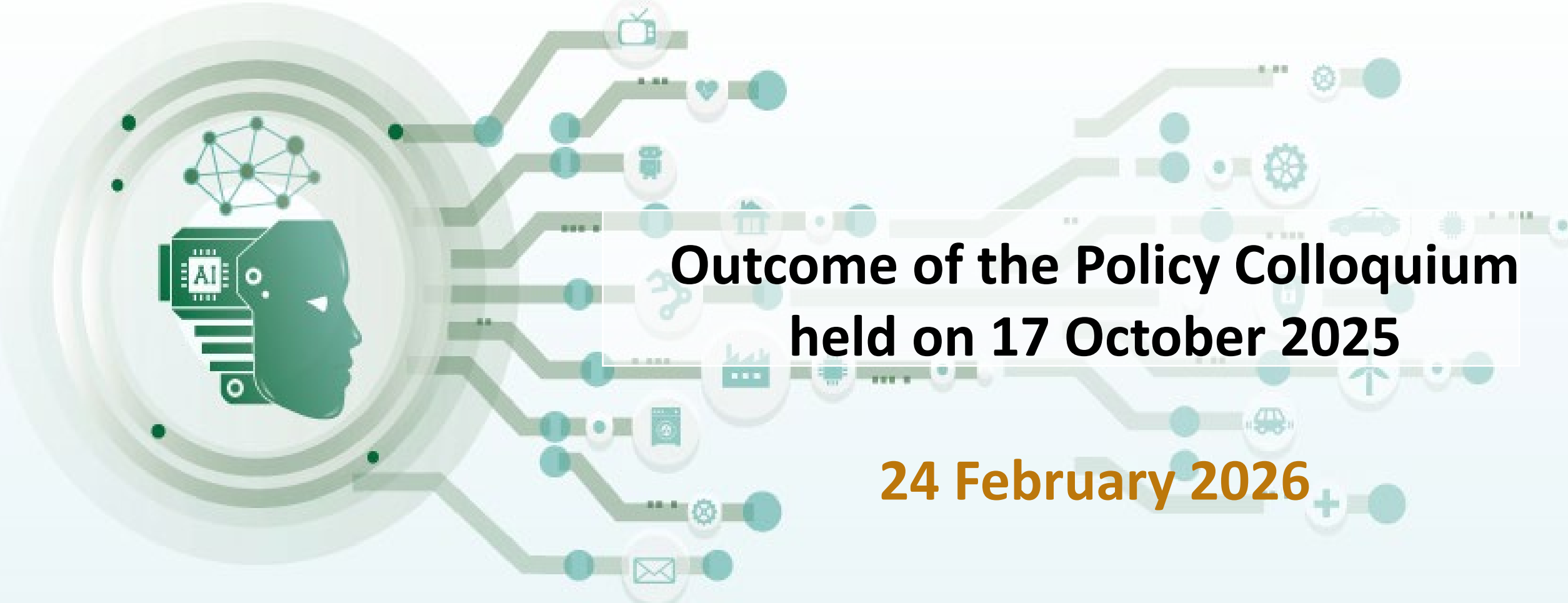




department of communications and digital technologies



Outcome of the Policy Colloquium held on 17 October 2025

24 February 2026

A leader in enabling a connected and digitally transformed South Africa!

- **Document Structure**
- **Important Note:** This document reflects stakeholder views, not official government positions. It is a starting point for continued dialogue.

Problem
Statement
Summary

Thematic
Feedback
Areas

Feedback
on Future
Priorities

Draft
Roadmap
for Action



Stakeholders agreed on five critical barriers in South Africa's ICT sector:

Slow Execution

Policy is moving in the right direction, but implementation is too slow and fragmented.

Regulatory Uncertainty

Lack of clear approaches to emerging tech creates investment risk and limits market growth.

Infrastructure Bottlenecks

Rollout is slowed by inefficient municipal processes, rent-seeking, vandalism, and uncoordinated public investment.

Cost of Access

Meaningful connectivity is blocked by the total cost—devices, data, energy, and a lack of skills/services.

Trust Deficit

A tangible lack of trust between government and the sector needs to be rebuilt.

THEMATIC FEEDBACK: INVESTMENT & REGULATIONS

Key Messages

- Current frameworks (like the ECA) are outdated and unfit for purpose.
- Regulatory fragmentation creates uncertainty and raises costs.
- Industry needs predictable licence renewals and clear obligations.
- Agile tools like co-regulation and sandboxes could help.

Proposed Solutions

- Establish a **Regulators Forum** (ICASA, Competition Commission, etc.).
- Launch a **priority regulatory impact review**.
- Create an **investment desk** to fast-track ICT investment.

Unresolved Issues:

- Regulation of Over-The-Top (OTT) media services.
- Making infrastructure sharing more practical.



Key Messages

- Coverage exists but converting it to **meaningful access** is the real challenge.
- Local government issues (wayleaves, rent-seeking) are key cost drivers.
- The Universal Service and Access Fund (USAF) has underperformed.
- A **whole-of-government approach** is required.

Proposed Solutions

- Enforce a **standardised digital municipal by-law** for infrastructure.
- Review USAF funding for transparency and "pay or play" models.
- Formally redefine "meaningful access" for South Africa.

Unresolved Issues:

- National PPP platform for digital infrastructure.
- Tax incentives for AI and data centre investment.

THEMATIC FEEDBACK: INNOVATION, SKILLS & DIGITAL INCLUSION

Key Messages

- Local innovation exists, but commercialisation is blocked by restrictive procurement and rigid funding.
- The National Digital Skills Framework is misaligned and ineffective.
- Startups feel unsupported by government.

Proposed Solutions

- Review and adopt a **National Digital Skills Framework** aligned with sector needs.
- Establish a **startup and innovation desk** for guidance and market access.
- Pilot a **digital and AI sandbox environment**.

Unresolved Issues:

- Innovation-friendly procurement within PFMA rules.
- Recognition for industry-led digital skills certifications.

THEMATIC FEEDBACK: GOVERNANCE, COORDINATION & TRUST

Key Messages

- Government coordination failures and "siloed" operations increase costs and undermine efforts.
- Industry feels excluded from genuine decision-making.
- There is a clear **trust deficit** that requires transparency and delivery.

Proposed Solutions

- Institutionalise a quarterly **multi-stakeholder platform** with five workstreams.
- Establish a small, dedicated **unblocking function** within DCDT.
- Create a **national evidence hub** for data-driven policy.

Unresolved Issues:

- Getting political buy-in from other government departments.
- Integrating national digital priorities into local government programmes.

Stakeholders identified these areas requiring attention but that does not mean we can/should immediately incorporate it into our priority actions.

Sovereign AI	Satellite & Space	AI & Data Centre Infrastructure	Measuring the Digital Economy
Develop a national policy-grade LLM/toolset, integrated with an evidence hub, for rapid, evidence-based decision-making	Create a cohesive national position on space-air-ground integrated networks to promote national interests in international forums (ITU/WRC).	Develop a coordinated energy and investment framework to attract investment while managing energy demand and setting standards	Update national accounts to properly attribute digital activities, making the sector's economic contribution visible to policymakers.

It should be noted that not all these areas the exclusive domain of DCDT and will require collaboration with other government departments and entities.



DRAFT ROADMAP: IMMEDIATE ACTIONS (JAN - JUNE 2026)

Intervention



Institutionalise a quarterly Digital Economy Stakeholder Forum with five workstreams.



Establish a priority working group (**DCDT, COGTA, SALGA**) to improve by-law implementation.



Convene stakeholders for a **rapid regulatory impact assessment** to find quick wins.



Develop a concept document for a **national evidence hub**.



Launch the process to define **meaningful access** in the South African context (ECA Section 82).

DRAFT ROADMAP: MEDIUM-TERM ACTIONS (JULY 2026 - DEC 2027)



Operationalise the Regulators Forum.



Finalise the review and update of the **National Digital Skills Framework**.



Establish and resource an **investment desk** and a **startup/innovation desk**.



Launch **ICT sector regulatory sandboxes**.



Develop and table a **legislative coordination roadmap** and ECA review proposal.



Review the deployment of the **Universal Service and Access Fund (USAF)** and publish an annual report.



Establish and maintain a coordinated **South African position in global digital forums**.

DRAFT ROADMAP: LONG-TERM STRATEGIC ACTIONS



Gradually shift government's regulatory approach to an **enabling, client-centred model**.



Embed **digital economy measurements in national accounts** to set national targets for investment, inclusion, and skills.



Create a supportive environment for large-scale private investment in **AI-ready infrastructure, data centres, and energy** using incentives and PPP platforms.

Many of the proposed interventions are related to activities already under way. Rather than duplicating efforts, DCDT's approach is to incorporate the feedback to adapt our approach to stakeholder needs.

Activity	Details
Stakeholder engagement (stakeholder forum)	- Digital Economy Masterplan (DEM) Executive Oversight Committee (EOC) convened and working groups identified. - EOC and working groups consist of representatives from government, private sector and labour → represents key stakeholder forum - DEM review nearing completion. Once approved by EOC, will be tabled with Cabinet and Gazetted - Focus of EOC is on implementation of DEM priorities, so broader stakeholder forums will be incorporated in 2026/2027 workplan
Regulatory Impact Assessments	- Range of stakeholder engagements conducted under review of DEM - DCDT entered into advisory partnership with World Bank Group, which includes review of regulatory landscape (to be done in consultation with stakeholders)
National evidence hub	Preliminary research initiated, further work to be incorporated in 2026/2027 workplan
Meaningful access definition	Preliminary work towards policy direction initiated in Ministry

