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| TO: | Primedia |
| 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?
2. What service types do you offer? (Digital, Analogue, Satellite 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 stations that are offered by your company.
   2. List the frequency on which each is offered.

**Competitive environment**

1. To what extent do you consider satellite radio 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 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 radio to access your channels and content, please provide it.
   2. Do you have information on the different costs of accessing satellite radio for your particular end users of terrestrial (e.g., consumer surveys)?
   3. Please provide any market research on the proportion of consumers that have a satellite radio 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 radio vs streaming to access your channels and content, please provide it.
   2. Do you have information on the different costs of accessing streaming platforms for your particular end users (eg. consumer surveys)?
   3. Please provide any market research on the proportion of consumers that access to 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. Please provide your costs of supply of both digital (if relevant) and analogue signal distribution in Tab 3.
   1. Cost per station 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
3. What are the costs of signal distribution relative to your total operating costs? Please provide in Tab 4.

**Facilities**

1. Have you ever considered self-provision of signal distribution? If yes, please provide information about 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 providers or any potential entrants into signal distribution who offer services on mobile towers? If so, why or why not would you be able to utilize their services? Do you think there is the prospect of entry?
6. 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 the prospect of entry?