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| TO: | MultiChoice Group |
| FROM: | ICASA |
| DATE: | 4 JULY 2023 |
| SUBJECT: | STAKEHOLDER QUESTIONNAIRES |

# Contact Details for the Respondent

Please complete the table below. Where there is more than one contact person, please include the full details of the additional contact person/s in the format provided below.

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Title |  |
| Organisation |  |
| Department |  |
| Address Line 1 |  |
| Address Line 2 |  |
| Address Line 3 |  |
| Postal Code |  |
| City |  |
| Telephone (Switchboard) |  |
| Telephone (Direct Line) |  |
| Mobile |  |
| Email |  |

# Background and Instructions

The purpose of this questionnaire is to obtain information and opinions from market participants and stakeholders that are required for the ICASA Market Inquiry into Signal Distribution Service. Respondents are asked to complete the relevant sections of the questionnaire that follows. Please complete the survey as accurately as possible.

* All data should be provided electronically in Microsoft Excel in the template provided.
* When providing written responses, as well as supporting evidence and data, indicate clearly to which question the information pertains to.

Should a respondent be of the view that the information submitted is confidential, the respondent must take steps to claim confidential treatment for such information.

The information requested is to be provided by within forty-five (45) working days from the date of publication of the notice in the Government Gazette on request of further information from stakeholders. Earlier submissions of the responses to the questionnaire would be welcomed.

Should there be any questions or further clarification required from ICASA, kindly address your questions to the Chairperson: Signal Distribution Inquiry Council Committee at [signaldistribution@icasa.org.za](mailto:signaldistribution@icasa.org.za).

**Company information**

1. What licences do you have for broadcasting (e.g. subscription broadcasting, subscriber management)?
2. What service types do you offer? (Digital Terrestrial, Analogue Terrestrial, DTH Satellite, IPTV other)
3. Do you offer any streaming services? Please stipulate these.

**Product information**

1. Please provide the following in Tab 1 of the accompanying spreadsheet:
   1. List the different channels that are offered by your company.
   2. Provide the platform on which each channel is offered.
   3. Please provide the number of users per channel platform on Tab 3 of the spreadsheet.

**Competitive environment**

1. To what extent do you consider satellite to be a competitive alternative to you from the perspective of a broadcaster who needs signal distribution to reach their end user? Under what circumstances would you switch to an alternative platform? Please provide explanations or evidence for your view.
   1. If you have any data or information of the proportion of your customers that utilize terrestrial vs satellite to access your channels and content, please provide it. Are there customers that use both?
   2. Do you have information on the different costs of accessing satellite for your particular terrestrial end user profile (e.g., consumer surveys considering LSM)?
   3. Please provide any market research on the proportion of consumers that have a satellite dish in order to access your content.
2. To what extent do you consider internet streaming to be competitive alternative to you from the perspective of a broadcaster who needs signal distribution to reach their end user? Under what circumstances would you switch to the Internet as an alternative streaming platform?
   1. Please provide explanations or evidence for your view. If you have any data or information of the proportion of your customers that utilize terrestrial vs streaming to access your channels and content, please provide it. Are there customers that use both (i.e., terrestrial and the Internet streaming platform)? If yes, please provide the relevant data.
   2. Do you have information on the different costs of accessing alternative platforms for your particular end users (e.g. consumer surveys)? If so, please provide this information.
   3. Please provide any market research on the proportion of consumers that use the internet to access your content.

**Competition**

1. Are you able to access signal distribution, transponder capacity or other inputs at a reasonable price?
2. Are you able to negotiate prices and terms with your signal distribution provider?
3. Have you engaged in any studies on the cost of signal distribution. If so please provide them as well as any accompanying calculations and documents.
4. Please provide your DTT, Analogue and Satellite costs of supply in Tab 4.
   1. Cost per channel paid to Sentech for signal distribution over the last three years (specify whether monthly or annual fees and break out any additional line items).
   2. Total paid to Sentech per month over the last three years.
5. What are the costs of signal distribution relative to your total operating costs and capital expenditure costs (detail in Tab 4)?

**Facilities**

1. Have you ever considered self-provision of signal distribution? If yes, please provide information about the reasons why you considered self-provision, the nature of self-provision considered, as well as the reasons for your decision.
2. Under what circumstances would you consider complete self-provision of signal distribution including facilities? What would the challenges to this be?
3. Under what circumstances would you consider leasing facilities (such as high sites) and self-providing the signal distribution for your broadcasts? What would the challenges to this be?
4. Do you consider mobile towers to be potentially competitive to Sentech high sites? Please substantiate.
5. Have you encountered any potential entrants into signal distribution who offer services on mobile towers? If so, would you be able to utilize their services and why?
6. Do you think there is the prospect of market entry via mobile towers? Please explain.
7. Why do you think there has been little take-up of facilities leasing (of Sentech sites) by potential signal distribution providers? Do you think there is a prospect of market entry? If yes, please provide reasons.