



NATIONAL BROADCASTING CONFERENCE

THE FUTURE OF
BROADCASTING
IN THE ERA OF
EMERGING
TECHNOLOGIES



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INTRODUCTION



On the 8 - 16 October 2018, the Botswana Communications Regulatory Authority (BOCRA) held the second National Broadcasting Consultation Conference in Gaborone under the theme, "The Future of Broadcasting in the Era of Emerging Technologies." The conference was attended by more than four hundred local and regional industry players.

This Conference forms part of the consultative process intended to offer industry stakeholders the opportunity to reflect and contribute on some of the key issues that impact the Broadcasting industry.

The Conference interrogated digital technological advances that are disrupting traditional broadcasting and how these can be leveraged to promote a thriving broadcasting sector. Equally, the conference explored transformations within the broadcasting industry such as trending technologies in broadcasting; emerging terrestrial sound and video in the digital era etc; Further, the conference;

- Reviewed the progress that Botswana has made in Broadcasting technology advancement;
- Consulted with the public on the current regulatory instruments proposed by BOCRA; and
- Educate attendants on the mandate of BOCRA.

BOCRA – Who are we?

BOCRA is mandated by the Communications Regulatory Authority Act (No. 19 of 2012) to regulate the communications sector – comprising telecommunications, broadcasting, internet, and information communications technologies (ICTs), radio communications, postal services and related matters, in Botswana.

A critical success factor in undertaking this mandate is to establish and maintain an effective platform where BOCRA and its stakeholder can consult regarding the implementation of its regulatory functions vis-a-vis interests of consumers and users of regulated services.

Mission

To regulate the communications sector for the promotion of Competition, Innovation, Consumer Protection and Universal access.

Vision

To have a connected and digitally driven society.

Values

Transparency

Our decision making will be open and informed by consultation with various

stakeholders. We will embrace the diverse interests of our different stakeholders.

Consistency

We will ensure that our decisions are fair, predictable and dependable. We will be objective in our decision making and apply remedies that are proportionate.

People Centered

We believe that our people are indispensable assets who drive our success through their commitment to excellence. We shall therefore harness individual skill and strengths and work as one.

Innovation

We will continuously explore new ways in designing proactive regulatory interventions that will respond timeously and effectively to market demands and the latest technology trends.

Accountability

We are responsible for our actions and decisions, we take due care in the use of public resources and adhere to internationally acceptable governance principles.

Core Business

The BOCRA will take the lead in areas

that drive the advancement of the communications industry. The Authority will in particular focus on its core business which includes:

- Efficient management and use of radio frequency spectrum;
- Licensing and monitoring of service providers;
- Developing and promoting appropriate strategies and policies that encourage infrastructure development and use of ICT services;
- Ensuring security and efficiency of telecommunications networks; and
- Comparative engagement and exchange with international telecommunication regulatory and standardisation bodies for global harmonisation and coordination.

In addressing the core business as set out above, the BOCRA has identified six (6) Key Result Areas which are:

- Universal Access and Service;
- Network Efficiency and Effectiveness;
- Affordable ICT services;
- A knowledge society;
- Organisational Efficiency and Effectiveness; and
- Globally Competitive Communications Sector.



Welcome Address

Mr Martin Mokgware – BOCRA Chief Executive

Welcoming the delegates to consultation conference, Mr. Martin Mokgware the BOCRA Chief Executive, noted that

the objective of the conference was to solicit ideas from industry players to help address emerging challenges that face the broadcasting sector, and help shape the direction of the broadcasting industry and regulatory intervention.

Mokgware acknowledged the fact that technological advancements always bring challenges and benefits, and he stressed the importance of appropriate responses as regulation and industry grapple with challenges such as lack of jurisdictional licenses, that emerging technologies such as Over The Top (OTTs) applications pose over traditional broadcasters and broadcasting industry, in general.

The International Telecommunication Union (ITU) estimates that 2 billion devices are connected to the internet, making OTT broadcasting a very attractive option for wider reach to consumers. Mokgware urged the industry to work with regulation to explore how these can be leveraged to advance the broadcasting sector, and balance the interests of all the stakeholders while ensuring the sustainability of the broadcasting service for the future generations. Mr Mokgware also noted that this forum was vital to regulation as participants would have an opportunity to discuss and refine documents such as the Code of Conduct for Broadcasters during Elections.



Official Opening Address

Mr Kabelo Ebineng – MTC Permanent Secretary

Officially opening the conference on behalf of the Honourable Kitso O.

Mokaila, Minister for Transport and Communications (MTC), Mr. Kabelo Ebineng, Permanent Secretary (MTC) applauded BOCRA’s efforts to consult with the sector on matters that concern the development of the sector.

He alluded to the National Vision 2036 which espouses Prosperity for All, noting, that media is an integral component of this ideal. He acknowledged that media is critical in Government’s efforts to create a knowledge base, and promote freedom of expression. Mr Ebineng assured the delegates that MTC will continue to provide effective oversight of the performance of other arms of government.

Mr Ebineng also reminded the delegates that Government has invested heavily in broadcasting resulting in least 90% population coverage for radio and 80% with terrestrial TV. Through satellite technology, broadcasting services achieve 100% population coverage. With all this investment in infrastructure, Mr Ebineng noted that media in Botswana still has a lot of room to grow in terms of geographic coverage, variety of services, and diversity of content.

On other issues, Mr Ebineng, noted the following:

- Government had approved that all the communications transmission infrastructure has been transferred to the Botswana Fibre Networks (BoFiNet) to facilitate sharing with commercial entities;
- Ministry is also working with the Attorney General’s Office to finalise the Communications Regulatory Authority Act Regulations;
- MTC is committed to developing a National Policy on Broadcasting to guide the development of a competitive broadcasting sector that offers diversity and plurality of choice;

Mr Ebineng pointed out that BOCRA had established the Universal Access Service Fund (UASF), as a special vehicle created solely to address gaps with ICTs offer across Botswana. Despite availability of funding, he decried the fact, private commercial Broadcasters had been unable to benefit from this Fund due to

inability to agree on a common project to be funded. Mr Kabelo Ebineng expressed his hope that such a forum would help iron out things that hamper growth of the broadcasting sector.



Vote of Thanks

Mr Donald Seberane of Duma FM

On behalf of the broadcasting industry, Mr Donald Seberane, Duma FM Station Manager thanked BOCRA for organizing the consultation conference.

Day 1

The day was divided into two plenary sessions. Session 1 focused on the Development of the Broadcasting Industry in Botswana.



The Development of Broadcasting Industry in Botswana

Mr Bathopi Luke – Director, Broadcasting Regulation, BOCRA

Mr. Bathopi Luke, Director Broadcasting at BOCRA set the tone for the consultation process by outlining the evolution of the broadcasting industry as well as legislative instruments and regulatory regimes, past and present.

These include the CRA Act, the Regulations and Codes of Conduct. He also outlined the broadcasting landscape since 1999 when the first commercial radio stations were licensed. These were then licensed to go national in 2007 and with an additional private radio station added to the mix.

The first private terrestrial television service was authorised to operate in 2000. In 2017, there was licensing of several commercial satellite television stations both free to air and subscription television. In addition, Subscription Management Service (SMS) licences were also introduced, enabling licensees to access satellite broadcasting content for redistribution.

Generally, the primary broadcaster could be based outside the country. Currently MultiChoice Botswana, Econet Botswana and Media Core Botswana are licensed as such. In 2018, two commercial digital terrestrial television services were licensed but they have not yet launched. These are Khuduga TV and Access TV.

In terms of licensing processes, Mr. Luke spoke of two processes i.e. competitive licensing and non-competitive licensing. The competitive process involves a tender process where applicants put in bids for evaluation and are awarded frequencies based on their presentations. Under this licensing process, a tender for licensing of Network Facilities Provider (NFP) was issued but unfortunately it was not successful.

With this license an operator enables Content Providers to use NFP network to convey broadcasting content. He pointed out that BOCRA took a bold decision to encourage citizen participation in the NFP by pitching citizen shareholding at a minimum of forty percent (40%) taking into consideration the infrastructure cost implications for an NFP.

The Licenses that are awarded non-

competitively include the IP Licenses, SMS and the Satellite Content Service Providers. In terms of the television market, the terrestrial operators are eBotswana which broadcast within 60KM of Gaborone, Access TV, Botswana Television (BTV) and NOW TV. The satellite platform comprises of OVY Network, Maru TV, BTV and AlfaView which is not yet operational.

Subscription Management Services comprise of Multichoice Botswana, Star Times, Econet Media Botswana and Media Core Botswana. On IPTV there is Cene Media, Mascom Wireless and Power TV. The radio space comprises of Radio Botswana, RB 2, and the three commercial radio stations being Duma FM, Gabz FM and Yarona FM. IP radios include, Sports Network Proprietary, Rera online, ICE100, Lion ront, Solly Cannon Holdings and Southern Kings.

A light touch regulation is employed for IP broadcasting where operators are authorised without a lot of obligations except for the code of conduct. The reason for the light tough regulation was initially informed by the limited broadband capacity. No digital terrestrial radio has been licensed yet and there has not been any interest in digital terrestrial radio.

In terms of performance, the commercial radio stations are able to meet the content standards while the regional commercial TV station has not been able to meet the required content quota. Mr. Luke also noted that some jurisdictions are moving away from the quota systems because they believe they limit creativity. International providers do not favour the regulatory obligation to provide local content.

He explained that BOCRA insists on the quotas to ensure that operators give back to the communities they serve. In terms of population coverage, Yarona FM covers 41%, Gabz FM 59%, Duma FM 66% of the population whereas the State owned Radio Botswana and Rb2 cover 95% of the population. Regarding TV, eBotswana covers 16% of the population and BTV covers 80% on digital terrestrial and has 85% analogue terrestrial. There is also 100% coverage on satellite.

In terms of challenges, Mr Luke noted that they grapple with the fact that licensed operators have not reached all areas they have been assigned to. There is also a problem of acquisition of land for putting up of sites and duplication of infrastructure in which stations are based.

This would be resolved through infrastructure sharing. Lack of infrastructure sharing leads to inconvenience for consumers since they have to tune their terrestrial antennas to different locations. There are also challenges regarding competition with commercial broadcasters complaining about the lack of level playing field with the state broadcaster which is not regulated.

The other challenge is the OTT substitution which has disrupted traditional broadcasting, spectrum issues especially the lack of frequencies as a result of unfavourable legacy agreements. The other major challenge is the problem of consumer equipment regarding the digital terrestrial television.

Mr. Luke expressed optimism over the future of broadcasting. He pointed out that BOCRA has streamlined its licensing processes to ensure a quicker turnaround time for licensing. With advancement of broadband, more opportunities are being offered for internet broadcasting.

He informed the audience that there is also room for untapped markets which could be exploited by new entrants and the regulator is in the process of coordinating more frequencies in order to open space for more entrants. Mr Luke also said there are plans to establish a content monitoring service to ensure up to date data on the performance of the industry.

The three-day conference saw the announcement of two major decisions impacting on the broadcasting industry. The transfer of the broadcasting infrastructure belonging to the Department of Broadcasting Services to Botswana Fibre Network (BOFINET) in preparation for infrastructure sharing and the drafting of a broadcasting policy expected by December this year.

More than 400 hundred delegates

attended the conference from both local and regional industry players.

The conference covered four broad themes being development of broadcasting in Botswana, Broadcasting convergence, Emerging Terrestrial Sound and Video Technologies and Trending Technologies in Broadcasting. The themes are discussed in the subsections below.

The Development of Broadcasting in Botswana.

This theme addressed the current status of broadcasting, the evolution of broadcasting with a particular look at the National Broadcasting Board (NBB), Botswana broadcasting aspirations looking at the next decade and reviewed the broadcasting survey results of 2018.

Broadcasting Convergence theme discussed the characteristics of convergence, the impact of convergence on traditional broadcasting and content rights with a particular reference on new types of piracy. Trending Technologies in Broadcasting theme discussed regulation of over the top services, recent advances in broadcasting and using technologies to effectively deliver content and improve revenues.

There was also a panel discussion on content development, production and commissioning programs, challenges and opportunities in the era of digital broadcasting. The conference then discussed the Code of Conduct during Elections. This included areas such as Principles of Covering Elections and the Role of MISA during Elections. In addition, codes of conduct for broadcasters in Zambia and Malawi were discussed.

The session was concluded with an overview and discussion of the current Broadcasters Code of Conduct during Elections.

The last day of the conference was dedicated to a media workshop during which media practitioners were taken through the mandate of BOCRA and all its regulatory processes. These were the Role of Regulation, Consumer Protection, Tariff Principles, Internet, Social media and Universal Service and Access. A

presentation on the Communication Consumer Satisfaction Survey was also delivered to the participants.

The workshop was concluded with Master Class on Creation and monetisation of broadcasting content by Mr. Phillip Molefhe, the former Chief Executive Officer of the South African Broadcasting Corporation (SABC). Several recommendations were made at the end of the three-day conference.

The conference covered four broad themes being development of broadcasting in Botswana, Broadcasting convergence, Emerging Terrestrial Sound and Video Technologies and Trending Technologies in Broadcasting.





RECOMMENDATIONS

1. BOCRA should start licensing community radio stations
2. BOCRA should introduce Political party advertising
3. Government should review the decision on the digital migration
4. COSBOTS should convene a conference on content production industry;
5. Traditional media should continue to take advantage of the internet;
6. BTV should use the revenue accrued from advertising to invest on content production;
7. BTV should increase its expenditure on content;
8. There must be a clear definition of the regulatory body in view of the proposed transfer of infrastructure to BOFINET;
9. Broadcasters and content providers should be regulated by a common regulatory body;
10. All local languages should be used in/during broadcasting in Botswana;
11. Broadcasting houses should develop their own code of conduct for election coverage that affiliates to the national code of conduct;
12. Media houses should create their own social media policies both on and off air;
13. There should be continuous public education on the digital migration;
14. All political parties should enjoy balanced coverage;
15. Upcoming content producers must be empowered;
16. A specific tax for OTTS should be introduced;
17. The regulator should license more broadcasting services;
18. A regional block for content distribution should be established.

POLICY AND REGULATORY ISSUES



During the official opening of the conference the Chief Executive of BOCRA Mr. Martin Mokgware spoke of a power shift in broadcasting from the hands of the broadcasters to the consumers due to the advent of new technologies.

He said consumers can now choose what to watch, when to watch it and how to watch it. Mr Mokgware noted the advent of content consumption via the use of Over-the-Top (OTT) devices which are estimated to be over two billion worldwide.

Such devices distribute content delivered over the internet without the involvement of other parties in the delivery of such

content. He said in 2016 OTTs were estimated to have generated annual revenue of over Twenty billion US Dollars. Conversely, the growth of OTT delivered content contrasted with declining figures for traditional broadcasting platforms. Nevertheless, he noted that traditional platforms have survived despite the challenges.

Mr Mokgware noted that the success of traditional broadcasters is dependent on their ability to capitalise on local content development and delivery. While OTTs are now competing for premium content with traditional broadcasters, they need to devise strategic partnerships to remain competitive.

From a regulatory point of view, OTTs do not require jurisdictional licensing to operate thus it is difficult to be subjected to oversight control.

However, Mr. Mokgware pointed out that BOCRA is observing the global trends on the regulation of OTTs for purposes of competition, social obligations, consumer protection and tariffs. Similarly, there are some jurisdictions which require OTTs to have local offices and others require that they pay taxes.

Mr. Mokgware also spoke of other phenomena that have entered the broadcasting landscape such as the block chain technology. He said the concept

of block chain threatens to revolutionise consumption of broadcasting content. These remove the central authority in the form of the OTT provider. They enable viewers to participate in the acquisition of content through joint funding and with the use of artificial intelligence content distribution can be localised and personalised to viewers.

He also informed the audience that BOCRA has licensed three IPTV services to enhance competition on the subscription service television market which has so far been delivered through satellite. The regulatory mandate of balancing the interests of all stakeholders is now more daunting than ever. But the BOCRA CE stressed that the regulator is bound to ensure the sustainability of broadcasting for the benefit of future generations.

The key note address was given by the Permanent Secretary (PS) in the Ministry of Transport and Communications Mr. Kabelo Ebineng on behalf of the Honourable Minister Mr Kitso Mokaila. In his address Mr. Ebineng spoke of the importance of the media in promoting a knowledge-based economy espoused under Vision 2036. In addition, he highlighted that the media will continue to provide an effective oversight over other arms of government.

He noted that government has been a key player in broadcasting both through facilitation of the private broadcasters and direct provision of broadcasting services in radio as well as television. But Mr. Ebineng acknowledged that media still has room to grow in terms of variety and diversity of content. He announced that government has approved the sharing of government transmission infrastructure with the private sector in order to achieve diversity in coverage.

Consequently, all the communication transmission infrastructure is being transferred to Botswana Fibre Network (BOFINET) to facilitate sharing. The move is anticipated to address the challenge of provision of broadcasting services in a country with sparse population.

Additionally, there will be sharing of production studios with the private sector in order to facilitate the creative industry especially in the face of widespread youth

unemployment. Mr. Ebineng noted that a team is currently carrying out due diligence exercise to facilitate the implementation of this initiative. It is expected that the process will be completed in 2019.

The PS also announced that work is in progress to finalise the Regulations under the Communications Regulatory Authority Act (CRA Act) by December 2018. This is meant to provide a predictable and transparent regulatory environment for the industry. In addition, he pointed out that the Ministry is considering a national policy on broadcasting; aimed at guiding a diverse broadcasting environment that would enable plurality of choice.

Mr. Ebineng further acknowledged that government considers the communications sector, including broadcasting as a candidate for economic diversification. He emphasized that currently commercial broadcasters have employed 384 people directly. There is therefore a need to create an environment for employment especially since more people are graduating from tertiary institutions.

The objective of government, he said, is to ensure universal access to information services. This would be enhanced by the provision of broadband services. The Universal Access and Service Fund (UASF) has thus been established to facilitate the roll out of broadband and other services beyond major cities, towns and villages. Nonetheless, the broadcasters have not been able to benefit from the Fund because they are unable to agree on a programme to be funded.

He called on the industry players to iron out obstacles that hinder the growth of the industry. He said a combination of the infrastructure sharing, the national broadband strategy and new ideas should lead to the reshaping of the industry for the benefit of the country. The Permanent Secretary said the Government would like to see participation in the broadcasting industry at both local and international levels.

He called on the broadcasters to adopt modern technologies to take advantage of opportunities created by such technologies. In his vote of thanks, the

Programmes Manager at Duma FM Mr. Donald Seberane said the consultation process launched by government more than a decade ago has become a standard. He thanked BOCRA for their capacity to listen to the industry.

Mr Seberane also challenged the regulator to consider allowing party political advertising by broadcasters. He called for regular audience measurements to enable monitoring of performance by the communication industry. The former Chairman of National Broadcasting Board (NBB), Dr Masego Mpotokwane briefed the conference on the genesis of broadcasting regulation in Botswana from its inception as the National Broadcasting Board, (NBB) to the current BOCRA under a converged regulatory environment.

The NBB was established under the Broadcasting Act of (1998). Its functions included issuing of broadcasting licences, exercising control over broadcasting services and the supervision of broadcasting activities. It was also entrusted with allocation of available spectrum resources.

The NBB had to establish its operational processes with the then Botswana Telecommunications Authority (BTA) as its Secretariat. Members of the board had to be familiarised with the broadcasting regulations, among other issues. In addition, the board set in motion the development of a broadcasting policy to guide the development of broadcasting in Botswana.

Public consultations were conducted, culminating in the presentation of a draft broadcasting policy to Parliament in 2006. But the policy was never passed by Parliament. The NBB also developed regulations which became operational in 2002.

The regulations defined issues such as, advertising and sponsorship codes, harmful interference, copyright and neighboring rights, code of practice, public notices and emergency operations, complaints and investigations. The NBB was able to license three private radio stations to go nationwide in 2007 namely; Duma FM being a new entrant, Gabz FM and Yarona FM. The vision was that the



Tumisang Mothei- Duma FM, Martin Mokgware - BOCRA CE

new stations would promote the diversity of broadcasting services and increase the local content which is played on radio. The private broadcasters pooled their resources to form a transmission company Kemonokeng.

The NBB was also involved in a court battle with Multichoice Botswana when it attempted to license it as a broadcaster but lost the case. The NBB was also involved in the development of a code of conduct for broadcasters during elections in preparation for 2009 elections. However, in an attempt to implement the code, the NBB was thwarted following an incident that took place at DBS.

Eventually the NBB had to withdraw the code as it appeared non-enforceable. According to Dr Mpotokwane, the case highlighted possible oversight by the Board, ambiguity with the definition of DBS according to the Broadcasting Act then, and the state of paralysis which the regulator could easily be thrust into.

A Digital Migration Task Force was set up in 2008 to develop a digital migration strategy in line with the ITU expectation by June 2015. The task force came up with costs and expected revenue streams scenarios for the migration and produced a report in 2010 which was subsequently submitted to the parent ministry in 2011. But there was never any official response to the report. The NBB was eventually merged with the BTA in 2012 as a converged regulator.

In his conclusion, about the NBB years, Dr Mpotokwane noted that in its twelve years of existence, the NBB defined the country's broadcasting character.

He observed that Botswana's broadcasting sector is stunted due to its low population vast territory and the spill over from stations in South Africa. But he also observed that the advent of convergence may create room for innovative ways to grow broadcasting.

The Director in the Department of Telecommunications and Postal Services (DTPS), in the Ministry of Transport and Communications, Mr. Itumeleng Batsalelwang discussed aspirations for the future of the industry in the next ten years. He observed that there will be a need to redefine broadcasting in view of technological developments.

Some of the features of future broadcasting are that the OTT environment outpaces traditional mode of broadcasting and that cloud computing creates more opportunities for versatility. National Regulatory Agencies (NRA) are also challenged as content is delivered outside the traditional methods of transmission making it difficult to regulate content. Nevertheless, there is still a need to ensure acceptable behaviour in broadcasting.

There is also a need to interrogate issues such as community broadcasting, social media development, content streaming and Big data as well as reconfiguration of

copyright laws. From a legislative point of view, Mr. Batsalelwang said broadcasting policy has now been placed under the ICT refocusing initiative although the State Broadcaster is still under the Ministry of Presidential Affairs, Governance and Public Administration. He said there is a need to concentrate on the commercial broadcasting development.

As a way forward Mr. Batsalelwang said there is need to consider the use of digital dividend Post Migration and to develop guidelines on Party Political Broadcasting. There is also a need to continuously plan and implement Digital Audio Broadcasting.

The implementation of infrastructure sharing initiative should alleviate huge capital investments in infrastructure and allow wider reach. There is also a need to consider regulation of OTTs' and a clear distinction should be made between a Public Broadcaster, a commercial broadcaster and a Community Broadcaster.

The focus in broadcasting should shift to content productions and provision without worrying about the platform or technology. Other opportunities include network facilities services provision, construction and leasing of towers, and content storage facilities. There is also a need to increase collaboration with other Regulatory Agencies such as Competition Authority

BROADCASTING CONVERGENCE



Ms Violet Letsiri, Senior Manager, Social Policy for ICT Services at Independent Communications Authority of South Africa (ICASA) presented on the Broadcasting Industry in the Convergence Age. She noted that broadcasting media consumption patterns are changing with linear viewing giving way to non-linear viewing. In addition, consumers have more choice and more options, streaming services are possible via broadband networks and broadband networks are delivering "broadcast type" content.

In the meantime, regulatory models are left behind. There is also increased tendency towards pirated content regardless of quality and driven by demand to see the most current episode.

Ms Letsiri shared her country's approach to convergence driven by the principles of net-neutrality licensing framework, one regulator responsible for all ICT services and at policy level- government drafting new laws to cater for convergence.

She noted that regulators need to adapt to convergence, fast track digital migration process and keep abreast with technological development.



Ms Goabaone Taylor from Kwese TV in her presentation titled, "How convergence is affecting traditional Broadcasting" recounted the Kwese TV story. She said they realised that in the fourth industrial revolution its critical to move swiftly if you come in as a player. Consequently, they have had to roll out more products at a faster pace.

She said due to technological developments and digital transformation, there has been an emergence of Non-Asset centric content aggregators and developers like Netflix and Amazon. These don't invest in infrastructure like traditional broadcasters do. But they focus on content acquisition and distribution.

There has also been mergers and acquisitions of communications companies with content companies such as AT&T and Time Warner. In addition, telecommunication companies have moved into content such as BT Sport.

This she said occurred when Telco's realised they needed to make use of their infrastructure. This provides lessons for BOFINET to leverage on its management of the communications infrastructure to provide content.

Content consumption trends are rapidly evolving with more people receiving content on the internet followed by television and radio. This has led to the rethinking of advertising with advertising moving more to the online environment than the traditional media.

In response to the shifting trends, Kwese adopted a multiplatform approach to enable various groups of consumers to access content how they want, when they want and where they want. Products under this strategy include, a free to air platform, a pay tv platform, a digital platform and a mobile platform.

The free to air offering, which caters for more than 65 million people around Africa per month is designed for people who cannot afford subscription. The pay tv format is subscription television, the digital platform caters for consumers who want to watch content on demand while the mobile platform is designed for the small screen for people on the move.

The Kwese approach has earned it international industry recognition including the TV Gadget of the Year award and the 2018 IBC Judges Prize for TV everywhere in Sub-Sahara for Kwese Play. The Kwese Iflix is also a recommended app on Google Play Store.

Mrs Taylor noted that the approach to content delivery in the current broadcasting environment requires re-packaging and blending of content into more lifestyle offers. In addition, business partnerships must be based on complementary lifestyle segments with increasing movement to more lifestyle congruent retail partners of sales channels.

The creation of local e-market places to allow others to contribute and benefit is critical because greater emphasis is now on local content. Other success

imperatives are, better segmentation & data analytics and excellent customer service.

Some of the challenges faced in the new digital environment are the ever-increasing costs of sporting rights because there is competition for rights. What is also clear is that social networks are not easy to manipulate and hard to control since they are everywhere. Further, the "user-generated content" is often triggered by an emotional reaction.

In the TV based services the performance of both transactional and subscription TV based services depends on the consumer capacity and will in turn have a bearing on the development of consumer markets. Consumer concerns about data security and privacy could cause a barrier to the development and take up of on-line services.

Looking ahead, Mrs Taylor indicated that cloud TV delivery is on its way. It has been a big theme in the past and TV industries around the world are adopting it on many levels. Kwese will be partnering with Microsoft Azure, piloting cloud delivery for Play out & origination, live, OTT on-demand streaming and distribution in 2019.

Mr. Niall Downey from CENE MEDIA presenting the title, Riding the New Wave (New Era of Broadcasting - IPTV Provider, said we are now in the entertainment age and no longer in the information age. "To improve is to change, to change often is to be perfect." said Mr Downey. We all watch videos on the internet.

Times are changing. TV used to turn off at midnight. Movies are now released worldwide at the same time due to platforms such as rotten tomatoes. Regarding IPTV, Amazon and Netflix have become popular. But on the horizon is Disney TV streaming service which is due late in 2019.

They have bought a lot of content such as Marvel Universe, Pixel and Star Wars in addition they want to buy James Bond for five billion US dollars. This is in addition to their sports content such as ESPN. Their revenue in 2017 was about 80 billion dollars.

Mr. Downey informed the audience that the entry into the market by Disney is likely to drive up competition which in turn will be beneficial for the consumer and content will then become cheaper. The way news is delivered has also been greatly impacted by digital technology.

Mr Downey gave an example of the US president Donald Trump who bypasses news organisations by using his twitter account to communicate with the public. Celebrities and artists communicate directly with their followers on Twitter and can promote their products directly without going through traditional advertising channels.

More than five billion videos are watched on YouTube per day. Netflix annual revenue is 89 billion dollars and one billion hours of Netflix are consumed per week. This will only grow bigger with more players coming into the scene. What needs to happen is that the picture of the content needs to be good because the need for content will not change for the next ten to fifteen years.

What will change is the way business distributes and the consumer accesses content as well as the nature of the relationship around the supply chain. The best way to predict the future is to invent it. Therefore, the best way for governments to predict the future is to put in place key infrastructure and to allow people with imaginations the freedom to populate it with new things.

This will allow creativity in content creation. Mobility will become common to allow people to consume real time live content while travelling even by air. It calls for innovation and need to embrace it. This means BOFINET will become the main player in content distribution and consumption in Botswana.

Mr. Edward Mnisi, the Anti-Piracy Manager for Multichoice Africa, responsible for Southern Africa, discussed the topic Content Rights with a focus on the new types of Piracy. He described piracy as copyright infringement. Piracy affects everyone from the content creators, news industry, music, sports event industry, broadcasters and even governments through unpaid taxes. Moreover, piracy

impacts on country reputations which may lead to reluctance to invest in countries which turn a blind eye on piracy. Currently piracy threats are prevalent through IPTV devices and the internet through content streaming.

People are able to get pirated content streamed from broadcasters such as Sky, BBC consequently bypassing broadcasters such as Multichoice and Kwese TV. Any broadcaster that distributes content gets pirated by the internet streaming piracy. The OTT boxes are also a vehicle for piracy. Some of them have add-ons which enable the OTT boxes to download illegal content.

Other technologies used for pirating are webcasting and peer to peer which is used by pirates to download content for redistribution. Mr. Mnisi called for strict regulation of OTT boxes. Currently there are many OTT boxes coming out of Africa which are not type approved by regulators. There is need for stricter control of entry of the devices at ports of entry to deal with piracy.

EMERGING TERRESTRIAL SOUND AND VIDEO TECHNOLOGIES



Ms. Basebi Mosenyi Acting Deputy Director, Technical Services from BOCRA spoke on broadcasting frequencies for new technologies. She spoke of the need for more FM spectrum because it is no longer available for Botswana cities and major villages.

Traditional way of listening to radio is not being replaced by internet radio. This calls for solutions that provide efficient use of frequency spectrum to be able to accommodate the expansion of the radio service. She briefed the conference on the various frequency agreements impacting on Botswana since 1984 and how they are related to neighbouring countries.

The challenge with FM frequencies means that five radio stations have been assigned frequencies across the country. This has left only one frequency per site. In South Africa there are more than 1016 assignments and may not be willing to coordinate more frequencies in Botswana.

Regarding digital terrestrial television, there is not much challenge. It could be the region may have to relook at the DTT spectrum after 2020 to see if the spectrum has been used efficiently. It is important to therefore plan ahead.

In terms of solutions, there is a possibility to go for digital terrestrial audio broadcasting to help overcome the need for FM frequencies.



Mr. Calvin Goiletswe, from the Department of Broadcasting Services presented the status of the Digital Migration Story. He said a digital terrestrial standard was adopted in 2013, being ISDBT from Japan. Thereafter structures were put in place to implement the process of digital roll out. The implementation strategy was to roll out the transmission network and upgrade the production studios. The network has been rolled out and production studios are now being upgraded. The analogue switch off will be

influenced by the availability of receiver equipment.

That end, there is continuing engagement with manufacturers. Initially the switch off was expected to be done in 2016, but at the moment, dual illumination is still ongoing.

Analogue has been switched off in Gantsi and Maun. The digital transmitters were intended to mirror the analogue sites. So far forty-five digital transmitters have been installed in forty - five sites which originally hosted analogue transmitters. Most of the forty-five digital transmitters are now operational. Most of the transmitters are situated on the eastern side of the country where most of the population resides.

Coverage in Botswana indicate that there are around 500 thousand households with television receivers. There is ongoing confirmation exercise to ascertain the exact number of households covered expected to be completed by the end of December 2018.

Regarding multi-channel broadcasting, an eight-channel multiplexer is in operation from BTV with six channels on trial. These are BTV, Khuduga HD, France 24, Access TV, Now TV and Kwese Sports. The youth channel was launched in March this year.

The government has purchased and distributed 10 thousand set top boxes through various distribution methods including competitions. But the main plan is that the private sector should be driving the distribution through business dealings.

Coverage in Botswana indicate that there are around 500 thousand households with television receivers.

So far six companies have been approved by BOCRA to acquire, supply and distribute the set top boxes. Three of companies are actively supplying the boxes. For the analogues switch off to be done, at least 300 thousand households should be covered by DTT, which is the 65 percent approved by SADC to be the minimum covered for analogue to be switched off.

Awareness campaigns on the digital migration were done through radio and television as well as nationwide workshops. Local companies were also engaged for nationwide public awareness. There is also a call centre available as a continuing process of public awareness.

Regarding lessons learnt from the campaigns, it was discovered that some viewers did not use proper aerials for reception because the analogue signal was very strong. There was no need to buy antennae. It's also clear that analogue TV is mainly viewed by low income bracket and by the elderly, while satellite TV is mainly viewed middle to high income households. It is also clear that the migration is achievable.

Viewers who have received set top boxes have welcomed digital television because of the increased number of channels they have been able to receive. In terms of risks and challenges, viewers are reluctant to switch to DTT because they are used to free to air set top boxes that give them more channels than those that are available in the BTV set top boxes. This could be mitigated by producing more compelling content for BTV to attract

viewers to the DTT platform. Availability of set top boxes is another challenge since government is no longer prepared to subsidise the set top boxes. This means the private sector has to take it upon themselves to meet the need. However, the difficulty is convincing manufacturers to produce for 65000 households only. This does not make a viable business case. This could be mitigated by producing also for the rest of SADC which uses a different standard.

Further consultations are on to ensure availability of the set top boxes. It is critical that the analogue switch off should be completed so that resources used in maintaining the analogue transmitters can be diverted to the purchase of content.

From Sentech South Africa, Mr. Noto Modungwa shared the story of Digital Radio and Television trials in South Africa. Mr Modungwa noted that they have a challenge of FM frequencies in the metropolitan areas. But he noted they tested a new digital audio standard called DAB plus radio in the Johannesburg metropolitan area.

It is a standard that is currently gaining traction in Europe and could be an answer to the FM crisis. The standard enables twenty radio stations to be carried within one frequency. During the trial other considerations was its availability in HD format as well as regulatory implications.

Other considerations were the required quality of service and replication of existing FM services. The trials involved using transmission power ranging from

two to ten kilowatt. The results showed significant improvement in quality, coverage density improvement from two to five kilowatts. From five kilowatts to 10 kilowatts, there was not much coverage, but more penetration of the signal.

The signal could be received in an underground parking where ordinary FM would not be able to penetrate. With polarisation, vertical seems to perform better than horizontal. Hence, the recommendations following the trials include the use of vertical polarisation and use of high power transmission mainly for penetration as opposed to coverage

About the funding, Sentech took the view that the signal distributor will fund the network site and the broadcasters would be responsible for the delivery of their signals to the site. The broadcasters were also responsible for the receiving devices. Car manufacturers were also included in the trials.

Mr Modungwa concluded with an appeal for more use of the digital platforms to deliver teletext information. This he said can greatly enhance the delivery of e-government services, even without the availability of the internet.

TRENDING TECHNOLOGIES IN BROADCASTING



Mothusi Matlhodi, BOCRA Public Relations Officer spoke about the regulation of the Over-The-Top providers. The OTTs are broadcasters that deliver content over the internet without the intervention of the regulator such as Netflix, Apple TV and Amazon. These are fast growing in Botswana.

Their power and rapid growth threaten the existence of major broadcasters such as Multichoice, and others, so they are worth understanding. Mr Matlhodi outlined the disadvantages and advantages of regulating the OTTs.

The parties who are against the regulation of the OTTs are the consumers and the OTTs operators. They argue that OTTs prove better value for money, regarding pricing and multiservice offering compared to traditional broadcasters.

They also argue that OTTs provide ease of access to services and rejecting them would be tantamount to stifling to innovation. OTTs are also a source of revenue for small medium and large ISP players in Botswana and regulating them

would lead to cost escalation. Parties who want the OTTs to be regulated include traditional broadcasters. They argue that OTTs do not want to adhere to regulatory obligations which apply to traditional broadcasters.

These include quality of standards and do not contribute to the economies of the countries they operate in. They can easily dictate pricing and content without any intervention because they have complete and sole control over their services. They are also not obliged to be sensitive to the cultural, religious, political and social sensitivities of the populations which they provide content to.

There are also privacy concerns in that there is no provision to take legally approved counter measures in case of privacy violations by the OTTs. BOCRA's position is that the regulator protects both the consumers and licensed operators.

But at the same time, the regulator has an obligation to grow the communications market through regulatory provisions that encourage innovation without jeopardising the operation of existing players and providing the best deal for the consumers.

The regulator is therefore caught between ignoring operators that are unregulated and subjecting consumers to inefficiencies when they can derive value for money from OTTs.

Mr. Matlhodi highlighted some of the ways to regulate OTTs that operate from outside the country. An example given was that of Indonesia which obliged the OTTs to set up offices in Indonesia and employ locals.



Mr. Phillip Molefe, the former CEO of SABC spoke on recent advances in Broadcasting. He spoke of landmark changes in broadcasting saying these are disruptive technologies which create turbulences in the broadcasting industry. These have led to advances in broadcasting.

Mr Molefe emphasised that the other land mark change in broadcasting is the migration from analogue to digital broadcasting which he described as a major development in broadcasting. The migration has caught many operators unawares.

Many operators have not changed their business models and operating models even though there has been a shift from analogue to digital. He said the reluctance to change and to adapt will lead to the collapse of some of the traditional broadcasters. Additionally, the value chain must also change.

The other major change in broadcasting is that power is shifting from content creators to consumers. Consumers want



Moratwa Modise of eBotswana moderating the panel, Kelly Ramputswa - Yarona FM Station Manager, Philip Molefe, Mothusi Matlodi

compelling content when they want it and have therefore rendered schedules irrelevant. This compels the broadcasters to respond accordingly. Digital technology has also spawned new ways of creating content and this has resulted in citizen journalism in the digital age.

In radio broadcasting, the new tools are benefiting the advance of community radio, giving it new vitality and relevance. This may benefit Botswana which is yet to introduce community radio broadcasting. New advances have also led to the creation of an economy in which content development and creation has become an economic activity.

There is an ecosystem which goes with this economic activity. Mr. Molefe also spoke about the skills elevator which describes new forms and strategies of content creation. This involves participation of communities, producers and other partners in deciding what goes on in the content consumed. It is a model that is in testing in South Africa. He highlighted that this works well with community broadcasting.

He noted that Botswana lends itself as a candidate for community broadcasting because it is a vast country, thinly populated and steeped in communal life. This would also solve the problem of spectrum scarcity as there would be deployment of low power transmission for community broadcasting.

This could be started with a few communities who are then assisted to run the radio service and helped to ensure that it is commercially viable. With

the use of the skills elevator model, the community can be assisted to create their own content. Tertiary institutions can also become content creators and their content can then be used in the community stations.

The landscape has changed, convergence has occurred, regulators and content developers must find ways of making technology work for advancement of broadcasting and to make a business case and economy out of broadcasting.



Ms. Kelly Ramputswa, the Station Manager of Yarona FM presented on the topic "Using trending technologies to effectively deliver content and improve revenues". In her presentation, she demonstrated that radio is still a very relevant medium.

The resilience of radio in the face of many advances in technology such as television and internet stems from the fact that it is

free, it's accessible and can reach even the remotest areas, it is real time and has very few barriers to entry. Radio is also flexible and presents an easy sales and promotion platform.

But over the years the way people consume content has changed. Technology has changed the way people consume music. Where in the past people heard a new song on radio first, now music is released on online platforms that speak directly to the consumer at an individual level. This has compelled radio to adapt. The use of apps has greatly advanced radio consumption in that listeners can use apps to access their favourite radio stations anytime and anywhere. The radio apps also enable advertisers to access consumers wherever they are even visually.

Social media has also enabled radio to stay relevant. It enables listeners to also interact while also tuned to their favourite programs. This enhances the capacity for brands also to connect with consumers and improves the broadcaster's bottom line.

The SMS premium line is another revenue stream. Digital tools also enable research which helps in determining the audience numbers and types. Yarona FM digital pages can identify the profiles of the listeners who like its pages or who respond to online surveys associated with the station. The WhatsApp application has also enabled audiences to interact with the station via voice notes which can be screened before they are played on air.

PANEL DISCUSSION



Panelists on Elections Code of Conduct

A panel discussion on Content Development, Production and Commissioning: Challenges and Opportunities in the era of Digital Broadcasting was conducted.

Mr Nchingane, said initially AFDA was poorly received in Botswana. But increasingly Botswana Television began to warm up to AFDA. The institution produces short films and documentaries every year. There are 110 students who will be producing about 45 productions.

The gate keeping system used by the system that decide the fate of products are normally industry experts. The story of Sebonda has been played in Germany, Durban and Gauteng Film festival.

He said UB has very good television studios and equipment and good gate keepers. He urged the Broadcasters to visit the institutions and see what they have in archives saying that these could be used in schedules. Mr Nchingane further urged the commissioning departments to familiarise themselves with the curriculum at institutions as these would give the students an idea of what the market requires.

For her part, Mrs. Mathape outlined the content acquisition processes that are used by DBS. She explained that there are three ways that are used, the first way of commissioning is whereby an idea is pitched, discussed and resources put to it in which the station controls the editorial and all rights to the product.

During the production process there is constant monitoring to ensure that all specifications are followed. She highlighted that there are also in-house productions such as news and current affairs that cannot be outsourced.

The second way is through commissioning of independent producers. The third way of acquiring content is through unsolicited processes.

Producers come with finished products for which they have sourced sponsors and present them to the station for airing in a trade exchange arrangement. When some unsolicited productions are presented to the station, a team of adjudicators is assembled under the supervision of Public Procurement and Asset Disposal Board (PPADB) to decide on whether to air the program.

In most time when bidders are asked to improve on certain aspects of their products, they do not come back. Mrs Mathape said 50 percent of production was in house, 35 percent was by independent producers and 15 per cent was by other government ministers.

But increasingly Botswana Television began to warm up to AFDA. The institution produces short films and documentaries every year. There are 110 students who will be producing about 45 productions.



Attendants - NBC Welcome Dinner



Mrs Mathape said they spent 17 million pula on commissioned content in the last financial year and 10 million on sporting rights acquisition mostly internationally. She urged the Independent producers not to depend only on BTV as the sole buyer for their content. She further said that a substantial amount of money has been used through the Youth Development Fund to buy equipment for production which are currently lying idle.

Ms Fenny Lokwalwane narrated her experiences as a producer on how acquisition of her television drama, Flat

101 by BTV impacted the lives of several people to propel them to greater heights in the production industry. The story was how proceeds from the first production funded through CEDA was able to launch careers of content creators. One bought a television station, another went into producing documentaries, another is into the production industry in New York and another is still involved with Botswood.

Tonderai Tsara from The Dialogue Group, an advertising agency, said while they do some production, they outsource 80 percent of their work to independent producers. The group works with producers on conditions of quality and trust and works broadly with all other creators.

Tsara said there are boundless opportunities in production because of the global appetite aided by the digital applications. For example, Netflix is now venturing into African content with a purchase of Nollywood productions. This calls for producers to up their game.

Mr Washington Thabo Phale from CIPA outlined that they focus on intellectual property and specifically copyrights for producers and content creators. The organisation interacts with the industry

through advising the players and protecting the works as well as dealing with issues of infringements.

CIPA can present evidence of works that have been created and submitted to the office as evidence in court on behalf of rights holders. Furthermore, Mr Phale informed the audience that CIPA is to establish an arbitration panel which will settle disputes arising from copyrights claims.

There is also funding on development of technical devices through the levy on technical devices and many projects have benefited from this funding. The Panel discussion recommended for the taxation of OTTs. The panel also called for an incubator which will house the production equipment under one roof with experts to guide young people on how to produce compelling content.

They called on BTV to let go of in house productions by government ministries to liberate production from bureaucracy. When you sell to international markets, they assume that you already sold locally. So, it's important that local support is forthcoming. The advent of more services will provide opportunities.



CODE OF CONDUCT DURING ELECTIONS

The conference also discussed issues of the Code of Conduct During Elections led by elections experts and media experts from Botswana and other jurisdictions. In this regard the conference heard presentations from the Independent Electoral Commission (IEC) of Botswana, MISA Botswana, Independent Broadcasting Authority of Zambia, Malawi Communications Regulatory Authority, and BOCRA.



Mr. Osupile Maroba from the IEC, discussed the Principles of Covering Elections. He spoke of three phase which comprise the electoral process in Botswana. These are the pre-electoral period, the electoral period and the post electoral period.

The processes are managed through a legal frame work which serves as a manual. The Electoral Commission is bound to stick to the law. But the stakeholders are normally free from the parameters of the law that binds the IEC. Then it becomes necessary to ensure that they operate within acceptable standards because elections are very emotive.

Media becomes the referee in the electoral process because political parties quite often accuse the IEC of manipulating the process in favour of someone else while

the electorates on the other hand accuse the IEC of disenfranchising them. So, the media becomes often the acceptable voice in any such conflict.

The media provides information for the political process, acts as a platform for political party messages and monitors and observes the electoral process. The media also enhances social cohesion. They remind politicians about the promises they made during elections. The media also give the public a platform to express their views.

Regarding the principles of covering elections, Mr. Maroba said the development of a code of conduct looks at impartiality in covering different views. He said there needs to be editorial independence in the coverage of elections.

Ethical and professional reporting are also key principles of elections coverage. In addition, objectivity and integrity, accuracy, and accountability are critical for successful coverage of elections. It is important to respect issues of human dignity such as dealing with disabled people, racial minorities, minors and other groups.



Mr. Mboki Chilisa, MISA Botswana Chairman spoke about the Role of media

during elections. He highlighted the educational role of the media during elections. He said through the media the public get to learn what each political party stands for as well as each candidate. They also get to learn about the polling dates and the polling places as well as the results.

That requires the media to remain impartial, without any bias or prejudice. The media also provides a platform for political debate for citizens to engage with the electoral process by debating among themselves, candidates and political parties.

The media also plays the watchdog role during the electoral process to sensitise the public on matters of the electoral fraud and any wayward conduct during the electoral process.

As an example, Mr Chilisa noted the rescinding of the decision to use the electronic voting machine in the next general elections as a result of pressure created by media reports about the disadvantages of the use of the EVM.

The media also provides a platform for the various political parties and candidates to campaign through the purchasing political advertising space in newspapers. In the UK and Ireland this is prohibited. There may be a need to consider whether there is need to regulate political party advertising in the print media. The media is powerful for campaigning.

It is therefore critical that the public media accord equal coverage to parties and candidates. He said it is critical for the code of conduct to speak about fairness in the coverage of parties and candidates by the publicly funded media.

The code must ensure that there is transparent coverage, fair coverage and integrity in the way that journalists cover elections.



Ms. Josephine Mapoma from the Independent Broadcasting Authority (IBA) of Zambia spoke on the Code of Conduct for Broadcasters in Zambia. She said since the establishment of the IBA there have been two national elections. About elections, the media in Zambia gets its cue from the Electoral Process law of 2016.

IBA has established a code which addresses several issues including allocation of time and election programming. Some of the duties include providing fair and balanced reporting of the campaigns of all registered political parties and candidates.

Ms Mapoma recalled that in 2016, the IBA had to call the broadcasting stations to order because they did not balance their reporting with the public broadcaster reporting only on the ruling party while the private broadcasters reported only on the opposition parties.

The media are also expected to cover the electoral process up to the announcement of the results. Ms Mapoma said in Zambia the social media was also used to impact on the reaction to the results in that some political parties issued their own results before the commission announced the figures and by the time the figures reached the mainstream media, people already knew the outcome.

This ensured that no one could tamper with the outcome. In terms of capacity building, the IBA together with the Electoral Commission conducted training around Zambia on election reporting to the members of the media. The challenge however is that there is a lot of turnover, especially with community

broadcasters which means the training must be continuous. The media houses are obliged to keep all records of election coverage period in case there are any complaints.

Complaints from the public about coverage can be made directly to the broadcasters who are compelled to respond to such complaints within two days. If the complainant is not satisfied with the response they can take it up with the IBA who can take it as far as the High Court.

In Zambia the Public Service Broadcaster has a mandate to ensure equitable distribution of airtime to political parties and candidates. The PSB should also provide equal, fair and balanced coverage to all candidates during elections. If the commercial broadcaster chooses to provide a free coverage to a political party, this should be extended to all political parties taking part in the elections.

As for community radio stations, they are obliged to ensure that candidates contesting the elections are given a platform to address the issues impacting on the community served besides the national general issues. Community radio stations are also ordered to ensure that they do not charge prohibitive prices to political candidates who wish to use their stations to communicate messages during elections. There are sixty community radio stations in Zambia.

The authority has proposed guidelines for all broadcasters which speak to rules on political adverts such as tribal statements and hate speech. The guidelines also spell out general offences such as bias coverage, promotion of civil disorder, blocking political adverts, blacking out of candidates, false accusations and character assassination.

Penalties include, warnings, suspensions and cancellation of station licenses. In the last general elections in 2016, three radio stations were suspended for disturbing the peace and alarming society.

Mr. Fegus Lipenga, from the Malawi Communications Regulatory Authority (MACRA) presented on the Code of Conduct for Broadcasters in Malawi. Mr Lipenga said broadcasting in Malawi is regulated because it is a very sensitive

area and for security purposes pointing out that there is extensive monitoring of radio stations. Malawi has 22 TV stations and 19 community radio stations. Community radio stations are more impactful.

The code of conduct in Malawi recognises an elections cycle. The code of conduct is needed because the media plays a critical role in ensuring that there are free, fair and credible elections. In addition, the code of conduct reference bench mark against which one can measure whether the elections were free and fair. The Malawi code of conduct has a section on the role of the media explaining what is expected during the elections cycle.

During the elections cycle, the media is expected to provide information to ensure transparency and also to provide adequate resources for election coverage.

The media is also expected to protect the whistle blowers. The code of conduct in Malawi also speaks about the duty of balance. The principle of equitable coverage is emphasised as opposed to equality due to the disparity in the capacity of parties to field candidates.

The Public Broadcaster has a role to provide civic education on the electoral process. There is also an obligation for accuracy. Journalists are also not allowed to wear political party gear when reporting on elections. The code also emphasis on integrity, truth and honour. Inflammatory and abuse language is prohibited. Opinions must be distinguished from facts.

All political parties must be represented in political party debates. Replies, corrections and retractions must be made when necessary.

The code also emphasises sensitivity to people living with disabilities. The code also obliges broadcasters to accord opposition parties response in stories that feature Ministers using public projects for campaign purposes.

The Malawi Code of Conduct was championed by the Malawi Electoral Commission. All stakeholders such as political parties, universities, NGOs, the IEC, the media including the Public Serviced Broadcaster and others are signatory to the Code of conduct.



Attendants - National Broadcasting Conference

The Code of Conduct for Broadcasters during elections; Botswana

An overview of the project to develop a Code of Conduct for Broadcasters during elections was presented by Mr. Noble Katse from BOCRA who chaired the session. He reminded the conference that the first Code of Conduct was done by the National Broadcasting Board in 2009.

It was then reviewed and finalised in 2014 to provide guidance during the 2014 general elections. The current exercise seeks to consider possible improvements to the 2014 document.

The code is meant to provide guidance to broadcasters on how they should behave prior and during elections. It derives its authority from the BOCRA mandate of sector regulation, monitoring and supervision. It also takes the cue from the SADC guidelines.

The Manager, Broadcasting Regulation Ms Masego Jeremiah presented the draft code of conduct for broadcasters during elections which has been used in the past two elections. The code will be

applicable to all licensed broadcasters including the authorised IPs or any other entities authorised by BOCRA under the broadcasting regulations. It covers all the elections including by-elections.

The code covered the issue of objectivity and balance as well as right of reply. The code prohibits endorsement of political parties or candidates. The Code compels broadcasters to familiarise themselves with electoral act. Broadcasters are also urged to fact check issues pertaining to parties and candidates before they publish.

They must also report results only after the IEC has released the figures. Stations when they report on possible results should state that the official results will be known only after the IEC issues them. The discretion to publish should be left to the news editors. All contesting parties must be allowed access to broadcasting media.

The code also permits reporting of opinion polls with discretion. Broadcasters are compelled to declare the details of the polls. On the professional conduct, broadcasters are prohibited from using

party regalia.

The code permits phone-ins but should cease forty-eight hours before elections. The broadcasters should develop in house policies on how to cover elections. The code speaks to party political broadcasts which are permitted during the election period to be aired for free. Party political notices are permitted.

Party political advertising are prohibited. Party political infomercials are prohibited. Complaints procedures are in line with the BOCRA Complaints and Handling procedure where complaints come to BOCRA on escalation.

Complainants are first to address their complaints to the broadcaster and if not satisfied, the complainants can then take their queries to BOCRA.

The code also provides for penalties for breaches in accordance with the CRA Act of 2012. The code will remain in force during the elections. The deadline for consultations on the code of conduct was set for 30th of November 2018.

COMMENTS ON THE CODE OF CONDUCT FOR BROADCASTERS

The Director of Broadcasting Services said even though BTV is not regulated by BOCRA they have their own code derived from the BOCRA code and SADC.

During comments on the Code of Conduct for Broadcasters, participants called for consideration to introduce political party advertising. It was noted that election period represents an opportune time for broadcasters to make money. It was also highlighted that other media such as print media and bill boards are not prohibited from political party advertising while broadcasters are not allowed.

Participants noted that it did not make sense that broadcasters are expected to cover elections when they cannot make money out of the process. Participants recommended introduction of political party advertising with caps to avoid tilting of scales by parties with most money. BOCRA was urged to speed up the process to introduce the code.

There was also calls for more pressure to be brought to bear on BTV to ensure that all actors in the political space are given coverage. The Director of Broadcasting Services said even though BTV is not regulated by BOCRA they have their own code derived from the BOCRA code and SADC. She stated that at the moment they have not started covering rallies but, they cover press conferences for all political parties.

She also emphasised that the President and the Vice President enjoy 100 percent coverage from government media. BOCRA was asked to assist in how the social media should apply to broadcaster's behaviour. There was also a call for specific legislation as to how the public broadcasters should behave so that it is not dependent on the good will of leaders.

BOCRA was asked to consider licensing of community radio stations as community broadcasting lead to community participation. BOCRA was asked to share with broadcasters any public comments about them solicited through public education campaigns.



Mr Moeti Mhwasa, BNF

MEDIA WORKSHOP

The BOCRA CE Mr Mokgware said the purpose of the workshop was to enable the media to cover the regulatory issues from an informed position.

BOCRA conducted a media workshop on the third day of the conference aimed at apprising the media with the different functions of the regulator and inform them on the various key regulatory principles and activities. The BOCRA CE Mr Mokgware said the purpose of the workshop was to enable the media to cover the regulatory issues from an informed position.

The workshop was also meant to apprise the media on the state of the sector. During the briefing of media practitioners, Mr Aaron Nyelesi, the Director of Corporate Communications and Customer Care in BOCRA spoke about the role of regulation. He gave a brief history of BOCRA from its progression from a telecommunications regulator alongside the broadcasting regulator to the time two merged in 2013 to form a converged communications regulator.

He said the mandate of BOCRA is to regulate the communications sector comprised of telecommunications, broadcasting, internet and postal. He highlighted some of the functions of regulation such as enhancing competition. This is done through issuing licenses.

He said BOCRA is also responsible for tariff regulation. In addition, BOCRA deals with consumer protection as part of its regulatory imperatives. In this regard consumer complaints first go to licensees

and then escalate their complaints to BOCRA only if they are not satisfied with the response. BOCRA also monitors quality of service, manages and allocates spectrum resources and also manages numbering resources.

BOCRA regulates through regulatory tools such as the Telecommunications Policy, the Regulatory Act on 2013, Regulations which are to be passed, and the Universal Access Service Fund. There are also enforcement guidelines which ensures people comply with conditions.

Two Acts which are recent are the Electronic Records and Evidence Act 2014 and the Electronic Communications and Transactions Act 2014 which are meant to help Botswana participate effectively in the digital world. The two acts ensure that there is security in the use of electronic communications network.

In terms of the licensing there are four sets of services for licencing being telecommunications, broadcasting, internet and postal. For telecommunications there are network facilities provider for building networks and services and applications provider for provision of services and applications.

In the broadcasting space there is the commercial terrestrial television, content and network and services provider. In the postal sector, there are licenses for couriers and public postal operator. The Public Postal Operator has a special mandate and it's the only one that can sell stamps.

In terms of the market share, Mascom has a larger share at 53%, Orange at 31% and BTC mobile at 16%. There are currently 3.5 million mobile subscriptions and 98% of the market is prepaid. Fixed telephony has not grown since the advent of mobile phones. The mobile broadband services are also growing rapidly.

On consumer protection, the Manager, Customer Care & Investigations Mrs Suzan Jacob focused on consumer education

and consumer complaints. Under the CRA Act of 2012, the regulator is responsible to ensure that consumers are protected in the services they use, the gadgets and the networks they are connected to as well as the tariffs they are charged.

Education campaigns are carried out throughout the country to inform consumers about their rights. All kinds of media are used to disseminate information. There are also customer satisfaction surveys to get the views of consumers regarding their services. In addition, there are road shows and other meetings with consumer groups.

It is important for consumers to be more informed about the different services they receive. The Regulator also receives complaints from consumers. Some complaints are sourced from the social media.

BOCRA is also a member of international bodies that discuss ways to improve consumer protection. Currently there is a review of quality of service guidelines in the region to harmonise the policies and guidelines.

This year complaints were mostly regarding mobile money. The operators have now increased the security features. Other complaints were with mobile data. Consumers have to be vigilant because there is availability of sufficient information.

Mr. Noble Katse, the Director of Business Development at BOCRA briefed the workshop about the tariff principles while Mr Seepelo Malefo, Manager, Information Technology in BOCRA briefed the audience on the internet.

The Workshop was also addressed by Ms Maitseo Ratladi, the Director of Broadband and Universal Access and Service Fund who discussed the Universal Access and Service Fund.

COMMUNICATIONS CONSUMER SATISFACTION SURVEY RESULTS - BIDPA

The study used both qualitative and quantitative data and focused only on services that are regulated by BOCRA. It used sample of 1000 respondents carried out in cities, towns, urban villages, rural villages and remote areas.

The workshop was also informed about the results of the consumer satisfaction survey by Botswana Institute of Development Policy Analysis (BIDPA) by Mr Patrick Malope. This was the second study after the 2015 one. Its objective was to determine customers and service providers level of satisfaction and their perception on the services regulated by BOCRA. The survey covered both customers and service providers.

It sought to specially probe consumer perceptions on the services provided, probe operator's perception of the BOCRA in areas of fairness, promptness, neutrality and effectiveness, compare the consumer's awareness and level of service provision between 2015 and 2018, assess operators' participation in regulation and policy development, identify negative experiences during the survey and identify pointers to future developments to address negative perceptions.

The study used both qualitative and quantitative data and focussed only on services that are regulated by BOCRA. It used sample of 1000 respondents carried out in cities, towns, urban villages, rural villages and remote areas.

Regarding service providers particularly broadcasters, the study found that they understood the BOCRA mandate as to regulate quality and content, to ensure competition and to assist in compliance with regulatory frameworks. They however expressed concern about the lack of

regulation of the public broadcasters, restriction on party political advertising and local content requirement. They suggested that BOCRA should regulate the public broadcasters and facilitate the inclusion of TV channels in other providers' decoders, such as Multichoice.

Broadcasters were also partially satisfied with their involvement in the decision-making process. They said there were instances in which decisions were taken without their participation.

Results of the consumer satisfaction survey revealed that, the public radio stations (RB1 & RB2) are the most listened to at 57.9% and 53.7% respectively, followed by Duma FM.

Similarly, BTV is the mostly viewed TV station (55.9%), followed by SABC (24.7%) and Multichoice (20.8%). Conclusions drawn are that Service Providers are generally happy with their relationship with BOCRA but there is room for improvement. The level of consumer satisfaction and awareness is generally high and that there has been improvement in consumer satisfaction levels and awareness.

It recommended that there should be more engagement of stakeholders in policy and regulation formulation and that there be engagement of government with the view to regulating public broadcasters especially those that compete with the private sector for advertising.



Mr Patrick Malope, Botswana Institute of Development Policy Analysis (BIDPA)

CREATION AND MONETISATION OF BROADCASTING CONTENT

The final event of the workshop was the presentation of a Master class by Mr. Phillip Molefe on Content Creation and Monetisation. Mr. Molefe explored the principles of monetisation that is to convert non-revenue generating assets into sources of revenue or convert something into currency or transferable value. Mr Molefe said for content to be truly monetised it must be able to earn revenue in various markets not just locally.

Mr Molefe informed participants that content producers should be able to turn their production into businesses cases. They must take a business approach to their content. For that to happen there must be proper and continuous market research and market intelligence because that is what is demanded by the advertising market. He said the African continent is getting very little share of the advertising spend for Coca Cola even though more of it is consumed in the continent because there is no reliable market research.

He took participants through the various stages of content such as conceptualisation and development, creation, production, post production and distribution. The distribution stage is critical because it enables the content assert to be converted into a source of revenue.

He pointed out that there must be a market for the content because Botswana alone cannot be a market that is competitive. Most African broadcasters are bankrupt because they consume what they produce instead of monetising it.

Digital technology has made monetising content possible. Content can be distributed through film festivals and TV markets. A market attracts both buyers and sellers. There is need to think about regional cooperation.

The Southern African Development Community (SADC) countries already have a structure like Southern African Broadcasters Association (SABA). If the region can pool their resources together they can create a regional market for content. This can then become competitive with other blocks. The principle can then be replicated to the continental level.

Technology has broken down barriers. Content is king and platforms are just vehicles for the content.

The answer to the influx of global broadcasting giants is to create compelling local content and monetise it through creating regional markets.



Mr. Phillip Molefe



Attendants listening to Mr. Molefe



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