a review of the top 50 sites accessed reveals that the SABC's sites do not feature. In contrast, *Independent Online* and *The Time*s are market leaders – and both also include audio and video content. To address these problems, the SABC has a project in place to bring the sites together into an easy-to-use navigable portal, which focuses on using more Web 2.0 tools. [47]

3.2 Degree of cross-platform collaboration and convergence at the SABC

One of the first early multimedia experiments involved the Afrikaans-medium Radio Sonder Grense (RSG), but the initiative ran into internal obstacles. As things stand, the SABC's newsroom is not set up as a multimedia newsroom, but gives priority to platform-specific reporting and especially to radio and TV. Between 1999 and 2002, the SABC experimented with 'bi-media' operation, which involved journalists reporting for both radio and television news. This experiment was abandoned a few years after it was initiated, although some regions and individual journalists continue to produce content for both platforms.

However, SABC News has continued to experiment with a number of converged possibilities. These include making radio current affairs content available on other platforms, with the intention of directing audiences from one platform to another. There is some cross-promotion between platforms, although rather limited in extent. SAFM and SABC News have been starting to make news available on SABC news.com. Current affairs programmes are being promoted on SABC news.com, and are being posted as podcasts. Twitter is also being used to attract audiences to SABC news.com.

SABC News wants to try to shift radio towards being a more enduring, less fleeting medium. This is by making special packages available once audiences have heard them on radio. To this end, podcasts are being uploaded onto the SABC news.com site.[48] However, more training and incentives need to be offered for journalists to report across platforms, as the primary focus remains on reporting for specific platforms.[49] At present, SABCnews.com operates with a

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[47] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[48] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.
[49] Personal correspondence with Izak Minnaar, 21 August 2009.

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separate staff that is not integrated into the general newsroom, and which mostly repurposes content (text, audio and video) off radio and TV news. Generally, reverse-publishing is not taking place from the website to the broadcast platforms.

3.3 Content Management System (CMS)
One challenge the SABC faces in promoting cross-platform collaboration is that it does not have a CMS that seamlessly integrates all content services. According to Richard Waghorn, the BBC uses a single CMS that is available on all personal computers in the corporation, and the SABC lacks this. He argues that the SABC needs a CMS that allows content to be made available for many platforms, and noted that the corporation is working on establishing a digital library to overcome these problems. [50]

Izak Minnaar notes similar problems within the News Division. The NewStar production system is used for text-based content and line-ups on radio and TV. Dalet is used for audio and video studio playout and Vortex for video-editing. Sabcnews.com and most other SABC websites use Vignette. These systems are not integrated. A process is under way to acquire a new production system that will integrate all content management functions for radio and television, and also link to other systems in the SABC. [51]

3.4 Training programmes
Foreign correspondents in the SABC are required to report across all platforms, which they are trained to do – mainly in TV and radio. Similar training is also offered to journalists on an ad hoc basis, for when stories come up where the SABC cannot afford to send platform-specific reporting teams. Staffers have also been sent to the annual Highway Africa conference at Rhodes University to attend new media courses. Frayintermedia also provides courses for SABC staffers which include a multimedia component. Internal courses are also run by SABC News Research. [52]

3.5 Audience participation
While SMS text messaging is used extensively to receive comments and to poll audiences in SABC news and current affairs, the SABC also expresses concern that its websites are not interactive enough. [53] In fact, very few sites provide the opportunity for audience discussion of topical issues. SAFM has a discussion forum on its site, but at the time of writing (August 2009) it was empty save for a topic on the elections (which did not contain any discussion).

The SABC is implementing plans around interactive dot mobi sites, which has led to Goodhope FM launching a site (Goodhopefm.mobi). According to Richard Waghorn, the stations already promote interaction between themselves and audiences, but he feels "there is still too much emphasis on old-media ways of engaging with stations", such as through phone-ins and SMS.[54] Stations are now considering ways of drawing on user-generated content with new media

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[50] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[51] Personal correspondence with Izak Minnaar, 21 August 2009.
[52] Personal correspondence with Izak Minnaar, 21 August 2009.
[53] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[54] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.

tools, thereby encouraging the expression of opinions on topical issues. In fact – he argues – the SABC needs to encourage shows based entirely on user-generated content.

SABC News has been developing a model for how the corporation can use television and radio, as well as a mobile platform, and then drive people from one to the other.[55] In terms of this model, the division will encourage audiences to send SMSs, or to phone in. Once they have done so, they will be sent a question about whether they want to receive feedback from a programme. The moment they say yes to interaction, they will become part of a database, and be offered related content on cell-phone, or they can interact through a mobile platform with the programme.

To this end, the SABC has piloted a joint mobile tool with Vodacom called Mo-B. One of the first Mo-B initiatives was in an interactive mobile solution using SMS, mms, and mobi sites, and was called 'In Live'. This was used in some election debates to encourage people to simulate how they would vote for political parties. The voting results appeared in real-time on the television screen. The SABC also staged an election game show in conjunction with the Independent Electoral Commission called Quiz Me, where some content was integrated on dot mobi sites, and audiences were encouraged to answer questions as part of voter education.

The intention of 'In Live' was to ensure that once audience members participated, they would be sent an SMS, and directed to the mobile site where they could further be pointed to social networking sites or be signed up to receive updates via Twitter on similar content. Radio and television reporters would then be used to produce mobi content. Users, such as citizen journalists, or journalism students, would also be invited to create dot mobi content. However, 'In Live' has not been fully implemented beyond this initial experimental stage, as there were some internal challenges around decision-making. SABC News is waiting for another major national event to pursue these experiments further.[56]

Richard Waghorn acknowledges that there is no content strategy for new media usage to attract youth audiences, and that the SABC needs to develop one.[57]

3.6 The SABC's Digital Migration planning
South Africa's terrestrial television stations, namely SABC and e.tv and M-net, are all being migrated onto DTT. Trials for DTT began in November 2008 in some areas, when the national signal distributor Sentech turned the digital signal on. It is anticipated that there will be a three-year dual illumination period, during which audiences will be expected to purchase set-top boxes, and the analogue signal will be switched off in November 2011. Government subsidies for these boxes will be available for low income earners, although these subsidies cover only 70% of the cost of the box, which is expected to retail for around R700.

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[55] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.
[56] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009..
[57] Interview with SABC's Chief Technology Officer, Richard Waghorn, Radiopark, 21 July 2009.

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The SABC's initial intention was to have its trial completed in the second half of 2009, but there have been numerous hold-ups, including the finalisation of Icasa's DTT regulations, as well as the regulator's final frequency plan. Nine channels and 19 radio stations are being tested as part of the DTT trials (da Silva 2009).

Most immediately, SABC News International (if it continues) would become available to South African audiences on digital terrestrial services. There has been some discussion about developing new products for digital terrestrial, but fixed plans still have to emerge. Izak Minnaar hopes that all radio stations could be made available on digital terrestrial platforms, which would go some way to addressing the gaps in coverage in rural areas. An estimated 10% of the country is not covered for people who speak languages which are indigenous to that particular area.[58]

Since the start of the trials, Icasa's digital television regulations have been finalised, in terms of which three Multiplexes of eight channels each have been allocated. This approach marks a departure from the past, as broadcasters have been allocated channel capacities rather than single frequencies. The approach is meant to encourage more efficient use of the spectrum. The first Multiplex has been assigned to SABC, with 10% having been set aside for Trinity Broadcasting Network. Sixty percent of the second Multiplex has been allocated to e.tv, while a large chunk of the third Multiplex has been allotted to M-Net, according to Icasa's Sekgoela Sekgoela.

Concerns have been expressed about the extent to which Icasa's DTT regulations protect public interest values, such as media diversity and local content. In terms of the regulations, the Multiplex assigned to the SABC will be subject to a public value test, which means that the authorisation of public channels should involve a public process. According to Media Monitoring Africa, the concept of media diversity is not adequately catered for in the regulations, as only the public service channels of the SABC are meant to comply. This requirement is being contested by the MMA on the grounds that *all* broadcasters should comply with the public value test (MMA 2009). Also, Icasa has the discretion to pursue a public process, rather than being compelled to (Icasa 2009). New conditionalities on digital services – such as conditions in which a receiver (for instance, not paying the TV licence) can be cut off – are also not spelt out (Berger 2009).

Icasa's Digital Migration regulations have also put paid to the hope that radio broadcasting would be allowed on the Multiplexes, which represents a missed opportunity to address SABC radio's language coverage problems. This decision reduces the potential for TV sets to serve as radio devices, at the very time as it is likely that many of the TV channels on the multiplex will lie dormant due to the expense of launching them. Icasa says a different dispensation will be developed for digital radio at some future point. Whether that will be restricted to a scenario in which citizens will have to buy new digital radio sets, or whether it could include them being able to receive audio via digitally enabled TV sets remains to be seen.

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[58] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.

4. Other players

This section does not provide a comprehensive overview of other players active in the multimedia landscape. Rather it provides two examples of other players who are now implementing plans to offer content on a converged basis: MultiChoice and Vodacom. [59]

4.1 MultiChoice and Vodacom's platforms

MultiChoice operates across five platforms, direct to home, broadband (including web television and closed network Internet protocol television), mobile (3G and DVB-H, although Icasa is yet to award licences for this service), digital terrestrial television, and analogue, which will become obsolete within the next two years due to Digital Migration. On Digital Migration, MultiChoice is on track to meet the International Telecoms Union's deadline of 2015 for switchoff of the digital signal, as well as the Southern African Develop-ment Community (SADC) and South African deadlines of 2013/ 2014. MultiChoice will finalise its channels offerings and numbers once Icasa's Multiplex regulations and frequency plan are finalised. A court action against Icasa was in process in August 2009, over the number of digital channels on the Multiplex being offered to M-Net, with the complainants saying this inhibited black empowerment entry into the industry. However, M-Net plans to offer at least the same service as currently on its analogue service. [60]

Vodacom has a portal called Vodafone Live, which is a browsing service similar to browsing the Internet on a cell-phone. The pages are designed specifically for Vodafone Live. Browsing of the Vodafone Live service is free for Vodacom users, who only pay for downloaded content. Users can also subscribe to particular services and receive alerts downloaded onto their phones. The portal includes content categories merged into one. These categories are as follows: music (ringtones, downloads, full music tracks, latest music news, wallpapers, album of the week, and featured artists), mobile television and video on demand, games, infotainment (text- and picture-based), adult content and sport. Vodafone Live is also accessible to people who do not have fixed Internet access, so information can be disseminated to people who would otherwise not be reachable in any other digital context.

4.2 Degree of cross-platform collaboration and convergence, and content management system

Cross-platform collaboration is evident in both MultiChoice's and Vodacom's offerings. However, according to MultiChoice, its ability to offer converged services is constrained by broadband (supply-side) and consumer (demand-side) limitations. In spite of this problem, the company is seeing an increasing demand for converged services. The cost of broadband presents a significant obstacle to the com-pany's plans. Mobile broadcast-ing plans are in process. [61]

MultiChoice is attempting to address the youth market through a number of third-party channels that target the children and teenage segments, as well as various M-Net brands that

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[59] It should be noted that repeated attempts were made over a four week period to secure an interview with e.tv, but to no avail.
[60] Interview with Jackie Rakitla, General Manager for Corporate Affairs of MultiChoice, 30 July 2009.
[61] Interview with Jackie Rakitla, General Manager for Corporate Affairs of MultiChoice, 30 July 2009.

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produce and aggregate youth-orientated channels. The recently-launched Vuzu caters specifically for the youth segment and focuses heavily on Web 2.0 services, and has a presence on Facebook and Twitter. According to MultiChoice, international and local trends suggest that the youth market has an appetite for on-demand service delivery and consumption. MultiChoice offers a web-TV

MultiChoice exploits cross-platform collaboration, and uses ICT for the youth market in particular.

catch-up service on DStv. Each of MultiChoice's operating units use specific custom-built CMSs for their platforms. Many of these systems are built by technology sister companies within the Naspers Group. These CMS's are continuously upgraded as the platform requirements mature. [62]

For Vodacom's video television and video-on-demand services, Vodacom has a licencing arrangement with DStv, and with some other suppliers, for example Playboy, to provide it with content. Vodacom also has a content deal with e.tv, but says it has been unable to conclude a deal with the SABC. The company has no intention to produce content, as it is prohibitively expensive to do so. Also, it argues, the in-built limitations of cell-phones make it difficult to provide in-depth educational and documentary material. Vodacom has a deal with Media 24 and iTouch, through which Vodacom customers can access Independent Online, so Vodacom does offer a news service. Vodacom is also launching a free news service called News For You, and news will be sourced from content providers such as AOL. The service will be launched in 2009.

4.3 Audience profile and participation
Historically the bulk of MultiChoice's subscribers have been from a high LSM demographic, consuming the premium offering. However, over the last few years, the mid-tier market has responded overwhelm-ingly to the "Compact" product, and MultiChoice estimates that the biggest growth in its subscriber market will be in this segment. In addition MultiChoice offers a range of products to cater for all remaining segments, such as Select 1, Select 2 and Easyview. MultiChoice integrates audience participation services into a number of high profile programmes like Big Brother, Carte Blanche, and Idols. In addition, there is a strong audience participation in the DStv forums, especially around their technologies and content. The company has recently launched DStvi, which is an audience participation panel via the set-top box and which provides insight into viewing preferences and patterns. [63]

Vodacom is developing a youth proposition. However, there does not seem to be much of a demand for news specifically geared towards youth. The greatest demand from the youth is for infotainment.

5. Changing conceptions of public service and scenarios for 2015:
It is clear from the above that the concept of public service broadcasting is changing and facing challenges. The old concept of one-to-many communication is being challenged by

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[62] Interview with Jackie Rakitla, General Manager for Corporate Affairs of MultiChoice, 30 July 2009.
[63] Interview with Jackie Rakitla, General Manager for Corporate Affairs of MultiChoice, 30 July 2009.

the incorporation of new media into the operations of public broadcasters. At the very least, public broadcasters are challenged to increase their interactive media activity, extending their provision of public interest content (and especially news) into also becoming public-interest content and comm-unication agencies. The SABC is clearly grappling with ways in which to do so. South Africans are also being challenged to think afresh about the delivery of the public service mandate, in the light of a discussion paper on the future of public broadcasting released by the Department of Commun-ications in July 2009 (Department of Communications 2009). Public interest news and current affairs have distinctive features that community and commercial news may well not have if left to their own devices. An uncontroversial feature is universality (or universal accessibility and appeal), and another is giving a voice to marginalised groups. Public interest news should also be available in the spread of South African languages: a difficult requirement as the SABC's forays into on-line content in indigenous languages shows. A more controversial proposition is that the news values of public service media should differ from those of commercial news media. Drawing on the best traditions of 'development journalism', it can (and should) be argued that public service news and current affairs should have grassroots focus, as Rhodes University Professor Fackson Banda points out. There is an important place in the media landscape for news infused by public interest values, and which especially engages with youth interests.

Opinions vary on whether the public service news mandate in South Africa should be spread across a network of channels and content creators. According to Izak Minnaar, Public Broadcast Services (PBS) content should not be limited topublic broadcasters, but the focus should rather be to promote PBS content, irrespective of who produces it. He argues that because spectrum scarcity is not really a ground for regulation in a digital environment, the rationale for regulation may need to be re-thought. Also, with all the new platforms, newspapers or broadcasters in South Africa should not be conceptualised as stand-alone sectors anymore. Minnaar argues: "If we need regulation, it should move away from platform regulation and towards content regulation. It should move away from regulation as a punitive measure and more towards an incentivised scheme. The implication of what I am saying is that the incentive for the production of PBS content should be spread across all media." [64]

Speaking more generally, Richard Waghorn feels there is a need for a strong public broadcaster: "Frankly, I don't think that other channels would want to do PBS content." But he acknowledges that the SABC has not fully identified its own distinctive niche yet. In view of the changing nature of public service media, the SABC faces a number of (not mutually exclusive) scenarios in the next few years.

5.1 Public broadcaster:
One possible scenario is that the SABC continues along its current path of linear broadcasting, with interactive aspects built into its services, including news and current affairs. But the underlying concept of public broadcasting remains essentially unchanged. This scenario may mean that it misses out on potential opportunities for creative synergies in the creation and distribution of news and current affairs content.

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[64] Interview with Izak Minnaar, Head of News Research at the SABC, but speaking in his personal capacity, SABC Television Centre, 21 July 2009.

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5.2 Public interest content provider (platform-independent)

Other scenarios include the SABC being reconceptualised as a provider of public interest content services (also sometimes called a 'public service publisher'). Here, the SABC would be responsible for content creation across a multiplicity of platforms. Also, given that so much web and mobile phone content is infotainment, a stepped-up role by the SABC in providing news and current affairs on these platforms could be an important advance. To do all this would mean that the SABC expands its in-house production capacity, and/or utilises external content providers, so as to fully supply the new platforms. Retraining existing staff to report for multiple platforms can also contribute to a cost-effective strategy to move ahead.

In this scenario, the SABC could be a facilitator of public interest content produced by itself and a range of service providers. To this end, the SABC would need to enter into a range of production and distribution agreements with content creators and distributors. This will require strong contract management skills and the will to take editorial risks. In this new model, the SABC would, for instance, act as a facilitator and navigator of on-line content. It would also need to review its existing copyright arrangements, and consider moving onto an open rights model. If the broadcaster is able to surmount its current challenges, then it could lead the field in the *assembling* public service content, even if it does not *produce* all this content.

But this scenario may also lead to other public interest content providers arguing that they should have access to the already-meagre pot of funding for such content, including the licence fee. How this evolves depends on the regulator, and whether it is able to develop and implement licence conditions across a network of providers. It would need to find ways of recognising the contribution of unregulated content to public interest content targets, such as online content. The weak nature of public interest obligations in the DTT regulations raises questions about whether Icasa will, in fact, secure public interest objectives sufficiently in the multi-channel environment.

5.3 Public interest communications agency

This scenario is not in contradiction to those above, but a possible extension of them. It refers to whether the SABC also opens up significant opportunities for audience-generated content, including citizen journalism and peer-to-peer communication and discussion around the content it carries. In this way, the corporation would evolve to take on some functions akin to community media. What is significant from a public interest perspective is the extent to which there are appropriate and distinctive policy parameters for all this, and the extent to which the set-up enables participation by marginalised communities in and around news and current affairs. While the SABC's call-in and SMS facilities are now based on the user paying the costs, the universal service and access mandate of public communic-ations would entail SABC providing phone numbers that are toll-free to citizens. In turn, that would have implications for a business model appropriate to the mission.

5.4 Marginalisation and fragmentation scenario

Failure to protect the space for public interest content and communications may lead to another scenario, namely marginalisation of this content and of the role that the SABC should be playing. A significant challenge that all incumbent broadcasters face is audience fragmentation, leading to decreasing access to adspend. Costs may rise as a result, which may

make it more difficult for broadcasters to survive. Public service broadcasters are vulnerable to marginalisation, as middle and upper income brackets migrate to other channels.

The SABC is particularly susceptible to this problem, as it relies mainly on advertising, while having to deliver on significant public service obligations. The SABC is also undergoing a major financial crisis, and which has led to a request for a government 'bailout'. In spite of the fact that, as far back as 2002, the ruling African National Congress (ANC) decided at its national conference that the SABC should receive public funding for its public service obligations, no significant public funding has been forthcoming. The projected shortfall in national revenues in the wake of the global recession makes this prospect even more difficult to achieve. In the absence of a viable funding model, digitisation may lead to channels becoming commercialised and struggling to meet their public interest mandates to the full.

If the multichannel environment as a whole is regulated for public service obligations, and the SABC as a discrete entity is gradually dismantled, then another danger arises. Rising costs may lead to broadcasters arguing that they cannot afford public service obligations, including news and current affairs, which in turn may lead to the relaxation of regulatory requirements. Incrementally, public interest content and communications may land up falling between the cracks without any particular institutional champion. At the same time as all this, there should not be an undue emphasis on digital media at the expense of traditional linear media, as this may undermine what remain extremely important platforms at least during the TV Digital Migration period if not longer.

Another possible, and related scenario, is the balkanisation of audiences. Audience fragmentation will also place the concept of public broadcasting as a public sphere under pressure. The higher LSMs already have access to a multiplicity of news and current affairs services, and their options look set to expand. The LSM group where there has been highest growth recently – namely LSM 4-7 – could be lured away to other news and current affairs services as more affordable opportunities open up on platforms like the DStv platform.
There is a real possibility that the lowest LSMs will have no other choice but to access SABC services. If this sort of balkanisation happens, then South Africans will lack common platforms for deliberative debate. Pressing social problems may not find their way onto a nationally-shared agenda, which in turn may contribute to social instability.

It is also important not to plan scenarios based on social demographics from wealthier countries. In 2007, the UK regulator Ofcom proposed that the BBC be reconceptualised as a public service publisher; one of the main reasons it advanced was that youth consumption of media was moving away from linear broadcasting and towards interactive media. The regulator argued that if the BBC were to survive in the digital age, it would need to recognise these shifts before audiences moved away from the broadcaster in massive numbers.

While these arguments could hold for the media consumption patterns of middle class South African youth, it is doubtful whether they apply in the same way for working class youth, many of whom are neither in school, tertiary education or gainful employment. If public broadcasting is to be reconceptualised in South Africa, it will need to be done with the media

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consumption patterns of all youth in mind, which implies foregrounding those aspects of the public mandate that can be delivered on mobile platforms. The SABC should have a particular obligation to ensure that public interest interactive services are provided to such users, which would distinguish them from other social media initiatives that may have an inherent middle class bias especially in terms of the costs of participation. At present, the cost of SMS is a deterrent to participation by poorer citizens, even assuming they have access to a cell-phone. An MMS is completely out of the picture.

5.5 Regression
An additional scenario is that SABC (and e.tv) audiences may shrink in the short term, as the uptake of set-top boxes may take longer than planned, especially given that poor households are not fully subsidised, which may lead to affordability problems. Thus a challenge the SABC especially faces is to develop more content of interest and relevance to South African audiences, to justify their outlay on the set-top boxes. Few people will be enticed to incur this expense in order to receive existing channels.

Public broadcasting in South Africa faces significant opportunities and threats in the next five years. It remains to be seen whether the opportune-ities can be harnessed and the threats avoided. But what is clear is that public broadcasting cannot afford to remain the way it is at the moment.

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Conclusion: Looking forward
By Guy Berger

1. Introduction

This chapter assesses the general patterns present in the preceding pages, and in the light of other information. It extracts key trends from the country studies, and sets them out in terms of technology, the wider environment, and future prospects. Moving onto solutions, there is a special appeal to journalists to tell the digital story, and in that way to help catalyse more coherence in society at large. Finally, the chapter focuses on the values of "public service broadcasting" as the guiding star for re-orientating state-owned broadcasters in regard to the revolution unfolding around us.

2. Trends

This report shows that digital developments raise rather complex issues, whether in the UK or in Southern Africa. It is therefore hardly surprising to find that things are uncertain and incomplete, and that there is a great deal of uneven development. In Digital Migration, TV may lead in front of radio, but that doesn't mean it's advancing much at all! Meantime, a parallel universe is emerging, with newspapers venturing into audio-visual communication online, and in Zambia's case with plans by *The Post* to live-stream video of parliamentary proceedings. Telecoms companies and other non-media institutions are also in on the act of distributing digital content, but in diverse and very different ways. In short, the digitisation picture, including Digital Migration, is pretty messy. While it would be unrealistic to expect neat and elaborated holistic plans, things don't have to be quite so all-over-the-place.

That's where this report comes in. By showing the fractured situation, it also seeks to capture the totality of this. Instead of fragments and silos, shared trends and common issues become visible. These can be examined under the three general areas in terms of which the country chapters are structured: *technology, environment*, and *the future.*

In terms of *technology*, it is immediately clear that there is a patchwork of infrastructures in the offing. Analogue transmission is already being complemented by digital in South Africa, and the same is in the pipeline for Namibia, Zambia, and Mozambique – probably in that order. Radio channels still operate mainly on FM. It is however being listened to in Mozambique on cell-phones that double up as portable radios, and some radio channels are distributed to TV sets on DStv. Expectations are that analogue transmission equipment is on its last legs in several countries. Meanwhile, satellite relay for terrestrial on-transmission helps broadcasting to reach rural areas in Zambia and Mozambique, and satellite combined with WiMAX is one ISP model in Zambia. Fibre optic cables are linking Mozambique's regional capitals, while cell-phone companies are promoting 3G and, in South Africa, also experiment-ing with digital

broadcasting to the handheld. SMS seems to be king of interaction, but social networking is being explored in some cases.

In the realm of production, media institutions are increasingly digitised, although there is a divide between private players having modern CMSs and the absence thereof in state and especially commun-ity media. Elite and urban audiences are consuming pay options from digital platforms, and taking advantage of participation. There seems to be very little in the way of public literacy efforts about the changes taking place.

As regards the *wider environment* that impacts on digitisation, there is a disconnect between policy, law and regulation. In Mozambique, things don't quite add up between two regulatory bodies; Zambia and Mozambique suffer from the lack of converged and autonomous regulation. Namibia has several relevant policies in place, but still not yet an overall approach to Digital Migration. There, and in Mozambique and Zambia, radio operators are in the dark about whether the migration applies to them. South African regulation is leaving radio till last – and is also becoming entangled in court action over the allocation of Multiplex TV channels. In the same country, specification of public interest content on digital TV Multiplexes is vague, and the issue is not yet even on the table in Mozambique, Namibia and Zambia.

Economics are at work in the environment, with the recession reducing the likelihood of state funding for both public interest digital broadcasting – and for Internet roll-out. But partnerships between cell-phone companies and media institutions are unfolding across the region. On the other hand, universal access is not being extended to participatory possibilities by the public – and instead being available only to those citizens able to pay – in Zambia at premium rates. There is a spatial dimension to this as well, with a divide emerging between urbanites contributing to content and rural people remaining as purely recipients of service.
The *future developments* suggest that commercialisation forces are also a factor in plans by cellphone companies to partner with broadcasters. In the case of South Africa's Vodacom, the company also aims to become a vehicle for advertising. This means additional competition for broadcasters dependent on these revenues. On the upside, commercialisation in Zambia seems to have helped keep partisan politics out of partnerships between state-owned telecoms and independent media.

State-owned broadcasters more than any other player have to wrestle with unfolding audience fragmentation and not just because of the economic implications. The growth of many publics with diverse content and communication interests can complement the role of public broadcasters offering services to certain niche groups, but it also more than complicates the mandate of creating a common public sphere – and even of establishing what constitutes the "public interest".

Looking to future developments also raises the issue of youth and public interest communications. While many youth take eagerly to participatory communication, others are victims of a form of digital-participation divide due to poverty. However, the future suggests that as urban middle-income youth come of age, they will increasingly expect nothing less than choice and interactivity. Whether they can be engaged with public interest news and current affairs, rather than other kinds of content content, is a challenge for everyone.

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Another future development relates to reduced barriers to entry. Mozambique presents an interesting case of a new entrant into the media scene, the Soico group, successfully exploiting new technology to compete.

3. Solutions

It is a common theme in this report that governments are having a major impact on the pace of digitisation – and mainly through snail-paced leadership that cascades into delays. On the other hand, it does take time to develop policy and to assemble the necessary stakeholders to ensure a successful transition. In South Africa, it took approximately two years to form the "Digital Dzonga" advisory group on Digital Migration, and even then there are still gaps in representation by the telecoms and ISP sectors. Several of the countries under study are lagging behind Botswana and Malawi in setting up task forces to develop policies and systems. The ZNBC has developed an internal strategy. Task groups are being assembled in Mozambique and the same will happen when Namibia completes its legislation. It is also a positive development that the Communication Regulators Association of Southern Africa seems to be taking up the challenge with some seriousness. All member states of the Southern African Develop-ment Community have also agreed that December 2013 should be the deadline for switch over, which is 18 months ahead of the International Telecomm-unications Union global deadline.

Much as governments have ultimate responsibility to prepare for and oversee developments, it would also be wrong to only point the finger at them. Industry and civil society groups have also been slow to develop a coherent and holistic approach. Put yourself in the position of a low-income household. Even if you knew that in five years time you will need a set-top box to watch TV programmes, would you choose to invest scarce funds in this device – or in an upgraded cell-phone with internet access?

For its part, the media has also not done justice to the emerging story. Many journalists have lacked sufficient understanding of the story. Wrong information is put out, such as equating digital TV and High Definition television, and thereby confusing consumers as to what it will take to watch TV in the future. Further, reportage has been on fragments of the big picture, with very little in the way of seeking to add things up. For example, when discussing push-driven digital broadcasting, the alternative of demand-driven viewership via Internet or 3G tends to get left out.

However, if journalists, using all media platforms, can begin to comprehend and communicate the complexity of digitisation, the possibility then exists that such understanding can be spread to other sectors. That means more and better public interest news and current affairs on this topic. And if journalists do really "get it" about the historical transition to an all-digital communications system, they will also facilitate interactive communication on the topic as well. In a sense, the digital revolution, if it is to be popular, participative and powerful, starts in the newsroom.

4. Summing up

Digital communications technology does many new things. Its spread means that it is no longer a case of a tiny minority of professionals and politicians having a monopoly on mass communication. Implicit in the observations of this report, is the recognition that – amongst other things – digitisation also disrupts old boundaries between inter-personal and mass communication. What used to be the subject of, or product of, communication between a few individuals, can increasingly be put into the public sphere. Much of this content remains personal in quality, despite it being public in availability. But there is also much that is of public interest. In some ways, this therefore threatens those institutions supposed to be specialising in public interest information. In other ways, it can help them not only reinforce this mission, but to also take a step towards expanding their role into becoming wider public interest content and commun-ications agencies. They can, in short, be the motive force that pulls personal conversations into focussing on journalism that is of common public interest.

That image of leading the transformation of mass communication is, however, just one of the scenarios outlined in this report. The others point to lesser roles, even including extinction. It should be noted that scenarios are not predictions of the future, but attempts to highlight a range of possible options. They help guide action in one or other direction.

The complication is that digitisation and all that comes with it can deal a surprise to even the best-considered scenario possibilities. Who would have thought that a search engine company (Google) could become such an effective player in the advertising arena? Or that newspaper newsrooms would start hiring video-capable staffers, or that some cell-phone companies would move into distributing content? Could anyone have guessed that a company like Twitter could attract and burn millions of dollars of investment without even a proper business plan about how it intends to make money?

In the face of these kinds of developments, it is tempting to throw up one's hands and take a come-what-may approach. That's preferable to the illusion of controlling and managing the process. At the same time, between these two extremes of paralysis and over-planning, there is a broad direction that can be identified and pursued. We may not know exactly where we are going, but – as this Report seeks to do – we can look at where we are and what's immediately ahead. More fundamentally, however, there's worth in remembering from whence we come. In other words, while looking at the present and near-present, and keeping an eye on what future scenarios we can imagine, we can hold onto our values. In the context of public broadcasting, these values are – in a nutshell – to focus mass communications on deepening democracy and development.

These public interest values remain all the more valid in a time when the historical *informational* "service" model is being expanded to also function as a public interest *communicational* mode. Keeping these ideals aloft helps state-owned broadcasters steer a course between delivering government-interest and commercial-interest content. They help to define the meaning of universal access in the face of financial pressures and socio-economic divides. They empower people to see the big picture and to bring concerted action to bear on it.

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In sum, they help us reinvent "public service broadcasting" in a fashion appropriate to its contemporary possibilities. Roll on digitisation in Southern Africa – and the transformation of at least some state-owned broadcasters to become leaders in this process.

Appendix 1:
Public Broadcasting in Southern Africa Beyond Protocols and Rhetoric. A Review.
By Libby Loyd

Introduction

The purpose of this input paper is to promote discussion on public broadcasting and broadcasting policy and regulation in Southern Africa. As such it raises questions rather than even attempts to provide solutions.

Any meaningful debate on broadcasting in the region inevitably has not only to scrutinise the possible reasons for the lack of progress in transforming state broadcasters into services responsive to the needs of citizens (rather than governments and/or advertisers), but also question whether or not this ideal is even feasible considering, for example, political, economic and human resource constraints.

Any meaningful discussion on public broadcasting inevitably also has to consider the impact of a converged and digital future - and whether or not traditional concepts of PBS services will become more or less relevant over the next decade. The need for individuals and communities to have access to information in order to enable them to participate meaningfully in society is a given. More and more emphasis is also being placed internationally on the importance of facilitating communication between citizens and from the public to authorities and centres of power. Public broadcasting has been seen for a range of reasons as the most appropriate medium for achieving this. However, given the possibilities promised by introduction of new technologies, it is necessary to question both how broadcasters can be empowered to exploit this potential to better meet public mandates and even the presumption that traditional models of public broadcasting will continue to be the only and/or best mechanism for ensuring access by all to compelling content.

It is necessary again to emphasise that this paper does not even attempt to provide answers to questions, but rather raises them in order to hopefully provoke meaningful discussion. It further does not detail individual country experiences, but rather presumes knowledge by the readers and looks broadly at the issues facing broadcasting in the region. At times, the South African example is highlighted – not only because of the writer's familiarity with the broadcasting system in this country but also as for many years the South African model has been touted as proof that transformation from state to public broadcasting is possible. Given the continued commercialisation of the South African Broadcasting Corporation (SABC) and recent evidence of party political interference with the governance and editorial independence of the

broadcaster, alongside apparent weaknesses in the regulatory and policy-making structures in the country, the success and suitability of the model is questionable.[65]

Status

As suggested in the introduction, this section does not provide details of individual country situations, but rather briefly (and inevitably simplistically) describes general trends.

There have been many reports on the history of broadcasting in the region and the continued control by liberation movements of radio and television services post colonialism in the name of 'national interest/nation building/development'. The 1990s promised a change with the apparent move to multi party democracy in many countries.

Media advocacy and civil society groups took this opportunity to begin actively lobbying for freedom of the airwaves, and calling for:

- The transformation of state institutions into public entities
- The establishment of independent broadcasting regulators responsible for regulating the industry within parameters set by government policy
- Licensing of commercial and community stations and channels.
- The removal of old colonial laws that inhibited freedom of expression.

Media development organisations (including the FES) played a critical role in supporting these movements with financial and intellectual resources. Support was given, amongst other things, to:

- Advocacy organisations through technical and financial support.
- Governments to assist in developing appropriate models and frameworks and build understanding of broadcasting policy and regulation.
- Training institutions to assist in developing editorial skills.
- Public broadcasters to facilitate their transformation into public entities.
- Regional bodies to assist in developing standards and protocols supporting liberalisation of the airwaves.

Impetus was given to the calls for democratisation of the media when South Africa - even before the first democratic elections - announced its intention to transform the state broadcaster into a service with a publicly nominated Board and establish a constitutionally protected regulator

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[65] The situation is complex and is related to the political situation in the country. Essentially, in 2007 a battle for leadership of the ruling ANC emerged. Shortly before the national congress of the party, Parliament recommended members to the public broadcaster's board. As the ANC has an overwhelming majority in Parliament, the candidates proposed by the ANC were put forward for appointment by the then President Thabo Mbeki. However, shortly after the parliamentary process, ANC MPs leaked stories to the media stating that they had been forced to recommend certain individuals by members of a particular faction in the party. At the party's congress Mbeki lost the presidency to Jacob Zuma. The Board members were then accused of supporting the ousted faction of the party. MPs (allegedly eager to prove loyalty to the new leadership) have subsequently passed motions of no confidence in the Board and drafted a Bill giving Parliament the power to disband the entire board. The Bill has been sent back by the current President to Parliament due to concerns about the constitutionality of these provisions.

for the sector. This assisted in countering suggestions that such freedoms were Western concepts ill suited to developing countries' needs.

Initially at least there were many reasons for euphoria and a sense of achievement. With ongoing support from media development organisations, activists from across the region – together with development organisations – were instrumental in crafting model laws and policies for broadcasting and ensuring the development of regional and continental protocols and instruments reinforcing the need for transformation of radio and television and freedom of expression for all citizens. In line with this, many governments, in response to pressure by both country specific advocacy organisations and regional institutions, appeared to be open to beginning the process of re-regulating broadcasting and opening the airwaves.

However, since the initial impetus things have stagnated (along with the general democrtisation of societies).

Whilst many governments in the region (and institutions themselves) have proudly adopted the terminology of freedom of expression, declaring that they have "liberalised" broadcasting and dubbing their national broadcasting services "public" stations and channels, there are few (if any) consistent examples of compelling public service programming in the region. Even in many of those countries which might appear on paper to technically meet regional and continental standards, there has been little progress beyond the rhetoric of freedom. In other instances, programming responsive to public needs has been marginalised by commercial imperatives imposed by advertisers.

As regards *public broadcasting*, whilst in a country such as Zimbabwe the broadcaster continues to be unabashedly a state institution, in others, the term "public broadcaster" masks continued control by a Minister or government department through appointment of boards and/or key staff members with allegiances to the ruling party rather than a commitment to meeting listeners and viewers needs. In others "independence" from government has in practice been reduced to limiting of public subsidies and the inevitable focus therefore on cheap content that attracts advertising.

South Africa and the public broadcaster, the SABC, have long been touted as a model for successful transformation, but in reality the SABC has continued to rely predominantly on commercial funding[66] and is thus forced to favour lucrative markets (rather than the majority of people) during prime time broadcasting. This results in an unofficial privatisation of the broadcaster.

Alongside this (and despite the fact that the government only provides an average of about two per cent of its funding), recent political changes in the country have uncovered instances of direct interference by members of the ruling party in appointment of the Board of the institution.[67] The organisation's Articles of Association moreover give the Minister of Communications the power to veto recommendations by the Board of appointment of executives.

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[66] According to the SABC's 2007/2008 annual report, 78% of its income was from advertising.
[67] See footnote 1

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By law the broadcaster is accountable to Parliament rather than a Minister, however this has not protected the broadcaster from political party influence. The ruling party dominates Parliament, and, for example, in recent hearings to account on spending, MPs focused on the Corporation's alleged editorial bias towards a breakaway political party rather than its performance against its legislative mandate.

Independent regulation of broadcasting is key to transformation of the system. In many countries, however, the opening up of the airwaves has been controlled by Ministries or by institutions firmly under the control of a Minister. Too often, where private broadcasters have been licensed, regulators/institutions responsible for licensing have been accused of cronyism and providing licences to the rich and powerful and/or friends of politicians. Pluralism has not necessarily meant diversity but rather resulted in a plethora of similar sounding stations and/or channels focusing on cheap foreign content and formats.

Even in South Africa, where the regulatory policies provide for a public broadcaster as well as community and commercial services, and the law emphasises diversity of ownership and content, licensing of new operators appears to have come to a halt in recent years and the regulator (the Independent Communications Authority of South Africa) has been accused of not having the financial resources or necessary expertise to monitor compliance with licence conditions. Thus, for example, though there are over 100 licensed community radio stations[68], many of these have been described as jukeboxes run by would-be deejays rather than services providing a platform for the airing of community issues. There has however been some success in this country. The licensing of a commercial television station with strict licence conditions on production of news and current affairs in the late 1990's has, for example, provided at least some alternative news sources.

There are other examples in the region of radio stations that do focus on news (rather than just music) however 'public' broadcasters generally still monopolise the airwaves with commercial and private services often having restricted coverage. The majority of people in the region therefore do still not have access to insightful and diverse news and information.
Freedom of the airwaves furthermore continues to be subverted by the imposition of old colonial laws focused on preventing freedom of xpression and in some instances inhibiting criticism of the state.

Obstacles
The above section paints a gloomy picture of progress in meeting the ideals articulated in the 1990's that motivated civil society and development organisations to mobilise around the fight for freedom of the airwaves. It purposely focuses on the pessimistic as it is important to acknowledge challenges in order to evaluate progress and refine strategies to facilitate access by citizens to vibrant content.

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[68] Defined in law as non-profit entities owned and controlled by the community broadcast to

It is equally critical to try and identify the obstacles and factors that have lead to this stagnation of transformation of the airwaves. This section attempts to at least begin to outline some of these in order hopefully to stimulate discussion on this.
These include:

• **Absence of political will:**
Ruling parties are inevitably reluctant to hand over editorial control of national broadcasters. The political will to meet the spirit and not only the letter of international, continental and regional agreements is predictably absent as a critical and insightful media and informed citizenry could potentially threaten governments and/or individual political leaders.

This lack of political will further manifests itself in limited or no commitment to freedom of expression or transparency – making it difficult for media advocacy organisations to engage in processes related to broadcasting. In this way, the idea of independence of broadcasting is subverted.

• **Lack of institutional will:**
People within broadcasters are themselves often reluctant to transform. Experience has shown that, whilst it is comparatively easy to put in place policies reinforcing independence, it is extremely difficult to change attitudes and practices of the leadership and staff of a broadcaster – to turn bureaucrats into journalists or defenders of editorial freedom. This difficulty in changing the culture of broadcasters can result in Board members, CEO's, news editors and/or individual journalists not only making editorial decisions based on instructions from who they deem to be their superiors, but also on what they presume politicians would consider to be in the national interest. Such practice is an anathema to insightful journalism aimed at ensuring an informed populace and exists even in institutions where editorial independence is protected in legislation. It also obviously limits the potential of public broadcasters to play a watchdog role.

Members of newly established regulators – too often chosen because of political alliances or favours rather than expertise – also appear often to lack an understanding of the concept of independence and are subject either to political pressures or a self-imposed "reluctance" to make what might be politically unpopular decisions.

• **Funding dilemmas**
Whilst endless conferences have been held and resolutions developed on the "ideal" funding model for public broadcasting in the region, these have generally defined the principles that should guide decisions on funding rather than proposed practical models. To the writer's knowledge no actual effective, viable and implementable model has been developed in any country in the region that takes into account a particular broadcaster's reality. Broadcasters are thus generally predominantly either reliant on often dwindling state subsidies or on advertising – both of which potentially negatively impact on programming and editorial decisions and do not provide for the long term security of funding essential to dynamic planning at any broadcaster.

In line with this, no specific alternatives to collect fees from the public have been defined – although in countries like South Africa there seems to be general consensus that the existing mechanisms for collecting licence fees from television viewers are not viable in the long term.[69]

Whilst resolutions from advocacy groups and regional organisations of broadcasters, as well as inter governmental agreements, all stress the need for "adequate" funding of broadcasters, it does not seem that any economic modelling has been conducted to determine the actual minimum funding requirements of any public broadcasters – ie what is the basic minimum amount required to meet their mandates.

Regulators in the region have also raised concern about their funding – though it is generally recognised adequate resourcing is an essential requirement of effective regulation.

• **Skills/knowledge/expertise shortages**
A lack of skills in a range of areas (including in governance, general management, financial management, policy making, regulation, programming, scheduling and journalism) has severely hampered progress in democratising broadcasting. The impact of this is felt at all levels – within government, the legislature, regulators and at broadcasters.

Inadequate skills at all these levels have severely impacted on the capacity within countries to craft and implement new broadcasting policies – even in instances where there might have been political will. Lack of skill amongst regulators, moreover, also potentially leads to industry capture of regulatory bodies.

• **Limited exposure to quality broadcasting**
Public broadcasters produce mundane programmes not only because of lack of funds or limited resources (human, technical etc) but also because audiences do not have a choice and often do not demand excellence as they have no experience of how broadcasting could be different.

Access to funding for quality programming could go some way towards ensuring compelling programmes and more insightful and relevant news. Ensuring a choice of services/options also assists. Unfortunately, in many countries in the region, even where competitors have been licensed, they often focus on music and commit minimal resources to news and information programmes.

The important impact of facilitating alternative quality programming cannot be underestimated. Even in the UK where the BBC has considerable support and loyalty amongst viewers and listeners, citizens in a recent national survey conducted by the regulator, the Office

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[69] An average of about 18% of the SABC's income is derived from licence fees collected by the broadcaster from television viewers. Although the law requires that viewers pay licence fees, and despite considerable efforts by the broadcaster to increase collection efficiency, Over half of the population either does not have a television licence or has defaulted on annual payments of the fee. The SABC itself has raised concern that in future collection costs might exceed the actual funds raised through this mechanism.

of Communications (Ofcom), emphasised that competition was essential to ensuring high standards in public broadcasting. [70]

These are just some of the obstacles that have hampered the realisation of a truly vibrant and relevant broadcasting system. There are undoubtedly others – some which may be generic and others which will be particular to an individual country's situation. It is critical that all obstacles and potential hindrances to freedom of the airwaves are identified and analysed in developing strategies.

As part of this, it is also necessary to consider whether or not the ideal of innovative public broadcasting relevant to viewers and listeners is achievable. Certainly if the funding conundrum is not resolved any efforts in this regard are bound to be stymied.

Digitalisation, Convergence … what does the future hold?
The future of digital broadcasting, convergence between broadcasting and telecommunications (when, for example, content will be made available over traditionally telecommunications devices) and affordable broadband poses both opportunities and threats for public and other broadcasters in Africa as well as elsewhere in the world. Traditional broadcasting in the region is certainly not recognised for its innovation, but if services want to continue to be relevant and attract audiences they will have to creatively utilise new technologies to reach all audiences and enable listeners and viewers to interact with them and each other. If they do not there is a real threat that they could be marginalised – further threatening opportunities of public funding.

New technologies have the potential to provide access by people in the region to alternative information and content – as well as opportunities for all people to create their own media (citizen journalism). They also provide opportunities for effective lobbying by activists and media advocacy groups.

The potential impacts of digital terrestrial television migration and convergence are briefly outlined below. They are not explored in depth as this would warrant a paper on its own.

Digital Terrestrial TV (DTT)
The International Telecommunications Union (ITU) has set July 2015 as the 'cut off' date for migration by countries from analogue television transmission to digital transmission. This means that analogue frequencies will not be protected by international laws following this date. So, television channels will be able to continue broadcasting in analogue after that date but could be interfered with by other users of the frequency spectrum.

The migration process is extremely expensive as it requires replacement of transmission and production equipment by broadcasters. Television viewers will also be required to purchase

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[70] The audience research survey was conducted by Ofcom as part of its review of public broadcasting in the UK to ensure the continued relevance of public broadcasting in the digital age. Information can be found in Ofcom's Second Public Service Broadcasting Review: Phase Two - Preparing for the Digital Future accessible on http://www.ofcom.org.uk/tv/psb_review/

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set top boxes (STBs) to convert the digital signal to one which can be viewed on existing televisions. The incentive to governments to convert though is based on what is called the 'digital dividend' realised through freeing up of frequencies and therefore potential income for government in allocation these.

It is difficult without more detailed research to predict the state of readiness of countries, broadcasters and governments for migration to digital terrestrial television. Most countries appear to have declared that they will migrate before 2015 and have set up task teams to assist in achieving this. Effective and efficient migration however requires, as stated, political will and resources and technical, policy and regulatory expertise.

Whilst, given the current general low penetration of television in the region (comparative to radio), the potential of digital television might seem remote for most citizens in SADC and Africa, it is important to consider possibilities this offers to broadcasting in general. Some of the opportunities and challenges are detailed below:

• Digital television offers opportunities for public broadcasters to more easily and cheaply meet public mandates through, for example, the broadcasting of multiple language tracks and services to facilitate access by viewers with disabilities (such as audio description for people that have sight problems and sub-titling for those with hearing difficulties). Resources will be need to be dedicated to this.

• Digital television allows for multiple channels to be broadcast on a single frequency. Frequency restrictions are thus reduced creating more space for diversity.

• Digital transmission allows for easy access via television to e-governance services, and potentially the internet. It facilitates more interaction from viewers and opens the potential for more transparency.

• The cost of migrating to digital transmission and broadcasting will eat into the existing limited funds available for public service programming – unless additional public funds are made available. It is unclear if contingencies have been put in place for this.

• Whilst it is expensive for existing channels to migrate, new channels will be able to be established providing for more competition. This will necessitate new regulatory frameworks to ensure that diversity becomes a key criteria in licensing. There is a danger that more channels could result in a plethora of services providing similar cheap content rather than diversity. This would not only add no value to viewer experiences but could threaten the economy of broadcasting.

• It seems unlikely that most countries will be able to subsidise the purchase of STBs by poorer people – thus negatively impacting on television penetration figures.

• One of the biggest threats faced by public and other broadcasters is audience fragmentation. It is critical that regulators are equipped to ensure that viewers have easy access to public interest programming in the digital environment. This might necessitate not only making provision for easy access to a public broadcasting service (through for example must carry

rules and placement on election programme guides), but ensuring that public service content is available through other avenues (by imposition of licence conditions and possibly providing access to funding). Viewers needs and interests must be paramount in decisions in this regard.

- **Digital Migration necessitates a review of the funding of public broadcasting.**
  o It is unlikely that adspend will increase with the introduction of new channels so public broadcasters reliant on commercial funding could face decreases in funds available.
  o Commercial digital channels will undoubtedly target wealthier audiences – further threatening the commercial base for funding of public broadcasting with the loss of viewers attractive to advertisers.
  o There need to be new ways of thinking about raising public funds. For example, Ofcom's earlier referred to review of public broadcasting has raised concerns that in the long term viewers might feel more resentful of subsidising the BBC if they no longer regularly view its programmes. The final review highlights the need also for public funds to be made available to ensure access to public interest programmes across a range of channels and platforms and not only on the BBC.[71] In the region, those countries that are at least partly subsidised through licence fees already face reluctance to pay these.

Convergence

Much has been written and predicted about the impact of convergence on people's access to knowledge and information in developing countries. Although, as with any new technology, it is take-up by consumers that determines the future success and impact of particular devices, the much reported use of SMS'ing, mobile phones and blogging in, for example, the 2008 Kenyan elections and related violence begins to indicate the power of new technologies.[72] Digital and broadband technologies undoubtedly transform the way people receive, create and use information though the real potential of these technologies still has to be uncovered in the region.

Whilst growth in access to computers has been slow in Africa, and access to the internet limited even more by high costs of broadband, new technologies and the migration to digital television potentially promise access to the internet on television sets. Although television is not as pervasive as radio in any of the region's countries, there are more television sets per 100 people than computers and these new technologies thus open the way for increasing access to the internet. The promise of cheaper broadband costs could further increase access (perhaps particularly amongst the youth) to television and radio content streamed on the net – and enable people to more easily become producers and not only consumers of media.
Perhaps more important and relevant though is the potential of mobile phones as media platforms – given the phenomenal (and oft reported on) growth in ownership of cell-phones in Africa and other developing countries. Internews Europe in a recently published paper states:

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[71] See footnote 6
[72] See for example: 'Blogs, SMS and the Kenyan Election', http://blogs.law.harvard.edu/idblog/2008/01/03/blogs-sms-and-the-kenyan-election/

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"Mobile telephony will be the world's first ubiquitous communications platform and will get there faster than anyone expected ….(It) holds unprecedented opportunity for media in developing countries to engage their core audiences more deeply, reach new audiences and provide interactive and customised news services that are both profitable and life improving..."[73]

The report highlights the continuing growth in penetration of mobile phones in the developing world – already exceeding access to television in many African countries with about 15m people who have no television at home owning a mobile phone. Although growth was initially spontaneous, the report emphasises that the mobile phone industry is now one of the best examples of a Bottom of the Pyramid business with major operators specifically targeting the poor as central to their future. Telecommunications operators, realising the huge potential are also buying up content. As the report argues, unless media organisations effectively use such new technologies to creatively reach audiences in new ways, they will lose out on audiences. It is critical that public broadcasters, development agencies and media advocacy groups explore how they can harness these new technologies to promote access to information and development, as well as increasing interaction with citizens.

What Now?
It is clear that strategies to promote access to public interest content in the region need to be refined if we are to move beyond the rhetoric of transformation to implementation. New creative ways must be developed to ensure audiences have access to a range of compelling content relevant to their particular realities. As noted in the introduction, this paper does not even attempt to make suggestions on the way forward, but rather raises some of the issues that arise. A few of these are summarised below:

• What exactly are the obstacles to progress that have hampered the bid to transform broadcasting in the region? Some of these have been listed above, but there are undoubtedly many others – some of which will be specific to individual countries. We need to scrutinise these if we are to develop dynamic and effective strategies.

• Are, for example, the existing public broadcasting models, given obstacles, the best means for ensuring viewers and listeners have access to meaningful information and programming? Or do we need to focus more broadly on other mechanisms for delivery of public content to citizens? What too are the best ways to ensure accountability to citizens? Although the principle of accountability is espoused, no practical models seem to have been developed to reinforce this.

• How can public broadcasting be funded in the region? The debates on funding for public broadcasting have to move beyond defining the principles to developing practical, viable and affordable funding models. Any discussion on such funding has to also explore ways to ensure that funds are dedicated to production of content and not just institution building and be based on thorough evaluation of the needs of broadcasters in relation to their mandates.

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[73] West, John, Internews Europe: 'The Promise of Ubiquity: Mobile as Media Platform in the Global South', 2008, accessible from http://www.internews.eu

• How also cn we ensure that universal access is achieved? New technologies allow for cheaper mechanisms for transmission and need to be explored to achieve this goal. At the same time, we must ensure that Digital Migration does not further limit access.

• How also do we deal with the lack of expertise and knowledge of policy makers, broadcasters, regulators and audiences in order to ensure implementation beyond the rhetoric? How do we ensure audiences demand more than the mundane and are actively involved in calling for change?

• What needs to be done to ensure that any new strategy considers opportunities of new technologies to not only reach audiences but also provide mechanisms for real communication between citizens? How also can existing public service media be empowered to utilise such new technologies to enhance the ways they meet mandates? How can advocacy groups be strengthened through use of such technologies?

In dealing with all these questions, and others that arise, it is critical to also focus on the importance of media literacy. Media literacy (including information on how to access content, critically process different sorts of information and protect children from harmful content) is essential in building a media environment that not only informs, educates and entertains but also enables citizens. [74]

Most important of all though is to constantly keep in mind that the fundamental underlying motive is not to consider how to save or promote public service broadcasting, but rather how to ensure citizens have access to creative, vibrant and relevant information and content.

Acknowledgements

This paper has benefited from the insights and information gleaned over some time from a range of individuals (both in conversation and from their inputs at conferences), various papers and research. The following documents were, however, directly considered in finalising the report.

African Media Development Initiative: Research Summary Report, published by the BBC World Service Trust, 2006, accessed from http://downloads.bbc.co.uk/worldservice/trust/pdf/AMDI/AMDI_summary_Report.pdf

Article 19, *Broadcasting Policy and Practice in Africa*, 2003, ISBN 1-902598-50-4

Berger, G. *Media Legislation in Africa: A comparative Legal Survey*, UNESCO, September 2007

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[74] Note that the new policy framework in the UK highlights the importance of media literacy and government has requested that the regulator evaluate its strategies to promote media literacy. The Minister responsible for the BBC in that country has also highlighted that a fourth value – that of "enabling" – needs to be added to the Reithian principles underpinning public broadcasting in that country. See: 'The media debate in the UK is unique - but the challenge of subsidising independent public interest media has urgent implications for democracy everywhere', James Deane, 24/01/2009 accessed from http://www.comminit.com/en/node/284135/bbc

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Appendix 2:
A response to Libby Lloyd's paper "Public broadcasting in Southern Africa. Beyond protocols and rhetoric. A review".

By Guy Berger

Presentation given at: "The state of (in) public broadcasting in Africa. A brainstorming discussion." Cape Town, workshop organised by Friedrich Ebert Stiftung. 18-19 February.

Lessons for media development organisations.

What Libby Lloyd's paper does is look at the depressing deficit of state-owned broadcasters in relation to an ideal type of public broadcasting, and why this is – for reasons like political will (or, rather, political "won't"), institutional inertia, lack of skills, regulatory problems, business model challenges, etc. The orientation is on what should be, and the shortfall in relation to this.

The writer's assessment is that the gap is so severe that it is clear that, however noble, the ideal remains just that – an ideal, not a reality. What this suggests is that the BBC-style model of a single big, impartial, democratically-positive, and culturally uplifting, state-owned service just does not transplant into African conditions. It suggests that we – FES, Misa, academics, SABA, regulators, parliamentary and democratic activists, entre-preneurs, and consultants - have tried and failed. So, then, it makes sense not to just keep on blindly trying, diehards refusing to accept realities.

The logic of this position then is that either you have to forget your ideals (which incidentally is something very common amongst people working in African state-owned broadcasters), OR that you acknowledge the evidence and forget about the unrealisable dreams of reforming these institutions, and so look elsewhere to achieve your ideals. Let the ruling powers preside over a discredited and diminishing institution. In the face of competition, they refuse reform, so let them then face the inevitable consequences. The spin-off of this signpost about looking elsewhere is not spelt out by Libby, but it can suggest one of two options: kill off state broadcasters by campaigning to unbundle and privatise them to several players, OR simply set aside our historical interest in the whole moribund sector as archaic, and instead begin to focus energies on alternative broadcasting sectors.

In this regard you can, instead, concentrate on building up private broadcasters (which is, to put it simplistically, the USA's approach to media develop-ment – although there is another USA tradition of audience-volunteered funding for public service stations) OR put your energies into strengthening the community broadcast sector (which, again simplistically, is a northern European strategy). By the way, the German model of decentralised public broadcasters has not been much embraced in Africa – unfortunately.

Implicit in Libby's paper is a disbelief in the viability of these alternative strategies. She argues that the licensing of private broadcasting equates to cronyism and entertainment programming, making for pluralism without diversity, while community broadcasting degenerates into "just music" and wanna-be DJs.

In short, one can only conclude that broadcasting as a whole is not conducive to public service content. Such an end point might point us to look at the private press or to citizen journalism as the preferred cost-effective strategic area to work on. Unfortunately, if one looks more closely at these areas, there are, however, several obstacles. The press has its own problems, such as over-politicisation, sensationalism especially at the tabloid level, and a business model that is under strain. Some observers might say that the press is also an urban phenomenon, but it can be responded that nevertheless its impact on public service is far greater than its immediate reach. As regards ICT, there are more serious criticisms related to the limited scale and influence of Internet-based media, and of the way that cell-phones tend to be used for private networking rather than public service mass communication.

After winding down this whole path, then, one is left to conclude that if you write off state-broadcasting, it is not as if there are other media opportunities that announce themselves as strikingly better alternatives. So where then? The churches? Political parties? What about their problems? How about the public per se – can you put your trust in "the people" to want and do public service communication, or are they incorrigibly addicted to entertainment programming and passively available to put up with propaganda?

Perhaps the whole notion of public itself proves to be a disappointment – that it turns out to be, contrary to the BBC model of public service communication – as artificial as the institutions that are supposed to serve it. Again, we are talking about what seems to be an unhappy marriage between imported notions and African realities. This is a theme stressed by writers like Francis Nyamnjoh and embraced by dismissed SABC CEO Dali Mpofu.

What then if we follow this train of thought, and look not at a public (which not insignificantly happens to be a construct related to long-established nation states), but at publics (plural)? For Nyamnjoh, this means acknowledging language communities, clans and other ethnic networks. Where does this take us – down to the level of micro-publics. If one believes in the Starfish ethics, that very small differences still matter to those affected by them, then perhaps this is a viable level at which to work. But then again, cosy networks of public communication on a small scale can be overwhelmed and even outlawed by much more powerful forces that operate in the name and scale of a wider public. You might have good service for a particular community, but its members also remain members of larger entities which suffer from dysfunctional media and thence citizenship deficits in societal terms.

Does all this mean that all alternatives boil down to much of a muchness? Does it mean that there is no real difference, when you add it all up, between (a) bashing your head against the immovable wall of state broadcasters, (b) trying to reduce the distance between journalistic ethics and actuality in the press, (c) in trying to reform the behaviour of politicians through their parties or the churches, or (c) in empowering a micro-public?

Truth to tell, it's hard to say. It depends on the political moment in a given society. It depends also on whether you want your journey to end in a secure and final destination, OR whether you are attuned to a very long historical process of rise and fall, progress and retreat, and eternal vigilance against the recurrent forces opposed to public service communication.

All this is not a very edifying or inspiring assessment. But it flows from the starting point in Libby's paper. You start with an attractive dream, and you find yourself saddled with something very far from it. Perhaps if we change the paradigm, however, we might be able to come up with an alternative.

Instead of starting with an ideal and observing the seemingly unbridgeable distance between it and actual practice, let's begin with the practice. So, for a moment, think not about what you think state-owned broadcasters (or other media) *should* be doing, but what they are doing. And, again to tweak the paradigm, let's ask not what broadcasting is doing for people's needs, but what people are doing with broadcasting.

In some ways here, I suggest a different, perhaps less depressing, picture emerges to the one painted by the idealistic starting point. While Libby's paradigm paints a picture of state-broadcasting failure, this is not necessarily the case from the vantage point of audiences. It's not all bad.

When the Zambian National Broadcasting Corporation leads its TV news with 10 straight minutes of the (late) president speaking from a podium, with images of dodgy quality and sound that is even worse, how is this taken by viewers? If they're in a pub, more than a few ignore it altogether. Those that do watch, try to make out what the hell he's saying, with only a few succeeding. And I haven't even got into what those who do get an inkling actually make of it. Maybe it reinforces an impression that he's dull but trustworthy, possibly one person feels a sense of pride, maybe it angers someone else and it provokes them to vote for the opposition. Perhaps they want to know what the leader of the opposition party is saying. Maybe they are wondering why they're being inflicted with this when surely there must be English soccer that can be watched? They're all part of the public, and they want broadcasting in their diverse interests – at present, some at least are partially served (perhaps in ways that are not obvious), even if others are not. The point is that it is not all hopeless. A contribution is made to some viewers (albeit that it could be much better).

To take another case, when a family in a rural village in Botswana gets its hands on some batteries and can crank up the radio for the first time in five weeks, what pleasure do they get from its information and entertainment? Maybe there's appreciation of hearing Tswana well-spoken or sung, perhaps there's intrigue in listening to a Gaborone group translating rap into local rhythm. Possibly there's a development information programme about an oven available that can bake six loaves of bread in one go, available from the Small Enterprise agency. Maybe an HIV programme that persuades a parent to speak to a teenager about safe-sex. Is there value for this family, yes.

Another example, it's elections in Zimbabwe in 2008. What has ZBC been doing (as distinct from what it ought to have been doing)? A lot. It's been providing not public service, but public

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disservice. It's been helping keep a bunch of corrupted people in power by constructing the crisis to rural people as being the result of British sanctions. But now there's been an evolution on the go. From originally ignoring the opposition altogether, programming then moved to a form of acknowledgment – attempted demonization. But the next step was a system whereby opposition voices could be directly heard, albeit only once government had been given a chance to respond to the point being made. Finally, there's a semblance of equitable treatment – until, of course, the Director General is fired by Mugabe's thugs. But during this temporary period, rural Zimbabweans begin hear interpretations of the crisis that point fingers at the regime rather than the Brits. So, there's a moment – often around elections – when the state-broadcaster can help democracy.

A few other brief mentions. In Uganda, where state-owned radio is eclipsed by private and community stations, there is a hugely popular format called ibimeeza – meaning live broadcasts of heated debates amongst citizens in a pub. In Zambia, where many viewers are SMSing their vote as to who should get evicted in Big Brother – you can be sure they won't easily be deprived of a right to evict politicians via elections. Are these positives? Yes.

What do all these instances suggest? First that broadcasting, and state-owned broadcasting, plays many roles – some of these being unexpected and unanticipated in terms of how they work out. On the one hand, it is too important to be left to its own devices as it were: it has significance, in the sense of setting some agendas as to what's important, having some influence in some cases, providing some sought-after services. On the other hand, it is not so important after all that it can be assumed to be a tool guaranteed to influence all those in the Zambian bar with the president on the screen. It is not easy to reduce to a simple instrument in consolidating despotism or one of building a civic culture, democratic choice or empowered knowledge. It constitutes publics – and sometimes counter-publics who respond by inverting the propaganda. For instance, instead of being citizens loyal to the government as instructed (more-or-less subtly) on some programmes, they define themselves as different and oppositional. It has potential influence, rather than certain power. In this, we can note that it is not only information, as privileged by Libby, but also entertainment and education – which has this kind of potential relevance for the democracy and development significances of state-owned broadcast-ers.

Second, what are the strategic implications of all this, from focusing on what is, rather than starting with what should be? This is not to say Libby's paper is wrong, but to approach the topic from a different direction. And this is not to dismiss standards evolved elsewhere, whether BBC or many other variants of public service broadcasting, but to suspend them for a moment. If we look at what actually exists, and not at shortfalls, we are in a position to say – aha, what practices resonate, with whom and why?

Then to do one of two things. One is to map some scenarios as to what will happen if there are no interventions to change trajectories, and to assess how good or bad that future appears to be. The other is to think of interventions in terms of building a model of public communication ideals from the ground up. These are home grown definitions of what public service means (although not necessarily in isolation of other experiences, and not through some in principle rejection of foreign definitions).

This means assessing, through mechanisms (perhaps including Ofcom type of surveys) that need to be spelled out, in relation to the various publics that are constituted in varying degrees and for variable periods, what works – and what needs work about public communications and the state-owned sector in particular, and which social agents are prepared to work towards preserving or expanding or securing public interest communications? What do people choose to watch or listen to? Where do they get involved in phone-ins or letters? Is 2010 programming appreciated, is HIV-Aids content making a difference, do political parties have serious grounds to complain about unfair coverage?

We need to identify who is prepared to work for these objectives, whether through producing quality content within the broadcasters, or by advocacy, support by keeping up with licence payments or subscription fees, entrepreneurialism, etc. Roll up the language activists, the independent producers, the HIV-Aids campaigners, the political actors, sports lovers, people with environmental passions, small businesses, parents, youth, etc. And don't forget minorities, whose interests are important but not mobilised – like many abused women for instance.

The next issue then is: how do we interpret these views? What if people say they want more educational content, but actually don't watch it or listen to it? How do we aggregate these different views into a commons – a vision of public service communications that addresses the whole as well as the parts? In this, to what extent the notion of a pluralistic balance of interests is a more realistic than claims by one communications apparatus to represent the general public interest.

And when we think realistic, let us not forget, by the way, that we meet just a month after Gateway TV went bankrupt, at a cost of more than $200m. TV Africa paved the way four years back, with a loss of $53m.

What kind of media institutional landscape, in practice, is then possible, in terms of adding up to achieving this kind of vision? That means, what regulation and governance systems, what revenue models and changing technologies and convergences, and what audience preferences can advance us just that little bit more along the path of history?

Can we start finding ways forward to building by looking at the glass being partly full? It seems to open more possibilities than we assess state-owned broadcasters as being primarily, and frustratingly, heading for empty.

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ABBREVIATIONS AND TECHNICAL TERMS

3G	Third Generation – A family of standards for mobile telecommunications, allowing among other things, fast mobile Internet access
AfriMAP	The Africa Governance, Monitoring and Advocacy Project
BBC	British Broadcasting Corporation
CAZ	Communications Authority of Zambia
CFI	Canal France International
CMS	Content Management System
CRAN	(Namibian) Communications Regulatory Authority
DTT	Digital Terrestrial Television
DVB-H	Digital Video Broadcast-Handheld
EDGE	Enhanced Data Rates for GSM Evolution – Mobile phone technology that allows improved data transmission rates
Gabinfo	Mozambique's Office of Information
GPS	Global Positioning System – Space-based global navigation satellite system, providing worldwide positioning services
GSM	Global System for Mobile communications - A digital mobile phone standard, the most popular standard in the world
HSDPA	High-Speed Downlink Packet Access - A fast protocol for mobile telephone data transmission, improving on 3G data transmission speeds
Icasa	Independent Communications Authority of South Africa
ICT	Information and communications technology
INCM	National Communications Institute of Mozambique
ISP	Internet services provider
ITU	International Telecommunications Union
LSM	Living Standards Measure
MMS	Multimedia Messaging Service
Nampa	Namibian Press Agency
NASA	National Aeronautics and Space Administration
NCC	Namibia Communications Commission
NGO	Non-Governmental Organisation
Ofcom	The UK Office of Communications
PBS	Public Broadcast Services
PSB	Public Service Broadcasting
PSM	Public Service Media
RM	Radio Mozambique

RTP	Portuguese Radio and TV
SAARF	South African Advertising Research Foundation
SABC	South African Broadcasting Corporation
SADC	Southern African Development Community
SMS	Short Message Service - text messaging in the GSM mobile communication system between mobile telephone devices
TDM	Telecomunicações de Moçambique (Mozambique Telecommunications)
TVM	Mozambique Television
TRASA	Telecommunications Regulatory Authority of Southern Africa
USA	United States of America
VSAT	Very Small Aperture Terminal - a two-way satellite ground station with a dish antenna smaller than 3 meters for data transmission, including Internet
WAP	Wireless Application Protocol
Wi-Fi	Wireless fidelity" - Certain types of wireless local area networks (WLANs)
WiMAX	Worldwide Interoperability for Microwave Access -– a wireless digital communications system
Zamtel	Zambia Telecommunications
ZESCO	Zambia Electricity Supply Corporation
ZNBC	Zambia National Broadcasting Corporation
ZNFU	Zambia National Farmers Union

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