More Media for Southern Africa? The Place of Politics, Economics and Convergence in Developing Media Density.

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Abstract

In line with global trends, media in Southern Africa in the past decade has been moving slowly towards mergers, partnerships and multi-platform publishing. Driven by politics and facilitated by technology, the process has had to confront the difficulty of establishing viable economic models, the lack of regional integration within Southern African countries, and what is sometimes a difficult political environment. Markets remain largely national or local and economically weak. Print media faces huge hurdles. Broadcast media density is improving, partly through non-commercial mechanisms. News websites are understaffed, lacking in viable survival strategies and skills, and are incompletely integrated with parent media platforms. Economic pressures, however, are likely to force Southern African media operations into greater synergies in search of survival. The various convergences entailed may increase media density.

Introduction

One of the problems facing Southern Africa is this: there just isn't enough mass media.[1] Things are better than they used to be, but as a region we remain media-thin rather than media-dense.[2]

One of the implications of this is the problematic nature of applying willy-nilly in this region, theories and policy agendas taken from media-dense societies. The fact of the matter is that media in Southern Africa is not ubiquitous; people do not 'live' media here. Identity-formation – for example – is far less affected by media content. Contrary, too, to the views of theorists like Neil Postman (1986, 1993), the region's people are more likely to suffer starvation from lack of information than suffocate from an overload. In short, our local challenge is to develop our own understanding about how to increase media-density and media utility in economic and political conditions that are very different to First World experience. Without such growth, however, the impact of media in southern Africa will be insufficient to help take the region past the problems of poverty, AIDS, xenophobia, despotism and the like.

Of course, this is looking at media in quantitative terms only. It could be argued – against my focus on increasing density – that a sizeable quantity of government propaganda media or of Hollywood escapism is not a good thing for either democracy or development. On the other hand, no one can be forced to consume media, and nor can people be force-fed

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media meanings – they produce meaning (in varying degrees and impacts) in the ongoing social moments of consumption and 'ingestion'. So, in this light, a surfeit of media is not automatically an undesirable, even when its 'quality' is questionable. Quantity of media, in my view, is the primary question.

It can be argued that, on balance, the more media available, the greater the chances of a variety of perspectives will occur, and the greater the potential that the specific information needs and wants of citizens will be addressed (Berger, 2002). In this regard, my bias is towards forms of density that are specifically comprised of journalism, even though it is clear that the far greater portion of media content is not journalism. I accept that expanded media density covers phenomena like more advertising billboards littering the landscape and more radio stations playing more American music. These kinds of messages are part of the media picture and while they can play a range of very important social roles (such as pro- or anti-women's rights, for example), they are distinct from journalism. It is assumed in this paper that an absolute increase in journalism and information will likely accompany an increase in general media density, and this so even in the event that the proportion of news may even shrink vis-à-vis content that is more commercial or entertaining in orientation.

Media density, then, is a relevant topic and within this, the focus has to fall upon the sustainable development of media outlets and media reach across Southern Africa. Media is not just a factor that can assist economic and political development; its own growth is a register of part of that development. Media development therefore is well worth studying.[3]

As a concept, 'media density' hearkens back to the modernisation writings of Daniel Lerner (1958), Wilbur Schramm (1964) and others. It has also informed United Nations Education Science and Cultural Organization (UNESCO) global statistics for decades. Certainly, the paradigm as a whole has its problems: an idealist over-rating of the power of media as a cultural force, and a Eurocentric conception of appropriate media content. There are also the unfortunate linear, evolutionist and technological-determinist connotations that imply that media technologies evolve willy-nilly and universally along western lines (never mind the diversity of experience in the West anyway). Such views, including technological determinism, have correctly come in for criticism (see Chandler, 2000; Servaes, 1999). However, a case can be made that it is possible to extricate the concept of 'media density' from this context.

Part of this exercise is to highlight the nature of media as the vehicles that ferry messages within the two-way circuit of information flow. In this light, the desire to increase density does not just mean giving the 'information poor' better access to the 'knowledge society'. It also means the enrichment of the latter through the inclusion of the voices, stories, wisdoms and 'indigenous knowledge' of the marginalised. This moves us away from the mass media 'hypodermic needle' and 'colonizing' conception of media's role in development. Instead, it becomes possible to rehabilitate 'media density' as a more neutral concept in order to focus on the key question: how do we achieve an expansion of media in Southern Africa?

Part of this in turn relies on an understanding of what drives media development and hence density.[4] An underlying issue is whether media can grow faster than other social and economic indices. According to Wilbur Schramm and Lee Ruggels (1967, p. 59), "the mass media tend to grow along with other measures of economic and social development". For these authors, levels of per capita income, literacy, and urbanisation make up an integrated system, and this interdependence is a "basic fact of media growth". Their conclusion is that the three variables are all mutually influencing (though in different degrees in different national experiences), although income and urbanisation seemed to do more to determine literacy, than the reverse (1967, p. 63). As a factor, urbanisation seemed also to be less influential in determining media growth than it was during the pre-radio period (1967, p. 57).[5] Clearly, all these factors do have an important bearing on media density levels, but it is likely that the relationship is not nearly as tight a system as Schramm and Ruggels believed.

In Southern Africa, as will be outlined below, a complex mix of sociological indicators, political drivers, economic possibilities and technological developments call out for attention in explaining and predicting media growth. And in particular, as will be argued, it appears that future growth will hinge upon greater concentrations of ownership; effective state policies to create an enabling environment for media operation and investment; additional media synergies within a context of global competition; and the better use of new technologies in a context of technical convergence and diasporic markets.

The post-apartheid promise

Upon the ending of apartheid rule in 1994, observers could have been forgiven for thinking that Southern African media would be able to flourish unhindered. The prognosis looked good for political and economic reasons.

First, it was clear that the political environment – though considerably eased compared to the restrictions of the 1980s – would be radically liberalised. It was reasonable to think that the prospects for freer publishing in neighbouring countries would also improve after the end of apartheid in South Africa.

Second, it seemed logical to assume that with the black majority coming to power, the old white-oriented media would rapidly be overtaken by the thitherto struggle-oriented and alternative media serving the constituency that was coming of political age. The black market with rising wealth, education and expectations would mean huge media opportunities. Certainly, this was the dream specifically among many in the alternative press, which hoped to move from the margins to the new mainstream (Berger, 2000a). But there was every reason for any media enthusiast in general to look ahead with excitement. The market potential for media business was promising. Compared to other countries at comparable levels of development, like India and Brazil, South Africa was very low in newspaper penetration (Fiej, 1993). In short, the political and economic conditions for media growth looked good after apartheid. And, as the whole region moved away from conflict and economic stasis towards reconstruction and development, media growth could be part of an anticipated 'peace dividend'.

In actuality, the situation turned out to be a lot more complex than anticipated, and the extent and shape of media growth took turns that were not wholly foreseen. To take one example, literacy increased by 20 percent between 1991 and 1995, but this was not reflected in newspaper sales (Government Communication and Information Services - GCIS, 2000/2001).[6] Another example is that while levels of civic participation declined after the end of apartheid, a stream was nonetheless successfully harnessed to secure the existence of community radio (notwithstanding ups and downs). In order to understand the trajectory of what happened in South and Southern Africa, it is necessary to dissect the anatomy of media density and growth.

Getting to grips with "media density"

Media density has traditionally been identified as one of the critical variables (along with urbanization) that correlate with democratisation and economic growth. For classic writers like Lerner (1958), Schramm (1964) and Everett Rogers (1976), the assumption was that mass media served as the 'multiplier' that powered a society into 'modernity'. For Lerner (1967, p. 316), "mass media are clearly the primary resource for developing societies-in-a-hurry", and their role was to teach people "what to want" and "how to get".[7] He operated with a matrix of urbanisation, literacy, media participation and electoral participation in order to assess how "a communication system is both index and agent of change in a total social system" (1958, pp. 56-57). Media participation in his analysis was taken as the proportion of total population buying newspapers, owning radios and attending cinemas. Writers like Schramm and Ruggels (1967) defined media density (to establish its correlation with urbanisation and literacy) more narrowly, focusing only on the number of radio receivers and the sales of daily papers.

There have been several other interpretations of what to measure when assessing media density. Thus Gilbert Winham (1970) looked at post office expenditures, and at per capita numbers of publications, telephones, radios and television sets. A similar approach in Japan, known as the Johoka Shakai index, examined four indicators. These are: the *amount* of information (phone calls per person, newspaper circulation, books read, and population density); *distribution* of media (phones, radios and TV sets per 100 households); information *activities* (service workers and students as a percentage); and, household *spending* on information compared to other expenditures (Ito, 1998; Dorrick & Wang, 1993). Alternatively, Kim Smith (2000) has focused on ratios for 1000 people of daily newspapers, radio receivers and TV sets; as well as on outgoing international telephone traffic as a percentage of subscribers, telephone connections per 1000 people, and computer imports as a percentage of imports. For its part, UNESCO has set as its development standards a minimum of 100 newspapers, 50 radio receivers, 20 TV sets and 20 cinema seats, per 1000 people. (Smith, 2000, endnote 1). The total kilograms of cultural paper consumed per person has also been used as an index (UNESCO, 2000, table 12).

Mixed up in these measures is an ad hoc combination of quantitative and qualitative issues. More problematic, confused in amongst them all are two distinctive arenas of density: the side of the media providers, and the side of the consumers. In theory, one pole of this density spectrum can expand without the other doing so – thus more production does not inevitably mean more consumption, and vice versa. But in practice, it is likely that the two do correlate somewhat (see below).

Media growth on the production side can take a variety of forms – from increasing existing outlets (such as launching additional print titles or sister broadcast stations), through to wholly new offerings coming onto the market. The absolute expansion of advertising revenue drawn into media as a percentage of Gross National Product (GNP) would also count. Media densification can also involve a quantitative increase in the reach of the product (on the same or on additional platforms) as in syndication or content sharing arrangements. There may also be an expansion of a given product (e.g. increased pagination, extra supplements or editions, speedier delivery, lengthened news bulletins, etc.). Perhaps even the provision of better 'quality' content (however defined) in a given media product ought to count as increased media density. At the very least, (and in terms of my bias towards information), this should be the case with an increase in the ratio of news to other kinds of media content.

From the point of view of consumption, media growth can be analysed in terms of place, price, product and promotion. These translate into access to media (e.g. to broadcast signals, to literacy skills, affordability, and the availability of radio and television receivers, networked computers, and telephone technology). [8] Product also includes whether the media offerings are desirable and appropriate (e.g. with regard to language, timing and content). Promotion covers consumer awareness of the offerings in relevant markets. These factors come together in constituting a density of audiences (and advertisers) and a given 'market penetration'.

A consumer may also increase media consumption intensively – spend more time with a given media product, or extensively – spend more time with new products. The key question from a 'media density' perspective would be the total amount of time absorbed by people's media consumption as a proportion of their use of time as a whole. Research could profitably be developed into the statistical picture of all of this within Southern Africa.[9] Another matter that could profitably be explored is the extent to which it is appropriate in Southern Africa to measure media density per individual consumer, rather than per household unit or micro-community.[10]

This is not the place to develop a new model of media density. Suffice it to say that the distinctions elaborated above have significant application. Thus, one can certainly conceive of an increase in media consumption without an expansion of media production. For example, those with radio receivers can hear an additional station or listen to the same one for longer. However, it is fair to argue that one of the constraints on consumption is precisely the state of play in production: the types of products, and their availability, pricing and sustainability. To analyse the development of media density therefore leads us to focus on media production, even if it is closely bound up with successful expansion of consumption. It is this area that constitutes the focus of this paper – i.e. the ‘supply side’ of media densification. And rather than pursue contextual issues of literacy, urbanisation, telecommunications, etc., a narrower range of evidence will be considered.

Media growth: limits and potentials of economics and technology

Expansion of the media as a production sector hinges on many things, not least the state of the wider economic and political terrain – both within the Southern African region and internationally. It is also a function of the organisation of the industry in a given scale, where there is substantial room for variation within wider parameters, and which can have major impact on growth. Worldwide, akin to other economic sectors, such internal influences on growth are linked to the extent of commercialisation and competitiveness, and the consolidation and concentration of enterprises. A study by Joseph Turow (1992) has outlined the development of synergies, niche-marketing, cross-enterprise ownership, and strategic partnerships as part of this picture. Similar analysis by David Croteau and William Hoynes (2001) has pointed to media economies of scale, cross-promotion, branding, market segmentation and specialisation, conglomeration, diversification, globalisation and joint ventures. Within this total mix, the cost of the means of media production are an important factor. Media economics are heavily influenced by technology (Albarran, 1996).

In the 1990s, a new element entered the media growth equation in the form of technological developments, which gave rise to the notion of media ‘convergence’ largely due to the work of Nicholas Negroponte (1995). As a result, the term ‘convergence’ has typically come to refer – in the first instance - to the phenomenon of technological homogenisation via digital data, in which development opens up unforeseen possibilities for diverse enterprises to expand and/or collaborate. Negroponte focused on the technical link-up between telecommunications, computing and the media. Certainly, from a media-centric point of view, this kind of technological convergence has enabled both print and broadcast outlets to expand their businesses into cyberspace from the mid-90s onward. Technological convergence in this sense is by no means the only, or even the most important, component in media development. However, it is a powerful facilitator of other forms of convergence (Berger, 2001).

Writers like Graham Murdock (1994) and Robert McChesney (1997, 1999) describe convergence as a powerful impetus to media concentration. Conversely, Jean-Paul Marthoz (1999, p. 75) emphasises that ownership concentration “sanctions a convergence of content (information and entertainment) and technology (the same content simultaneously supplies the written press, the audio-visual sector and the Internet)." Clearly, the relationship is dialectical. Yet writers on both sides of the emphasis share a common concern with control rather than with the impact on media density. And even in as much as they deal with the impact on the media landscape, they argue that the result is no real increase in consumer or citizen choices – because an increase in pluralism does not equate to an increase in content diversity (Murdock, 1994, p. 5). This claim is based on generalisations such as: owners’ ideological influence expanding across the new outlets; cross-promotion such that the same vision and way of seeing is presented across all outlets in a conglomerate; the power wielded by mega-concerns is such that smaller competitors and would-be competitors can be expelled or excluded from the market place (1994, p. 5).

In contrast, the argument in this paper is that although such perspectives may be relevant to First World countries, the issue in Southern Africa is different. The problem here is not owner-control or market-dominance, but small size of the market. These are not completely separate issues, but in our conditions, the critical concern is what convergence and concentration mean for media density. Control is a significant, but ultimately lesser, issue.

This is clear not only in respect of South Africa, but also in general. In this regard, it is worth interrogating the notion of concentration, which is not the same as monopolisation. As described by Marthoz (1999, p. 75), it is concentration as the result of mergers, take-overs and alliances that make strong media groups even more powerful. He differentiates horizontal concentration (combining television and print outlets for example) with vertical (aggregating film studios, television channels and cinemas as part of a whole chain). Going further, Richard G Piccard (1989, p. 29) describes "concentration" as the domination of a market by a limited number of large companies. In turn, the market is defined by the number of suppliers and the number of buyers in it.

In my view, this is far too static a picture. The limitation of the Piccard perspective is that it seems to imply a fixed size and clearly delimited market, where control entails omnipotence. But is this the case? When assessing concentration, it is important to analyse what markets are being spoken of – distinctions should be made between consumer markets, advertising markets, supplier markets, and investment capital markets. And, lest, we limit ourselves to commercial markets, let us note that community media competes within all these, *plus* with a range of non-media contenders for funds from donor and state capital, as well as with claims on the time of the volunteers who are needed for the production of community radio programming. In short, media in all its diverse forms and outlets competes in a great many arenas and in varying ways. Concentrated control across all of these is more likely to be megalomaniacal delusion than actual reality.

In addition, as a sector, media as a whole competes with every non-media product or activity that could absorb adspend, investment capital and people's money and time. The state of internal competition, concentration or monopoly amongst media players is arguably less important than how media stands vis-à-vis other institutions, sectors and activities.

Against this background, while one might say that imperatives to growth may well be stronger when there is intra-sectoral competition between media players, even media "monopolies" cannot afford to stagnate or rest on their laurels. In the case of those media mainly in the business of information, this is especially the situation in regard to the global threat from entertainment.

In any event, as Jeremy Rifkin (1999) convincingly argues, following Manuel Castells' analyses (see Castells, 2001), markets in capitalism are moving away from commodity exchange and ownership issues, and towards networks, where access (rather than title) rights are traded between servers and clients. Concentration of ownership in this view becomes less important than network integration and domination.

The theories of ownership and its impact thus need to be re-visited in general, and it is also important to come back to the challenge of applying these considerations to the Southern African market. In our conditions, no one should deny that there is a dire need to increase both the number of media suppliers and the number and extent of their offerings, as well as the number of buyers and consumers and the extent of their purchase (or time-spend). What if concentration of control in one or more market arenas in the face of such huge needs could be an enabling condition for a media player to expand? Certainly, in our conditions at least, concentration does not automatically mean that the shape, size and limits of media expansion are blocked off or curtailed. In short, to the extent that concentrated ownership enables more control in the allocation of resources, plus enables a range of economies of scale and synergies, it is not necessarily in contradiction to growing media densification in a society, especially in a low density one. Concentration is probably not a sufficient condition for media growth, but in our conditions it may well be a necessary one.

My argument that general theory born of media dense societies needs re-working for Southern Africa can also be seen in another instance. This is in regard to an important finding by Maxwell McCombs (1997) whose research established a 'Constancy Factor' to the effect that while consumer and advertiser spend on media rises and falls with the general economy, the general proportion absorbed by media within the whole economy, stays unchanged. This fixed proportion is a "powerful economic constraint limiting the growth and expansion of mass communication" (1997, p. 6). Specifically, McCombs showed that media in the USA in the 20th century has never absorbed more than approximately five percent of Gross National

Profit (despite some fluctuations over the years). This is in terms of the percentage of combined contribution to GNP of consumer and advertiser spend. Similarly, he found that the outlay per household on media as a percentage of total household income has also stayed constant over the years - and also at around 5 percent.

What McCombs' research means is that any new medium that comes along can only survive at the relative expense of existing media. For example, the decline of consumer spend on movies in the USA historically was counterbalanced by increased spend on print media and broadcasting (1972, p. 17). When new media in the form of radio and television entered the market, the economic pie was simply re-sliced to include their share, and the result was a smaller piece for daily newspapers (1972, p. 57). "The competition among different media and among different communicators in the same medium has apparently failed to draw any new consumer dollars into mass communication" (1972, p. 22). According to McCombs, this phenomenon is because consumers simply switch resources to other functional media equivalents (1972, p. 33).[11]

From the vantage point of media density, what this means is that unless there is an expansion of the economy the survival of any new media outlets requires the contraction of existing ones. The pressure this creates is unbearable, and so one result of the Constancy Factor, according to McCombs, is that "economic constraints on mass media in the market place suggest that the observed disappearance through merger and suspension of dozens of daily newspapers was economically inevitable" (1972, p. 56).[12]

This is gloomy news for hopes to increase the density of Southern African media, but there is even worse from McCombs. According to him, absolute (as opposed to proportional) increases media spend have tailed behind the general growth of the economy. In other words, contrary to the idea that media spending (by consumers and advertisers) can increase GNP and growth of the economy, the reverse is the primary relationship (albeit qualified by factors like literacy and urbanisation in developing countries) (McCombs, 1972, p. 13). Media densification is hostage to the state of the general economy.

However, it is quite possible to challenge the implications of this research for Southern African media prospects. I do not dispute that, in the USA, history to date has shown that "only a small and fixed proportion of the economy is available to finance mass communication" (McCombs, 1972, p. 61). It is indeed true that humans per se could not survive if media occupied such a large portion of GNP that the production of food, infrastructure, housing, etc. was insufficient. We cannot live on media consumption alone. But there is a lot of room for flexibility before this point is reached. And in societies of great need such as those in our region, and where non-market mechanisms (including voluntary labour and grant subsidy) can and do play a major role in the character of economic allocations, it may well be that the kind of 'law' outlined by McCombs may be inapplicable.[13]

There is also the point about units of analysis within the wider division of labour. The contribution of media production to the total product of Los Angeles is obviously higher than McCombs' 5 percent. Clearly the external sales and the exports that result from this production are what enable that city's local economy to make up the shortfalls in other realms through importing other commodities. The question, therefore, is whether Southern Africa, or parts of it, could break through McCombs' constraint by becoming net exporters of media content.

Finally, in the current epoch, while there may be a minimum level of media density necessary for a minimum level of functioning of a given society (and vice versa), the question of the maximum level for media is not absolutely set in stone. Media markets can be grown, and in often unforeseen ways. If McCombs is correct that media growth has lagged, rather than led economic growth in the USA, this reflects a particular history and a particular period. Certainly, in the age of the 'information economy', many people believe that increases in information services and speed are a growing factor in driving economic activity (see Castells, 2001).

In conclusion, there is not one intrinsic meta-principle that would block the expansion of Southern Africa's media. Instead, it is practical to focus on the specifics, and on the possibilities.

The conditions for media growth pre-1994

Bearing in mind the discussion of media growth above, the task becomes to assess the evolution of media density on the supply side in South Africa (and to a limited extent, the region). To do this, it is instructive to begin by reviewing the state of media development under apartheid and prior to 1994, and to pinpoint the drivers involved, including the role of media technology and more recently convergence.

South African media under apartheid was characterised by a degree of innovation and growth, linked significantly to the arrival of new means of media production and distribution. One can talk here of apartheid's media children in reference to the way that the country's politics and technology produced certain results up to 1994. Thus, 'separate development' policies and FM signals in the 1960s made it politically desirable and technically possible for the state to roll out numerous African language stations in South Africa (and, in the process, to sideline shortwave receivers that would otherwise tune listeners into programmes beamed in by the exiled African National Congress (ANC).) Politics in the form of the apartheid policy of promoting independent Bantustans stimulated further broadcast developments such as Bop TV, 702 and Capital Radio. On the consumer side, there was a significant increase in radio receivers per 1000 people – from 89 in 1970, to 274 in 1980, to 316 in 1995 (Esterhuysen, 1998; UNESCO, 2000, Table 13). Television sets per 1000 grew at 4.5 percent a year over the same period, reaching 109 in 1995. (UNESCO, 2000, Table 13, Table 2).

It is further evident that the advent of desktop publishing made practically possible the launch of the anti-apartheid alternative press in South Africa – a politically-driven (and economically loss-making) initiative. Thus the force behind media production growth under apartheid in these two cases was primarily politics, rather than economics. Technology underpinned much of the expansion.

Commercially-driven expansion of the print media under apartheid took the form of competition within the existing white market, where significant blood was shed (as in Naspers' 1970s war with Perskor). But not much was achieved by this in the form of new titles to the market place, or developing markets of new readers. One reason may be because monies made went back to the non-media parent companies (like Anglo American or Sanlam), for distribution as dividends or investment in non-media businesses. This needs further research. However, another reason, arguably, was the racial blinkers of newspaper managers, for whom markets stopped at the edge of the white community. This observation could explain the following figures: in 1980, there were 48 copies sold per 1000 South Africans, a figure that had fallen proportionately to 31 per 1000 by 1994 (UNESCO, 2000, Table 12).

The one significant case of commercially driven expansion under apartheid was the launch of the broadcast subscription television service, M-Net. This was designed to compensate newspapers for the loss of advertisement revenue after South African Broadcasting Corporation (SABC) was allowed to introduce television (SATV) into the market (GCIS, 2000, p. 13). Though different in rationale to the media expansion cases mentioned above, this expansion was still politically qualified. M-Net never ventured into news services which could have rocked the SABC propaganda boat, and indeed, it was widely speculated that the licence was granted to the commercial press in exchange for the closure of the critical news vehicle, the Rand Daily Mail (Jackson 1993, pp. 10,99). Interestingly, the M-Net experience does share with the others of its era, the fact that it was new technology (in this case, military-derived) that made possible such an expansion in media density.

If media development under apartheid was strongly coloured by politics, this is probably to be expected of the kind of society that South Africa was at the time.

Post-94: politics, economics and broadcasting expansion

After apartheid, the political imperative continued as a factor propelling certain media growth in South Africa and much of the region. This was very visible in the entirely new community radio sector. In South Africa, from 1995 onward, the Independent Broadcast Authority (IBA) prioritised the licensing (and thence growth) of this sector over and above commercial broadcasting. More than 80 community stations were in existence by 2001 (GCIS, 2000, p. 16). International funders pumped in substantial sums as part of a non-commercial agenda to help build up such grassroots enterprises (Cohen, 1996). In 1999, the government's Department of Communications also began underwriting the development of this sector, providing funding of R6.5 million for stations in the 2000/1 financial year (GCIS 2001/02). Again, cheaper broadcast technology – computers rather than tapes – played a part in making this possible.

This political (as opposed to profit) stimulus in media development continues up to the present and is evident in media legislation in South Africa in early 2002 to set up a Media Development and Diversity Agency (MDDA). Although state funding for this initiative is low, and in fact will simply re-allocate the money already spent on media in existing government budgets (GCIS, 2000, p. 51), the Agency is intended to foster more grassroots media development. It projects that there will be 221 new radio stations in South Africa over the next five years, and 30 new publications (GCIS, 2000, p. 71). If the MDDA succeeds in helping make part of this happen, it will make a significant difference to the media landscape beyond the established markets.

However, notwithstanding such important political initiatives for South Africa's media development, it would be wrong to see these as automatically continuing to be the primary factors in powering media development. Given that the economic policy orientation in post-apartheid South Africa has been capitalist, it is now the private sector that is looked to by government and other players as the engine of growth in media. It was in terms of this policy orientation that commercial power to drive media development was unleashed in 1996 in the form of the privatisation of six SABC stations. It seemed at the time that the rationale was that SABC as a public broadcaster would no longer be in the business of chasing commercial revenue. However, the policy emphasis was soon clarified. The SABC – having just sold some of its biggest money-spinning radio stations – not only did not receive any of the sales revenue; it was still required to raise much of its own revenue by commercial broadcasting (which in turn meant competing with its former properties). Though the policy today, as inscribed in the Broadcasting Act of 1999, foresees SABC commercial services as cross-subsidising the public broadcasting stations and channels, even the latter will remain commercial up to a point.

For political and business reasons, SABC has also launched two pay-television satellite African services – SABC Africa and Africa2Africa (SABC, 2001). While the corporation evidently hopes to make money out of these, it is likely that for the present they are operated out of cross-subsidy from other SABC revenue streams.

It seems clear from the above that, with the post-apartheid government orientation, even the state-owned media sector, i.e. SABC in particular, has been required to avoid being a drain on the national fiscus, so that in effect it has had to compete vigorously for audiences and advertising in the wider broadcasting market in South Africa and in the region. One positive result (combined with a non-commercial imperative) has been the accelerated drive by SABC and Sentech to expand signal distribution to parts of South Africa that for years were excluded (SABC, 2001). In June 2000, 18.6 percent of the population, or 7.8 million people, did not receive adequate broadcast signals, and one million did not receive any FM signal (GCIS, 2000, p. 22). Arguably, other results have been that the SABC has initiated additional media ventures, partially as public service, partially as promotions, and partially for profit. These include a San-Khoi radio station, websites for stations like 5FM, RSG, GHFM and Motsweding, as well as SABCnews.com and cell phone information services (see below) (SABC, 2001).

This expansionist trend will likely continue with the increasing commercialization of much of the SABC, notwithstanding that 12 of its 19 stations are supposed to retain some public service obligations. Part-privatisation of one of its TV channels is in the offing, and this will further emphasize the commercial characteristics of broadcasting (Duncan, 2001). SABC's expansion has been partly a function of making up lost revenues from the privatized stations, which are now its competitors. But it is also a function of the fact that further commercial drivers of media development were called into being in South Africa in 1997 by the licensing of seven 'greenfields' radio stations, and the licensing of a commercial TV station (eTV) in 1998.

The effect of all this competition for audiences, and to varying extents for advertisers – between community, commercial and SABC broadcasting – has been to set in place a drive that will expand the sector as a whole, even though there is of course huge unevenness within it. Stations like Highveld steal the show as far as disproportionate share in advertising revenue goes (GCIS, 2000, p. 25), but the casualties in the sector as a whole have been very few, even though Duncan (2001) predicts a negative impact on SABC's minority African language programming as a result of cost-cutting measures at the corporation.

Commercial television in the form of eTV has succeeded in attracting audiences, but insufficient advertising to cover its costs. It is indeed a prime case that demonstrates the need for concentration. However, M-Net's move into subscription satellite bouquet services in the form of Digital Satellite Television (DSTV) has been very economically viable. 'Reality TV' programming in the form of *Big Brother* proved to be a huge boost to the number of subscribers, and the launch of interactive TV by DSTV in March/April 2002 will further increase audience loyalty and possible growth. M-Net and DSTV have now grown 1.4 million subscribers in 50 African countries (GCIS 2001/02).

In the regional countries of Angola, Namibia, Zambia, Mozambique, Malawi, Tanzania, Botswana and Lesotho, there have been some similar licensing developments since 1994 that have seen an increase in broadcast density in their countries. By the end of 2001, there were approximately 217 radio and television ventures operating alongside state broadcasters in 10 SADC countries excluding South Africa (Sassman, 2002). An exception is Zimbabwe, which has remained rooted in government possession of the airwaves.

Again, echoing developments in South Africa, digital technology has played a part in reducing the cost of broadcast equipment, enabling this overall expansion to happen in the rest of southern Africa. Again, too, state broadcasters have become far more commercially aggressive in terms of retaining or growing audience and advertising/sponsorship share.

Generally, the wholly private commercial radio enterprises are mostly flourishing across the region (some much more than others; some in cross-border ventures like South Africa's YFM and Botswana's Yarona). Although this success is partly at the expense of state broadcasting institutions' extant audiences and advertisers, on the whole the total broadcast audiences would seem to have expanded. In short, although statistics are hard to come by and collate, for the whole region, there are now many more - and more varied - broadcast services than previously.

Post-apartheid newspaper development across Southern Africa in the form of growth of titles has been more a mixed bag than broadcast. The racial character of South African audiences has constituted one fetter here. Papers have lost white readers while trying to cater to slowly emerging black readers, often falling between the two groups. Circulations have continued to decline. Total daily circulation in Jan-June 1993 (excluding the *Sowetan* for which data is not available) was 1 081 775, and this fell to 959 572 for the same period in 1999 (again excluding the *Sowetan*). This is a decline of more than 11 percent.[14] On the other hand, All Media Products Survey (AMPS) figures do show an increase in the readership (distinct from circulation) of the dailies – for example, from 17.2 percent of the population in

1996 to 18.3 percent in 1999 (SAARF, 1996, 1999). This would seem to be a case of increased consumer density without increased production density.

Only in 2001 did it become evident to the South African newspaper industry that black working class readers would respond to media suited to them, with the successful performance of the new titles *Sowetan Sunday World* and the *Sunday Sun*. The increasing spending power in the black community has coincided with substantial political pressure on the advertising community, which in 2002 was called to account to parliament for racial placement practices. The result seems to be that adspend targeting black print readers will continue to increase, underpinning further growth in this sector of the media. Backed by more professionals and commercial capital, this trend may succeed in growing the market in a more sustainable way than was the case with the advertising efforts of alternative and community newspaper experience of the 1990s (see Berger, 2000a; Cloete, 2000).

In the wake of the success of the Sunday black papers, the Zulu-speaking market around Durban in early 2002 found itself spoilt for choice with the Maritzburg *Echo* being included with *Ilanga*, a new product titled *Ilisolizwe* being launched by Independent Newspapers, and the revival of Umafrika. In the Western Cape, Independent Newspapers expanded the circulation area of Xhosa-language community paper *Vukani*, while Johnnic Publishing launched the Xhosa weekly *Ilizwi* out of Port Elizabeth. Like community radio stations, these publications hoped to draw smaller scale businesses into the advertising market by offering rates and audiences appropriate to the sector.

If South Africa has experienced corporations as mainly being behind a limited expansion of print in this country, in several other southern African countries, politics has been the driving force of both growth and contraction. In Zambia, ongoing harassment has kept the Post newspaper from reaching its full potential; in Swaziland, it appears that political reasons prompted the closure (for a year) of the state-owned *Swazi Observer*. In Zimbabwe, the political controls over the state press created fertile conditions for the circulation success of an independent press, headed by the *Daily News*. However, this beleaguered sector faces enormous political battles to simply keep going, including having to overcome bombings and harassment, and its economic losses may cripple it yet.

Politics in Zimbabwe has also meant the blocking of attempts by South African print media to expand north. Restrictions on foreign ownership blocked Johnnic Publishing from investing in the *Financial Gazette*, while a collapsing Zimbabwean currency and capital export restrictions killed the attempt to seriously grow the sales there of a *Sunday Times* Southern African edition. (New media in Zimbabwe in the form of cellphone-delivered independent news also ran into political limitations: the service was simply withdrawn by operator EcoNet, seemingly in the face of government pressure).

In Namibia and Botswana, governments have also attempted unsuccessfully to undercut independent newspapers by banning state advertising in them. The blow could have seriously harmed the prospects of the papers concerned, not least because of the knock-on effects where private business advertisers would have then been isolated as supporters of these papers and become susceptible to pressure. In Malawi and Lesotho, a legacy of print pluralism from the democratisation 1990s still exists to a point, although viability is often hand-to-mouth, and the survival of the publications concerned is still far from certain.

While print expansion has been aided by continuing innovation in technology over the years, the Achilles heel in recent times has been steep increases - rather than decreases – in the costs of another central means of production, viz. newsprint, as well as in a key means of distribution (fuel). These increases will be a major fetter on the future of growth in print media in the region. According to Duncan (2000), South Africa has the second lowest number of titles in the world in relation to population size, and a circulation that is fifth lowest. Given the economic difficulties, however, these ratios will be hard to change, even if the content of the products were tailored more appropriately to larger sales.

The expansion of foreign media content, titles, programmes and capital into southern Africa is relevant to media density, as is the reverse relationship. In some cases, foreign players like the *Financial Times* and the *Express* have simply published locally, piggybacking on their brand names and overseas-funded cost-structures. In other cases, local enterprise has bought franchises to run national versions of *Big Brother* and *Pop Idols* in South Africa, as well as *Oprah*, *Men's Health*, *GQ*, etc. What marks out such purchases from simple content imports such as sports programming, is that this localizing has stimulated a degree of new media business in the region. On the export side, M-Net and DSTV have been able to deliver programming (often itself imported) around the continent and thereby generate some revenues that filter back into local profits – part of which could be available for investing in further media growth in the region, although this would need to be investigated. Other than this, however, the major consumer and advertising markets have been national and local.

Assessment of print and broadcast growth 1994-2002

All told, the situation of print and broadcast media development is more complicated than what might have been expected in the post-1994 period. Community radio has been one of the most visible successes – and it has grown on a donor-and-volunteer, rather than business-commercial, model of viability. From a consumer point of view, the contemporary supply is a substantial improvement on the past in terms of quantity of products and range of language at least. Not surprisingly, therefore, AMPS figures for South Africa suggest an increase in broadcast consumption from 85.3 percent of total population in January-June1996, to 88 percent in the same period in 1999, as regards radio listening over seven days. The equivalent figure for TV consumption over seven days rose from 64.8 percent to 69.6 percent. (SAARF, 1996; SAARF, 1999).[15]

Much of the commercially driven growth has been premised on urban and middle- or upper-market audiences. In South Africa, accusations of 'cherry-picking' could be made of the large media companies. This is not the case with the new newspaper titles, which have witnessed growth in the hitherto untapped lower end of the market. But outside of these new titles and the funded-community radio sector, it is the case that the country has witnessed mainly expansion of elite and English language media – such as magazines (*GQ, Elle*) and various web-offerings. Even eTV with its language mix and programming content caters to the wealthier classes.

At the same time, it would be churlish to overstress the limitations of such growth. It is true that national democracy and development does ultimately presuppose increasing the level of media services for the rest of society, so that their media contribute to the agenda setting of the elite, provide information tailored to their needs and interests and add to the supply of personnel and meanings within the circuit of information flows. Of course, it is also likely that – as per classic Knowledge Gap theory - the information rich tend to utilize information for themselves vis-à-vis the information poor (Tichenor et al, 1970). But there is also no point in shared information poverty and the exclusion of all strata from media networks. Having a country saddled with an uninformed elite does nothing for anyone.

Looking ahead, it can be said that, given the prevalence of a neoliberal orientation in southern Africa, even where there are pro-media politics and policies, the future will probably lie primarily with business to power sustainable media development. Subsidised media – whether government propaganda organs in Zimbabwe, or community radio in South Africa – relies on transient political and donor will for survival. As a result, much as a political-economy approach requires attention to both levels, the commercial viability of media in the region will probably be what really counts in the longer term. Media that makes it in the market place (of course within a particular political and policy framework) – and which grows that media market at the same time – will be the wellspring for significant development of the sector as a whole. What are the prospects in this regard?

Coalescence and commercial media imperatives

Commercialisation of media in First World countries is often held to be a major problem that compromises the quality of content. It is also seen to lead to ownership concentration and monopolization, which in turn also makes it very difficult for new players to enter the market.

However, in Southern African the situation is more complex. This is not least because commercialisation is not very advanced, while at the same time there are substantial gaps in the market. It is true, as Tony O'Reilly, amongst others, has noted (Garman, 1998), that the central question from a business point of view is not whether there are gaps in the market, but (viable) markets in the gaps. Commerce cannot create markets out of nothing. Yet, at the same time, it would be wrong – as I have argued – to take markets as fixed and unchanging. Salutary here is the experience of cellular telephony, which infamously predicted the South African market - currently estimated by government to have more than 14 million subscribers – (Ngcaba, 2003) as peaking at a several hundred thousand subscribers. Media businesses, in short, need not only see themselves as *following* the Southern African market and 'realistically' aligning to its class, race, linguistic, national, etc. contours. They also have potential to *lead*, expand and create media markets.

The potential to do this is high. As per standard capitalist principles, media commercialisation entails expanded operation over time. This in turn, as in other industries, entails productivity increases on the one hand, and a coming-together of different media ventures at the levels of ownership, technology, and sales, in search of greater strength. But, more uniquely and related to the nature of the industry, the output (media content) has special characteristics. It is expensive to produce in the first place, but thereafter is relatively cheap to reproduce (Shapiro & Varian, 1999). Although this is less true in the case of print media, the general principle holds: while media businesses like all businesses seek to reduce production costs, their growth potential is in improving scale of output. The imperative here is in co-operation in marketing (i.e. encompassing sales and distribution), content-sharing and increasing the opportunities to publish. In turn, what this characteristic of the industry gives extra impetus to, as a logical trend in competitive media situations, is concentration, collaboration and alliances.

Of course, concentration of ownership is nothing new in South African capitalism and media. In South Africa, the larger players have increasingly absorbed the smaller. In the 90s, there was Times Media Ltd (TML) taking over the *Daily Dispatch*; Independent gaining the *Pretoria News, Natal Mercury* and the *Cape Times*. In 2001, Naspers took 50 percent in the last remaining independent daily, the *Natal Witness*. In 2001/2, there were attempts to consolidate enterprises in the commercial radio business, with New African Investments Limited (NAIL) – owners of Jacaranda – seeking to take over Kagiso, owners of East Coast radio. The bid was approved by the Competitions Board. However, it was subsequently thwarted by regulatory authority, Icasa, on grounds not of monopolization but limited black empowerment ownership of NAIL. Subsequently, after an unsuccessful attempt to buy Johnnic in 2002, NAIL put up its media assets for sale in 2003.

Alliances are also not new in South Africa. Rivals Johnnic Publishing and Independent co-own the Allied distribution network. Together with Naspers, they all own the Sapa newsagency. Kagiso and NAIL co-own Radmark, a radio advertising sales agency. There have been various unsuccessful attempts to develop joint news and advertising systems and pools for community radio stations (such as the now defunct Network Radio News and the South African Community Radio Information Network (SACRIN) projects), and predating this – for the alternative press (Cohen, 1996).

In addition, there is some noteworthy experience in production collaborations. One particularly profitable experience in developing these kind of synergies is the twin *YOU* and *Huisgenoot* magazines, pioneered by Naspers. These extremely successful products operate to cross-purpose near identical content to serve two different (though still largely white) language markets. The extent to which this kind of strategy can include different cultural markets, by incorporating *Drum* magazine (servicing black readers), is worth tracking. Another case of successful production collaboration is the innovative financial newspaper, *Business Report*. This draws from all Independent newspaper titles around South Africa to fuse content into a national business read which not only rivals the *Business Day* for readers and advertising, but has given many more South Africans more information in an important subject. More recently, new newspapers such as *Sowetan Sunday World* and *Sunday Sun* have been possible largely because they piggyback on the systems and strengths of their parent media corporations.

Independent has also pioneered production synergies with its 'Newsfloor 2000' project, which has seen it merge photojournalists and sub-editors on its three Cape Town enterprises (*Cape Times*, *Cape Argus*, *Cape Community Papers*) into a single team servicing all the titles (Wrottesley, 2001). There are signs that – against some opposition such as at its KZN operation - management may extend this model to further occupations in the company, all in a search for economies in resource utilization (personal discussion, media personnel).

One of the more radical attempts at production collaboration post-apartheid has been the SABC's experiment with bi-media in the period 1999 – 2001. Inspired to some extent by the BBC, this took the form of trying to multi-skill journalists so that they could service both radio and TV platforms. The initiative ran into criticism from some journalists that radio became the 'Cinderella' of the system, and that the quality of journalism on both platforms suffered due to spreading staff too thinly across too many demands.

Such attempts to cut costs and maximise productivity do not of course translate directly into increases in media density. They may even compromise what some see as the 'quality' of existing density levels. On the other hand, if they do free up resources that are then invested in expanding audiences and/or outlets, that could have positive potential.

These types of collaboration in media economy are very important regarding the impact on media density. On their own, however, they do not presuppose 'convergence' in its more conventional technical sense. Under this sense, the notion is that 'content' is 'agnostic' and as such can be produced once and then published many times on a range of different platforms – greatly expanding economies of scale. In these respects, as will be shown, developments in Southern Africa to date represent two steps forward, one step back.

As elsewhere, technological convergence in South Africa has primarily taken the form of relations between old media and new, and great things were hoped for (and hyped about) when this technology came onto the market. After all, the largest previous increases in media density around the world were enabled by significant technological advance (see Fidler, 1997; Winston, 1995). The novelty of digitised content, internet protocols and investment capital globally led to soaring expectations for the web as representing a veritable tsunami of media expansion.

The Web

The late 1990s saw the proliferation of web platforms that were spun off old media operations around Southern Africa. There were also a number of stand-alone 'net-native' news enterprises such as websites iAfrica and Woza in South Africa, and, later, the Information Dispatch in Zambia. South Africa had at least 16 daily news websites in 2000 (GCIS, 2001/02). What was new about all these was not only that the region now enjoyed new outlets for information – and that the wired public would also be able to access archived information and generate their own contributions in chat forums. There was also the fact that southern African media players could now realistically service markets outside their borders. This was a way to reach the diasporas within the region, as well as nationals living abroad. The web's promise was that it now became possible to try to exploit part of a global market, and in doing so, to ensure some African presence in transnational cyberspace. This was not merely an increase in media density in the region, but a contribution to global media riches. That was the promise; the practise turned out differently.

The story of the stand-alone web-operations is not a happy one. Woza collapsed in 2000. As regards the combinations of web sites based on old-platform media, some interesting trends unfolded. In this regard, Megan Knight (2002) has usefully analysed the evolution of web news at two of the largest South African players, Johnnic and Naspers. Her model identifies their origins as experimental “shovelware” sidelines with little management support, then growing to the point where additional features were added, before absorbing substantial investment as separated-off ventures. A fourth phase of scaling back and reintegration, in her view, began in 2001, although “neither company has implemented convergence to any significant degree” (2002, p. 74).

Pioneer enterprises like TML (now Johnnic Publishing) started off in 1995, with hope emerging in the following two years that their print newsrooms would convert into multi-platform publishing operations, such that journalists’ work would feed a digital database that in turn would sustain both print and web platforms, and even radio (Classic FM) and television (Summit). One initial result was a fusion of content from *Business Day, Financial Mail* and the *Sunday Times’* business section into an online product called Net-Assets.

It did not take long, however, before the company’s management – despite technological convergence - decided to hive off the web operations into a dedicated and separate unit, including with its own staff to report and edit for the particular audiences of the website. One reason was cultural resistance on the part of the print editors and journalists to integration with the suspicious “new kid on the block” (Naidoo, 1999a). The result was that print product content was ported into the website of TML’s new venture, I-Net Bridge, a web operation launched in alliance with US company Bridge (subsequently collapsed). This content was just a part of the wider information resources gathered and packaged for the site. The combined product was bulk-sold to corporate clients on a subscriber basis. Meanwhile, the *Financial Mail* and *Business Day* and *Sunday Times* “feeder” platforms operated their own independent web sites. Thus, what began thanks to technological convergence rapidly evolved into organisational divergence, duplication and dispersal.

A similar evolution occurred with other South African media companies. Naspers melded its various publications’ contents into Media24.com, and employed a large separate staff to customize and translate this into English. Its sister company, M-Web, ran an independent portal site offering access to the company subsidiary, the *Mail & Guardian* online. Independent Newspapers gathered together stories from its publications around the country, added a heavy dose of newsagency content, and produced the content-rich news-site IOL.co.za. Primedia’s Metropolis had been set up to create ‘vertical communities’ of trade for business-to-business interactions, which in turn were to be centred around news content on specialist topics. Portal site iAfrica, which presented news content largely from the wires, began to tap unforeseen potential by spinning-off their technology systems for web publishing to customers like Transnet. Despite such instances of growth, across every web news operation, it was still hard to find message convergence[16] in the form of true multi-media offerings, where text-photographs-audio-graphics-video are fused into (interactive) messages in which the sum is greater than the parts. The medium, as such, was not fully exploited. Meanwhile, the losses continued to mount.

The investment in these extensive operations could not last without viable business models. Most of Metropolis was shut down in 2000, leaving only iAfrica and the websites of Primedia’s radio stations (702, Highveld, Cape Talk). The South African web news industry as a whole saw a radical downsizing in 2001, and extensive moves toward the news sites re-uniting and reconciling (up to a point) with the parent platform. Retrenchments were the order of the day at I-Net Bridge, Media24, and IOL, and all of them relocated their staff to premises within parent print enterprises.

In broadcasting, South African website development was less ambitious. Only SABC invested in substantial staffing for its site, SABCnews.com. But even predating this, there was little organizational integration between web presence and radio-TV newsrooms (Naidoo, 1999b). Primarily text-based, SABCnews.com was produced as a stepchild of the central news production systems, rather than as an equal partner. For its part, Classic FM was one of the earliest stations worldwide to begin webcasting to a global audience – unlike most broadcast stations which operated as marketing windows, perhaps with a selection of archived clips, but not functioning as a broadcaster combining on-air with online. Its service was also distributed via satellite television network, DSTV. But its ability to pay its own way was not guaranteed.

In short, during the early period in which websites diverged organizationally and roamed wild and free, they also ran up huge losses in the process. The emphasis in the past two years has thus been on partially re-converging them organisationally with the parent platform as a revenue-saving measure.

At the time of writing, it was clear that the web was being reined back in. *The Financial Mail* in 2001 decided to withhold publication of its online edition until well after the printed copies had a chance to sell – causing dissatisfaction amongst international readers who could not get the print copy in a timely manner. *Mail & Guardian* online began to charge international viewers, and required registration of locals. The websites as a whole began to be seen more as value-adds and brand-building operations for the parent platform, rather than as self-supporting media businesses. The prodigal sons had come back home, and were reduced to functioning as subordinate and parallel operations. However, this structural 're-convergence' did not translate into integration into multi-platform newsrooms. In a sense, it became at best an enhanced form of cross-promotion.

In retrospect, therefore, one can conclude that the dazzle of the web, as enabling a huge increase in media density, did not materialize. Technological convergence potential did not deliver sustainable results in the short term. The scenario ahead is likely to be one where organizational convergence will intensify even further, so as to involve not just print-web or broadcast-web synergies, but all kinds of operations in a variety of combinations – such as print-print; television-web; print-radio; telcoms-broadcast, etc.

In Southern Africa as a whole, serious structural weakness in news sites was recorded out of a survey of the people responsible for 10 such sites (Berger & Folayan, 2002). Only three of the sites had functional archives and search facilities, and just two had chat facilities. While they all hoped to make money, half had generated no income in their time of existence, and the majority had no clear business model or strategy to change this. Promotion activities were minimal. Almost all the sites depended on getting their content from the print parent, which they then put online, verbatim, approximately once a day. This work took up an average of 3.7 hours a day – all the time that could be spared. "For most, the support of a parent medium kept them afloat – just." (Berger and Folayan, 2002, p. 7). Each site reported a lack of skilled and sufficient journalistic and information technology staff. Few of those surveyed saw value in collaboration with other media outside the parent newspaper.

Counterbalancing this negative picture, the predominant feeling was that the sites played an important role in serving expatriates and in representing Africa in cyberspace. Most respondents said their target audience consisted of nationals living outside the home country, and some sites recorded high traffic. It may therefore be possible to devise a workable business model on this basis, and one that could encompass a range of collaborations beyond those with the parent publication. But the outlook is tough, and even more so for web operations operating independently of a parent medium or other stakeholders.

Convergence as regards cell phone platforms has been slightly more successful than the Web, if only because the business model was clearer. In this, editorial content is re-purposed for cell phone reception, and delivered to subscribers (on demand, or by email) at a price that is added to the phone bill. SABC led the way here in innovative partnership with cellular provider Vodacom. The result was its Newsbreak service, where a small team tapped into the computer network carrying the corporation's internal news items for radio and television, and then edited these into suitable sound bites to deliver on demand. The service expanded to offer African language audio during 2001, and went beyond simple re-purposing of broadcast news to offer services like matriculation results. An attempt to offer Wireless Application (WAP) services was handicapped by the low uptake and weak performance of the technology amongst consumers, but Newsbreak did expand into the Zimbabwean market, and has had plans to spread to other African countries.

IOL in similar fashion offered cell phone news, delivered by Short Message Service (SMS) – and also through a partnership with Vodacom. This was followed in 2000 by MTN, a sister company to Johnnic Publishing, and drawing its content from the I-Net Bridge team.

Known as MTNICE, the service had 730 000 subscribers in March 2002. (*Sunday Times Business Times*, 24 March 2002). Naspers began to supply content to cell phones via Independent's subsidiary, I-Touch (Knight, 2002). *Mail & Guardian* online followed suite in September 2003.

Future trends

What lies ahead? The global recession in 2001-3 has put enormous pressures on southern African media. Advertising is down, while costs of transport and paper have rocketed. The decline of the rand has made some imported content and technology almost prohibitive – although by the same token, this has opened the door to local producers for whom the aggressive pursuit of import substitution is now more viable than previously. It remains to be seen if they can take up the opportunities.

Technology is likely to continue falling in price and rising in power, and media businesses will seek advantage through these - though the kind of convergence enabled by it are still far from being realised. Meanwhile, it is fair to say that current economic conditions could even lead to a reduction in media density as some media operations face bankruptcy. Mismanagement, such as at the labour-owned Union Alliance Media which collapsed in 2002, compounds the picture.

It would seem that, under these conditions, for the media density status quo to be maintained, there would be increased collaborations and concentrations of media business. Certainly, if commercial pressures in stronger economies have prompted mega-mergers (Maynard, 2000), southern Africa is likely to experience the same development, and in intensified form (Berger, 2001).

Stand-alone enterprises like eTV will probably need to find partners or additional markets, or go out of business. Meanwhile, for South African community radio, there will be – in part through the Media Development and Democracy Agency – a rapid growth in numbers. However, all these stations will need to conjure up local advertising revenues, as more and more of them compete for less and less donor funding.

In magazines, a prediction by Annelise Visser (1996), that every successful new entrant presupposes an exit, may be truer than ever. Certainly, it will be extremely difficult for any independent small-scale outsider to break into the market. Broad-based print publications like general interest newspapers may contract, while niche-based and African language-based papers may grow, some with help of the Print Development Unit of the Newspaper Association of South Africa. But major growth in print here and in the region is unlikely. Convergence strategies will seek to keep titles afloat, to conserve rather than expand media density at this point.

Despite SABC's backtracking, sheer staff shortages combined with economic necessity will require that multi-tasking will likely continue in the broadcaster's regional offices. It will become the practice in many other media ventures as well. The regulatory restrictions on cross-ownership between print and broadcast outlets in the same geographical area will probably be modified to allow for partnerships in mutual interest. There may well be the evolution of conglomerates, both through horizontal and vertical concentration.

The search for viable business models for the web news sites will continue, but until these emerge there is likely to be little growth in this sector. Cell phone information services may have better prospects, especially if more diverse offerings are made available, and if General Packet Radio Service (GPRS) technology to be launched mid-2002 is taken up by the public.

One of the more interesting areas to watch will be the question of regional economic integration in the SADC countries and its impact on media. There is already a regional market for labour power and South African media has long been a draw card for journalists from the region. If the political, economic and technological conditions began to work to facilitate operating media on a SADC-wide production, advertising and distribution scale, this could be important for survival and growth. It does, of course, raise sensitivities about South Africa media imperialism, but the bigger question is whether a South African media presence in the region kills, or constrains, competitors, or whether it entails a net increase in media density. Interestingly, new impetus seems to be emerging for a pan-African strategy. This is evident in the setting up of a South African edition of Nigerian newspaper *This Day*, and by Johnnic announcing investment in Nigeria's film industry.

Conclusion

On earlier occasions (Berger, 2000b; 1997), I have argued that new technology should be used in Africa to raise media density levels. This paper has set out some of the requirements for this to happen successfully. The matter entails far more than technology and technological convergence. It concerns economics and politics, and how government policies and practices impact on both. It is also profoundly a function of strategic vision and organizational operations of media players.

In conclusion, it can be stated that the short-term future of southern African media is probably premised on increasing coming-together. Whether this portends the formation of media monopolies in the negative economic and political sense is not at all given. On the contrary, it may well be that a form of increased oligopoly of media in the region is a precondition for current survival - and for future growth. To the extent that technological convergence facilitates survival, which would be helpful. Certainly, it would be a sad thing, in the times of digital technology and the Information Age, if media density in Southern Africa were to shrink rather than expand.

According to the GCIS, "increased consumption and production of media and broadening of the media sector would benefit South Africa as a whole, including the historically and geographically disadvantaged, as well as existing players (by expanding local markets and developing a critical mass of content for export)" (2000, p. 37). As will be evident from my arguments, this is a sentiment strongly endorsed in this paper. If the wider SADC region develops a denser media economy, so much the better.

NOTES

[1] A news report reads: "… (I)n South Africa, where media density is high, … if you have a billboard in Johannesburg, you need a hundred to make an impact." It goes on to say that television is almost universal in urban areas. (IRIN). It is the case that relative to South Africa's rural areas, and relative to other cities in the region, a city like Johannesburg is media dense. However, it is all relative, and there is certainly vast room for more densification, even in Johannesburg.

[2] This point is stressed by GCIS (2000, p. 27) as regards South Africa, and is even more so applied to other countries in southern Africa.

[3] This paper works with a conception of media *development* that in effect is synonymous with media *growth*. There are views that would make a distinction, such as that by GCIS which stresses the expansion of media infrastructure only inasmuch as it is "aimed at redressing the exclusion and marginalisation of a vast range of groups and interests from access to media as owners, managers and producers of media" (2000, p. 11). These are very important concerns from GCIS vantage point. The priority in this paper, however, is to focus upon media density in general, which in turn rests on the assumption that increased density means increased information flows, which are important even if restricted to a well-served elite.

[4] Writing about one particular medium in the USA, Smith and Dyer (1992,p. 23) focus on economic forces: "What role did economic gain, compared with other factors, play at various times in the start-up and investment in newspapers? When publishers found market forces oppressive, what steps did they take?" As will be shown, southern African experience prompts rather different questions, particularly about the political drivers of growth. Within this, however, there is some relevance to specific economic questions that the two writers also pose: "How did specific newspaper markets and market systems evolve? What were the competitive forces facing newspapers at various historical junctures, including cost condition and entry barriers? What strategic responses, including horizontal and vertical integration, were made to these market dynamics? How was market structure related to content?" (1992, p. 24).

[5] In a similar perspective, a four-stage framework has been suggested for an evolutionary history of the newspaper by Kaul and McKerns (1985). It focuses on the variables of industry population, technology, resources and adaptation manoeuvres. (see Smith & Dyer, 1992).

[6] There was also the collapse of the alternative and resistance press, which lost its political lifeline and failed to secure an economic one. Marthoz (1999, pp. 72/3) writes: "In countries where until recently only one party predominated, the transition to democracy has been propitious for the media, whereas the return to democracy in the countries of the Southern Cone, the end of apartheid in South Africa, have seen the disappearance of many titles that used to support the fight for freedom. It may be that periods of transition are more auspicious to pluralism and media diversity than the advent or return of democracy." If he is right, then the question is how to build media density in "normal" times.

[7] "The news that must be spread is that reward goes with effort, that productivity (rising output per head) is the source of goods (rising income per head). … People must not be taught to expect things they cannot get." (1967, p. 317). For this "gigantic task of teaching", media had to be developed, and therefore "communication strategy must be integrated with the real development policy of the society." (1967, p. 317).

[8] Barnett (1999) sees developing the southern African media into a public sphere as a question of making access to the technological means of communication more equitable. He does go on to refer to "policies for infrastructural development", but this is not elaborated. What is stressed in my paper is not equity of access as a democratic issue (although of course it is), but its part as a factor in the bigger picture of growth of the media sector.

[9] Bovill refers to a trade-off between watching television and reading books in leisure time in some countries, but not so in others (1988). There does not seem to be information about this in southern Africa. Likewise, the phenomenon of young people multi-tasking their media consumption (e.g. engaging with television and internet simultaneously) also merits researching in the region.

[10] A study by Roe (2000) examines Flemish families in terms of how "media-lized" they are. This is a different approach to the standard developmentalist literature that relates media density to 1000s per population. (A similar point could be made as regards the SA Advertising Research Foundation's methodology in South Africa, which examines household income of consumers without researching the fact that buying power in the Black community often extends across households).

[11] While absolute growth in an economy could support proportional media growth, even this will eventually run up against a constraint, according to McCombs, namely: the scarcity of time (which is what leads to swapping functional equivalents rather than consumers incrementally and indefinitely increasing their media utilisation). Consumer demand can increase with income, but eventually runs into the constraint that consumer time is finite. (McCombs, 1972, pp. 2/3). There may be something in this point as regards media-dense societies. In our conditions, the same point may apply at the opposite extreme: the sheer struggle for survival for so many of our people means an absence of time (not to mention other resources) for any meaningful media consumption. Between such extremes (saturation of leisure time and non-existent leisure time), there is ample room for variation in media consumption density.

[12] Depressingly, McCombs (1972, p. 57) writes: "A popular, appealing editorial package is a necessary, but not sufficient, condition for survival in the mass communication market place; the market must be large enough to provide sufficient money to support competing newspapers."

[13] While US experience is based on a market-driven economy, southern Africa operates with a more interventionist and "artificial" agenda. Relevant to this is a point made by Schramm (1964) who criticizes economists from treating all expenditures on mass media as consumption rather than investment. Instead, he says, the consumption aspect of informational expenditures in "developing" countries is a small part of the total. Instead, the development of mass media requires that this be treated as investment, and that a "nation" wanting mass media as part of its development team should give commensurate support to this.

[14] Calculated from SAARF, AMPS (1996, p. 32), (1999, p. 32).

[15] The extent of consumer time spent on media and receiver dissemination within the region could be usefully researched.

[16] Cubitt (2000, p. 164) notes that message convergence has a history that encompasses when newspapers started to use illustrations. Subsequent message convergence saw pictures combined with movement to make film, and later film converging with audio to produce the "talkies".

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