21. Development of community television: Growth or stagnancy?

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The vision for community broadcasting in South Africa, of which community television is part, was ushered in by the White Paper on Broadcasting in 1998. The vision introduced a three-tier broadcasting system, which classified community television within the broad aegis of community broadcasting services, to include community radio services whose objective is to meet the broadcasting needs of a community or communities living in a specific geographic area at the local level. The history of services such as Trinity Broadcasting Network (TBN) [1] confirms that community television, one of the oldest sub-sectors of broadcasting in South Africa, predates the vision outlined in the 1998 White Paper on Broadcasting. The station was licensed by the South African Department of Telecommunications, prior to 1994, to serve the former homeland governments of Ciskei and Transkei. However, in terms of development, community television was slow, and played second fiddle to its radio counterpart. This is despite its licensing being enabled as far back as 2004 by the Community Television Broadcasting Services Position Paper.

> "Community television has reached stagnancy to a level where it is both unsustainable and disruptive to the broadcasting system"

The slow start could possibly be attributed to the initial Inquiry into Local Television process undertaken by the Independent Communications Authority of South Africa (Icasa), which revealed that community television will not be sustainable (2003). It is on this basis that the first set of licences, except TBN and Soweto TV, were issued on a test basis for a one-year period. These included 1KZN (Richards Bay), Tshwane TV, Bay TV (Port Elizabeth) and Cape Town TV. While this paved the way for other licences to sprout in various parts of the country, it did not conceal the weaker foundation on which community television was established, and continues to define the sector to this day.

The progress/growth of community development in South Africa should be looked at in two phases: The first early phase ranges from 1994 to 2013, and starts with the realignment of media policies in a democratic period. Key was the recognition of community broadcasting, through its licensing, and the establishment of measures to support community media, including the statutory Media Development and Diversity Agency (MDDA). The second phase, commencing in 2014, was a major turning point when a presidential proclamation was made separating broadcasting from other areas of Information and Communication Technologies (ICTs) through the establishment of the Department of Communications (DOC) housing the MDDA and Government Communications and Information System (GCIS) into one entity. This changed the community broadcasting landscape completely.

The White Paper on Broadcasting (1998) and the resultant Community Television Broadcasting Services Position Paper (2004) paved the way for the introduction and licensing of community television in the country. Of major importance in the policy provision is the ownership of community television by the community which has, as its mandate. to appoint the board. The board has to account for the activities of the station to the community at annual general meetings (agm's).

The Electronic Communications Act further provided for mechanisms on granting and renewal of licences. In addition, the Act further exempted community television from contributing to the Universal Access Fund, and payment of licence fees. The Broadcasting Digital Migration Policy makes provision for community television on Multiplex 1 catering for the SABC's regional broadcasting services during a dual illumination period wherein it has been allocated 15% of that Multiplex 1.

The challenges facing community television are not unique. Community radio had similar challenges, but was rescued by a huge and timely government support initiative, without which many of the stations would have collapsed, particularly those in the rural areas and non-affluent townships. With the number of community television stations increasing, pressure mounted for the government, particularly the DOC and the MDDA, to replicate the community radio support with community television. However, a number of factors dissuaded government to support community television:

Firstly, there was lack of a policy framework for such support. Secondly, there was uncertainty regarding the licensing framework as many of these stations were licensed with test licences for one year. This was further dampened by a licence moratorium imposed by Icasa in March 2010 until after the analogue switch-off. According to Icasa, the moratorium was informed by the scarcity of the radio frequency spectrum. Thirdly, the fluid business model prevented government support. For any organisation, a business model is important as an indicator of its sustainability. Given various business models in operation within the sector, ranging from quasi-community to purely commercial enterprises, it was difficult to understand which one was better suited for public funding in a manner that could ensure accountability and value for money. Fourthly, the increasing takeover of these stations by unscrupulous individuals who used them as their businesses, and their increasing migration to pay-television platforms. At that time, almost all the stations, except Cape Town TV, were available on pay-television. The benefit of being on pay-television was carriage fees that they received monthly. Therefore, a simple replication of the community radio support to community television would have given public funds to individuals and private companies, some of which were listed on the Johannesburg Stock Exchange. Fifthly, declining public funding and new priorities in government played a role. This situation was further compounded by the dearth of donor funding in the post-apartheid South Africa, which was the bedrock of community media for a long time. The DOC's support programme was established on the back of donor funds by the French government.

Major steps were taken to seek ways in which community television could be accommodated within the context of the factors raised herein. One such important step included a consultative process initiated by the DOC in 2011. The process started with commissioning a study to Pygma Consulting to investigate the impact of the support programme and measures for improvement. This study was followed by another by the Sol Plaatje Institute for Media Leadership at Rhodes University in 2012 to specifically analyse the community television environment and ways it could be assisted. These seminal studies were followed by a consultative community television summit in Johannesburg in 2012. It sought to develop a sustainable business model that was not only eligible for public funding, but was also located within the country's policy framework to ensure that community television fulfils the mandate that it has been established for, while maintaining its community attachment in terms of governance, community participation and contribution to community development, both socially and economically. Unfortunately, the recommendations of these studies and the outcomes of the summit could not be followed through owing to a myriad of factors, including but not limited to:

- New priorities and changing fiscal position in the public sector, which brought about budget cuts to the support programme;
- Comprehensive policy review which sought to look at the entire ICT sector anew, including broadcasting, especially on the policy question of regional broadcasting services;
- The 2014 institutional realignment following the presidential proclamation. The integration of the MDDA into the new DOC meant it was no longer logical to continue with the department's support programme and MDDA separately. The DOC's support programme was then transferred to the MDDA in 2015. This, as also recommended by the Pygma Research, [2] was an efficient way to overcome double dipping and competition between the programmes. However, it had its own downside. The MDDA only focused on the stations that were on its support programme as approved by its board, thereby leaving many of those on the DOC's in limbo. In contrast to the MDDA's support accessed through application, the DOC's support was largely based on identification by the department itself or through consultation by the communities themselves without any prescribed application process. The MDDA has not been able to continue with some of the strategic projects that the department handled, including the revision of the support scheme, and finalisation of the model for community television that could be funded through public means;
- Again, by the time the environment stabilised, momentum was already broken, and new challenges had emerged, making community broadcasting not a priority anymore. All the attention and focus that this sector enjoyed since 1994 dissipated.

Community television emerged during a buoyant period of the South African media industry. Despite the global economic recession ravaging many nations, the South African advertising base remained stable, suffering a paltry 0.6% decline. While this provided an opportunity for community broadcasters to survive, the sector was very unstable owing to poor governance and accountability. While many were licensed, a huge number were being switched off by the regulator owing to failure to comply with licence conditions. Others closed shop due to lack of resources. This situation battered the reputation of a promising and fledgling sector, resulting in it being shunned by the mainstream advertising industry (Misa-SA, 2003). This situation laid a poor foundation for the development of community television. Thus, the negative image associated with community radio shaped the entry of community television on to the broadcasting market, impacting on its survival over the years. While community radio could afford this unsatisfactory reputation, the same could not be said of community television given its capital-intensive nature and the risk associated with it.

Despite earlier promise, community television has reached stagnancy to a level where it is not only unsustainable, but has become a disruptive force to the three-tier broadcasting system in South Africa. Comparatively, the country has one of the most innovative and futuristic policy frameworks that provides an enabling environment for community television to thrive as a tool for socio-economic development. The allocation of 15% of Multiplex 1 for community broadcasting and the 2019 Community Broadcasting Services regulations underline the continued existence of community television as part of South Africa's broadcasting mix. As confirmed by ATKearney International (2018), the country has one of the most resilient media sectors in the world as evidenced by:

- Consumer media spend as a percentage of gross domestic product (GDP) per capita per annum being just behind the United Kingdom at 2.9%;
- Advertising spend as a percentage of GDP being 3rd, behind the United Kingdom and United States.

These market conditions present immense opportunities for community television to prosper in South Africa. However, as the current vulnerable position of community television continues to show, this will require getting the fundamentals right. This is important in view of the rapid market changes characterised by proliferation of new platforms distributing content and driving audiences from traditional television, and the capital-intensive enterprise that it is relative to community radio which could survive its less than acceptable reputation. For a resilient community television sector that can take advantage of these opportunities, a number of things have to happen. Internally, this requires consistent stability to totally overcome the disruptive governance challenges and negative perception, which bedevilled community radio since its inception. Externally, this will require an aggressive marketing drive to showcase the potential of the sector to drive socio-economic development and attract audiences.

Concomitant to these points of actions, the following recommendations are made:

- Cleaning the community television register and maintaining a channel provider distinction;
- Developing a fit for purpose and sustainable business model that is provincial in scope;
- Ensuring governance and accountability especially in the early years of establishment;
- Implementing strong government support;
- Detaching from pay-television so that it can have its own identity and cultivate its audience;
- Strengthening regulatory monitoring and enforcement.

Any regulation is as good as the measures to enforce it. Without regular monitoring and issuance of credible compliance reports detailing how these licences are governed, no external investor can risk investing in the community sector. It is important that measures be taken to strengthen enforcement in the sector so that non-complying licensees can be rooted out.

Finally, the majority of the current stations may be content with the carriage fees that they currently receive. They may not see the need to address the recommendations made, such as their business model, governance and accountability, and detachment from pay-television. Carriage fees do make a difference to the day-to-day running of the stations, but they will never know their actual worth, and will, therefore, continue to be an undervalued platform that lives from hand to mouth. Neither will they grow beyond the current levels. The sector must look at the bigger picture.

The South African government has policy options. They can choose the current sedentary approach to community television hoping that the law of natural attrition will take its course. Admittedly, many of the stations will disappear, but as recent trends have shown, this will not stop new ones from emerging. As this happens, chaos will prevail in the entire broadcasting fraternity and investor confidence will be eroded. It will continue to create instability in the sector and render the three-tier broadcasting system meaningless.

If this sector is remodelled as per the recommendations provided, community television will not only thrive, but will also become competitive and attract investment, thus creating enormous opportunities for young people, women, and people with disabilities to hone their skills across the entire value chain.

Footnotes

1. When the new 1994 dispensation arrived the two operations were combined and became jointly known as TBN Eastern Cape. Originally, no "conditions" were attached to the initial licenses. Only after the formation of the IBA (Independent Broadcasting Authority) and subsequently the ICASA (Independent Commu nications Authority of SA) were a series of "conditions" attached to the licenses. and TBN was classified as a "Community "licensee.
2. Pygma Research was commissioned by the Department in 2011 as part of its process to review its support programme in consideration of the changing environ ment characterized by growing demand amid public funds, advent of community TV, and multichannel environment ushered by broadcasting digital migration and other Over The Top (OTT) platforms. One of its key recommendation was the transfer of the DOC programme to the MDDA.

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