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ORGANISATION UNDOING TAX ABUSE

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BROADCASTING DIGITAL MIGRATION: DELAYED, EXPENSIVE AND LACKING OVERSIGHT

RESEARCH REPORT

Reviewing Broadcasting Digital Migration in South Africa

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LIST OF ACRONYMS

AGSA	Auditor-General of South Africa
ASO	Analogue Switch-off
APP	Annual Performance Report
ATSC	Advanced Television Systems Committee
ATV	Amateur Television (transmitters)
BDM	Broadcasting Digital Migration
BDMP	Broadcasting Digital Migration Policy
DBAB	Digital Broadcasting Advisory Body
DCDT	Department of Communications and Digital Technologies
DDCF	Digital Development Challenge Fund
DMAC	Digital Migration Advisory Council
DMWG	Digital Migration Working Group
DoC	Department of Communications
DSO	Digital Switchover
DTPS	Department of Telecommunications and Postal Services
DTH	Direct-To-Home
DTT	Digital Terrestrial Television
DVB	Digital Video Broadcasting
DVB-T2	Digital Video Broadcasting – Second Generation Terrestrial
ECA	Electronic Communications Act 36 of 2005
EPG	Electronic Program Guide
FCC	Federal Communications Commission
FIC	Financial Intelligence Centre
FSB	Financial Services Board
FTA	Free-to-Air (television)
IBA	Independent Broadcasting Authority
ICASA	Independent Communications Authority of South Africa
ICTs	Information and Communication Technology/ies
ITU	International Telecommunications Union
NDP	National Development Plan
PC	Portfolio Committee
RRC	Regional Radiocommunications Conference

SABC	South African Broadcasting Corporation
SDG	Sustainable Development Goals
SAPO	South African Post Office
SATRA	South African Telecommunication Regulatory Authority
STB	Set-Tob Boxes
UK	United Kingdom
USA	United States of America
USAASA	Universal Service and Access Agency of South Africa
USAF	Universal Service and Access Fund
USO	Universal Service Obligations
OUTA	Organisation Undoing Tax Abuse

1. EXECUTIVE SUMMARY

Broadcasting Digital Migration (BDM) is the process of moving from an analogue to a digital television broadcast with the aim to provide new and improved broadcasting. This means that the BDM is the conversion of the old analogue television to digital television. In addition, the process of migrating digital broadcasting is intended to clear broadcasters from the radio frequency spectrum to enable the provision of mobile broadband services. For the digital migration process in South Africa to be successful, it is necessary to have a clear government policy and implementation plan. All television owning households that rely on the old analogue systems will require Set-Top Boxes (STBs) or decoders to receive digital television.

On 1 November 2008, the South African cabinet approved a digital switch on and an analogue switch off on 1 November 2011, as well as the BDM policy to guide South Africa's digital migration process (South African Government Gazette, NO. 31048, 2008). To achieve this, Independent Communications Authority of South Africa (ICASA) ordered that transmission ceases in early 2013.[1] Digital migration deadlines in South Africa are crucial for the seamless transition from analogue to digital broadcasting, ensuring a more efficient and technologically advanced broadcasting system in the country. Thus far South Africa missed its 13th deadline for turning off terrestrial analogue TV broadcasting signals in May 2023. Unfortunately, 15 years and 11 Ministers later, the switchover is nowhere near being fully digital. The Department of Communications and Digital Technologies (DCDT) is aiming for a final switch-off date of 31 March 2025.

Digital migration begins with a switch-on of broadcasting digital transmission signals and ends with the switch-off of analogue ones. Until analogue switch-off occurs, there is a period of dual illumination during which both analogue and digital services are simultaneously broadcasted. In March 2001, the Minister of Communications, Ivy Matsepe-Casaburri, appointed a Digital Broadcasting Advisory Body (DBAB) to advise the Minister on issues relevant to the introduction of digital broadcasting in South Africa. The advisory body came up with recommendations on matters of policy, legislation and matters of economic feasibility studies. In April 2005, DBAB submitted a report to the Minister. She established a Digital Migration Working Group (DMWG) led by the Department of Communications, representatives from the public and from the private broadcasting sector.

The Working Group's function was to develop recommendations and contribute towards the development of a digital migration strategy. The BDM Policy also made provision for another advisory council referred to as Digital Dzonga to monitor the implementation of and raise public awareness about

[1] ICASA, 2010. Digital Migration Regulations and Reasons Document on Digital Migration-

digital migration in South Africa. Despite the implementation of the BDM Policy, the above-mentioned deadlines were missed and the advisory council referred to as Digital Dzonga dissolved in 2010 due to conflict of interest amongst council members. Since then, the BDM process has been mired in controversy, obscured by smoke and mirrors, and delayed due to a lack of political will.

The Organisation Undoing Tax Abuse (OUTA) believes that the biggest issue at hand is the wasteful and irregular expenditure that has been taking place due to the ineffective roll out of the BDM process. The wasteful and irregular expenditure has been ongoing for over a decade and is still taking place due to the government's inability to successfully conclude the BDM project.

However, South Africa's Broadcasting Digital Migration (BDM) faces significant challenges ahead of the 31 March 2025 deadline for switching off analogue TV signals. The SOS Coalition's #SaveFreeTV campaign highlights concerns that millions of households, reliant on free-to-air (FTA) television, may lose access to vital public interest programming due to the government's failure to adequately distribute subsidised Set-Top Boxes (STBs) and raise public awareness. Between 2.2 to 4.5 million households could be affected, many of whom may not be able to afford migration to satellite platforms or digital terrestrial television (DTT).

Major broadcasters like the SABC and e.tv fear substantial loss of viewership—up to 60% for the SABC—threatening their financial sustainability. The Marketing Research Foundation's (MRF) survey shows a recent rebound in terrestrial TV viewership but warns that the analogue switch-off could reverse this trend. Civil society groups (such as the SOS Coalition) are calling for a postponement of the switch-off, demanding that at least 80% of STBs be rolled out to indigent households, and for a nationwide awareness campaign to ensure no one is left behind. Failure to address these concerns could leave millions without access to crucial information, violating their right to access information and freedom of expression. It is nonetheless noted that this specific report does not deal with the complexity resulting from the switch-off, and instead focusses on the current BDM landscape in South Africa and inherent delays.

This report consists of three distinct sections. Section A is a comprehensive literature review covering the background to, policy environment of, and current contexts of BDM in South Africa. It is supported by a brief comparison with other countries. Section B is a detailed analysis of the BDM process as observed by government and the National Legislature. Section C provides observations resulting from the research, identifies challenges and issues, and makes recommendations for the way forward.

2. INTRODUCTION TO BROADCASTING DIGITAL MIGRATION

Broadcasting Digital Migration (BDM), also known as Digital Switchover (DSO) or Analogue Switch-off (ASO), refers to the process of transitioning from analogue to digital broadcasting technology in the television industry. This migration is aimed at improving the efficiency and quality of television broadcasting by replacing the older analogue transmission methods with digital ones.

Below a breakdown of what Broadcasting Digital Migration entails:

- **Analogue to Digital Transition:** In traditional analogue broadcasting, audio and video signals are transmitted in analogue formats, which can be susceptible to signal degradation, interference, and limited capacity for channels. Digital broadcasting, on the other hand, uses digital signals, offering higher picture and sound quality, as well as the ability to transmit more channels within the same frequency spectrum.
- **Spectrum Efficiency:** Digital broadcasting is more spectrum-efficient compared to analogue broadcasting. This means that digital technology can transmit more channels using less bandwidth, freeing up valuable radio frequency spectrum that can be repurposed for other services, such as mobile telecommunications or wireless broadband.
- **Improved Signal Quality:** Digital broadcasting provides consistent and high-quality audio and video signals. It eliminates issues like ghosting, snow and other analogue signal artifacts that can degrade the viewing experience.
- **Interactive Services:** Digital broadcasting allows for the incorporation of interactive features, such as electronic program guides (EPGs), interactive advertisements and interactive content. Viewers can access additional information, choose camera angles for sports events and interact with their TV content in new ways.
- **Mobile Reception and Mobility:** Digital signals can be received on various devices including mobile phones, tablets and laptops equipped with digital TV tuners. This enhances the potential for mobile TV services and ensures that viewers can access content while on the move.
- **International Standards:** Broadcasting Digital Migration often involves the adoption of international digital broadcasting standards such as DVB (Digital Video Broadcasting) and ATSC (Advanced Television Systems Committee), depending on the region or country.
- **Government Policies and Regulations:** Many governments have initiated BDM programs to facilitate the transition and set deadlines for the complete switch-off of analogue signals. Governments often provide guidelines, financial support and awareness campaigns to help citizens adapt to the new technology.

- **Challenges and Considerations:** BDM can present challenges, especially for viewers who still have analogue TV sets. Governments and stakeholders need to ensure that citizens have access to affordable digital TV receivers (set-top boxes or integrated digital TVs) and that they are adequately informed about the transition.

BDM has taken place in various parts of the world with different countries implementing the process at different times. The goal is to make broadcasting more efficient, offer better quality content and make room for other technological advancements that require access to the radio frequency spectrum. This report specifically focusses on the South Arican context. This report consists of three main sections. Section A is a comprehensive literature review covering a brief context of BDM in other countries, the BDM process in South Africa, the regulatory framework, South African role players, challenges and failures in implementing BDM within the deadlines, as well as the impact of BDM on South Africans. Section B provides a detailed analyses of the BDM process as led by the Executive and oversight provided by the South African Parliament. It is noted that the timeline of these comparisons is from 2008 to 2023. Section C explores the observations made from the research, challenges and issues identified, and also provides recommendations for the way forward.

SECTION A: COMPREHENSIVE LITERATURE OVERVIEW

3. BRIEF CONTEXT OF DIGITAL MIGRATION IN OTHER NATIONS

The transition from analogue to digital began in certain European countries and then spread to the United States of America (USA). The full-power broadcasting of analogue television in the United States was initially planned to have ceased after 17 February 2009 but went into effect on 12 June 2009. The decision to delay the analogue switch off was one of the first initiatives undertaken by the newly elected Obama administration and was necessary because of the under-funding of a programme to provide coupons for analogue-digital converter boxes to those still dependent on over-the-air broadcasts. In the week preceding the digital changeover, there was a significant decrease in the number of wholly unprepared homes (just 2.5% of US households). The homes that were entirely unprepared were more likely to be African American, Hispanic, Asian, younger, lower income and had no Internet access.[2] The transition was completed on 10 January 2022.

Germany was one of the first countries which started digitalisation, it turned off its analogue terrestrial transition signal in 2003, when the European states took the initiative and began transition initiatives. They highlighted low-cost and widely available set-top boxes as one of the crucial success criteria. On 3

[2]https://www.nielsen.com/insights/2009/the-switch-from-analog-to-digital-tv/

August 2003, Berlin became the world's first city to switch off terrestrial analogue signals. Luxembourg was the first country to complete its terrestrial switchover, on 1 September 2006. The United Kingdom (UK) then began its development on 17 October 2007 and was completed on 24 October 2012.[3] Tanzania became the first country in the East African Community to gradually phase out analogue terrestrial television broadcasting. They shut off the last of its analogue signals in July 2014 and switched to DVB-T2 (Digital Video Broadcasting – Second Generation Terrestrial).[4]

The transition to digital technology in Kenya has not been without its share of successes and difficulties. In the context of broader conversations about the relationship between digital connectivity and forced migration in Africa, the approach that the country takes to digital migration was analysed by Leurs and Smets.[5] The cut-off date for analogue television in Kenya was set for 2012. After Digital Terrestrial Television (DTT) was introduced in 2008, the analogue switch off was scheduled to occur in 2013. However, after media organisations challenged the decision in court, the switch off date was changed to 31 December 2014,[6] with DVB-T2 becoming the standard throughout the rest of the country in March 2015. Kenya is said to be one of the thirty-seven countries to have completed its ASO in 2015.[7] This was achieved through the Minister for Information, Communications and Technology (MICT) that developed multi-stakeholder groups to assist with the migration process.[8]

Nigeria's efforts to transition from analogue to digital broadcasting are part of a larger trend towards digitalisation in the region. However, these trends highlight the significance of the country's efforts in the context of African media and technology landscapes.[9] To complete the digital migration by the date of 17 June 2012, the Nigerian government signed the regional and international agreement. Due to the report being submitted but never being put into action, the date was changed to 17 June 2015. A new deadline was set to 17 June 2017 and sadly it was not met. Thereafter, Nigeria was promised a new deadline of June 2019 that which passed as well. There were four straight misses at the target over the period. The digital switch off was launched by the Federal Government of Nigeria on 29 April 2021, in Lagos.[10]

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[3] https://en.wikipedia.org/wiki/Digital_terrestrial_television_in_the_United_Kingdom

[4]https://www.werksmans.com/wp-content/uploads/2018/10/JN5721-Werksmans-Brief_The-Great-Migration_FIN.pdf

[5] Leurs, K. and Smets, K., 2018. *Five questions for digital migration studies: Learning from digital connectivity and forced migration in (to) Europe*. Social Media+ Society, 4(1), p.2056305118764425

[6] https://www.bbc.com/news/world-africa-31485671

[7]chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.itu.int/en/ITU-R/seminars/rrs/2017-Africa/Forum/GSMA%20Digital%20Migration%20Process%20in%20Kenya.pdf

[8]chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.itu.int/en/ITU-R/seminars/rrs/2017-Africa/Forum/GSMA%20Digital%20Migration%20Process%20in%20Kenya.pdf

[9] https://core.ac.uk/download/pdf/234652319.pdf

[10]https://www.tekedia.com/on-nigerias-journey-to-digital-switch-over/

In Australia, DVB-T standards were used to launch digital terrestrial television on 1 January 2001 in Sydney, Melbourne, Brisbane, Adelaide and Perth. Analogue transmissions were phased out starting on 30 June 2010 and it was finished on 10 December 2013. Finland introduced DTT in 2001 and on 01 September 2007, analogue transmissions were stopped nationwide.[11] In conclusion, the international study on digital migration provided a thorough examination of the transition from analogue to digital television transmission in numerous nations. The findings from analyses of countries such as the United States, Germany, the United Kingdom, Tanzania, Kenya, Nigeria, Australia, and Finland provide a detailed knowledge of the problems, accomplishments, and methods used during this revolutionary process. Decision-making processes, delays, and outcomes differed across nations, reflecting the various socioeconomic and technical environments that influence digital migration.

The overview's significance stems from the awareness that the transition to digital platforms is a global process with repercussions that extend beyond national borders. Each country's experience provides vital insights for countries going through comparable transformations. The variations in readiness, accessibility, and socioeconomic factors that influence digital migration highlight the significance of context-specific interventions. The report underlines the importance of multistakeholder involvement, effective policymaking, and tackling concerns like as affordability, internet access, and inclusion.

Importantly, the international perspective provides for a more comprehensive understanding of the issues confronting emerging countries such as Nigeria, whose missed deadlines and delayed implementation exposed the complex processes impacting digital migration. Furthermore, the comparative research highlights successful situations such as Germany and Finland, where early initiatives and effective techniques helped to smooth transitions.

In essence, the report emphasises the global significance of digital migration, as well as the need for personalised approaches to each country's specific circumstances. As the world's digital evolution proceeds, the lessons gathered from various international experiences provide vital guidance for policymakers, industry stakeholders, and communities attempting to navigate the complexity of the digital shift.

4. BROADCASTING DIGITAL MIGRATION IN SOUTH AFRICA

Television is one media form through which to communicate with people live in their living rooms and a single message can reach billions of viewers from all over the world at the same time. Television was first

[11] https://en.wikipedia.org/wiki/Digital_terrestrial_television#Analogue_to_digital_transition_by_countries

introduced in the United State in 1928 and then it was introduced in South Africa in 1976[12] with the goal of transmitting images and sounds over large distances. At the time of its creation, television broadcasting around the world was made feasible by analogue transmission which employs full waves to communicate images and sound. Even with the introduction of the internet on 1 January 1983,[13] which allows for webcasting, podcasting and multicasting, television has remained the focal point of visual broadcasting. However, as technology advanced over time, the transmission method improved considerably from one phase to the next. Between 1946 and 1950 the first electronic and colour television was created by RCA Laboratories research team. On 17 December 1953[14], television broadcast technology moved from monochrome (black and white) to colour transmission, and recently, it has begun transmission in digital format.

South Africa joined the Regional Radiocommunication Conference for the planning of the digital terrestrial broadcasting service in sections of region 1 (comprises of Europe, Africa, the former Soviet Union, Mongolia and the Middle East west of the Persian Gulf, including Iraq) and region 3 (contains most of non-FSU Asia east of and including Iran, and most of Oceania)[15] in the frequency bands 174-230 MHz and 470-862 MHz (RRC-06) from 15 May to 16 June 2006, and signed the regional agreement. During the conference each country was allocated numbers to identify the country and the declaration and reservation number for the South Africa is 38.[16] The conference was held in Geneva. The conference decided to transition from analogue to digital broadcasting services.

The pursuit of BDM in South Africa commenced in earnest throughout the early 2000s. The government acknowledged the necessity of conforming to international norms and commenced a procedure to shift from analogue to digital broadcasting (Madikiza, 2011). The decision to implement this action was consistent with the rules set forth by the International Telecommunications Union (ITU) and had the objective of improving the overall quality of broadcasting services (Nkuna, 2014). According to Armstrong and Collins (2011), the objective was to enhance accessibility and foster avenues for innovation within the media sector. The adoption of BDM was perceived as a strategic move aimed at the modernisation of the nation's broadcasting infrastructure. Furthermore, it was perceived as a mechanism to facilitate

[12]http://web.sabc.co.za/sabc/home/tvob/events/details?id=c01a1640-7f2b-4270-82c3-caea284ad8ad&title=The%20First%20Ever%20SABC%20TV%20Broadcast%20in%20SA#:~:text=With%20the%20speed%20technology%20develops,Africa%20was%20introduced%20in%201976

[13]https://www.usg.edu/galileo/skills/unit07/internet07_02.phtml#:~:text=January%201%2C%201983%20is%20considered,Protocol%20(TCP%2FIP)

[14]https://www.tcl.com/global/en/blog/playbooks/history-of-tv#:~:text=Electronic%20television%20was%20first%20successfully,images%20on%20a%20video%20screen

[15] https://www.gov.za/sites/default/files/gcis_document/201803/41534gen161.pdf

[16] https://www.itu.int/pub/R-ACT-RRC.14

equal access to information and communication technologies, hence promoting democratisation. According to Hallett and Hintz (2010), this procedure facilitates more optimal utilisation of the radio spectrum, hence enabling an increased quantity of channels and improved broadcast quality. The global phenomenon of transitioning to digital broadcasting has been propelled by developments in technology and international agreements. This is a crucial step in transforming and revolutionising the traditional approach to broadcasting and is also considered a priority area for the development of the national economy, as it encompasses digital transformation and the utilisation of digital technologies to drive economic growth and enhance the overall well-being of citizens.

According to the 2006 Digital Migration Working Group Report, [17] BDM is the practice of encoding and transmitting audio, video and image signals using advanced compression techniques, which results in more effective bandwidth usage. Set-top Boxes (STBs) is a transitional tool to enable migration from analogue to digital. The report states that the process of transformation is frequently referred to as convergence, referring to the convergence that is occurring between the traditionally independent sectors of print media, data, telecommunications and broadcasting. According to South African Government Gazette No. 31408 (Republic of South Africa, 8 September 2008), the conversion of the national broadcasting system from analogue to digital is destined to revolutionise the world.

The historical context of BDM in South Africa is characterised by a multifaceted interaction between technology advancements, regulatory frameworks and socio-economic conditions (Madikiza, 2011). The formulation of policies, such as the Broadcasting Digital Migration Policy of 2008, was undertaken to provide guidance for the process of migration (Madikiza, 2011). Nevertheless, the execution of the initiative has encountered various obstacles, such as limited financial resources, technological limitations and concerns pertaining to public knowledge and approval. Multiple stakeholders have actively participated in the process, each making valuable contributions towards the development and formation of the digital broadcasting environment in South Africa (Mbatha & Lesame, 2014). The process has exhibited complexities and remains a prominent area of emphasis within the telecommunications sector of the nation. The evolutionary trajectory of BDM in South Africa is influenced by two key factors: the global phenomenon of digitalisation and the distinctive characteristics of the country's media landscape (Mokganyetji, 2018).

The transition to digital broadcasting in South Africa has aimed at improving broadcasting services, even if not wholly completed. Digital technology has enabled the introduction of new channels, giving viewers

[17] https://www.gov.za/communications-hold-digital-migration-working-group-plenary-19-20-oct

an expanded selection of programming (Mocheki, 2021). The enhanced quality of broadcasts, which includes sharper images and clearer audio, has improved the viewing experience. Furthermore, digital broadcasting has enabled interactive services, allowing viewers to interact with content in novel ways. Not only have these enhancements enriched the media landscape, but they have also enabled local content creators to reach larger audiences. The transformation has begun to democratise information access, fostering a more vibrant and diverse media landscape. However, as this report reflects, the transition process is nowhere near perfect nor complete, raising a myriad of challenges in finalising digital migration.

5. REGULATORY FRAMEWORK

This section discusses South Africa's transition from analogue to digital terrestrial television. It sees South Africa's Digital Migration Policy as a framework for expediting digital terrestrial television rollout. The purpose of this part is to simply review the policy effort and implementation steps taken thus far toward digital migration, while flagging potential drawbacks. There are international and national regulatory frameworks that influence BDM.

5.1. International Telecommunication Union (ITU) Guidelines in implementing BDM

The ITU has set forth specific guidelines for the implementation of BDM, which have been instrumental in shaping the global approach to the transition from analogue to digital broadcasting. These guidelines include allocating and planning the digital dividend spectrum, establishing technical standards and providing support for capacity-building in developing countries (Kennedy et al., 2015).

The ITU's guidelines also emphasise the need for collaboration among governments, industry and international organisations to ensure a smooth and efficient migration process. They provide a roadmap for countries to navigate the complex technological, regulatory and socio-economic aspects of digital migration. South Africa's commitment to aligning with ITU guidelines reflects its dedication to adhering to international best practices and standards in digital broadcasting (Armstrong & Collins, 2011). By following the ITU's framework, South Africa has sought to coordinate its approach to BDM, aligning its policies and practices with global norms and ensuring compatibility with international broadcasting standards.

The ITU has played a substantial role in establishing rules for this transition (Madikiza, 2011). It set 2015 as the cut-off date for African and European countries to transition from analogue terrestrial television networks to digital platforms. The utilisation of BDM also presents prospects for the emergence of novel

services and advancements in the field of broadcasting which signifies a significant transformation in the method by which television services are provided to viewers (Nkuna, 2014). Countries (within Africa and Europe) must modernise their television networks to receive digital signals as analogue broadcast channels are phased out. This was agreed during the 2006 when International Telecommunications convened a Regional Radiocommunications Conference (RRC 06). This has necessitated government action in the form of policies or plans to manage the analogue-to-digital transition, which has been gradual in South Africa. Because of the ITU resolution that countries should migrate their broadcasting services from analogue to digital, South Africa has started with the process of migrating broadcasting signals from analogue to digital.

5.2. National policies governing BDM

In 2008, the Broadcasting Digital Migration Policy laid the groundwork for South Africa's transition from analogue to digital broadcasting. It outlined the government's digital migration vision, objectives and principles, as well as the formation of a Digital Dzonga Advisory Council to oversee the process (Madikiza, 2011). This policy has guided spectrum allocation, infrastructure development and the distribution of set-top boxes to households over time. It has played a key role in shaping the regulatory environment for BDM in South Africa (Mokganyetji, 2018).

Before that, the 2005 Electronic Communications Act established the legal framework for regulating electronic communications and broadcasting services, including digital migration. It established the Independent Communications Authority of South Africa (ICASA) as the regulatory body in charge of licensing and oversight (Duncan, 2017). This Act has played a significant role in governing relationships among various stakeholders, ensuring compliance with international standards and facilitating the development of the digital broadcasting sector.

The country's broadband policy, South Africa Connect, was launched in 2013 with the goal of achieving universal broadband access by 2020. While it is not solely concerned with BDM, it does have implications for the digital migration process by encouraging the expansion of broadband infrastructure and services (Mokganyetji, 2018). This policy has helped to align BDM with the national development agenda and has supported the broader goals of digital inclusion.

The White Paper on Broadcasting Policy, published in 1998, laid the groundwork for the transformation of South Africa's broadcasting sector. Although developed prior to the advent of BDM, it established principles for diversity, accessibility, and public interest in broadcasting (Mocheki, 2021). These principles

have influenced the approach to digital migration, ensuring that the transition to digital broadcasting is consistent with the larger goals of social development and democratic participation.

These policies, taken together, form a comprehensive framework for BDM implementation in South Africa. They reflect the intricate interplay of technological, regulatory and socioeconomic factors that have shaped the digital migration process. The evolution of these policies over time demonstrates South Africa's ongoing commitment to aligning the country's broadcasting landscape with global standards while also addressing the country's unique needs and challenges.

6. SOUTH AFRICAN ROLE PLAYERS

6.1. Public and private stakeholders in South Africa

Government agencies, regulatory bodies such as the Independent Communications Authority of South Africa (ICASA), and public broadcasters like the South African Broadcasting Corporation (SABC) have been key players in the migration process (Nkuna, 2014). Their involvement has included policy formulation, regulation, infrastructure development and public awareness campaigns (Madikiza, 2011). The mandate that was given to the agencies was to ensure that the transition to digital broadcasting aligns with National Development Goals (NDP), social equity and democratic values. The public stakeholders were meant to collaborate and coordinate in guiding the digital migration process, ensuring compliance with regulations, engaging with communities, civil society, and other interest groups, addressing the unique needs and challenges of the South African context.

It is further envisaged that private stakeholders in South Africa be instrumental in the BDM process by bringing in expertise, efficiency and competitiveness to the process, trying to enhance the quality and diversity of broadcasting services. Telecommunication companies, technology providers and private broadcasters such as MultiChoice, eMedia Investments and SENTECH should have contributed to the development and implementation of digital broadcasting infrastructure and services.

The collaboration between private and public stakeholders has, in OUTA's opinion, failed to create a synergistic approach to digital migration. This in turn has led to missed opportunities in leveraging strengths and resources of both sectors to facilitate a successful transition to digital broadcasting in South Africa. OUTA believes that despite all the policies and guidelines that the stakeholders had at hand, their effort to implement the BDM project was unsuccessful and there has been no explanation as to why the project failed to meet the set deadlines.

During the committee meeting on 10 March 2015 (Department of Communications on BDM state of readiness), [18] Mr. Norman Munzhelele, who was the then Deputy-General, gave a presentation outlining the project's key participants and their roles in it. ICASA would serve as the regulatory body; SENTECH would be in charge of managing the network; the South African Bureau of Standards would be in charge of creating the standards that would guide BDM; Universal Service and Access Agency of South Africa (USAASA) would be in charge of managing the funds; the South African Post Office (SAPO) would be in charge of handling the distribution of STB's; and eTV, the SABC and MNet would be the broadcast partners.

6.1.1. Independent Communications Authority of South Africa (ICASA)

In July of 2000, the South African parliament merged the telecommunications regulators, the South African Telecommunication Regulatory Authority (SATRA) and the Independent Broadcasting Authority (IBA), into a Chapter 9 institution, now called the Independent Communications Authority of South Africa (ICASA).[19] Its responsibility is to regulate three areas in the ICT sector namely the 1) telecommunications, 2) broadcasting and 3) postal industries.

The phased analogue switch-off strategy, in the opinion of ICASA, would guarantee continuing television programming and improved accessibility to mobile broadband services. Its duties include issuing licenses to broadcasters, signal distributors, telecommunication service providers and postal service providers; making regulations; imposing license conditions; planning, allocating, controlling, enforcing and managing the frequency spectrum; ensuring international and regional cooperation; efficiently allocating numbers; ensuring network interoperability; and receiving and resolving complaints.

6.1.2. Universal Service and Access Agency of South Africa (USAASA)

According to Schedule 3A of the Public Finance Management Act 1 of 1999, the Universal Service and Access Agency of South Africa (USAASA)[20] is a public organisation. Sections 80 to 91 of the Electronic Communications Act 36 of 2005 (ECA), which took effect on 19 July 2006, regulate the existence, responsibilities and mandate of this Agency. The new ECA changes came into effect on 21 May 2014 and directly affected how the Agency is governed. It was responsible to disburse subsidised STBs to approximately five million TV-owning household, that is considered needy and deserving.

Part of the USAASA legislative mandate is to:

[18] https://pmg.org.za/committee-meeting/20456/
[19] https://www.icasa.org.za/
[20] http://www.usaasa.org.za/

- *Make recommendations to the Minister in relation to policy on any matter relating to universal access and universal services;*
- *Advise the Authority (ICASA) on any matter relating to universal access and universal;*
- *Manage the Universal Service and Access Fund (USAF) in accordance with the provisions of the Act;*
- *Utilise the Universal Service and Access Fund (USAF) exclusively for the payment of certain subsidies;*
- *Provide incentives to network licensees to construct operate and maintain networks in areas declared under-service by ICASA.*[21]

Over five million households in South Africa that rely on social assistance and have monthly incomes under R3 200, were promised free STBs by government. Digital broadcasting signals for analogue TVs must be converted by STBs. The DTT and (Direct-To-Home) DTH STBs and antenna costs, as well as installation services through the Universal Service and Access Fund (USAF),[22] were to be covered by USAASA, which was established to help poor TV-owning households.

The final stages of the draft STB manufacturing sector growth strategy were announced during the 2009 department's budget vote. For the first allocation in 2010, USAASA was given R400 million over two years to cover the cost of subsidised decoders. USAASA had gotten R1.6 billion by 2015. USASSA was supposed to manage BDM with the funding provided. On 11 May 2021, during the Portfolio Committee on Communications meeting, it was noted that USAASA partnered with SENTECH to assist with the rollout of BDM Phase One.[23] The fund was established to help bridge the digital gap and an Electronic Communications Amendment Bill is now being drafted for that goal. The suggested changes include enhancements to the current universal service and access framework. "Universal access" and "universal service" would be replaced with "universal digital services." To foster a digital economy and society, specific provisions were made to ensure that the policy on universal digital services was updated at least every two years. It is noted that the STBs have, to date, not been wholly distributed, and many remain in storage ultimately paid by South African tax-payers.

[21] http://www.usaasa.org.za/about/
[22] https://www.gov.za/sites/default/files/gcis_document/201409/35985gen1036.pdf
[23] https://pmg.org.za/committee-meeting/32836/

6.1.3. Universal Service and Access Fund (USAF)

The Universal Service and Access Fund (USAF) was established in teams of Section 89 (1) of Electronic Communications Act (ECA) of 2005 and is listed as a schedule 3A public entity in the Public Finance Management Act (1999). It is to provide funding for initiatives and programs aimed at ensuring that all South Africans have access to universal service and ICTs. The expansion of connectivity opportunities to underserved and unserved communities is the focus of many countries' creation of communal funds which are typically financed through mandated contributions from mobile network operators and other telecommunications providers. These are public funds that function as a conduit for the collective investment of the whole telecoms sector. Target 9.c of government's Sustainable Development Goals (SDG) is to work toward obtaining universal, affordable internet access which is a top social and economic concern for nations around the world.[24]

USAASA is an administrative arm of the USAF and according to Section 82(5) of the ECA, USAASA must manage USAF. The funding from USAF is approved by cabinet for subsidies to poor TV-owning households towards the cost of a STB, antenna and installation.

The presentation at the meeting of the Portfolio Committee on Communications on 11 May 2021, said that the budget for the years 2022–2023 and 2023–2024 were to be significantly reduced because the BDM project should have been implemented by then. The overall revenue for the USAF's budget for the 2020–21 fiscal year is R741 million. The budget is broken down into three components: R158.9 million for broadband, R4.1 million for administrative expenses and R578 million for the BDM project. Because the rollout of the voucher system was scheduled to take place during the 2021/22 fiscal year, the total income was increased to R1.1 billion.

6.1.4. SENTECH

SENTECH is a state-owned company (SOC Limited) operating in a commercial environment and has provided broadcasting signal distribution services, including infrastructure and technological support, for the transition. Their investment in technology, innovation and market-driven solutions has complemented the efforts of public stakeholders in achieving the goals of digital migration (Mokganyetji, 2018).

SENTECH is a leading provider of electronic communications network services to the country's broadcasting and communications industry. All the radio and television stations operated by the South

[24] https://webfoundation.org/docs/2018/03/Using-USAFs-to-Close-the-Gender-Digital-Divide-in-Africa.pdf

African Broadcasting Corporation (SABC) as well as 118 community radio stations, receive broadcast transmission services from SENTECH. It can provide infrastructure and connectivity to the retail, telecommunications and public sectors thanks to its 181 Digital Terrestrial Television (DTT) locations. Since 2017, when MultiChoice trialled six sites, it has been managing the Digital Terrestrial Television (DTT) network on a business-to-business basis.

Together with the then Department of Communication and the current Department of Communication and Digital Technologies, SENTECH has been attempting to make sure that everything has been done to allow for a seamless transition to digital broadcasting; something which they have not been successful in achieving to date. SENTECH controls the ASO[25] and must modify and convert around 220 terrestrial transmitter sites throughout South Africa for them to transmit digital terrestrial television. The cost of the refurbishment was expected to be more than R1 billion in 2007. However, the expected cost in 2018 climbed to R10 billion. Government had only invested R200 million in 2007.[26] Furthermore, the financial value of the South African government's total commitment to the SENTECH digital broadcasting infrastructure program is still unknown.

SENTECH claimed that in 2010, they have covered more than 40%[27] of their projected digital terrestrial television transmitter broadcast population. The target was set by the late Dr Ivy Matsepe-Casaburri, the Minister of Communication at the time. In her budget vote speech on 24 May 2007, she said, "I am pleased to inform the members of parliament that SENTECH is on track to meet the government's commitment by providing approximately 80% DTT coverage by the 2010 FIFA Soccer Football World Cup."[28] However, only a few South African provinces were affected. By the end of the 2014/15 financial year, the company reported that they have completed the implementation and rollout of the DTT network at all 178 analogue sites. This resulted in a population coverage of 84.23% and a geographical coverage of 57.99% in accordance with the ICASA's Frequency Spectrum Plan.

SENTECH is responsible for 'Dual Illumination' in South Africa. Dual illumination is the process of illuminating both analogue and digital terrestrial television signals, as some households had already migrated to Digital Terrestrial Television. Others were still using the analogue input signal received

[25] https://www.sentech.co.za/
[26] https://www.sec.gov/Archives/edgar/data/932419/000095013607001786/file2.htm
[27] https://pmg.org.za/committee-meeting/10452/
[28]https://mybroadband.co.za/forum/threads/ivy-matsepe-casaburri-communications-dept-budget-vote-2007-08.628371/

through outdated TV antennae. In 2016 it was reported that SENTECH will run both networks simultaneously at a cost of about R140 million a year.

The dual illumination process was envisioned to continue for a period of 3 years until the Analogue Switch off occurred on 1 November 2011, the deadline set by then Minister Ivy Matsepe-Casaburri. It is worthy to note that between the start of the dual illumination process and present day, the deadline has been moved a total of 12 times. The DTPS noted that an amount of R193 million was prioritised in the 2017/18 financial year for the allocation for subsidiaries for STBs to SENTECH to cover dual illumination costs.

Shockingly, OUTA has found that between the period of 2016/17 and 2020/2021, a total amount of R668,385,000.00 has been paid by South African taxpayers for dual illumination.

6.1.5. South African Post Office (SAPO)

According to the Companies Act, No. 61 of 1973, the Post Office was created as a public business in October of 1991. The only shareholder is the State (Republic of South Africa) and represented by the Minister of Telecommunications and Postal Services. The South African Post Office was recognised as a State-Owned business (SOC) pursuant to the South African Post Office Limited Act No. 22 of 2011, as amended, following the repealing amendment of the Companies Act No. 61 of 1973 and the passage of the Companies Act No. 71 of 2008 (as amended). According to Schedule 2 of the PFMA No. 1 of 1999 (as amended), the SA Post Office is also a significant state enterprise.[29] According to the Postal Services Act of 1998, the Post Office is required to offer postal services. The regulation of postal services, including its Universal Service Obligations (USO), is provided by this Act. The Post Office has a legal monopoly over reserved services and was given government funding up until the 2012–2013 fiscal year. The Post Office aims to comply with the protocols and legislation governing SOCs and is guided by various postal, courier and financial regulations laid down by the regulatory bodies such as ICASA, the Financial Intelligence Centre (FIC) and the Financial Services Board (FSB).[30]

DCDT selected SAPO to serve as its distribution and registration partner for BDM. According to SAPO's 2019/20-2021/22 strategy plan, as of the end of March 2018, 356 402 DTT set-top box kits had been given out to qualified receivers and 686 150 qualifying homes had enrolled. A total of 870 128 of the 1.5 million Set Top Box kits intended, have been delivered to SAPO. On July 2023, according to DCDT over

[29] https://nationalgovernment.co.za/entity_annual/3205/2022-south-african-post-office-(sapo)-annual-report.pdf
[30]https://www.icasa.org.za/pages/postal-services#:~:text=In%20terms%20of%20the%20Postal,services%20in%20under%2Dserviced%20areas.

1.25 million set-top boxes (STBs) were installed in qualifying households across all provinces. Qualifying households were required to register for these devices at their nearest SAPO branch.

SAPO's role as distribution partner included the following services:

- The display and distribution of Set-top Box marketing material at SA Post Office online outlets.
- Process applications for the subsidised Set-top boxes.
- The ordering, warehousing and distribution of STB equipment to SA Post Office outlets.
- Process delivery of STB equipment in sequential distribution number order to qualifying applicants.
- The exchange/ replacement of faulty/ incomplete/ incorrect Set-top Box equipment (Reverse distribution process).
- Acceptance of the return of uninstalled STB kits by the assigned STB Installers at SA Post Office branches.
- The insurance of STB kits up to installation level.

It was found in 2020 that government-subsidised STBs are held in SAPO warehouses at a monthly cost of R5.1 million. It is equivalent to a R60 million per year loss due to government's inability to roll out the BDM process timeously.[31] It is SAPO's function to send set-top boxes from various warehouses to the four provinces, where SENTECH contracted installers were to complete the installation procedure and offered training as needed.[32]

Disturbingly, the SA Post Office was placed under business rescue on 1 July 2023 and Cabinet agreed to provide it with an additional cash injection of R6.2 billion so that it can restructure and restore its operations. This is in addition to the R10.39 billion the entity has received over the past nine years. This is money lost because SAPO is bankrupt and unable to perform its fundamental duties. In 2024, SAPO's situation has only worsened, with thousand laid off, offices closed, and many more foreseen to suffer the same fate. The current state of SAPO is just one of the many issues encountered which has a direct impact on the successful roll out of the BDM process.

[31] https://www.itweb.co.za/content/DZQ58vV8Qb3MzXy2

[32] Chrome extension://efaidnbmnnnibpcajpcglclefindmkaj/https://nationalgovernment.co.za/entity_annual/3205/2022-south-african-post-office-(sapo)-annual-report.pdf

6.1.6. Minister of Communication and South African Broadcasting Corporation

In April 2022, Communications Minister Khumbudzo Ntshavheni's relationship with the SABC soured when the SABC board stated that the plan to switch off all amateur television (ATV) transmitters by 31 March 2022 despite the slow progress of set-top box registrations and installations, presented an unsustainable risk to the rights of millions of indigent households, as well as the broadcaster's turnaround plan. The SABC board of directors also declared, "a premature switch-off will deprive millions of people of critical public television services." [33] Only 165 000 set-top boxes had been deployed in the four notable provinces as of February 2022, out of 2.9 million impoverished households (5.7%). This figure is simply too low for the SABC's ATV services in the four main provinces to be turned off at this time and this enraged the Minister, who instructed the SABC's board to remove the published statement. When they refused, she then pulled her signature from SABC performance reports, raising concerns that the public broadcaster would no longer receive state bailouts.

OUTA believes that there is fruitless and wasteful expenditure being incurred due to government's inability to successfully roll out BDM. OUTA presented, on 27 October 2020, to the Portfolio Committee on Communications, its findings on the allegation that wasteful and fruitless expenditure is being incurred by the BDM programme.

Even though OUTA submitted its findings to the Portfolio Committee and asked important and critical questions, it seems as though the Department and the entities responsible for the BDM roll out did not correct their wrongs. The country is still faced with the failures of the Department together with the entities involved in that the BDM program is still not fully implemented. OUTA firmly believes that proper consequence management must be applied to ensure that no further loss of funds be incurred and to ensure that the BDM process is successfully rolled out.

7. CHALLENGES AND FAILURES IN IMPLEMENTING DIGITAL MIGRATION

7.1. Technological difficulties

South Africa's shift to digital broadcasting has largely technological problems, particularly in terms of poor infrastructure in remote and rural areas. This absence of infrastructure represents a significant impediment to the successful implementation of digital broadcasting services in these areas. The effects of this infrastructure gap are visible in the limitations on the reach and efficacy of digital technologies, slowing the overall pace of the digital migration process.

[33] https://www.news24.com/citypress/news/minister-ntshavheni-and-sabc-board-on-a-collision-course-20220403

According to Armstrong and Collins (2011), the lack of adequate infrastructure in remote and rural locations has severely hampered the introduction of digital broadcasting systems. This restriction has obvious consequences for residents in these places, limiting their access to the benefits of digital broadcasting and contributing to a digital divide.

Furthermore, the technology necessary for digital migration is complex and advanced. This complexity becomes a significant barrier to acceptance, especially among elderly people and those who are unfamiliar with technology. Mbatha and Lesame (2014) argue that particular populations may fail to adjust to the intricacies of digital broadcasting technology, resulting in a slower overall rate of migration.

The intricacy of digital migration technology creates acceptance difficulties, particularly for older and less tech-savvy populations. This causes migratory delays, as stated by Mbatha and Lesame (2014), and requires considerable investments in education and infrastructure development, as outlined by Mocheki (2021). These investments are needed not only to directly address technology difficulties, but also to bridge the knowledge that contribute to the delays in the digital migration process.

In conclusion, the statement sheds insight on South Africa's practical obstacles in switching to digital broadcasting. The combination of inadequate infrastructure, technological complexity, and adoption barriers among specific demographic groups all contribute to migration delays, emphasising the importance of strategic interventions and investments to facilitate a smoother and more inclusive digital migration process.

7.2. Public awareness

The difficulties surrounding public awareness of digital migration in South Africa are multifaceted and including the following aspects:

- **Resistance and confusion in the public:** Despite concerted efforts to educate the public about the benefits and necessity of digital migration, some segments of the population have expressed opposition and confusion. This resistance could be attributed to a lack of expertise with digital technology or anxiety of the transition, particularly among those accustomed to analogue broadcasting (Madikiza, 2011; Mbatha & Lesame, 2014). Overcoming entrenched habits and ideas is a significant barrier to achieving widespread acceptance.
- **Misinformation and a general lack of understanding about the digital migration**: Individuals may be unsure about the ramifications of the change, the measures required, and the benefits of

using digital technology. This lack of understanding can lead to unwillingness to embrace change (Mbatha and Lesame, 2014).

- **Ineffective Communication by Government and Stakeholders:** The government and other stakeholders have struggled to properly communicate the importance and ramifications of digital migration to the public. Inadequate communication tactics may cause misunderstandings and mistrust among the public. Failure to communicate the benefits of digital technology and the importance of migration might lead to implementation delays and inefficiencies (Mocheki, 2021).
- **Cultural and Linguistic Diversity:** South Africa's rich cultural and linguistic terrain complicates communication about digital migration. Tailoring communication tactics to appeal to the population's diverse cultural and linguistic origins presents a substantial challenge. Failure to acknowledge this variety may result in messages that do not properly reach or resonate with specific sectors of the public.
- **Socioeconomic issues:** The discrepancies in knowledge and resource access, can have an impact on public awareness and acceptability. Individuals with limited access to educational resources and knowledge may struggle to appreciate the benefits of digital migration, resulting in a disparity in levels of awareness and acceptability among socioeconomic categories.

To summarise, the challenges in raising public awareness and acceptance of digital migration in South Africa include overcoming resistance, addressing confusion and misinformation, improving communication strategies, taking cultural and linguistic diversity into account, and accounting for socioeconomic factors that may influence the population's understanding and acceptance of the digital transition. These problems cumulatively contribute to delays and inefficiencies in the implementation of digital migration programs.

7.3. Regulatory and policy issues

Regulatory and policy issues have complicated the digital migration process even more. Coordination has been difficult between various government agencies, private sector players and civil society (Nkuna, 2014). Disagreements and delays in decision-making have resulted in competing interests and a lack of clear guidelines (Armstrong & Collins, 2011). The regulatory environment's complexities, combined with the complexities of the migration process, have resulted in a lack of cohesion and alignment in the implementation of digital migration policies (Duncan, 2017).

8. THE IMPACT OF BDM ON SOUTH AFRICANS

Financial accounts and annual reports show that money for the transition to digital broadcasting was given in several sectors. On 15 September 2016, a member of the Parliamentary Committee asked the department if they knew how much the BDM project would cost overall if all programs would receive enough funding. In response, Mr. Mlamli Booi, Chief Executive Officer of SENTECH, said that "he was unable to offer the exact cost of the BDM." In response, Mr. Ndivhuho Munzhelele, Acting Director General of the Department of Communication, said "he had an estimate of how much the BDM project will cost overall but did not know how much public and consumer awareness would cost.[34] Based on OUTA's research on information gleaned from the annual reports, it is estimated that since 2008, a whopping R7.5 billion has been allocated to and spent on BDM thus far.

8.1. Optimal spectrum utilisation

In South Africa, the lack of availability of spectrum has been labeled as a national crisis. The key issue requiring priority attention relates to spectrum allocation assignment and management and the general strengthening of the communications regulator (ICASA) in terms of its capacity to develop and enforce regulations. There has been a paradigm shift in terms of the spectral allocations, assignment and management. The old order of spectral allocation assignment and management is obsolete and inadequate.[35] This spectrum's release paves the way for expanded connectivity across the nation, particularly in unserved areas. Even though the complete reallocation of spectrum is still in progress, the process has already initiated the potential for improved internet services, bridging the digital divide and contributing to social and economic development.

8.2. Influence on data price

The digital migration process in South Africa has initiated a path that may influence data prices in the future. Spectrum availability will increase because of the transition to digital broadcasting (Mokganyetji, 2018), resulting in increased competition among mobile broadband providers. Even though the full impact on data prices has not yet materialised, the ongoing process represents a significant opportunity to increase digital inclusion. With ICASA's spectrum that is to be released, this will lead to a decrease in data prices. Mobile network operators have expressed that gaining access to the spectrum will allow them to improve coverage and reduce data prices.[36]

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[34] Broadcasting Digital Migration: update by Minister Muthambi & Cwele, SAPO, SENTECH, USAASA https://pmg.org.za/committee-meeting/23281/

[35] chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://wapa.org.za/sites/default/files/2020-06/Optimal-Spectrum-Utilisation-in-South-Africa-WAPA-White-Paper-Version-1.01.pdf

[36] https://mybroadband.co.za/news/cellular/401469-good-news-for-mobile-data-prices-in-south-africa.html

8.3. Economic expansion

In South Africa, digital migration has cost the citizens more than that for which they could prepare. This is seen in the delays that have taken place with no results despite the budget for the BDM project been provided for. The development of new infrastructure, the production of set-top boxes and the expansion of the media and technology industries have generated opportunities for investment and employment (Mocheki, 2021). These activities contribute to the expansion of various sectors. However, these activities did not contribute to the country's economy as the STBs were not utilised and kept in SAPO storages at the expense of taxpayers. Part of the aim of the BDM project was to foster innovation and entrepreneurship, facilitate technological advancement and contribute to sustained economic growth.

8.4. Social and cultural impact

The social and cultural influence on South Africa includes a wide range of developmental difficulties, such as the digital divide, the need for social cohesion. Despite these limitations, digital broadcasting has significant potential to address and minimise them. The rapid increase of channels enables the broadcast of diverse programming in multiple South African languages, demonstrating the country's vast cultural variety. This inclusive approach fosters a sense of belonging while actively contributing to societal cohesion. Furthermore, the interactive capabilities built into digital broadcasting encourage public participation in both media and political processes, resulting in a more engaged and educated citizenry.[37].

The financial accounts and annual reports demonstrate substantial funding allocated to the transition to digital broadcasting in South Africa, but challenges in tracking expenditures and determining the project's overall cost persist. Despite significant allocations, inconsistencies in budget utilisation and instances of underspending raise concerns about resource management and project efficiency. Program restructuring and inter-programmatic shifts over the years indicate organisational challenges and shifting priorities within the government departments involved. Moreover, inadequate financial oversight and governance underscore transparency issues within these departments. Delays in project execution may hinder the timely rollout of digital services, potentially impacting public access and service accessibility. The observations also reveal an increase in spending in later years, reflecting a renewed urgency to complete the project as deadlines approach, although multiple deadlines have already been missed.

[37] chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/http://ulspace.ul.ac.za/bitstream/handle/10386/3841/mocheki_ml_2021.pdf?sequence=1

Furthermore, the transition to digital broadcasting presents various opportunities, including economic expansion, improved internet services, and enhanced social cohesion through the promotion and celebration of cultural diversity. However, the full potential of these benefits may not be realised due to delays and inefficiencies in BDM implementation. However, between 2.2 to 4.5 million households[38], which still rely on analog television, are at risk of being cut off from crucial sources of news, information, and entertainment, once the switch-off occurs. This is especially concerning as many of these households may not have the means to transition smoothly to digital television platforms like DStv, OpenView HD, or digital terrestrial television (DTT).

In summary, while the transition to digital broadcasting holds promise for South Africa, there are significant challenges in managing funds, executing BDM efficiently, and ensuring transparent governance. Addressing these challenges is crucial to maximising BDM's benefits for the country and its citizens.

Section A of the report reviewed the literature, the background of BDM and the successes of BDM from other countries. The BDM process has been mired in controversy, obscured by smoke and mirrors, and delayed due to a lack in political will. Going forward, Section B provides detailed analyses of the BDM processes as observed by the executive and national legislature.

[38] https://broadcastmediaafrica.com/2024/10/23/terrestrial-tv-viewership-rebounds-in-south-africa-insights-from-maps-data/

SECTION B: DETAILED ANALYSES OF THE BDM PROCESS AS OBSERVED BY THE EXECUTIVE AND NATIONAL LEGISLATURE

9. INTRODUCTION TO THE LONGITUDINAL ANALYSES

The purpose of this Section is to provide a general overview of the Broadcasting Digital Migration (BDM) programme and process by the Department of Communications. To make for a longitudinal understanding, the Annual Reports and Parliamentary Portfolio Committee engagements from the 2008 until 2023 were analysed, to provide data and insight concerning the migration to digital broadcasting services.

South Africa has set specified timelines for digital migration. Meeting deadlines is one of the obstacles in South Africa's digital migration process. The former Minister, Mondli Gungubele (appointed on 06 March 2023) announced on 15 June 2023 that he has set 31 July 2023[39] as the date for switching off all analogue broadcasting services above 694MHz and 31 December 2024 as the end of the dual-illumination period and the date for switching off the remaining analogue broadcasting services below 694MHz.[40] Although the 31 July 2023 deadline was achieved, the BDM program was not fully implemented by 31 December 2024.

[39]https://www.news24.com/news24/tech-and-trends/news/wider-more-stable-4g-and-5g-coverage-coming-soon-as-analogue-switch-off-finally-makes-progress-20230802

[40] https://www.itweb.co.za/content/PmxVE7KEQ2QqQY85

9.1. Digital migration deadlines

Below are the digital migration deadlines illustrating the deliverables from 2006 to date:[41]

South Africa's digital TV migration deadlines — from 2006 to 2024		
Deadline	**Milestone**	**Outcome**
31 December 2006	Digital migration strategy delivery	Missed
1 June 2007	Broadcasting Digital Migration Policy (BDMP) publication	Missed
8 September 2008	Broadcasting Digital Migration Policy (BDMP) published	Late
1 November 2008	Digital terrestrial television switch-on	On-time
11 June 2010	80% digital TV signal coverage by FIFA World Cup	Missed
1 November 2011	Analogue terrestrial TV switch-off — initial deadline (per Minister Ivy Matsepe-Casaburri)	Missed
30 April 2013	Potential analogue terrestrial TV switch-off (per ICASA)	Missed
31 December 2013	New analogue terrestrial TV switch-off deadline (per Minister Roy Padayachie)	Missed
17 June 2015	ITU deadline for analogue switch-off	Missed
31 December 2018	New analogue terrestrial TV switch-off deadline (per Minister Faith Muthambi)	Missed
31 July 2020	New analogue terrestrial TV switch-off deadline (per Minister Nomvula Mokonyane)	Missed
31 December 2020	New analogue terrestrial TV switch-off deadline (per Minister Nomvula Mokonyane)	Missed
31 December 2021	New analogue terrestrial TV switch-off deadline (per Minister Stella Ndabeni-Abrahams)	Missed
31 January 2022	New analogue terrestrial TV switch-off deadline (per Minister Ndabeni-Abrahams, affirmed by Minister Khumbudzo Ntshavheni)	Missed
31 March 2022	New analogue terrestrial TV switch-off deadline (per Minister Khumbudzo Ntshavheni)	Missed
30 June 2022	New analogue terrestrial TV switch-off deadline (per Minister Khumbudzo Ntshavheni, following High Court ruling)	Missed
31 March 2023	New analogue terrestrial TV switch-off deadline (per Minister Khumbudzo Ntshavheni, following Constitutional Court ruling)	Missed
31 July 2023	New analogue terrestrial TV switch-off deadline (per Minister Mondli Gungubele)	Missed
24 December 2024	New analogue terrestrial TV switch-off deadline (per Minister Mondli Gungubele)	Missed
31 March 2025	Latest analogue terrestrial TV switch-off deadline	Proposed

Based on the research conducted, through an extensive analysis of Departmental Annual Reports and Portfolio Committee meetings since 2008, it has become evident that perhaps ineptitude is the biggest reason for the delay. The Department of Communications has been stating for over a decade that digital migration is on track. However, nothing could be further from the truth, as will be illustrated hereunder on the following page.

[41] https://mybroadband.co.za/news/broadcasting/499189-south-africas-digital-migration-how-much-set-top-box-installers-are-paid.html

9.2. Timeline comparisons from 2008 to 2023

2008-2009 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Matsepe-Casaburri • Minister Siphiwe Nyanda • Deputy Minister, Ms Dina Pule • Acting Director-General, Gerda Gräbe • Ms Lyndall Shope-Mafole, Director-General for the DoC	• On 19 February 2008, the Department of Communications presented to the portfolio committee that the Digital Dzonga had been created to oversee BDM matters and mentioned the necessity to switch from analogue to digital. They stated that the digital signal would be switched on in November 2008 and that the analogue would be switched off in November 2011. • BDM was placed under Programme 3: ICT Policy Development. • On 17 June 2008, the Director-General Ms Shope-Mafole stated that the process of implementing the BDM policy will occur over a 3-year period. • On 19 October 2009, the Department of Communication informed the portfolio committee that a service provider would be appointed to assist in driving the BDM awareness campaign. • The Deputy Director-General Rosy Sekese mentioned that the Department facilitated the roll-out of broadcasting equipment to 19 newly licensed community radio stations.	• Government has approved the BDM Policy in August 2008 and allows the first digital terrestrial television switch on, on 1 November 2008 and analogue switch off on November 2011. • These milestones were placed under Programme 3: ICT Policy Development. • The 2008/09 annual report displays that importance was given to public awareness of BDM over a period of 36 months, costing R20 million (Page 88). • The 2008/09 annual report shows that an amount of R2,280 million was paid to SABC Group Sales & Marketing for public awareness on BDM using community radio stations (Page 102).	• The switch-off milestone for November 2008 and November 2011 was missed and not achieved. • The department's programme 3 had failed to achieve its set milestones. • The Committee asked who comprised the Digital Dzonga body and the Department of Communication did not provide much information and clarity to the PC on what the Digital Dzonga was. • There is very little accountability for failed performances and the Department of Communication continues to transfer funds to this programme. • Minister Matsepe-Casaburri assured the committee that the BDM Policy would be ready by 8 March 2008. However, it was only gazetted at a later stage on 8 September 2008. This is another example of delaying the BDM implementation process. • On 19 October 2009, Deputy Director-General Rosy Sekese did not provide clear information on the R2.2 million that was paid to SABC Group Sales Marketing, and the annual report does not reflect the same information.

2009-2010 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
● Minister General Siphiwe Nyanda ● Deputy Minister, Ms Dina Pule ● Acting Director-General, Dr Harold Wesso	● On 11 June 2009, SENTECH noted the success of the DTT switch-on before the target date, which was 1 November 2008. The entity had requested additional funding from the Committee for the process of dual illumination.	● The 2009/10 annual report reveals that SENTECH has been mandated by the Government since 2005 to migrate the analogue terrestrial television infrastructure to digital terrestrial television (DTT) and achieved the digital switch-on on 30 October 2008 (Page 143). ● In July 2009, Minister Nyanda launched the Digital Dzonga advisory council as a government component which was mandated to co-ordinate all BDM-related initiatives (Page 4). ● The report confirms that the Digital Dzonga Advisory Council produced 3 digital terrestrial television State of Readiness Reports and presented them to the Ministry (Page 20).	● Later in 2010, the Digital Dzonga Advisory Council was dissolved due to a conflict of interest among council members. ● The Minister received various reports and went through extensive measures for engagements as well as public awareness but there is no progress to show for this. ● Good governance and oversight were ignored. The 2009/10 Annual Report is a repeat of information from the previous reports. This means that it is the same information being shared.

2010-2011 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Mr. R Padayachie • Deputy Minister, Mr Obed Bapela • Acting Director-General, Dr Harold Wesso	• The Minister briefed the Committee that the African continent and Europe were classified as region 1 by the ITU of the United Nations. During the World Radio Conference held in 2006, they reached an agreement that Region 1 would apply the DVB-T standard for digital terrestrial broadcasts. The Minister proposed to Cabinet in 2008 that the DVB-T standard should be adopted by South Africa. • On 31 May 2010, the Department of Communication and SENTECH implemented BDM and conducted trials. Also, SENTECH had a due date of November 2008 to commence with dual illuminations.	• The 2010/11 annual report reveals that the Department of Communications Programme 1: Administration received additional R2.2 million for broadcasting digital migration awareness campaigns (Page 18). • The report also states that the DVB-T standard has changed from DVB-T to DVB-T2, which led to the BDM Policy being amended (Page 18).	• The 2010/11 annual report indicates that the Department of Communications underspent R710 million. This quantity is not correct because on separate pages the department is confirming different amounts of underspending (Page 20 and 99). • There was a delay in finalising the digital terrestrial television (DTT) standard, and the amounts displayed under the department's expenditure are not a true reflection and are misleading (Page 20). • The BDM Set Top Boxes subsidy project did not take place. But no consequences or other action was taken for such delays.

2011-2012 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Ms Dina Pule • Deputy Minister, Ms Stella Tembisa Ndabeni • Director-General, Ms Rosey Sekese • Minister Roy Padayachie, in 2011 • Mr Louis Moahlodi, Chairperson: Board of Directors, USAASA	• On DTT, The Department indicated that SA has formally adopted the DVB-T2 as the preferred standard. • On 10 March 2011, the Department of Communication allocated some funds to SENTECH to carry out the dual illumination project. • On 19 September 2011, the Committee held a two-day information session on the BDM programme implementation where all entities were present. The Minister mentioned the importance of having a way to conduct oversight over the implementation process. • On 19 October 2011, USAASA stated that the target set for distributing 367 000 subsidised STBs was not achieved because the project was placed on hold while awaiting strategy approval. • Cabinet approved a subsidy level of R490 or (70%) towards the cost of an STB per household for a total of 5 million needy television-owning households.	• The Director-General, Ms Rosey Sekese says that the department has developed a digital migration project plan which sets out the timelines for the migration process. However, it is difficult to follow the BDM project plan in the annual report because it does not clearly state how this project plan will be implemented (Page 12). • Ms Sekese also indicates that the department plans to appoint an agency in the new financial year for public awareness on DTT, but no further information is provided in the report on who the agency is (Page 13). • The 2011/12 annual report indicates that SENTECH has been allocated R109.9 million for DTT infrastructure and falls under programme 4 which was indicated on page 22 but on page 66 in the report, the same objective is presented under programme 5 which is a different programme. This makes it difficult to track and follow (Page 66).	• The Adjusted Estimates allocation does not suggest the correct figures. The report says the department had a rollover of R112,2 million but if you add up SENTECH and other projects in progress it adds up to R112,3 million. (Page 25) • SENTECH was allocated R279 million for the roll out of DTT infrastructure during the 2011/12 financial year. An amount of R169.1 million was not accounted for in the annual report. (Page 26) • The Department does not indicate how much was actually allocated to SENTECH. • Members raised concerns on whether the DoC had ensured that the SOEs delivered satisfactory performance. However, the Department assured the Committee that it monitored performance and conducted analysis, and entities were required to submit proper business plans. • On 19 April 2011, Members stated that USAASA's strategic objectives and KPIs needed to be clear so that the Committee would be able to monitor the entity. This shows that the Committee took an initiative to conduct oversight. • USAASA's missed targets were not accounted for.

2012-2013 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Mr Yunis Carrim • Deputy Minister, Ms Stella Tembisa Ndabeni • Director-General, Ms Rosey Sekese • Ms Dina Pule, Minister of DoC, in 2012 appointed in 2011. • Mr Setumo Mohapi, CEO of SENTECH	• On 28 November 2012, SENTECH stated that the amended BDM Policy must include a STB Control System to protect the investment by the Government in the Subsidy Scheme. • Cabinet approved the funding from the USAF for subsidies to go to poor TV-owning households towards the cost of STBs, antenna, and installation.	• The report states that the delays related to the broadcasting digital migration project were largely related to court proceedings against the Department of Communications regarding the management of the STB control mechanism. As a result, the tender for the manufacturing of subsidised STBs could not be finalised. (Page 85)	• Meanwhile the Director-General, Rosey Sekese, identified that despite the achievements made by the department, it still faced challenges such as organisational instability due to leadership gaps that affected the strategic oversight of the department's work and there is no clarity on how this matter will be addressed. (Page 18) • SENTECH achieved 80% digital signal coverage, with R116 million from R173 million received from the department. R57,1 million was not used in this regard. The Department has failed to provide more clarity on the funds not used in the report. (Page 116). • The Department specified that it would appoint a service provider to render a public awareness campaign on the Broadcasting Digital Migration at the cost of R11 million for 36 months. The Department has failed to provide more details about who the provider would be in the report. (Page 153) • During the 2012/13 term, the Department failed to report on the work the entities are involved in, with regards to the BDM programme.

2013-2014 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Dr Siyabonga Cwele, • Deputy Minister, Prof Hlengiwe Buhle Mkhize • Acting Director-General, Ms Rosey Sekese • Ms Dina Pule, Minister of DoC in 2013 • Ms Pumla Radebe, Chairperson of USAASA	• The Minister was in attendance in a briefing that took place on 20 March 2013. • On 20 March 2013, the Department mentioned that there has been a service provider that has been appointed for BDM awareness. • On 20 March 2013, the Department acknowledged the challenges that affected the specific facets of the BDM value chain. • The Minister stated that priority would be given to expanding national DTT and satellite coverage, allocations for STBs, STB installer training as well as provision of technical user-support. • SENTECH confirmed to the Minister that in terms of signal distribution, South Africa would be at 80% by the end of March 2013 and by the end of 2013, the signal distribution would be at 84%, then the remaining 16% would be covered by satellite. • On the Department's 3rd quarter Organisational Performance presented on 20 March 2013, it was stated that a monitoring report that was expected to be produced on the implementation of the STB Manufacturing Sector Development Strategy was delayed due to a court case brought against the DoC.	• The report indicates that the Department is planning in the 2014/15 financial year to roll-out targeted awareness campaigns across all provinces, develop an efficient STB distribution model. (Page 21) • The BDM policy was amended due to the to the Set Top Box (STB) control system and are aimed at avoiding challenges in implementing the Broadcasting Digital Migration Programme, caused mainly by differences between broadcasters and between certain STB manufacturers (Page 38) • The Director-General, Rosey Sekese also places the fault on broadcasters and STB manufacturers for the delay in digital migration efforts. (Page 38)	• The 2013/14 annual report reveals under its annual financial statements, SABC received R76 million for a digital migration project. However, the Department has failed to provide more details on this. (Page 167) • An amount of R40.8 million was spent on Advertisements or BDM awareness campaigns but no further clarity is provided within the report for these quantities. (Page 170) • On 15 October 2013, it was presented before the Committee that the Auditor General (AG) made remarks regarding USAF and that there is leadership instability that resulted in poor oversight and monitoring of performance, strategic planning, and performance reports not submitted according to Treasury regulations. • On USAASA, the Auditor-General also made material findings that 43% of the targets were not specific and not measurable and 29% of targets were ambiguous. The entity dealt with a capacity issue. • The Committee raised concerns on the targets that were missed. They also noticed a difference in information provided on the presentation and the annual reports that did not correlate and some information on the presentation was not on the actual annual report.

	● From a PC meeting that took place on 27 March 2013, it was stated that the National Treasury allocated R21,5 million to USAF. BDM was allocated R240 million, and the project costs stood at R2, 195 000 million. ● On 15 October 2013, USASSA presented on USAF's four projects' statuses: 1. DTT was not achieved. 2. The access centres project which was partially achieved. 3. Handover/ connectivity upgrade was not achieved. 4. BDM project was not achieved.		● On 20 March 2013, the Department speaks of a service provider that has been appointed but it does not actually mention the name of a service provider.
2014-2015 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
● Minister Dr Siyabonga Cwele, ● Deputy Minister, Prof Hlengiwe Buhle Mkhize ● Acting Director-General, Ms Rosey Sekese ● Donald Liphoko, Acting DG of DoC ● Mr Norman Munzhelele, DG, DoC	● DoC presented before the Committee on the BDM state of readiness. ● On 10 March 2015, BDM Amendment Policy was approved, with the inclusion of the control system in the STB. ● On 10 March 2015, Mr Munzhelele acknowledged that the deadline to switch over to digital had passed three times, even though the Minister had stated that stricter deadlines needed to be set.	● The 2014-2015 annual report reveals that under Programme 1: Administration, the Department of Communication did not achieve the set targets for the BDM awareness campaign. (Page 32) ● Under Programme 5: ICT Infrastructure Support, the BDM Call Centre was also not achieved. (Page 97) ● The Department of Communication has transferred R62 million to the SABC for converting old analogue technical infrastructure to digital technology. But only R7 million of the fund was spent. (Page 101)	● The report is absent on the funds that were not used by the SABC on their digital migration project. An amount of R55 million was not spent and reported. (Page 101) ● Based on the Minister's statement on 10 March 2012, there has not been accountability for missed deadlines. ● The Committee noted that the awareness campaign was late.

2015-2016 Term			
Person Responsible	What the Parliamentary Committee meetings discloses	What the Annual Report discloses	Issues identified
● Minister Ms Faith Muthambi, ● Deputy Minister, Ms Stella Tembisa Ndabeni ● Acting Director-General, Mr Norman Munzhelele	● On 10 March 2015, Cabinet approved the final amendments to the BDM Policy, which unlocked the project to enable implementation. ● On 15 September 2016, it was reported that free STBs and accessories were provided to five million TV-owning poor households. ● The 17 June 2015 ASO as set by the ITU was not met. ● The Minister stated that one of the critical aspects of the project was the bilateral agreements with the neighbouring countries to ensure harmonisation.	● On page 46, the annual report reveals that the programme which manages BDM is no longer under Programme 1: Administration but under a new programme which is Programme 3: Industry & Capacity Development. ● In addition, the strategic objective for the BDM was to ensure successful migration from analogue to digital TV in South Africa within two years. (Page 46)	● The report does not provide a statement from the Deputy Minister Stella Ndabeni. This is out of the ordinary. (Page 8) ● For the 2015/16 term the BDM project has shifted to another governmental subprogramme. (Page 46) ● The Committee noted conflicting figures from different entities and the policy (this was in terms of the STBs to be provided). ● The annual report does not provide actionable steps as to how the Department is planning on achieving the analogue switch off. For example, the department's strategy to overcome areas of underperformance does not address consequences for underperformances on BDM targets. (Page 48) ● The annual report does not provide information on free STBs to five million TV-owning poor households as presented to the Portfolio Committee.

2016-2017 Term			
Person Responsible	What the Parliamentary Committee meetings discloses	What the Annual Report discloses	Issues identified
● Minister Ms Ayanda Dlodlo ● Deputy Minister, Ms Tandi Mahambehlala ● Acting Director-General, Ms Qinisile Delwa	● On 15 September 2016, the Minister noted the progress on BDM: the adoption of the amended BDM policy, installation of the STBs & the registration of consumers in 4 provinces (Northern Cape, Free State, Mpumalanga & Limpopo.) The dual-illumination performance period was declared on 1 February 2016. ● On 15 September 2016, the Department stated that the terrestrial and satellite transmission network had been completed. However, the Department mentioned that there was no adequate funding for dual illumination, STBs, related accessories, public awareness, contact centre and warehousing of STB kits.	● The Minister offers the same assurance that there has been progress made in the implementation of the BDM programme and indicates that the milestone to switch off the analogue transmitters would begin in October 2016. (Page 28) ● Concerning public awareness on digital migration broadcasting, additional funds were allocated to the programme. However, the additional amounts are not displayed. (Page 53)	● The report does not provide enough information on the analogue signal switch off. Instead, the report only reveals the deadline. ● There are concentrated efforts made on public awareness campaigns, but these campaigns lead to no action to achieve long-term lasting changes. ● On 15 September 2016, Members asked if the Department had an idea of the total cost of the BDM project. ● The Department did not respond with the actual amount needed to complete the BDM project but responded and said that they had written a letter to request more budget from the National Treasury.

2017-2018 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
● Minister Ms Nomvula Mokonyane. ● Deputy Minister, Ms Pinky Kekana. ● Acting Director-General, Dr Mashilo Boloka. ● Thandi Mahmbehlala, Deputy Minister DoC, in 2017	● On 2 May 2017, it was noted that the delays in full implementation of the digital migration programme had a negative impact on the availability of spectrum. ● Also on 2 May 2017, it was reported that a door-to-door registration and installation campaign started in April 2016 in the Square Kilometre Array: Brandvlei (Hantam Local Municipality); Williston (Karoo Hoogland Local Municipality); Carnarvon, and Vanwyksvlei (Kareeberg Local Municipality) and Vosburg. ● On 6 September 2017, the Department stated that it had targeted 10 digital broadcasting migration awareness campaigns but held two digital migration awareness campaigns by the end of the first quarter. In total 31 awareness campaigns were carried out in North-West, Eastern Cape, KZN and Mpumalanga. ● On 6 September 2017, the Minister reported that a Broadcasting Digital Migration Advisory Council (DMAC) was established, and it composed of government, SOEs, broadcasters and Telkom operators.	● The 2017/18 annual report reveals that the Department will manage the broadcasting digital migration by 2019. This indicates that the target date keeps on changing. Also, the report displays that the BDM analogue signal could not be switched off because of the absence of direct to home STBs and the cancellation of contracts by USAASA with manufacturers. In addition, the Department specified that the delivery model would be explored with other participating SOEs. (Page 48)	● Although the department has a new ministry, the same note is stated in the annual report. For example, each minister has said that the department remains committed to accelerating the implementation of the Broadcasting Digital Migration (BDM) Programme. This program is aimed to migrate the country from analogue to digital, but more emphasis was placed on public awareness campaigns. ● Concerning the strategy to overcome areas of underperformance, the same information is stated in the previous annual report. (Page 51) ● The 2017/18 annual report discloses that the Department achieved 58 digital migration broadcasting awareness campaigns, meanwhile the Department presented that 31 awareness campaigns were carried out. ● The annual report does not mention anything on the establishment of the advisory council. This is out of the ordinary.

2018-2019 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Ms Stella Tembisa Ndabeni. • Deputy Minister, Ms Pinky Kekana. • Acting Director-General, Ms Nomvuyiso Batyi. • Ms Mamoloko Kubayi-Ngubane, of DoC in 2018.	• On 23 January 2018, the Policy was passed regarding the encryption & non-encryption, & there was a call to review that policy, which was then followed by a ConCourt judgement regarding the matter. • The Acting DG informed the Committee that the digital terrestrial network had been fully deployed and active across the country. Also 87.3% of the citizens were able to receive digital terrestrial television broadcasts, while the 12,7% remaining could receive broadcast via direct-to-home satellite.	• During the 2018/19 financial year, Minister Ndabeni specified that the BDM Programme's project management office will now re-sequence the provincial Analogue Switch-Off Plan to enable the early release of the high demand spectrum. (Page 5) • Minister Ndabeni further mentions that due to the slow pace of digital migration the department revised the delivery model to create demand to entice consumers to migrate. (Page 22) • The report discloses that the BDM project is extremely behind schedule, underscored and the situation is further constrained by resources across the public service. (Page 53) • The delay has resulted in South Africa missing the ITU deadline of June 2015 declaring its broadcasting signal vulnerable to unprotected interference. (Page 53). • Minister Ndabeni promises that the Department aims to achieve analogue switch-off by 31 December 2018 in the Free State and North-West. (Page 53).	• The Department indicates that their Programme 3 has achieved 100% targets. But one of the programme's objectives is to manage the BDM project. It seems that this target is not included in the overall performances per programme. (Page 24) • The delay has not only resulted in South Africa missing the ITU deadline of June 2015 declaring its broadcasting signal vulnerable to unprotected interference. It has further brought uncertainty regarding timelines. (Page 53) • During the parliamentary briefing on 17 April 2018, the Committee asked tough questions, and some responses were not forthcoming. The Committee called out the Department to stop lying to the public because it will not reach the target with the R48 million budget when it required R6 billion for the entire project. The Committee raised the fact that the Department reports on the same information every year, but nothing ever happens. Members further asked more about the Digital Migration Advisory Council. The Department replied and said due to the change of Ministry the DMAC was dissolved when Minister Kubayi took over.

2019-2020 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
● Minister Ms Stella Tembisa Ndabeni. ● Deputy Minister, Ms Pinky Kekana. ● Acting Director-General, Mr Robert Nkuna	● On 3 July 2019, the Department presented to the Committee on the 2019/20 annual performance plan, the Department will review the delivery model to accelerate the release of the radio frequency spectrum. ● On 8 October 2019, the Committee asked who the role players on this project were, the Department responded with the following: SAPO, SENTECH and Bosasa. Bosasa was the national empowerment fund responsible for funding the broadband digital migration project and Bosasa distributed STBs that were at the SAPO warehouse. ● On 8 October 2019, the Department mentioned that there were 500 000 STBs sitting at SAPO and they were waiting on the new installers since the old contracts had run out.	● The migration from analogue to digital target has shifted from 2019 to 2021. (Page 50) ● The annual report also shows that the BDM awareness and education campaign was not adequately implemented in some of the provinces during the first quarter reporting period. This is another indication of target(s) not being accomplished. (Page 51) ● Page 85 of the annual report reveals that the Department's internal audit function has also raised concerns regarding the BDM programme. The concern was as follows: ○ No documented and approved terms of reference (TOR) governing the PMO and Extended PMO ○ Critical planning documents not approved by the responsible authorities. ○ Inadequate Monitoring and Evaluation process or system in place ● Lack of controls/systems in place relating to the receival of gifts/ donations within the DTT project.	● The Programme performance indicators for the BDM keeps shifting each annual report. ● The 2019/20 annual report has a dedicated section that presents topics of portfolio committee meetings. This marks the first annual report that provides such information. (Page 77) ● During the year 2019, the Department did not clearly report on the status of BDM. ● On 8 October 2019, the Committee asked questions about the STBs at the warehouse, they wanted to know the costs associated with storing the STBs, how functional or obsolete would those boxes be after prolonged time in storage? ● The Department could not respond to the cost of STBs stored at the warehouse. ● The annual report does not report on Bosasa's role on BDM and the meeting of 8 October 2019 is not reflected on the table containing the Portfolio Committee meetings. ● The Committee asked these questions so they could conduct oversight. ● It is clear that the Department has been irresponsible with regards to the BDM project and has not accounted for it.

2020-2021 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Ms Khumbudzo Ntshavheni • Deputy Minister Mr. Philly Mapulane • Acting Director-General, Ms Nonkqubela Jordan-Dyani	• On 4 February 2020, it was reported that the BDM project was five years behind. The reason has been the slow pace of household migration to digital platforms. • On 4 February 2020 it was also reported that during March and July 2019, Cabinet approved the request to further review the delivery model to enhance efforts aimed at expediting ASO to release the early high demand of spectrum. • On 19 May 2020, the Department of Communications and Digital Technologies (DCDT) outlined the initial plan for the BDM programme, spanning 13 months. The Digital Migration Advisory Council (DMAC) will advise the Minister and ensure coordination with the General Directors. The interdependencies of the programme must include USAASA, SAPO, SABC (for awareness campaign), SENTECH & ICASA. Northern Cape, Free State, North-West & Mpumalanga are the priority provinces for the first phase and 863 810 household installations are projected. • On 1 September 2020, USAASA presented on its unachieved targets: Vacancies not filled although an Interim CFO was seconded to USAASA by the Department.	• Minister Ntshavheni reassures that the Department aims to conclude the migration by the end of the 2021/22 financial year despite the challenges experienced in relation to the BDM programme. (Page 6) • Deputy Minister Mapulane indicates that R78.3 million was allocated towards the BDM programme. (Page 7) • In addition, the annual report reveals that the Department experienced challenges with regards to the Broadcasting Digital Migration Programme largely due to delays in the finalisation of the Service Level Agreement between USAASA and SENTECH as well as delays in the finalisation of the voucher distribution system for implementation by USAASA. (Page 8) • The annual report reveals that USAASA has achieved the filling of the 2 critical vacancies under the organisational structure appointment of SENTECH to project manage the BDM rollout of Phase 1 installations of 860 000 set-top-boxes in 3 priority provinces, i.e., Free	• The focus of the BDM project has been restructured and shifted to a different departmental programme which makes it difficult to track. • Members raised concerns on DTT that the Department has been talking about it for the longest time and technology has moved on. They also added that a thorough review must be conducted. They noted that there is never enough money allocated to this process. • The annual report does not mention anything about the advisory council, but the Department informed that the council was established to advise the Minister. Meanwhile, we observed on 17 April 2017 that the council was dissolved. • The Portfolio Committee and the annual report provides different information with regards to USAASA's targets for the 2020/21 financial year.

	● Appointment of SENTECH to manage BDM Phase 1 roll out 860 000 STBs only concluded on 8 July 2020, but the appointment is subject to National Treasury's approval.	State, Northern Cape and North-West. (Page 73)	
2021-2022 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
● Minister Ms Stella Tembisa Ndabeni ● Deputy Minister, Ms Pinky Kekana ● Acting Director-General, Ms Nonkqubela Jordan-Dyani ● Minister Ms Khumbudzo Ntshavheni ● Deputy Minister Mr. Philly Mapulane	● A revised BDM Model was presented to Cabinet, from the one that was approved in 2018. A hybrid model was introduced. ● On 16 February 2021, the Minister stated that USAASA lacked capacity. Then the white paper gave guidance to change USAASA to a Digital Development Fund Agency to drive this project. Therefore, an Executive Caretaker Mr Basil Ford, was appointed as per Cabinet's approval, this decision was taken in the interim for 24 months. ● The President has announced that the switch-off would be finalised by March 2022 and the responsible people have been hired which includes SENTECH and the Board of the Project Management Office, the executives at USAASA, SAPO and the whole value chain. ● On 2 March 2021, the Department stated that there were delays, one which was the service level agreement (SLA) between USAASA & SENTECH. The SLA had been subsequently finalised & National Treasury granted USAASA approval to appoint SENTECH.	● The annual report displays that due to litigation challenges the analogue switch off date of 30 June 2021 has shifted to 30 March 2022. (Page 30) ● The annual report reveals under the audit committee report section that management did not have adequate internal control processes in place for collecting and verifying the data related to the Broadcasting Digital Migration indicator and related targets. In addition, no disciplinary steps were taken against some of the officials who had incurred and permitted irregular expenditure, (Page 111)	● The Ministry and department outline the same goals in a fast-tracking digital migration programme. This has been repeated in the previous annual reports. ● Despite the audit committee's internal audit findings there is no guarantee that these concerns will be taken into action. (Page 111) ● The annual report does not report on USAASA's caretaker Mr Basil Ford and the change of USAASA to Digital Development Fund Agency. ● The annual report of 2021/22 presents the same achievements of USAASA as per the 2020/21 annual report.

2022-2023 Term			
Person Responsible	**What the Parliamentary Committee meetings discloses**	**What the Annual Report discloses**	**Issues identified**
• Minister Ms Khumbudzo Ntshavheni • Deputy Minister, Mr. Philly Mapulane • Acting Director-General, Ms Nonkqubela Jordan-Dyani • Minister Mondli Gungubele	• On 21 February 2023, the Minister announced 30 September 2023 as the final date for registrations of government subsidised STBs. • On 6 June 2023, the Minister met with stakeholders and agreed that broadcasters should go below 694 Hertz and release the spectrum above that figure. The Minister told the Committee that there is an agreement that there must be an appropriate date to switch off which is not later than July 2023. • On 13 June 2023, the Minister stated that there was an agreement that by the end of December 2024, there would be a switch off despite any conditions. Broadcasters were moving in two phases, phase one which is above 694 Hz and phase two was the switching off by the end of December 2024. • On 10 October 2023, Sentech reported that they have switched off five provinces. Sentech was still operating analogue and digital television simultaneously pending the announcement of the ASO. This created dual illumination incremental costs. • On 6 February 2023, the Department states that there had been delays in the rollout of the BDM programme due to the floods.	• The Annual Performance Report (APP) reveals that the migration Household Migration and Analogue Switch off for the Broadcasting Digital Migration is scheduled to conclude by 31 March 2022, at the cost of R2.2 billion. (Page 84) • The annual report states that Sentech has enhanced capacity of installers across the country. This process was supported by the provincial governments, district and local municipalities as well as COGTA to raise awareness campaigns about the progress and what was expected of communities.	• The performance indicators are not reliable or consistently measured over time. • The Minister continues to address the delays in digital migration processes towards final analogue switch-off but no action against underperformances. • On 21 February 2023 the Minister briefed the Committee on the BDM progress, and the discussion was overwhelmed with litigation matters instead of addressing crucial targets and actionable steps in terms of achieving BDM project outputs. • The BDM project is placed under Programme 5 and it reports that the programme had a final budget of R544.5 million and expenditure amounted to R533.3 million (98%) in the 2022/23 financial year as compared to expenditure of R1.513 billion in the 2021/22 financial year. The net reduction was due to budget reduction of USAASA for BDM from R1.073 billion to R59.4 million. Page 15 • The Department still reports the same information in that there were challenges encountered by the Department when implementing the Digital Migration Programme, due to litigious matter regarding the analogue switch-off which led to the delays. As a result, the switch off date was extended.

9.3. Observations following annual report analyses

The expenditure on the BDM program implementation is not straightforward, which makes it difficult to calculate the overall cost of the project. For instance, the spending on the BDM sub-programme in the ICT infrastructure development and support programme was reported to decrease from R1.3 billion in 2021/22 to R84.1 million in 2024/25, reflecting an average annual rate of 59.5%. This reduction is attributed to the bulk of funding for the project having been transferred to the Universal Service and Access Fund and the South African Post Office in previous financial years (ITWeb, 2022).

Furthermore, the National Treasury's ENE document revealed that the department has a budget of R7.7 billion over the medium term, with 72.2% (R5.4 billion) allocated for transfers to entities for their operations and project-specific funding. A once-off allocation of R1.1 billion in 2021/22 was made specifically for the BDM project. The allocation of spectrum, a key aspect of the digital migration process, is expected to benefit the national fiscus with more than R8 billion from the proceeds of the auction (ITWeb, 2022). Four years prior, the government had spent R900 million on purchasing digital decoders among other costs associated with digital broadcasting.

In the 14 years from 2008/09 to 2021/22, the Department of Communication have spent R7.5 billion to achieve effective Broadcasting Digital Migration. Based on available information, the funding was tracked through the annual report's records from the Department of Communications and the Department of Communications and Digital Technologies.

The collating of funding for BDM is difficult to track as the annual reports do not clearly define the allocations and the allocations are inconsistent across the financial years. For example, the annual reports do not provide reliable feedback or breakdowns on the BDM program objectives. Furthermore, in the 2018/19 financial year, the Auditor-General of South Africa (AGSA) was unable to gather sufficient relevant audit evidence to support the declared achievement of the BDM program goal implemented.[42]

Likewise, in 2019/20 financial year, the Department's Internal Audit Committee also expressed their concerns about the BDM program's monitoring and evaluation method or system.[43] This is highly

[42] South African Government. "Department of Communications Annual Report 2008-2009". https://www.gov.za/documents/department-communications-annual-report-20082009

[43] Department of Communications and Digital Technologies. "Department of Communications Annual Report 2009-2010". https://www.dcdt.gov.za/documents/annual-reports/file/73-annual-report-2009-2010.html

problematic in terms of measuring efficiency and progress, as well as holding those to account who have failed in their duties to ensure the successful rollout of BDM.

Following stringent analyses of 15 annual reports over the years, the following observations can be made of BDM-related budgetary allocations and expenditure:

Awareness Campaigns and Consultancy Appointments:

- In the 2008/09 Annual Report, consultant appointments were made for BDM public awareness over a 36-month period, indicating a strategic effort to raise awareness about the digital migration process.
- Additionally, the SABC Group Sales and Marketing received R2.2 million in 2008/09 for spreading awareness about the BDM project, suggesting collaborative efforts with media organisations to promote digital migration.

Budget Allocation and Spending Patterns:

- Over the years, there has been a pattern of significant budget allocations for digitalisation and DTT rollout, but the actual spending often falls short of the allocated amounts.
- For instance, in the 2009/10 Annual Report, SENTECH received R260.019 million for digitalisation, yet the underspending of R249.9 million in the subsequent year raises questions about the effective utilisation of allocated funds.

Program Management and Restructuring:

- There is evidence of program restructuring over the years, with the BDM project being managed under different programs such as Program 1, Program 3, and Program 5, indicating shifts in priorities or organisational strategies.
- The 2015/16 Annual Report highlights the restructuring process, with the BDM project being managed under Program 3: Industry and Capacity Development, emphasising the importance of capacity building for successful digital migration. These inter-programmatic shifts can be very confusing.
- The 2022/23 Annual report states that the program is managed under program 5: ICT Infrastructure Development and Support, reports that the 2022/23 financial year saw a net reduction due to budget reduction of USAASA for the BDM project from R1.073 billion to R59.4 million.

Resource Management Challenges:

- Despite substantial allocations, there are instances of underspending, such as in the 2013/14 Annual Report where SENTECH underspent R138.805 million for DTT migration, raising concerns about inefficiencies or delays in project execution.
- Furthermore, the rollover of significant amounts from one fiscal year to another, such as the R1,214 million from 2015/16 to 2016/17 for DTT awareness, suggests challenges in timely project implementation or planning.

Impact on Public Services:

- Underspending and delays in project execution may have hindered the timely rollout of digital broadcasting services, affecting public access to digital content and services.
- For example, despite significant allocations for DTT rollout in the 2014/15 Annual Report, achieving only 84% population coverage and 58% geographic coverage indicates potential limitations in service accessibility.

Financial Oversight and Governance:

- The discrepancies between allocated budgets and actual spending raise concerns about financial oversight and governance within government departments and entities involved in the BDM project.
- Lack of clarity on spending, such as the R249.9 million underspending by SENTECH in the 2010/11 Annual Report, underscores the need for improved transparency and accountability mechanisms.

Public Awareness and Engagement:

- Despite allocations for awareness campaigns, the effectiveness of these efforts is unclear, as evidenced by limited details on outcomes or impact in the Annual Reports.
- Increased spending on advertising and awareness campaigns over the years, such as the rise from R35.6 million in 2011/12 to R40.8 million in 2012/13, suggests ongoing efforts to engage the public but raises questions about the efficiency of these expenditures.

Increased Spending in Later Years:

- There is a noticeable increase in spending on BDM in the later years, particularly in the 2020/21 and 2021/22 financial years.
- This increase indicates a renewed urgency in completing the BDM project as deadlines are approaching with multiple being missed already.

Overall, these observations highlight the complex and multifaceted nature of the BDM project in South Africa, involving multiple stakeholders, budget allocations, and challenges in implementation.

The following sections provides an overview of the observations resulting from the research, challenges identified and makes recommendations for the way forward.

SECTION C: OBSERVATIONS, CHALLENGES AND RECOMMENDATIONS

10. SUMMARY

South Africa's BDM project has been marred by years of mismanagement, with each new minister inheriting unresolved issues and making little progress. Despite repeated funding requests, the Department of Communications and Digital Technology has not met key targets, and inconsistent reporting between Portfolio Committee minutes and annual reports hinders accountability. The BDM project is fragmented across different departmental programmes, complicating oversight and transparency, while advisory councils and caretaker appointments have only contributed to wasteful spending.

Many households, especially low-income ones reliant on free-to-air broadcasts, remain unprepared due to insufficient distribution of set-top boxes (STBs). Affordability issues, a lack of public awareness, poor coverage, infrastructure shortfalls, and shifting deadlines add further complications. There is concern that the migration could favour larger broadcasters over local content providers, while the costly dual transmission of analogue and digital signals strains budgets. Regulatory gaps and limited parliamentary oversight have led to wasteful expenditure and inadequate accountability.

Recommendations include launching extensive public awareness campaigns, strengthening collaboration among stakeholders, accelerating infrastructure investment, and implementing a supportive regulatory framework. Regular monitoring, evaluation, and effective oversight are essential to avoid further delays and ensure a successful transition to digital broadcasting.

10.1. Observations

In considering the findings of the longitudinal analysis, the following observations can be made:

- OUTA observed that over the past decade every new Minister inherited the problem, attempted to fix it, but failed. There seems to be a lack of understanding on how to fix the mess.
- By monitoring the Portfolio Committee on Communication and Digital Technologies meetings, it seems like the Department always requests extra funding, but it never meets the targets.

- The information that could be gathered from the Portfolio Committee meetings is not reflected in the annual reports, hence there are gaps in the representation of findings between the minutes and reports themselves. The annual reports, together with the Portfolio Committee minutes, show that the BDM project has been placed under Program 1 and 3: Administration and ICT and Policy Development. The BDM awareness campaign has been placed under Program 1 Administration, and it has its own budget, but the rest of the BDM work is under Program 3 ICT Policy Development, which has its own budget as well. This makes the tracking of progress, delivery activity and financial reporting much more complex.
- Advisory councils and the caretaker appointed on 16 February 2021, did not bring about any changes and contributed to the irregular and wasteful expenditure.
- On 15 June 2023, then Minister Mondli Gungubele gazetted[44] that 31 July 2023 would be the new date for switching off all analogue broadcasting services. Together with this, 31 December 2024 was gazetted as the end of the dual illumination period and date to switch-off all the remaining analogue broadcasting services. On 27 September 2023 during the portfolio committee meeting ICASA's presentation stated that "As of 31 July 2023, all broadcasters from any band above 694 megahertz were successfully migrated"[45] and that "there is still temporary analogue broadcasting of some highly populous areas using the sub-694 MHz until 24 December 2024."[46]
- Viewing fifteen annual reports from the Department of Communications from 2008 until 2023, the reports reveal that there is no guarantee that the BDM milestones will be delivered as promised. For example, on 10 March 2015, the Deputy Director-General, Norman Munzhelele acknowledged that the deadline to switch over to digital had passed three times. And the 2015 annual report does not report on action taken for underperformances. Since 2018, each annual report has stopped reporting on strategies to overcome areas of underperformance on the BDM project.
- Each minister that was assigned to the BDM project has reported the matter in the annual report in a different manner. However, numerous reports reveal that the reporting style is duplicated.
- The objectives of the BDM project kept on changing in each annual report and placed under different departmental sub programs which makes it difficult to measure and follow.
- The reporting on the targets for each sub-program also changes but is not accurately reported on. For example, the 2018/19 annual report reveals that the department has achieved 100% of

[44] Government Notice No. 1804, government gazette of 25 February 2022
[45] https://pmg.org.za/committee-meeting/37591/?via=homepage-feature-card
[46] https://pmg.org.za/committee-meeting/37591/?via=homepage-feature-card

the planned targets set for their Program 3: Industry and Capacity Development. This may seem positive, but BDM is one of the targets. As has been proven, the BDM project is constantly being delayed and is underperforming, how can the program report on achieving 100% of its targets when there are such obvious failures? This provides the wrong impression of the overall performances for this specific program and calls into question all other target performances.

10.2. Challenges and issues identified

This report depicts how South Africa has been undergoing the process of BDM with its own set of challenges and issues. Together with governmental (Executive) and parliamentary (Legislature) delays, the following key issues have been associated with BDM in South Africa:

- **Affordability:** One of the significant challenges has been ensuring that disadvantaged and low-income households can afford the necessary equipment to receive digital signals. Many households in South Africa rely on free-to-air broadcasts and the cost of digital TV set-top boxes or new digital TVs could be a barrier.
- **Awareness and Education:** Citizens, especially in rural areas, may not be fully aware of the transition to digital broadcasting and its implications. Even though there were different campaigns conducted, many citizens are still not aware or fully understand the BDM process and this may lead to confusion and resistance to modern technology.
- **Signal Coverage:** Ensuring that digital broadcasting signals cover all parts of the country, including remote and rural areas, has been a challenge. Areas might have poor signal reception due to geographical and infrastructure limitations.
- **Migration Deadlines:** Government had set specific deadlines for the migration process, but these deadlines were postponed several times due to delays in implementation, technical issues and other challenges. This uncertainty might have contributed to confusion among viewers.
- **Local Content:** There have been concerns about the availability and promotion of local content on digital platforms. Some worry that the transition might lead to a concentration of content from larger broadcasters, potentially overshadowing smaller, local players.
- **Infrastructure and Spectrum Management:** Upgrading broadcasting infrastructure and managing the radio frequency spectrum efficiently requires significant investment and coordination. This can be challenging, particularly in a country with diverse geographical and socioeconomic characteristics.
- **Interference:** Transitioning from analogue to digital broadcasting involves reallocating portions of the radio frequency spectrum. This reallocation can sometimes result in interference with

neighboring countries' broadcasts or with other services that operate in adjacent frequency bands.

- Dual Illumination: During the transition period, both analogue and digital signals are transmitted simultaneously. This dual transmission phase adds complexity and a significant cost implication. During the June 2023 Portfolio Committee meeting, the Minister pointed out that the department will carry the cost related to the dual illumination without mentioning the amount.[47]
- Consumer Support: Providing technical support to consumers who experience difficulties with their new digital equipment can strain resources, especially if there is a lack of local technical expertise in a specific region.
- Regulatory and Policy Framework: Ensuring that the regulatory and policy framework adequately supports the digital migration process, including issues related to licensing, competition, and content regulations, can be complex.
- Proper oversight and consequence management: Parliament has appropriate mechanisms to conduct oversight, but the members of the parliament do not use the oversight mechanism to their full advantage. This leads to a lack of accountability, a breakdown in trust and irregular and wasteful expenditure of the BDM project.

10.3. Recommendations

OUTA believes that the digital migration process can be significantly improved by implementing the following recommendations:

- Proper public awareness: The public's lack of awareness and comprehension is one of the most important obstacles in the BDM process. It is recommended that government and the relevant stakeholders launch comprehensive public awareness campaigns to educate citizens on the advantages of digital migration, the process involved and the available support. To ensure inclusivity, this education should be adapted to different demographics and languages. By increasing public awareness, the transition to digital broadcasting can be facilitated and resistance or confusion can be reduced.
- Collective Cohesion: Participants in the BDM process include government agencies, broadcasters, manufacturers and consumers. For a seamless transition, strengthening collaboration and coordination among these parties are essential. Regular consultations, open communication and distinct delineation of roles and responsibilities can facilitate collaboration. A coordinated strategy ensures that all stakeholders are aligned, that resources are utilised optimally, and that potential conflicts or duplications are avoided.

[47] https://pmg.org.za/committee-meeting/37217/

- **Infrastructure development:** The success of digital migration depends on the availability of transmission facilities and set-top boxes, among other components of the required infrastructure. To ensure that all citizens have access to digital broadcasting services, it is essential to accelerate infrastructure development, particularly in underserved areas. This may necessitate focused investments, public-private partnerships, and streamlined regulatory procedures. By placing infrastructure development at the forefront, government can ensure that the technological foundation for digital migration is robust and inclusive.
- **Regulatory framework:** The regulatory environment is crucial to digital migration. BDM requires the implementation of policies and regulations that promote innovation, competition and investment for its success. This includes creating an environment conducive to set-top box manufacturing, incentivising content creation, and ensuring broadcasters compete fairly. A supportive regulatory framework can stimulate growth in the broadcasting and technology sectors, thereby contributing to the digital migration's overall success.
- **Continuous monitoring and evaluation:** Monitoring and evaluation of the BDM process are essential for identifying obstacles, assessing progress and determining any required modifications. Implementing a robust monitoring and evaluation system that tracks key performance indicators, timelines and milestones can provide invaluable insight into the migration process's efficacy. Mechanisms for regular reporting and feedback ensure accountability and allow for timely interventions. By monitoring and evaluating progress closely, the government and stakeholders can ensure that the BDM process is on track and aligned with the desired outcomes.
- **Proper consequence management:** One of the functions of Parliament is to hold government to account in respect of how taxpayer money is being used. It detects waste within the machinery of government and public agencies. Thus, it can improve the efficiency, economy and effectiveness of government operations. In order to effectively hold government accountable, parliament should utilise the oversight mechanism available to them and apply proper consequence management, to ensure that no further irregular and wasteful expenditure be incurred for the BDM project.

11. CONCLUSION

The Broadcasting Digital Migration (BDM) in South Africa represents a crucial yet complex transition from analogue to digital television, aiming to enhance broadcasting quality and free up the radio frequency spectrum for mobile broadband services. Despite the potential benefits, the BDM process has faced significant challenges, including political inertia and financial mismanagement, resulting in missed

deadlines and ongoing public confusion. Broadcasting Digital Migration in South Africa has proven to be costly, and the failure to implement the process properly is exacerbated by a severe lack of oversight.

South Africa is facing a critical period. On the one hand, a concerted effort involving all stakeholders can ultimately realise the promise of a modern, efficient digital broadcasting landscape.

On the other hand, broadcasters and civil society are emphasising that free access to television is not just about entertainment but about ensuring democratic access to information. With public broadcasters like the SABC facing unprecedented financial pressures, the shutdown of analogue signals could widen the information gap, leaving marginalised communities even more disconnected. The fear is that, without careful consideration and effective intervention, the switch-off will disproportionately affect lower-income households, effectively violating their right to access information and their right to freedom of expression.

OUTA maintains its belief that the biggest issue at hand is the wasteful and irregular expenditure that has been taking place due to the ineffective rollout of the BDM process. The wasteful and irregular expenditure has been taking place for over a decade and is still taking place due to the government's inability to successfully conclude the BDM project.

One cannot point a finger at only one entity to take the blame for the unsuccessful roll out of the BDM process. It is however abundantly clear that the BDM roll out has been mired in controversy, obscured by smoke and mirrors, and delayed due to a lack of political will and proper consequence management.

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