Gordon Institute of Business Science
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Determining the Influence of Technological Advancement on Strategic Decision-Making in the African Broadcasting industry.

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A research project submitted to the Gordon Institute of Business Science, University of Pretoria, in partial fulfilment of the requirements for the degree of Master of Philosophy International Business.

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Abstract

The African broadcasting landscape is undergoing a fundamental shift driven by technological; advancement and changing audience consumption patterns. Artificial intelligence, virtual production and streaming platforms are transforming how content is produced, delivered and monetized, creating both opportunities and uncertainty for broadcasters. While traditional linear television remains culturally and commercially relevant, digital transformation is reshaping strategic priorities and placing pressure on legacy business models.

The purpose of this research is to investigate how emerging technologies influences strategic decision making in the African broadcasting sector. The study focuses on how broadcasters adapt their approaches to content creation, audience engagement and monetisation when integrating new digital tools and platforms. Guided by the Business Model Innovation framework, the research investigates how value creation, value delivery and value capture are being reconfigured within this evolving ecosystem.

A qualitative, exploratory research design will be employed, using semi-structured interviews with executives and industry experts across multiple African markets. Thematic analysis supported by Atlas TI will be used to analyse and interpret the data. The outcome of this study is expected to provide both theoretical insight and practical guidance, contributing to scholarly understanding of digital transformation while supporting broadcasters seeking sustainable innovation in a rapidly changing environment.

Keywords

Artificial Intelligence (AI); Business Model Innovation (BMI); Digital Transformation; Monetisation Models; Virtual Production (VP).

Declaration

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Philosophy International Business at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

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Chapter 1: Introduction

1.1 Background and Motivation for the Research.

The global broadcasting industry is experiencing operational and structural transformation driven by accelerating technological advancement. In particular, the integration of artificial Intelligence (AI), virtual reality (VR) and streaming service, and that has triggered profound shifts in how content is created, delivered and monetized (Dwivedi et al., 2021) . Traditional linear broadcasting, once regarded as the dominant mode of mass communication, now, coexists with digital first platform that offer on-demand, personalized and interactive experiences. While research from across Europe, North America and Asia has generated a robust literature on digital disruption, streaming wars and AI in media ecosystems (Lotz, 2021); (Iansiti & Lakhani, 2020), much of this work assumes relatively high levels of technological readiness and organisational capacity. Far less is known about how similar pressures are experienced in resource constrained environment, especially within the African broadcast markets, and what this implies for how their business models are innovated.

From a business perspective, the stakes are high. Notable, Sub-Saharan Africa has one of the fastest growing media markets, driven by expanding mobile Internet penetration and youthful demographics. By 2030, Africa's subscription video on demand (SVOD) is projected to exceed USD 4.6 billion, up from USD 3.04 billion in 2025, at an annual growth rate of 8.6% (Mordor Intelligence, 2023). "The OTT market in South Africa is set to grow at a compound annual growth rate (CAGR) of 8.5%, with revenues expected to reach R6.8 billion (US$370 million) in 2028, a notable increase from R4.5 billion (US$246 million) in 2023" (Digital 365, 2025). Yet, despite this growth, incumbents like MultiChoice reported a 9% revenue decline in FY25, citing subscriber churn and intensified competition from global platforms (Iderawumi, 2025) . This illustrate a paradox: while opportunities exist, local broadcasters face mounting risks if they fail to recalibrate their strategies and reconfigure the way they create, deliver and capture value. This paradox highlights the importance of understanding Business Model Innovation (BMI), as a strategic response to technological and competitive turbulence in African broadcasting.

Beyond streaming, AI and VR present new frontiers for broadcasting. AI driven automation is already enhancing the production operation side, subtitling and audience analytics globally (Chizoba, 2024) . VR and virtual production are being adopted for sports, entertainment and live events, offering immersive alternative to traditional studio based production (Verhoef et al., 2021a). In Africa, these innovations remain in early stages but are beginning to emerge, particularly where 5G rollouts enable cloud based workflows and real time data applications. However, uneven infrastructure, affordable concerns and regulatory fragmentation continues to shape adoption trajectories (Mabweazara, 2020b) . Taken together, these developments can be understood as forms of technological turbulence that puts pressure on broadcasters to rethink their underlying business models. The central concern of this study, is not the technologies themselves, but how such challenges triggers or constrains BMI in African broadcasting contexts.

Academically, this transformation raises urgent questions about how broadcasters in emerging markets integrate technological disruption into strategic decision making. Business Model Innovation (BMI) theory offers a robust framework for understanding these shifts. BMI emphasizes the reconfiguration of value creation, delivery and capture mechanisms in responses to external shocks (Baden-Fuller & Haefliger, 2013) ; (Clauss, 2017a) ; (Wirtz, n.d.). Yet scholarship on BMI has predominantly focused on manufacturing, ICT and financial services in developed markets (Teece, 2018a) ;(Dwivedi et al., 2021). The application of BMI to broadcasting in Africa is limited, and, more importantly, existing studies say little about how BMI unfolds when firms operate with legacy infrastructure, constrained resource and uneven digital ecosystems. This points to a theoretical gap regarding how BMI processes function under such structural constraints, rather than simply a geographic gap in where BMI has been applied.

This study is therefore motivated by both practical urgency and academic necessity. Practically, African broadcasters require evidence-based insights into navigating digital disruption while sustaining relevance in highly competitive and resource constrained environments. Theoretically, extending BMI into African broadcasting contexts provides an opportunity to refine its assumptions and applicability by examining how business models reconfiguration is attempted under persistent infrastructural and capability constraints. The urgency of the research is underscored by a simple but compelling reality: broadcasters that fail to adapt risk irrelevance in a media ecosystem increasingly defined by technological turbulences and shifting value logics, which BMI seeks to explain.

1.2 Research Problem and Research Aims

Concise research problem statement.

Technological challenges is disrupting global broadcasting, yet it remains unclear how African broadcasters reconfigure their business models and related strategic decision-making processes in response to these pressures, particularly under conditions of infrastructural and resource constraint.

Why this problem matters

African broadcasters, must contend with structural challenges absent in developed markets. Noting a significant influence and different policies that govern within the African regions, via regulation. While consumption is rising, infrastructure gaps (e.g., broadband access, electricity reliability, regulatory inconsistences and audience fragmentation complicate adoption (Biga et al., 2023). The BMI framework suggests that organisations must reconfigure their business models under such conditions (Clauss, 2017b; Wirtz, 2019) , but empirical evidence specific to African broadcasting remains scarce and crucially, it remains underexplored how these structural constraints shape or limit the BMI processes that are typically theorised in more resourced environments.

Theoretical justification

BMI theory asserts that disruptive technologies necessitate systemic innovation in how firms create and capture value (Baden-Fuller & Haefliger, 2013) . Teece (2018) emphasizes the link between business models and dynamic capabilities, arguing that firms ability to adopt models determine survival under technological change. Clauss (2017) operationalize BMI in measurable dimensions, yet empirical testing in broadcasting sectors, particularly in Africa, is lacking. The unresolved theoretical question is, how BMI processes are activated when firms operate with constrained capabilities, legacy systems and fragmented digital infrastructures. In other words, how do African broadcasters' strategic decisions reflect and operationalise technological disruption through BMI under such conditions?.

Research Aims

The primary aim of this study is to analyse how technological turbulences shapes strategic decision making and business models reconfiguration in African broadcasting, though the lens of BMI framework.

Specific objectives:

1. To explore how African broadcasters perceive and priorities technological change in relation to strategic planning and business model design.
2. To examine how organisational constraints (e.g., infrastructure, capabilities, regulation) shape or limit BMI related responses to technological transformation.
3. To analyse how broadcasters reconfigure value creation, delivery and capture mechanisms in response to technical pressures.

4. To compare how BMI related strategic responses vary across African markets with different levels of technological readiness and infrastructure.

1.3 research questions

Derived from the aims, the study is guided by the following questions:

1. How do African broadcasters in emerging markets reconfigure their business models in response to technological transformation?
2. How do organisational constraints (such as infrastructure, capabilities and regulations), shape or limit BMI related strategic decision making?
3. How are value creation, delivery and capture mechanisms adapted as part of BMI in African broadcasting?
4. How do BMI related strategic responses vary across African markets with different levels of technological readiness and infrastructure?

These questions ensure tight alignment with the BMI framework by focusing on the components of value creation, value delivery and value capture, all anchored by strategic decision making under technological turbulence.

1.4 Research Contribution

Theoretical Contribution

This study contributes to the growing but underdeveloped body of knowledge on Business Model Innovation (BMI), within emerging economies, particularly in the context if the African broadcasting Industry. While the BMI framework has been extensively theorized in Western and Asian business environments (Baden-Fuller & Haefliger, 2013; Clauss, 2017b; Teece, 2018b; Wirtz, 2019) , its application to African creative media industry remains limited. Much of the existing literature assumes the presence of advance technological, capital fluidity and market maturity, condition often absent in African economies(Mabweazara, 2020a) ,and therefore leaves unanswered elements, on how BMI processes function when such assumptions no not hold. .

By using the BMI framework to analyse how African broadcasters respond to technological turbulences in their strategic decision making, this research extends BMI theory into a context characterised by structural constraints. It addresses an important theoretical gap, by demonstrating how technological disruption interacts with infrastructure limitations, regulatory uncertainty and diverse audience behaviour. This reframes BMI not only as mechanism for innovation in developed economies, but also as a lens through which firms in resource constrained environments pursue incremental, adaptive or hybrid forms of business model change (Verhoef et al., 2021b).

Furthermore, the study provides a conceptual refinement of BMI by situating it within the dynamic of strategic decision making under uncertainty. It links the three core dimensions of BMI, being, value creation, value delivery and value capture to the cognitive and institutional factors that influences executive judgment in African broadcasting context. In doing so, it aligns with Teece's (2018) argument that business model design is inseparable from dynamic capabilities and managerial cognition. The research therefore position BMI not as a static framework, but as an adaptive, decision oriented construct shaped by technology, governance and market realities in environments where resources and infrastructure are constrained.

Ultimately, this theoretical contribution enriches the discourse on BMI by offering African centric extension, demonstrating that innovation pathways in emerging markets, differ significantly from those in mature economies, yet still embody the same theoretical principle of reconfiguration and renewal.

Practical contribution

From a practical perspective, this research provides a strategic insights for African broadcasters, navigating digital transformation. Many legacy broadcasters continues to operate within outdated linear production and revenue models that limit agility and competitiveness. This study offers a structured, evidence based analysis of how technological advancements, and associated changes, can be integrated into organisational strategy through targeted reconfiguration of business models, to enhance operational efficiency, audience engagement and revenue diversification.

For broadcast executives, the findings are expected to serve as a strategic decision making framework that highlights both the opportunities and trade-offs inherent in adopting emerging technologies. By aligning innovation initiatives with the BMI model, organisations can identify which areas of their value chain content production, distribution or monetisation, which require reconfiguration to achieve sustainability.

For policy making and regulators, the study provides insight into how enabled regulatory environment can stimulates innovation and local content development. African markets often face inconsistent broadcasting and digital policies, creating uncertainty that impedes investment in new technologies (Biga et al., 2023; ICASA, 2024) . The empirical findings from this study could inform policy reforms that balance innovation with equitable access, data privacy and market fairness.

For academia and industry practitioners, the study offers a replicable research framework for assessing technological influence on strategic decision making in similar emerging sectors, such as telecommunications, fintech or creative industries. Its integrations of BMI with qualitative insight from African broadcasters, creates a transferable methodological model for future comparative studies across other regions or industries.
In essence, this study positions itself as the intersection of theory and practice: it advances scholarly understanding of business model innovation under technological disruption, while simultaneously providing actionable knowledge for practitioners tsked with steering the evolution of African broadcasting in the digital age.

1.5 Scope of the Research

Theoretical Scope

This study is conceptually grounded in the Business model Innovation (BMI) framework, which serves as the sole theoretical lens for analysing how African broadcasters respond to technological disruption. BMI, as articulated by Baden-Fuller and Haefliger (2013) and later refined by Clauss (2017) and Wirtz et al. (2019), provides a systematic means to examine how organisations reconfigure their value creation, value delivery and value capture mechanisms when faced with technological and environmental change. The framework's strength lies in its ability to bridge firm level decision making with market level transformation.
The study intentionally excludes alternative theoretical paradigms such as Rational Choice Theory, Resource based View(RBV) and Behavioural Economics, even though they could offer complementary insights into managerial cognition and resource allocation.

This exclusion ensures theoretical clarity and focus. While dynamic capabilities literature (Teece, 2018b) often overlaps with BMI, this study treats it as an informing, not competing, construct, recognizing that dynamic capabilities operate as an underlying mechanism enabling business model renewal rather than a separate explanatory framework.

The BMI framework thus anchors the research within a strategic management paradigm while maintaining flexibility to interpret how broadcasters innovate under technological pressure. In doing so, the study positions BMI as both analytical and diagnostic tool capable of revealing how African broadcasters evolve amid the diffusion of multiple digital technologies and associated technological transformation.

Empirical Scope

This research adopts a comparative, multi country approach, focusing on South Africa, Nigeria, Ghana and Kenya. These markets were purposefully selected, as they represent a distinct stage of digital maturity, infrastructure readiness and policy evolution with the African broadcasting ecosystem.

- South Africa has the continent’s most established broadcasting and production infrastructure, with advanced integration of OTT platforms, early experimentation with virtual production and a semi-matured regulatory environment led by ICASA (2024).
- Nigeria, Africa’s most populous nation, illustrates a vibrant but fragmented media ecosystem where audience reach and local content production have grown rapidly, yet the transition to streaming remains hindered by bandwidth constraints and affordability.
- Ghana and Kenya represent emerging digital hubs, Ghana for its regional content syndication networks, and Kenya for its strong mobile technology penetration and experimentation with hybrid SVOD/AVOD models.

The inclusion of these cases allows for cross market comparison to identify how contextual variables, regulatory regimes, consumer behaviours and technological access, shapes broadcasters’ strategic responses to technological advancement.

The technological scope of the study is deliberately confined to three primary domains of innovation, Artificial Intelligence (AI), Virtual Reality (VR)/Virtual Production and Streaming services, as they collectively represent some of the disruptive and consequential shifts for broadcasting operations. In this study, these technologies are considered as manifestation of broader technological turbulence rather than as separate theoretical constructs. Other technologies such as blockchain, AR or the internet of Things (IoT) are acknowledged but excluded, as their adoption in African broadcasting remains peripheral and empirically underdeveloped.

Data collection will focus on broadcasters, production executives and technical executives operating within these markets, ensuring a comprehensive but bounded inquiry into technological and strategic evolution across the value chain.

1.6 Chapter 1 Summary.

The first Chapter establishes the context, motivation and rational for examining how technological advancement, and associated turbulences affect strategic decision making and business mode; reconfiguration in the African broadcasting industry.

The discussion highlighted both the business urgency and the academic gap that justify the study. From a business perspective, African broadcasters face structural disruption amid digital transformation, requiring innovative strategies to remain competitive.

From an academic standpoint, the limited application of BMI theory to African media contexts reveals a theoretical void concerning how firms in emerging markets adapts business models under technological and institutional constraints that differ markedly from those assumed in most BMI studies. .

The chapter defined the research problem, formulated the research aims and questions, and clarified the theoretical and empirical boundaries of the study. It underscored that the research seeks to contribute dual value: advancing BMI theory by contextualizing it within African broadcasting and offering practical insights that inform strategic, operational and policy decision within the industry.

This synthesis ensures a coherent “golden thread” linking the business problem to its theoretical explanation and methodological design. Consequently, the next chapter, Chapter 2: Literature Review, builds on this foundation by critically engaging with existing scholarship on business model innovation, technological transformation and broadcasting evolution. It develops the theoretical argument and conceptual framework that will underpin the empirical phase of this research.

Chapter 2: Literature Review

2.1 Roadmap of the review

This chapter develops a cumulative theoretical argument explaining how technological advancement shapes strategic decision making in African broadcasting. Rather than describing technologies in isolation, the review interrogates how broadcasting transform their business logic, what they produce, how they deliver it and they monetise it, through the lens of Business Model Innovation (BMI). Each section builds towards a conceptual model that connects technological drives, organisational response mechanisms and contextual moderators specific to African markets with BMI positioned as the central explanatory mechanism rather than technology or context alone

1. The first section establishes the conceptual foundation by reviewing Business Model Innovation theory. BMI is examined from its early treatment as a business model template to contemporary scholarship that positions it as a dynamic organizational capability for responding to technological disruption (Teece, 2018. Clauss (2017) provides one of the most empirical validated frameworks, decomposing BMI into changes in value creation, value delivery and value capture, dimensions especially relevant in media, where firms reorganize production, distribution and monetization to exploit emerging technologies (Clauss, 2017). By foregrounding BMI as the primary theoretical lens, this chapter emphasises business model reconfiguration under technological turbulences, rather than technology adoption per se.

2. The second section shifts from theory to technological transformation in media ecosystems. Digital transformation literature shows that media innovation unfolds across multiple organizational layers: digitisations (analogy to digital conversion), digitalization (workflow redesign) and full business model reinvention (Verhoef et al., 2021). Studies in MIS and the “research does demonstrate how technological and market dynamics influence operational processes, governance structures, and aspects related to human capital within these ecosystems” (Engert et al., 2023). This section clarifies why digital tools such as real time rendering, cloud storage and data analytics compel strategic reconfiguration rather incremental upgrade and how these pressures create conditions under which BMI becomes necessary.
3. The third section examines artificial intelligence (AI) and virtual production (VP) as transformational production technologies. AI is discussed as a dual purpose capability, automating repetitive processes (e.g., subtitling, quality control) while enabling new creative and editorial workflows such as recommendation engines and

predictive commissioning (Dwivedi et al., 2021). Virtual production, Integrating real time rendering and LED stages, restructures production economics by collapsing pre-production, shooting and post production into a unified pipeline (Swords & Willment, 2024) . This portion of the review demonstrates how technology reshapes strategic decisions about the cost of management, talent, organizational structure and content strategy and illustrate concrete triggers for BMI related changes in value creation.

4. The fourth section focuses on streaming and platformisation. Streaming is treated as a business model regime, not simply a delivery channel, because it transfers competitive advantage from spectrum access to data stewardship, interface control and subscriber monetization (Lotz, 2021) . Scholars show that platform logic reorganises audience relationship through personalization, multi-device distribution and hybrid revenue system such as SVOD, AVOD and telco bundling (Mordor Intelligence, 2025) This section demonstrates how platformisation alter value delivery and value capture, which sit at the centre if BMI and provides the empirical setting in which reconfigured business models are most visible.

5. The fifth section contextualizes this dynamic within African broadcasting markets. Here, the review highlights the moderating effects of infrastructure inequality lag, affordability constraints and cultural preferences for local storytelling. (Biga et al., 2023), shows widening digital adoption but persistent disparities in connectivity and digital literacy across regions. This section shows that BMI in Africa is contextually adaptive, not uniform, underscoring the need for context sensitive and process oriented BMI research.

This section looks into a synthesis and conceptual framework that integrates these literatures into a testable model: technological advancement acts as a driver, BMI functions as the mediating mechanism and African structural and cultural realities moderate outcomes. The framework establishes the theoretical justification for the study's research questions and guides the empirical methodology in following chapters by specifying how technology, BMI and context are linked rather than treating them as parallel themes. .

2.2 Business Model Innovation (BMI): Theoretical Foundation

2.2.1 Definition, evolution and conceptual nuance

Business Model Innovation (BMI) has evolved into a central construct in strategic management, particularly in industries experiencing rapid technological disruption. At its core, BMI refers to the Intentional reconfiguration of an organisation's value creation, value delivery and value capture mechanisms to explore technological or market shifts (Baden-Fuller & Haefliger, 2013) . This definition positions BMI not as a minor operational adjustment, but as a strategic redesign of how a firm defines and secures its competitive advantage.

Clauss (2017) advanced BMI scholarship by developing one of the most empirically validated measure framework in the field, decomposing BMI into three higher order components, being, value creation innovation, value delivery (often conceptualized as value proposition) innovation and value capture innovation, which comprising of more than 40 empirical structure is particularly relevant for industries where technology simultaneously reshape production, distribution and monetisation such as broadcasting where changes in formats, platforms and monetisation are tightly interconnected.

The intellectual evolution of BMI spans three major phases. Early scholarship tended to treat business models as static description of how firms operated within existing markets (Johnson et al., 2008) . Subsequent work repositioned the business model as a unit of innovation, arguing that firms can innovate at the business model level regardless of whether they introduce new products or technologies (Zott & Amit, 2010) . More recent research conceptualizes BMI as a dynamic organisational capability, allowing firms to continually redesign value architectures in response to external shocks and emerging technologies (Teece, 2018b) . Under the view, BMI becomes central to survival in industries disrupted by digital platforms, automation and data analytics and shifts the analytical focus individual technologies to the underlying business models configurations they enable or disrupt.

Contemporary scholarship reflects both growth and fragmentation in BMI theory. Vaska, Antunes and Oliveira (2021), argues that digital transformation has propelled BMI " to the strategic core of firm renewal", because digital technologies force firms to rethink value logic, not merely operational process (Vaska et al., 2021).At the same time, major review point to conceptual inconsistency across studies. Subaruddin & Putra (2023) note that BMI lacks definitional consensus and call for more context-specific, process oriented research to clarify, how BMI unfolds in real organizational settings (Sabaruddin & Putra, 2023). Huang et al. (2023) reinforce this, demonstrating that BMI increasingly refers to non-trivial structural change in the architecture of business models, rather than incremental additions such as new pricing tiers or product extensions (Huang & Ichikohji, 2023) , implying that studies must pay close attention to the depth and the nature of change rather than labelling all adjustments as BMI.

A key conceptual refinement is the distinction between outcome and process perspective. The outcome view focuses on the emergence of new or redesigned business model, observable change in revenue models, customer relationships or delivery systems. The process view examines how firms transition from old to new models, including decision making sequences, resource mobilisation, organizational restructuring and perceptions of risk. This distinction is essential when analysing broadcasting, where firms navigate high sunk costs, entrenched legacy systems and uncertain returns on digital innovation and where the path from legacy to new models is often incremental rather than disruptive.

Taken together, these theoretical developments show that BMI is best understood not as a "new service layer" or "additional revenue stream", but as a systemic reorganization of value creation, delivery and capture under technological change. This conceptual nuance directly aligns BMI with the research problem of this study: Understanding how African broadcasters respond strategically to the transformative pressure of AI, virtual production and streaming when operating under infrastructural and resource constraints that are under-represented in existing BMI research.

2.2.2 Why BMI fits this study

Broadcasting industries are experiencing a convergence of technological turbulence and market fragmentation, making Business model Innovation particularly relevant as an analytical lens. Broadcasting is defined by intangible value, being, content rights, audience data, intellectual property and by consumption patterns that are increasingly mobile, personalized and on demand. This means that firms cannot compete solely through technological acquisition; they must redesign how they create, deliver and monetise value. Teece (2018), argues that in dynamic and volatile markets, competitive advantage arises not from possessing advanced technology, but from the organizational capacity to integrate technology into a coherent business models that reconfigures value flows (Teece, 2018b) . In short, technology is necessary, but insufficient; its strategic impact depends on how firms reshape the underlying value architecture precisely the domain BMI seeks to explain.

In African broadcasting context, this logic becomes even more pronounced. Broadcasters face the dual challenge of navigating powerful technological shifts, noting, AI driven automation, virtual production pipelines, cloud based post production and streaming, deeply rooted structural constraints including uneven broadband access, affordability limitations and regulatory lag. BMI provides the conceptual tools to analyse how decision makers align these opportunities with context, specific realities by redesigning value creation (e.g., immersive content, multilingual production, lower cost virtual shoots), value delivery (e.g., mobile first streaming, telco bundles), and value capture (e.g., hybrid SVOD/AVOD models and data driven ad monetisation) rather than treating each technology as a separate, isolated innovation.

A growing body of research reinforces that BMI outcomes are shaped by context. Iheanachor et al., (2021), demonstrates that the success of BMI depends on organizational capabilities, resource allocation and ecosystem collaboration (Iheanachor et al., 2021) . Baden-Fuller and Morgan (2021), add that business model involves the identity and organization of the firm, radical change in the model is akin to changing the model organism, a difficult process that should not be undertaken lightly (Baden-Fuller & Morgan, 2010) . These insight closely mirror the broadcasting environment in Africa, where strategic choices must reconcile ambition with market reality, using innovation models that are adaptive rather than purely disruptive and where hybrid configuration of old and new models are common.

For these reasons, BMI offers a robust and theoretically coherent framework for this study. It enables an investigation of how African broadcasters make strategic choices about AI, virtual production, streaming and why those choices result in specific business model configurations without elevating each technology to an independent theoretical construct. Rather than assuming that technology adoption leads directly to transformation, BMI allows this research to interrogate the design logic behind those decisions, capturing the nuance of incremental, hybrid and context specific innovation that characterises African broadcasting markets.

2.2.3 Critiques and refinements

Although Business Model Innovation has become an influential construct within the management and innovation scholarship, its theoretical development is not without critique. Foss and Saebi (2017), argues that BMI is sometimes used as a “catch all” label for any organizational change, resulting in conceptual ambiguity and tautology innovation explained (Foss & Saebi, 2017) . In their view, the field risks overstating novelty unless scholars clearly distinguish BMI from product, process or strategic innovation.

Methodological concerns have also been raised. Early empirical work struggled with measurement validity, often relying on descriptive case studies without standardized scales. The absence of validated constructs made it difficult to compare findings across industries or geographies.

Recent scholarship has attempted to resolve these issues through three important refinements:

1. Researchers have emphasized the role of antecedent conditions and contingencies, clarifying what triggers BMI, and under what environmental or organizational circumstance it emerges. Huang & Ichikohji,(2023), shows that BMI is more likely when technological discontinuities disrupt existing revenue logics, but only when firms possess sufficient organizational flexibility and absorptive capacity to redesign business models (Huang & Ichikohji, 2023).
2. There is a renewed focus on the process dynamic of BMI rather than treating it purely as an outcome. Sabaruddin et al., 2025), argues that understanding how firms transition from old to new business models, through experimentation, prototyping, partnership and managerial cognition, is essential to explaining why some BMI efforts succeed while other stall (Sabaruddin et al., 2025). This process-based view is especially relevant in settings where firms must innovate incrementally rather than through wholesale transformation.
3. BMI scholarship increasingly highlights the role of ecosystems and platform interdependencies. Wirtz and colleagues show that business models are no longer isolated firm level constructs; they evolve in relation to digital platforms, data networks, regulators, suppliers, creative talent and technology vendors (Wirtz et al., 2019). In this framing, value creation and capture are distributed activities, not purely internal organization functions.

For this research, these refinements are analytically material. By situating BMI within African broadcasting, the study explicitly addresses the antecedents (Infrastructure gaps, regulatory uncertainty, cultural and linguistic diversity), process dimensions (managerial decision making, technological experimentation, organizational capability), and outcomes (reconfigured production pipelines, hybrid monetisation, platform partnerships) that shape innovation. This positions the research within the contemporary evolution of BMI, not as an abstract model, but as a context grounded mechanism of strategic adaptation and directly responds to calls context-specific, process-oriented BMI studies in under-researched industries.

BMI provides both conceptual precision, clearly defined components of value creation, delivery and capture and empirical flexibility, making it suitable for analysing technological disruption across diverse markets. Its emphasis on organizational design, decision making and ecosystem interdependence aligns directly with the realities of African broadcasting, where firms must balance technological ambition with structural and cultural constraints. BMI therefore offers a coherent and theoretically robust foundation for this study's examination of how AI, virtual production and streaming reshape strategic decision making while keeping business model change, rather than the technologies themselves at the centre of analysis.

2.3 Technological Transformation in Broadcasting

Digital transformation in contemporary organisation is increasingly described as a strategic rather than merely technological process. Verhoef et al. (2021) provides one of the most influential frameworks for understanding this distinction, differentiating between digitization, digitalization and digital transformation. Digitisation involves the conversion of analogue inputs digital formats, a process already largely completed in global broadcasting through digital cameras, nonlinear editing and file-based delivery. Digitalisation refers to redesigning organisational processes using digital tools, such as automated scheduling, cloud based editing or digital asset management system.

However it is digital transformation, the reinvention of the firm's business model, that represents the highest of organisational change. This is the point at which technology alters strategic logic itself, rather than simply improving operational efficiency. The implication for broadcasters is clear: incremental upgrades (e.g., moving archive to the cloud or adding OTT as an ancillary service) do not deliver sustained competitive advantage unless accompanied by a redesign of value creation, delivery and monetization. In this sense, Verhoef et al. (2021) position business model changes as the defining feature of digital transformation and thereby conceptually link digital transformation to BMI.

Their MIS Quarterly study finds that technology adoption rarely fails because of technical factors; instead, failure stems from misaligned executive mindsets, weak data cultures and legacy organizational structure that resist new workflows. In broadcasting, these challenges are particularly visible due to deeply entrenched production hierarchies and scheduling routines built for linear television, making the transition to new business models a slow, contested process rather than a straightforward technological upgrade.

Transformation therefore manifests not only in the acquisition of new tools but in the redesign of content workflows, data driven audience modelling and cross platform story architectures. Technologies such as automated metadata tagging, cloud collaboration and algorithmic content recommendation systems only generate value when accompanied by organizational willingness to use data to drive commissioning, scheduling and marketing decisions a shift that implies changes across all three BMI dimensions.

From an economic perspective, Iansiti and Lakhani (2020) argues that digital transformation shifts the unit of competitive analysis from the firm to the ecosystem. Rather than operating as self-sufficient entities, firms become nodes in digital networks linking creators, distributors, advertisers, data brokers and audiences. This logic is especially pronounced in broadcasting, where content circulates across multiple digital environments, TV, mobile apps, YouTube, Social platforms and collects data feedback that shapes future creative and commercial decisions.

The broadcasters role is no longer limited to transmission; it becomes an orchestration of a multi-platform ecosystem centre on user flow, cross channel identity and monetization pathways. This represents a fundamental change in strategic logic: competitive advantage derives not from exclusive infrastructure (e.g., terrestrial tower or satellite transponders), but from data integration, platform partnerships and adaptive content pipelines, all of which requires corresponding business model designs.

In African markets, digital transformation follows a hybrid trajectory. Broadcasters have largely completed digitisation and are advancing through selective digitalisation, adopting streaming platforms, cloud tools and social distribution, but remain constrained by structural realities. Bandwidth limitations, unreliable power supply, current instability and high capital expenditure requirements slow full transformation. As a result, African broadcasters operate with dual logics: sustaining linear broadcasting for the mass market while investing in digital models for emerging urban diaspora audiences. This duality makes strategic decision making, especially complex: leaders must balance short term survival (advertising on linear channels) with long term investment (AI driven platforms, virtual production, localization analytics), despite uncertain return horizons a tension that makes BMI particularly a framework for understanding incremental and hybrid strategies.

Consequently, digital transformation compels broadcasters to rethink their entire business logic. It is not enough to add new technologies; firms must integrate them into coherent business model configurations aligned to BMI’s three pillars:

- Value creation – New content forms, data driven commissioning, virtual production
- Value delivery – multi platform distribution, mobile first streaming, personalized interfaces.
- And Value capture – hybrid monetization (SVOD/AVOD), dynamic advertising, partnerships.

Only when these three dimensions shift in tandem does technology translate into sustainable competitiveness. In the way, digital transformation is best conceptualised as a business model challenge, not a purely technological one, reinforcing BMI as the appropriate theoretical anchor for this study.

2.4 Artificial Intelligence and Virtual Production: Re-Imagining Value Creation

2.4.1 Artificial Intelligence (AI) in broadcasting

AI has diffused across the broadcasting value chain, automated speech to text for subtitling and dubbing, newsroom assistance (summarization, topic detection), rights/metadata extraction, recommendation engine and audience analytics, reconfiguring production speed, editorial workflows and distribution precision. Importantly, AI functions as both an efficiency technology (automation that compresses time and cost) and an innovation catalyst (enabling new products and audience experiences), a dual role repeatedly emphasised in recent digital transformation scholarship and highly relevant for understanding change in value creation and value delivery.

In broadcast contexts, the shift from “AI as tool” to “AI as organizing logic” becomes visible when data pipelines and models outputs begin to inform commissioning, scheduling and promotional strategy rather than merely post production tasks a point at which AI start to underpin new or reconfigured business model rather than isolated process improvements.

Despite rapid capability gains, integration Is uneven, especially in emerging markets where data scarcity, computational cost, vendor dependence and skill deficits slow adoption and heighten operational risk. Systemic review of AI in news and media since 2020 highlights fast diffusion in automation and optimization (speech recognition, tagging, asset search), but more cautious deployment for visible editorial outputs due to trust, accountability and governance concerns, factors that influence the pace and depth of AI driven business model change and limit the extent to which BMI can be fully realised.

These frictions are particularly salient where training data underrepresent local languages and formats, raising quality and bias issues in African settings.
Audience trust further conditions strategic choice. Large multi country surveys show audiences are significantly more comfortable with AI behind the scenes that with AI generated content for sensitive topic (e.g., politics), a perception that constrains fully automated news outputs and encourages ‘human in the loop” models. For broadcasters

designing BMI shifts, this evidence implies that value creation should priorities assistive and optimisation use cases (metadata, personalization, workflow acceleration) while carefully governing visible generative outputs to protect brand credibility and regulatory compliance and to avoid undermining the very value propositions BMI seeks to enhance.

For African specifically, early adoption clusters around Post Production automation (e.g., transcription, subtitling) and recommendation systems in streaming extensions, reflecting pragmatic returns under resource constraints and the need to serve multilingual audiences. Scholarship on African digital media warns that technologically “uncritical” borrowing can reproduce inequalities if local linguistic and cultural features are not represented in datasets and model objectives. Consequently, AI projects that embed localization (language models, content norms, regional metadata taxonomies) are more likely to delivery sustainable BMI outcomes than generic off the shelf deployments because they align business model design with realities.

Implication for BMI. AI reconfigures all three BMI pillars: value creation via productivity and data informed content decisions; value delivery via algorithmic targeting and personalized surface and value capture via dynamic adverting in, churn mitigation and bundle optimisations. Adjacent literature on recommender systems, while often studied in e-commerce, documents generalisable revenue effects through engagement lift and conversion, mechanisms analogous to streaming media’s watch time and ad-yield optimisation, thus providing theoretical support for AI enabled monetization models in broadcasting and reinforcing AI’s role contextual drive of BMI, rather than a separate theoretical lens.

2.4.2 Virtual Production (VP)

Virtual Production (VP) fuses film, broadcasting, VFX and game-engine technologies to render environment in real time (e.g., LED volume stages), collapsing traditional separations between pre-production, principal photography and post. Current media technology scholarship frames VP not ad an incremental tool but as a paradigm shift that redistributes creative decision making earlier in the pipeline, changes labour compositions and skills, and re-architects cost structures (e.g., fewer location moves, higher pre-viz investment, different CAPEX/OPEX mix). This shift is consequential for business models: the economics of time to air, asset reuse and cross platform would building increasingly depend on VP capabilities and ecosystem partnerships (engines, stage providers, integrators), all of which implicate value creation and indirectly, value capture.

Empirical and agenda setting work identifies three recurring benefits for broadcasters: (i) cost and time efficiencies through reduced location. Shooting and iterative pre-viz; (ii) creative innovation via immersive steps, data driven camera moves and live mixed reality integration for sport and entertainment; and (iii) sustainability gains from lower travel and logistics footprints. Yet these benefits are contingent on organizational readiness: VP requires new collaborative rhythms between editorial, art, VFX and engineering; real time graphics literacy; and vendor ecosystems that remain concentrated in few global hubs, making VP adoption a strategic choice embedded in broader business model considerations.

In emerging markets, the capital intensity and skills ramp magnify adoption hurdles, shaping a gradual, module uptake (e.g., real time graphics for sports before full LED volume builds). Implication for BMI. VP primarily transforms value creation (faster iteration, new aesthetics, reusable digital assets), but it also affects value delivery (live mixed reality formats that travel across platforms) and value capture (sponsorship integrations within synthetic environments, IP extensions across franchises). Where VP is integrated with audience analytics and streaming telemetry, it underpins a data rich loop: concept testing, production choice, cross-platform packaging, a feedback cycle that aligns with BMI's emphasis on continuous model refinement under digital transformation.

2.4.2 Synthesis: AI + VP as the "value creation frontier" for BMI

Taken together, AI and VP constitute a convergent frontier for broadcast BMI. AI injects computational intelligence into editorial and distribution choices; VP injects computational rendering into production itself. Where firms orchestrate both, they create a pipeline in which ideation, production, packaging and distribution are all data addressable and time compressible, unlocking new forms of value creation (immersive formats), value delivery (personalized, multi-platform surfaces), and value capture (dynamic, audience addressable monetization). In African markets, phased adoption (assistive AI + selective VP modules) aligned with local language/data strategies and cost sharing partnerships (telcos, studios, tech vendors) is most consistent with the constraints identified in recent literature and offers a pragmatic path to business model renewal without assuming that full-scale technological deployment is either feasible or necessary for BMI.

2.5 Streaming Services and Platformisation: redefining Value Delivery and Capture.

Streaming epitomizes BMI In the digital age: a reconfiguration of distribution (value delivery) and monetization (value capture). In contemporary media scholarship, streaming is not merely a new distribution mechanism but a platform logic that reorganizes how television creates access, governs audience and monetises attention. Lotz (2021) argues that competitive advantage now rests less on control of broadcast spectrum and more on data stewardship, user-interface control and platform partnerships, which recast television as a configurable, on-demand service rather than a linear schedule (Lotz, 2021) . This platformisation displaces legacy bottleneck and privileges firms that can orchestrate catalogue depth, interface design and algorithmic curation at scale and therefore becomes a core site where BMI is made visible.

Digitization to transformation.

From a digital-transformation perspective, Verhoef et al. (2021) view streaming as the culmination of a three stage maturity model: digitisation, digitalization and full business model transformation. Their empirical work shows that streaming only yield sustainable competitive advantage when data architecture, pricing models and organizational structure evolve together; standalone OTT pilots that ignore customer experience and data driven commissioning produce limited gains (Verhoef et al., 2021b) . This makes clear that streaming is not an IT project but a BMI motivated decision centred on value delivery and value capture.

Market Structure in Africa: heterogeneous and contested.

In Africa, the streaming market remains diverse. Global platforms such as Netflix and Amazon Prime Video coexist with indigenous service like ShowMax, iROKOtv and Wi-Flix, each adopting different strategies for pricing, originals and mobile access. Recent financial reporting shows that MultiChoice's linear subscriber base has come pressure while ShowMax's paid subscriber numbers have grown sharply after its relaunch and investment in local productions, demonstrating the pull of platformed delivery (Larkin, 2025) . These developments illustrate how streaming introduces new competitive pressure on legacy broadcasters and accelerates the need for business model reconfiguration.

African broadcasters, however, perceive streaming as both a threat and an opportunity. Garg & Tuteja, 2025 (2025), find that while streaming disrupts traditional broadcast economics, it also serves as a catalyst for business model diversification (Garg & Tuteja, 2025).

Because affordability and data costs remain barriers, hybrid monetization models dominate the region: SVOD + AVOD, mobile only tiers and telco bundling. These models demonstrate context specific BMI, where monetization and delivery are adapted to local economic and infrastructural constraints rather than simply replication global OTT templates.

From a BMI standpoint, value creation shifts from linear scheduling to data informed commissioning, where content decision draws on telemetry such as search behaviour, churn rate and completion metrics (Verhoef et al., 2021b) . Value delivery moves from airwaves to multi device digital platforms, accessible via mobile, smart TV, web and set-top boxes (Lotz, 2021) . Value capture becomes multifaceted, incorporating subscription tiers, advertising yield, sponsorship overlays and B2B partnerships with telcos, device manufacturers and payment wallets (Garg & Tuteja, 2025) , a reconfiguration that aligns closely with Clauss's (2017) three dimensional BMI structure.

Crucially, African media research shows that technological scale alone does not guarantee adoption. Okonkwo et al.,(2023) highlight the central role of culture and linguistic proximity. Their study finds that platforms with hyper-localisation, local language tracks, regional narratives, culturally resonant genres and user interfaces shape for African audiences, achieve significantly higher retention and willingness to pay than globally generic catalogues (Okonkwo et al., 2023). For BMI, localization is not cosmetic, as it is a design variable, shaping delivery and monetization and functioning as a core element of value proposition innovation.

Bringing these strands together, streaming represents the most visible manifestation of business models reconfiguration in broadcasting: it rewires value delivery (platform over spectrum) and re-bases value capture (tiers, ads, bundle, partnerships). In African markets, the winning configurations are typically hybrid and context specific, balancing the global scale of OTT technologies with the local resonance of originals mobile pricing and telco economics. For this study, streaming therefore operates as a primary empirical arena for observing BMI choices and their performance implication across markets, while remaining analytically subordinate to BMI as the core theoretical construct.

2.6 African Broadcasting Context: Institutional and Structural Moderators

African broadcasting operates within a complex tension between technological ambition and structural constraint. On one hand, digital adoption continues to rise as mobile network expand and younger audience consume content across multiple platforms. Yet access remains uneven. The 2023 Afrobarometer survey reports significant growth in internet use across urban centres, while also identifying persistent inequalities in broadband coverage, electricity reliability and digital literacy between countries and between urban and rural populations (Afrobarometer, 2023) . These disparities shape the commercial logic of broadcasters, who must design services for audiences with widely varying levels of connectivity and device access and therefore moderate the form and feasibility of BMI initiatives.

Regulation forms another decisive constraint. Broadcasting and digital policy in many African markets, evolve more slowly than platform innovation. Regulatory bodies such as the Independent Communication Authority of South Africa (ICASA) and the National Broadcasting Commission (NBC) Nigeria, continues to prioritise legacy licensing and spectrum management, while digital platforms operate on data, cloud infrastructure and cross-border distribution.

Cultural dynamics are equally influential. Notable African audience remain deeply connected to local narratives, languages and formats shaped by national identity, humour and social history. Okonkwo et al (2023), shows that audiences quickly disengage from platforms that provide technologically sophisticated interface, but lack cultural proximity. They describe this as a case where “technological modernity without cultural familiarity” undermines user loyalty ((Okonkwo et al., 2023). For broadcasters, this means that business model innovation cannot simply import global templates; it must embed local content, multilingual interfaces and community specific storytelling into design. Successful BMI in this context is therefore a cultural as well as technical exercise.

Technological infrastructure adds a further layer of complexity. The rollout of 5G networks, cloud data centres and real time rendering pipeline is generating new capacity of virtual production and high quality streaming, but these capabilities are concentrated in a handful of markets. Fair (2023) notes that , “the potential environmental benefits of virtual production should be commended. It is an innovative solution that could reduce the carbon footprint of productions, especially those that require journeys to remote and distant, difficult locations” (Fair, 2023) .This uneven development means that African broadcasters adopt technology in staggered phase, prioritizing tools that deliver immediate value under infrastructure limitations and shaping different national trajectories of BMI.

Taken together, these factors, regulation, infrastructure and culture, serve as moderating forces shaping the pace and form of BMI in African broadcasting. Rather than fully replacing legacy models, broadcasters often implement hybrid strategies that balance linear broadcasting with digital expansion, and global technologies with local culture alignment.

This context helps explain why BMI in Africa does not follow a uniform trajectory: transformation is adaptive, shaped by institutional realities, consumer expectation and infrastructural possibility. In this way, the African market provides a compelling environment for studying how technological innovation interacts with structural and cultural constraints to reshape strategic decision making and for extending BMI theory into underexplored institutional settings.

2.7 Synthesis and Conceptual Framework.

Across the literature reviewed, several patterns emerge that clarify how technology advancement interacts with strategic decision making in African broadcasting. The first insight is that technology acts as an enabler rather than a determinant. Artificial intelligence, virtual production and streaming technologies offer significant opportunities for productivity, creativity and monetization. However, outcomes depend on the strategic choices broadcasters make, rather than on technology alone. Teece (2018) argues that firms do not gain advantage simply by accessing advanced tools; they gain advantage by reconfiguring their business models to exploit those tools effectively (Teece, 2018b) . In this sense, BMI becomes the mechanism that turns technology capacity into a commercial value and therefore sists at the core study's explanatory model.

The second insight is that contextual asymmetry strongly influences adoption pathways. Infrastructure constraints, regulatory uncertainty and cultural heterogeneity shape how BMI unfold in practice. As noted earlier, uneven broadband access, gaps in digital literacy and capital limitations affect the speed and depth of technological integration (Afrobarometer, 2023). Regulatory frameworks that lag behind digital innovation introduce compliance risks and slow experimentation . Cultural expectations, particularly the importance of local language and narrative familiarity, shape consumer retentions, in particularly the importance of local language and narrative familiarity, that also shows consumer retention on digital platforms (Okonkwo et al., 2023). BMI therefore cannot be conceived as a uniform process; it is context-dependent, evolving differently across African markets and provides an opportunity to refine theory in relation to these moderating conditions.

The third insight is that strategic decision making in African broadcasting is adaptive and incremental, not disruptive. Instead of replacing linear broadcasting outright, firms develop hybrid models: partial virtual production pipelines, selective of AI automation, or streaming tiers bundling with mobile data. Scholars of digital transformation describe this as a phase trajectory, in which organisations gradually adjust value creation, delivery and capture while maintaining legacy revenue structures (Verhoef et al., 2021). This hybridization reflects managerial pragmatism in emerging markets, where risk tolerance and investment capacity differ from high income media economies and underscores the relevance of process oriented BMI perspectives.

Proposed Conceptual Model

Drawing these insights together, this research adopts a conceptual model in which technological advancement functions as an external driver, BMI acts as the internal mediating mechanism, and structural and cultural factors operate as moderators influencing outcomes:

- Drivers: technological advancement, specifically AI, virtual production and streaming; they introduce new possibilities for automation, creativity, distribution and monetization.
- Mediating mechanism: Business Model innovation reorganizing value creation (e.g., immersive production, local storytelling), value delivery (multi-platform access, personalization), and value capture (ads, subscriptions, telco bundles).
- Moderators: Market maturity, regulatory framework and cultural/localization demands influence how BMI manifests and how sustainable those changes become.
- Outcomes: When aligned effectively, these interactions lead to improved strategic focus, operational efficiency and competitive sustainability in the African broadcasting sector.

This conceptual models forms the analytic bridge between theory and methodology. It specifies which relationship the study will examine and justifies a qualitative approach that investigates how decision makers interpret technological change within real organizational and market constraints. The model also guides data collection and analysis in subsequent chapters, ensuring that the research maintains a coherent empirical alignment with its theoretical foundations and directly addresses the theoretical gap concerning BMI under resource and institutional constraints in African broadcasting. .

2.8 Chapter Summary.

Chapter 2 review and synthesised contemporary literature to establish the theoretical and empirical foundations of this research. The discussion demonstrated that while technological advancement is universal, its strategic interpretation is context bound. The BMI framework provides a powerful lens for analysing how African broadcasters navigate disruption, balance innovation with structural realities and reconfigure value creation, delivery and capture under technological transformation.

The chapter concludes that technological advancement influences strategic decision making through BMI, moderated by infrastructural, regulatory and cultural factors unique to African markets. This synthesis informs the research design and methodology in Chapter 3, where these relationship will be operationalised through qualitative inquiry that focuses on BMU processes rather than on technology adoption alone.

Chapter 3 Research questions and proposition

The purpose of this chapter it to translate the theoretical gaps and conceptual argument developed in Chapter 2 into a set of clear research questions and propositions. In keeping with academic convention, this chapter does not simply list questions; it demonstrate the logical progression from the research problem to the questions, strengthening the golden thread and theoretical alignment. As such, Chapter 3 servers as the critical bridge between the theoretical foundation and the empirical investigation that follows in Chapter 4.

The research problem, as established in Chapter 1, highlights that African broadcasters operate in a landscape of rapid technological change, which is driven by artificial intelligence, virtual production and streaming, yet face structural and cultural constraints that moderate innovation. While global scholars have documented digital transformation in mature markets, comparatively little is known about how broadcasters in emerging African markets make strategic decisions under these conditions.

3.1 Primary research Question

The main research question reflects the core theoretical and practical interest of the study:

RQ1: How does technological advancement influence strategic decision making in the African broadcasting industry?.

This question is intentionally broad, as it aims to reflects the systemic nature of transformation shown in the literature. It acknowledges that digital transformation is not purely technical, but embedded in organisational processes, capabilities and contextual realities. This framing reflects BMI’s emphasis on strategic reconfiguration rather than isolated technology adoption.

Research Questions Mapping to Research Gap

Table 3 Research Questions Mapping to Research Gap

Research Questions (RQ)	Research Gap (RG)
RQ1.1: How are African broadcasters using artificial intelligence and virtual production to reconfigure value creation, in content development and production workflows ?	Theme: Technological reconfiguration of value creation. RG: While global studies advise that AI and virtual production reshapes workflows, African research still offers limited evidence on how these technologies create new value. Existing work focuses mainly on adoption barriers rather than how AI enabled tools, generative systems and virtual sets, reconfigure value creation in resource constrained, hybrid production environments (Gideon Maree, n.d.; NYAGADZA, 2019)
RQ 1.2: How do streaming platforms and platformisation reshape value delivery and audience engagement strategies in African markets?	Theme: Platformisation and delivery. RG2: While platformisation research is growing globally, African context remain under-represented, particularly regarding how streaming reshape value delivery through interfaces control, data-driven personalisation and algorithmic visibility (Lobato, 2019) . Gaps exist in understanding how African broadcasters adapt to platform logic, manage uneven digital access and fragmented regulatory environments.
RQ1.3: What monetisation models are broadcasters adopting to response to digital	Theme: Monetisation and value capture models RG3: Current literature provides limited analysis of how African broadcasters redesign value capture mechanisms in

consumption, and how do these inform value capture through BMI?	response to digital consumption shifts. While studies note the rise of subscription, hybrid AVOD/SVOD, micro payment and mobile bundle models, their integration into a broader business model innovation framework remains unexplored. There is insufficient evidence on how monetisation strategies evolve under low ARPU (average revenue per user).
RQ1.4: How do contextual factors such as a regulation, infrastructure, affordability and cultural localisation moderate BMI outcomes in the African broadcasting industry?	Theme: Contextual moderators of BMI RG4: Research recognises contextual conditions as a major determinate of technological outcomes, yet empirical evidence remain thin on how African specific factors (regulatory lag, infrastructure deficits, cost of data, localisation pressures) moderate BMI pathways. There is a gap in understanding how regulatory unpredictability, affordability constraints and localisation imperatives shape BMI implementation and performance outcomes in African broadcasting markets.

Chapter 4: Research Methodology

4.1 Introduction

This chapter investigates the methodological framework guiding the study “Determine the Influence of Technological Advancement on Strategic Decision Making, in the African Broadcasting Industry.” The aim of this chapter is to explain, justify and defend the methodology choice made, while ensuring that the research design is coherent, academically rigorous and logically aligned with the research questions and theoretical foundation established in earlier chapters.

Noting that, this study deals with a real world, socially embedded and rapidly phenomenon, namely the integration of AI, Virtual Production (VP) and streaming technologies with the African Broadcasting organisations, the research required a methodology capable of capturing complex managerial interpretations and organizational decision-making logic. Accordingly, the study therefore adopts a qualitative, exploratory multi-case design grounded in an interpretivist paradigm. With this approach, it will allow for a rich contextual understanding and theoretically meaning insights into how Business Model Innovation (BMI) unfolding in practice.

The chapter will then proceed by explaining the philosophical foundation, research purpose and design, research strategy, methodological choice, time horizon, population and sampling, unit of analysis, data collection instrument, data collection procedures, data analysis approach, research quality and rigour, ethical considerations and limitations. All together, these components will ensure that the methodology is systemic, transparent and aligned with postgraduate standards, while directly supporting the golden thread of the study.

4.2 Research Philosophy.

4.2.1 Interpretivist Paradigm

This study adopts an interpretivist research philosophy, which views reality as a socially constructed context dependent, and subject to human interpretation. Interpretivism is particularly suited to understanding how executives in African broadcasting organisations make sense of technological advancement and its strategic implications.

Unlike positivism, which seeks universal laws like generalisations, interpretivism is a “paradigm asserts that there is no singular social reality that stands independently of the observer, but rather multiple socially-constructed worlds" (Sanchez et al., 2023). Strategic decision about AI, VP or streaming services are not merely technical choices, but they are shaped by perceptions of opportunity, risk, institutional pressure and cultural considerations. This philosophical stance strongly aligns with the BMI framework, which conceptualises business model change as both a structural and cognitive process. Executives reinterpret value, customer and competitive advantage in light of technological shifts and exploring these interpretations requires an interpretive approach.

4.3 Research Assumptions

4.3.1 Ontological Assumptions

Ontologically, the study assumes a relativist orientation: reality is multiple and constructed. Each broadcaster operates within its own institutional constraints, technological capabilities, market pressure and cultural expectations. Therefore, no single "truth" about technological advancement exists. Instead, different leaders interpret AI, VP and streaming according to their organisational realities. This assumption lines up with the study's aim to explore variation in BMI pathways across the noted different African markets, instead of seeking a uniform casual laws.

4.3.2 Epistemological Assumptions.

Epistemologically, the study assumes knowledge is co-created between researcher and participant though dialogue, as "the relationship between the researcher and the participant, when viewed through the lens of transformative learning, highlights dialogue as the fundamental social mechanism through which individuals process and solidify changes to their frames of reference" (Milazzo & Soulard, 2024). Insight emerges from exploring meaning, not measuring variables. This is why semi-structured interviews, flexible and narrative form were selected as the primary data source.

Knowledge arises from:

a) Executive experiences,
b) Organisational narratives,
c) Interpretations of technological change,
d) And interactions during the interviews.

4.3.3 Axiological Assumptions.

Axiologically, the researcher acknowledges that values, professional experiences and perspectives, do shape the interpretation of findings. Instead of claiming value free objectivity, the study embraces responsible subjectivity, where reflexivity and transparency are used to strengthen credibility. The researcher maintained a reflexive stance throughout, documenting assumptions and interpretive choice in order to enhance the trustworthiness of the analysis

4.4 Research Purpose and Design

4.4.1 Exploratory Design

This study uses an exploratory research design, which is appropriate when investigating emerging phenomena with limited prior research (Hosseini et al., 2023). Technological transformation in African broadcasting, especially AI and VP, is still in its early stages and empirical evidence is scarce. Therefore, the purpose is not to test predetermined hypotheses, but to:

1. Explore emerging patterns,
2. Understand strategic decision making,
3. Identify business model implications,
4. Build conceptual clarity,
5. And extend BMI theory into the African broadcasting domain.

Exploratory research is very key, especially when the researcher seeks to uncover meaning rather than measure variables.

4.4.2 Justification

The exploratory design aligns with the study's objectives, as:

a) It embraces complexity instead of reducing to a small set of variables,
b) Allows the new insight to emerge from participants accounts,
c) It accommodates context, specifically noting the differences across the African markets,
d) It fits the qualitative and interpretivist orientation of the study, and
e) It supports theory building, that is rooted in lived managerial experiences and organisational practices.

4.5 Research strategy: Multiple case study.

The study adopts a multiple case study strategy, across few African countries:

1. South Africa,
2. Nigeria,
3. Kenya,
4. And Ghana.

This approach follows (Yin, 2018) replication logic, where each case provides opportunities to identify patterns, similarities and distinctions. A multi case study enhances:

a) Analytical generalisation (not statistical generalization),
b) Comparative understanding of different regulatory and market systems,
c) Theoretical robustness through cross case convergence,
d) And Rich contextual insight into strategic decision making under technological pressure.

The research approach into this studies, is best suitable when looking into “how” and “why” questions within real world settings, which is in line with the nature of the study and the BMI focus.

4.6 Methodological Choice: Mono-Method Qualitative approach.

A mono method qualitative approach was selected for the notable below research’s reasons:

1. The research questions, seek to understand and not measure. BMI is fundamentally about strategic interpretation, creativity and organizational sense making elements best explored within the qualitative approach.
2. AI and VP adoption is uneven, emergent and context bound. Qualitative surveys would oversimply the nuances behind executive decision making.
3. Participants are industry elites. Engaging with this level of professional requires a flexible, conversational method.
4. Qualitative research supports conceptual contribution. Findings will generate a refined conceptual model of technological, with BMI interaction.

Thus, approach aligns with, (Descouens & Gerbault, 2021) recommendations for studies focused on “design and systematically justified throughout the methodology”

4.7 Time Horizon

The study follows a cross-section time horizon, capturing data during a defined period (September - November 2025). Even though technological challenge is ongoing, the purpose is to have an understanding of the current decision-making practice during a period of active digital transformation.

A cross-sectional design allows the research to:

a) Gather multiple perspective at a single strategy moment
b) Compare how different markets interpret the same technological challenges

c) Identify emerging patterns relevant to BMI dimensions (value creation, delivery, capture) under current environment.

4.8 Population and research setting.

4.8,1 Defining the Population

The broader population includes senior professional and leaders across the African broadcasting ecosystem, that are specifically involve in:

1. Technology strategy,
2. Content production and editorial decision making,
3. Business model design and commercial strategy,
4. AI/VP workflow development,
5. Regulatory oversight relation to broadcasting and digital platforms, and
6. Digital distribution (streaming services).

This includes individual such as:

7. Head of Production
8. Strategy executives
9. Linear and OTT channel directors
10. Regulatory focused on digital migration
11. Senior leaders (Implementing VP or AI driven workflows)

This population definition reflects BMI's multi dimension nature, requiring participants who influence value creation, value delivery and value capture.

4.8.2 Research setting

Research was conducted in contexts driven by:

a) Significant variation in infrastructure broadband,
b) Different approach of AI and VP adoption,
c) Divergent regulatory maturity,
d) Audience demand for local content,
e) Notable growth in streaming services,
f) Ongoing digital migration drive,
g) Competitive pressure from global companies and platforms.

The settings represent real world environments where technological strategy and BMI choices are being uncovered.

4.9 Target Population and Sampling

4.9.1 Purposive Sampling

The target population for this study comprises of individuals with direct experience, decision-making authority and strategic responsibility relating to technological innovation within the African broadcasting organisations. These individuals include, senior executives in technology, content strategy, production, platform management and regulatory engagement. A purposive sampling strategy was adopted, to ensure that participants were selected explicitly for their relevance to the research topic, rather than through random or probability-based selection. (Bakkalbasioglu, 2020),highlights that "Many researchers, who conduct purposive sampling-based on elite interview research, may encounter various obstacles when they try to gain access to the potential interviewees. Especially in challenging research environments and using purposive sampling increase the time and energy spent to gain access to elite respondents".

In this study, the purposive sampling enables the researcher to engage with those who possess the deep contextual knowledge, hands-on experience and strategic insight, necessary to illuminate how technologies as AI, Virtual Production (VP) and streaming influence organizational decision-making. The logic behind this sampling approach, aligns strongly with the interpretivist paradigm and the study's qualitative orientation, both of which prioritise information-rich cases over representativeness or generalizability.

4.9.2 Sampling Size and Justification

The final sample consist of 12 participants across the four case markets, being, South Africa, Nigeria, Kenya and Ghana. This number is both methodologically defensible and appropriate for multiple-case qualitative research focus on elite stakeholders.
(Guest et al., 2017) demonstrate that:

a) Date saturation in elite qualitative samples typically occurs around 12 interviews, as experts tend to share convergent patterns or reasoning, and
b) Additional interviews enhance cross-case comparison and nuance, instead of generating new themes.

Given the Multi-market nature of this study:

c) A minimum of 2-4 participants per country was required to generate sufficient depth within each case.

d) This distribution ensures triangulation of perspectives within the cross organizational contexts.
e) It also support meaningful cross-country analysis, allowing for the identification of patterns shaped by regulatory, infrastructural or cultural differences.

The resulting sample therefore provides both depth (within-case insight) and breadth (cross-case comparison), strengthening the analytic potential of the study.

4.9.3 Why Interviewing Industry Elites Matters?

Interviewing industry elites, notable organisational executives, heads of departments, Content Channel heads, Technology leaders, offers several advantages that are particularly relevant to this research:

1. High-level strategic insights: Elites possess intimate knowledge of organizational decision-making processes, technological strategies and business model considerations.
2. Strong theory-building potential: Elites interview often yield conceptual explanations rather than surface-level descriptions, enabling richer contributions to the BMI theory
3. Greater influence on interpreting BMI mechanisms: Because executives determine how and why new technologies are adopted, their perspectives directly shape organizational value creation, delivery and capture.

However, interviewing elites also presents methodological and ethical considerations:

4. Negotiating access carefully: Senior professional often have limited availability and require formal communication and relationship-building to secure participation.
5. Manage time constraints: Interviews must be efficient, focused and respectful of participants schedules
6. Ensuring confidentiality: Given the sensitivity of strategic information, participants must be assured that insights will be anonymised and handled responsible.
7. Demonstrating topic expertise: Elite participants engage more openly when the interviewer demonstrates a clear grasp of industry dynamic, technological trends and theoretical grounding.

Recognizing these dynamics shaped both the sampling strategy and the interview procedure, ensuring that the study captured rich, credible and strategically meaningful data.

4.10 Unit and level of Analysis

4.10.1 Unit of Analysis.

The unit of analysis for this study is the broadcasting organisation, examined through the lens of its strategic responses to the technological advancement. Each organisation, whether a traditional broadcaster, hybrid broadcaster (streamer), or a digital-first OTT platform, represents a distinct case that embodies decision-making practices, resource configurations and adaptation pathways.

Focusing on the organisation as the unit of analysis allows the study to capture the holistic business model dynamics that arise when firms confront emerging technologies such as Artificial Intelligence (AI), Virtual Production (VP) and streaming. This approach is consistent with the Business Model Innovation (BMI) framework, which conceptualizes the business model as a firm-level system consisting of interdependent components that organisation must configure strategically.

4.10.2 Level of Analysis.

The level of analysis is organizational and managerial, with a specific focus on decision-makers who influence or implement strategic and technological transformation within their immediate space (department), while also influencing organisations. This includes executives responsible for:

a) Technology strategy,
b) Production and Post Production workflows,
c) Digital platform development,
d) Business development and monetization,
e) Regulatory engagement,
f) And Innovation leaders

At this level, the study examines how organisational actors interpret technological opportunities, negotiate constraints and reconfigure elements of their business models. This aligns with the BMI theory, which argues that, firms adapt to technological environmental triggers by redesigning three interlinked domains:

1. Value Creation - how content is produced, edited, automated or localized through innovations such as AI-driven production phase and Virtual Production environments.

2. Value Delivery - how audiences access content through streaming, linear or traditional broadcasting, mobile-first platforms, multi-device ecosystems or new distribution partnerships.

3. Value Capture - how organisations monetise content through subscription processes, advertising models, telco bundling, data driven pricing and platform partnerships.

4.11 Research instrument: Semi-Structured Interviews

Semi-structured interviews were selected as the primary data collection instrument for this study because of their effectiveness in generating rich, nuanced insights from individuals who occupying senior strategic positions. This approach aligns strongly with the interpretivist paradigm and explores the purpose of the study, within the semi-structured interviews process.

The interview structure:

1. Allow participants to articulate complex reasoning about technological shifts and strategic decisions;
2. Ensured the probing of depth abstract construct such as BMI, organisational strategy and technological inclusion;
3. Is also best suited to interviewing strategic elites, who often require conversational flexibility and space to contextualise their decisions and experiences;
4. and gives a balance between structure (ensuring comparability across interviews) and flexibility (accommodating contextual differences across market and oraganisations)

Given the multi-country and multi-organisational design of the study, the semi-structured format provided a balance needed to maintain thematic coherent while accommodating contextual diversity.

An interview guide (see Appendix), was developed to ensure alignment with the research questions and the BMI framework. The guide was structured around four thematic clusters, each representing a core dimension of the study's conceptual model:

a) Technological and Organisational Strategy - understanding strategic priorities, organizational readiness, leadership perceptions of technological advancement;
b) AI and Virtual Production (VP) integration in Production - investigated how AI-enabled workflows and VP environments influence production efficiency, creative capabilities and decision-making cycles;

c) Steraning and Platformisation - reflect on the influence of streaming platforms on content commissioning, audience engagement, data-driven decision-making, value delivery innovation and revenue models;

d) Contextual Moderators - examined external forces shaping technological adoption, including regulatory frameworks, infrastructure, language and cultural consumption patterns.

The interview guide was pilot-tested with two broadcasting professional to refine question clarity and conceptional alignment. Minor adjustments were made to improve and ensure the guide elicited both strategic and operational insights.

4.12 Data collection Process

Date collection for this study took place between September and November 2025, following a structured and ethical procedure. A hybrid approach was adopted to accommodate participant availability across the four case markets. As a result, interviews were conducted through:

1. Virtual interview via Microsoft Teams, allowing geographically dispersed participant to engage conveniently and securely
2. In-person interview, were also conducted where feasible and appropriate, particularly in Johannesburg where participant were available for a face to face engagement.

Eash interview lasted approximately 45 to 60 minutes. Before each of the sessions or interview, participant were provided with an information sheet outlining the study's purpose, their rights, confidentiality assurance and the voluntary nature if their participation. A formal consent form was also shared in advance, in line with the institution guideline and a verbal reconfirmation was obtained at the start of each interview.

Due to the strategic seniority of the participants, explicit permission to audio record the interview was requested and granted. The recordings ensured accuracy, supported detailed transcription and enabled deeper interview analysis through ATLAS.ti.

A notable process was also adopted by the interviewer, with regards to the participant non-verbal cues, contextual elements, emotional tone and initial analytical impressions, this was to also strengthen the interpretive quality of the subsequent thematic analysis. This also enable the interviewer to have adequate follow questions to all subject matters, so that a clear depth is achieved from the discussion.

4.13 Data Analysis Approach

The study adopted a thematic analyses outlined by (Braun & Clarke, 2006a), using ATLAS.ti as the primary computed-assisted qualitative data analysis software (CAQDAS). ATLAS.ti, was selected because of its robust capabilities for handling multi-country qualitative datasets, and supporting systemic coding, theme development and visualisation or relationship.

The data analysis proceeded through Braun and Clark's six-phase framework:

1. Familiarise with transcript -Interview recoding's were transcribed verbatim and uploaded to ATLAS.ti, to capture all reflection and context specific insights.

2. Generation of the codes - ATLAS.ti's coding allowed for the creation of both descriptive and interpretive codes align with the BMI framework and the research questions. Codes were notable grouped into lists as "AI value creation", VP workflow shifts", "streaming monetisation", "regulatory constraints" and "infrastructure barriers".
3. Searching for themes – the ATLAS.ti tool Code do-occurrence explorer and code document Tables, patterns were identified across participants and markets.
4. Reviewing and refine thematic categories: Themes were refined by examining quotations, code density and co-occurrence strength. redundant themes were merged or collapsed where redundancy appeared, and others were tightened to reflect analytic clarity.
5. Defining and naming themes: Each theme was defined through, a conceptual description, supported evidence (quotations), and links to the BMI's value creation, capture and contextual moderation.
6. Producing the narrative: themes were synthesised into an analytic narrative that connects empirical findings to BMI's theory and cross-country insights. The final process identifies master themes and sub-themes that underpin Chapter 5.

4.14 Research Quality and Rigour (updated with ATLAS.ti and Session Guidance)

To ensure methodological trustworthiness, the study applied four criteria of qualitative rigour by (Lincoln & Guba, 1985), being credibility, dependability, transferability and conformability. This was enhanced through the analytical capability of ATLAS.ti.

A. Credibility:

1. Credibility was enhanced through member checking with selected participant, triangulation with public industry documents and regulatory reports and cross-country comparison of emerging patterns. The use of ATLAS.ti ensured that every thematic claim be traced back to verbatim participant data.

B. Dependability

2. Dependability was supported by maintaining a detailed audit trail of methodology decisions, coding processes and theme development. The systematic use of ATLAS.ti facilitated consistency and allowed the analytic to be review and followed.

C. Transferability.

3. Transferability was strengthened through the descriptions of organisational context, market environment, regulatory landscape and participants' strategic role.

D. Confirmability:

4. Confirmability was achieved by maintaining reflexive journal and using ATLAS.ti to log all codes quotations, link and network diagrams.

4.15 Ethical Considerations

This received formal ethical clearance from the University's Ethics Review Committee, ensuring compliance with the institutional and International research standards. Ethical integrity was prioritised throughout the research design and data-collection process, particularly given that the participants occupied senior and strategically sensitive roes within the broadcasting organisations across Africa.

Several ethical safeguards were implemented:

1. Informal Consent:

   All participants received a detailed information sheet outlining the study's purpose, research procedures, potential risks and expected benefits. Participation proceeded only after written and verbal consent was provided. This included explicit permission to record the interviews.

2. Confidentiality and Anonymity

   Due to the high-profile nature of participants, confidentiality protocols were strengthened. Identifiers such as name, job title, organisations and specific strategic initiative, were obtained in line with the interview guide from the institutions and noting the strict process of data management provided.

3. Secured Data Management

   All interview recordings, transcripts and analytic files were stored in encrypted, password-protected digital folders. Access was restricted solely to the researcher. Data storage in ATLAS.ti, was also backed up securely

4. Voluntary participation Right to withdraw

   Participants were informed that their participation was voluntary, and they could withdraw at any time without penalty or consequences. No participant exercised this option.

5. Non-maleficent and organizational sensitivity

   Given the competitive dynamic of the media sector, care was taken to avoid exposing sensitive operational or strategic information. Themes were reported in aggregate to prevent unintended reputational risk.

Overall, the study adhered to the principles of autonomy, beneficence, justice and respect which underpin ethical research in the social sciences.

4.16 limitation of the Research Design

While the methodology was designed to maximise depth, credibility and contextual insight, several limitations are acknowledged to frame the study appropriately:

1. Cross-Section Timing - The research provides a snapshot of a strategic decisions-making during a specific period of technological transition. Noting also, that organisational responses may evolve as technologies mature. A longitudinal design could capture these dynamic over time.
2. Single method reliance - the exclusive use of semi-structured interviews limits statistical generalisability. Future research might employ mixed methods to complement qualitative insight with quantitative evidence.
3. Elite Bias - Interviewing senior executives may introduce strategic framing or self-presentation bias. Triangulation and probing mitigation, but could not fully eliminate this rick.
4. Regional Scope – while four countries were included, the African broadcasting landscape is diverse, and the findings cannot represent all context on the continent.

These limitations do not intend to undermine the study's credibility, but to give context to the boundaries within which findings should be understood.

4.17 Chapter Summary

This chapter articulate and justified the research methodology underpinning the study, demonstrating clear alignment between the research problem, theoretical framework and empirical strategy. It outlined the interpretivist philosophical stance, the exploratory multi-case qualitative design, the purposive elite sampling strategy, the use of semi-structured interview as the primary data-collection instrument and application

Additionally, it detailed the rigorous measure taken to ensure research quality, credibility, dependability, transferability and confirmability. This was done to be consistent with qualitative methodologic standards. Ethical considerations were addressed comprehensively, and the inherent limitations of the research design were also acknowledged transparently.

Overall, the methodology provides a robust foundation for exploring how technological advancement influences strategic decision-making in the African broadcasting through the lens of Business Model Innovation.

Chapter 5 Findings

5.1 Introduction to the Findings

This chapter presents the empirical findings generated from thirteen-semi structured interviews conducted across South Africa, Nigeria, Kenya and Ghana. The purpose of this chapter is to report the results of the analysis without interpreting them through theory; an Interpretation process will follow in subsequent chapters. The findings reflect the views of executives and senior managers', through lived experiences of navigating technological advancements, specifically Artificial Intelligence (AI), virtual production (VP), streaming services and the strategic decisions that arise from those shifts.

The data were analysed using Atlas.ti, following a structured coding pathway moving from open coding to categories, then to the formation of the core themes. The analysis produced five dominant themes aligned with the study's conceptual model: technological drivers, value creation, value delivery, value capture and contextual moderators. Subthemes were generated within each category to reflect a cross-country difference, organisational priorities and technology adoption patterns.

To preserve authenticity, verbatim quotations are used throughout. Each quotation is Identified only by country and participant number to maintain confidentiality. The structure of the chapter follows a theme-based organisation, supported by cross-case comparisons to illustrate similarities and divergences across markets.

5.2 Overview of Themes from Atlas.ti

The analysis produced five primary themes and seventeen subthemes. Table 5.1 summarises these themes and their corresponding subthemes

Table 5.1: Summary of Themes and Subthemes

Main Theme	Subtheme Identified	Countries Represented
Technological Drivers	AI adoption; Virtual Production integration; Growth of streaming	All four markets
Value Creation	Content strategy transformation, technology enabled workflows	All four

Value Delivery	Platform delivery models; Audience access and fragmentation	All four
Value Capture	Monetisation evolution; Cost pressure and diversification	All four
Contextual Moderators	Regulatory constraints; Infrastructure gaps; Cultural proximity.	All four

5.2.1 Data saturation Test

A data saturation test was conducted on the consolidated codes to assess additional interviews were necessary. The saturation curve shows diminishing returns after 12 interview, indicating that the coding saturation points was achieved.

Table 5.2 Data Saturation test

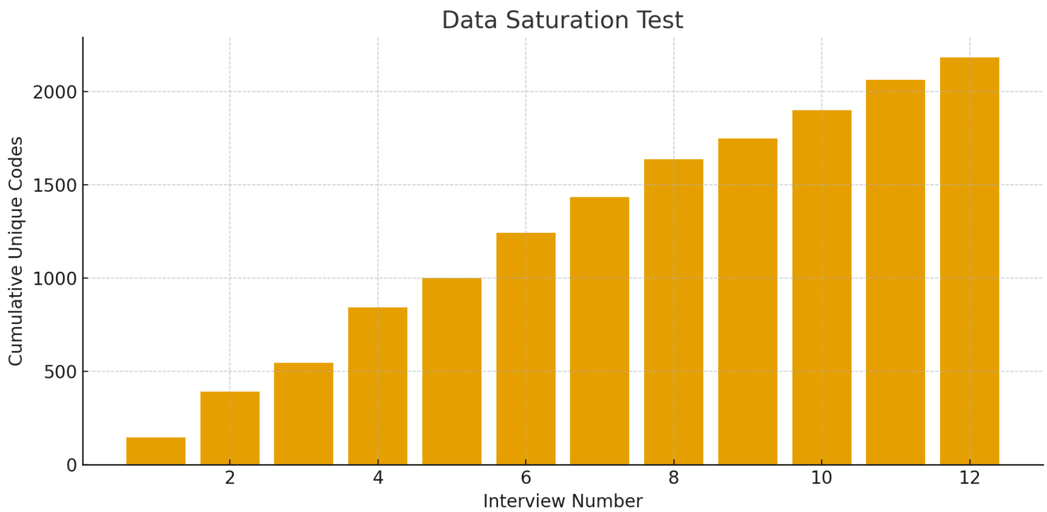

Figure 5 Data Saturation

5.2.2 Code counts and Thematic Consolidation

To validate the rigour of the coding process, the consolidated codes were grouped by research question, theme and sub-theme

Table 5.3: Code Count by Research Questions

Metric	**Total / RQ1 / RQ2 / RQ3 / RQ4**
Total first-line codes	644
Total consolidated codes (>5 grounded)	214
Codes per RQ	RQ1 = 61; RQ2 = 75; RQ3 = 78; RQ4 = *[Auto-calculated]*
Sub-themes per RQ	RQ1 = 19; RQ2 = 11; RQ3 = 9; RQ4 = *[Auto-calculated]*
Themes per RQ	RQ1 = 3; RQ2 = 1; RQ3 = 3; RQ4 = 1

5.2.4 Sub-Theme Arranged by Theme

Table 5.4 Sub-themes arrange and Theme with Code Counts

RQ	Theme	Sub-theme	Code count
RQ1	Technological Drivers	Technological Perception	35
		Strategic Adaptation	15
		Technology Influence	15
		Value Mechanisms	7
		Digital Challenges	6
		BMI Framework	4
		Ai Strategy	2
		Adaptation	1
RQ1	Value Creation	Business Model Reshaping	12
		Content Impact	2
		Barriers To Innovation	1
		Business Strategies	1
		Business Strategy	1
		Business Transformation	1
		Content Development	1
		Content Dynamics	1

		Content Strategy	1
		Innovation Challenges	1
		Process Improvement	1
		Strategic Innovation	1
		Technological Innovation	1
RQ2	Value Delivery	Audience Engagement	1
		Audience Targeting	1
		Streaming Dynamics	1
		Streaming Strategy	1
RQ3	Value Capture	Challenges In Monetisation	1
		Cost Efficiency	1
RQ4	Contextual Moderators	Market Infrastructure	9
		Cultural Influence	1
		Digital Infrastructure	1
		Governance Issues	1
		Infrastructure Impact	1
		Infrastructure Investments	1
		Infrastructure Role	1
		Local Media	1
		Market Challenges	1
		Market Dynamics	1
		Market Engagement	1

5.3 Theme 1: Technological Drivers in Broadcasting

This theme captures participants’ perceptions of AI, virtual production and streaming services as primary forces that reshaping operations, competitiveness and organizational strategy.

5.3.1 Subtheme: AI Adoption in Production and Workflow

Across all markets, AI was regarded as a transformative but unevenly adopted technology. Participants described its primary use cases as:

a) Automated subtitling and dubbing,
b) Quality control (QC) support,
c) Promo generation,
d) Editorial suggestions,
e) and Content recommendation systems.

A South African executive explained the shift:

"AI is taking over the parts of post-production that used to consume hours. Subtitling, rough QC, even colour suggestions, it does them faster. But we're still learning how to regulate it internally." (SA-P3).

A Nigerian participant highlighted workflow benefits:

"Our editors were spending days captioning talk shows. AI cuts that to minutes. The challenge is accuracy, we still need human review." (NG-P1)

AI's adoption was slower in Kenya and Ghana due to cost and skills gaps:

"Everyone is excited about AI, but we don't have the infrastructure or the talent to run heavy AI pipelines. We use it where it simplifies routine tasks." (KE-P2)

Across countries, AI was seen less as a creative tool and more as an operational accelerator.

Yet many participants emphasised concerns around cultural nuances and accuracy:

"AI falls apart when you feed it African languages. That's a real barrier." (GH-P1)

5.3.2 Subtheme: Virtual Production Adoption.

Virtual production (VP) emerged as a new but largely aspirational technology. South African respondents were furthest along with established LED wall stages and proof of concept projects.

A senior South African participants stated:

"Virtual production is no longer a 'nice to have.' It's becoming a strategic capability. It lets us create environments we cannot afford to travel to." (SA-P2)

Nigeria expressed interest, but cited the cost and skills shortages:

"We know VP is the future, but the investment is enormous. Even training a small VP team is expensive." (NG-P3)

Kenya and Ghanaian respondents saw VP as transformative, if, telco-backed investment grows.

Quotations reflected this aspiration:

"Once cloud infrastructure catches up, VP will explode here. It's a matter of time." (KE-P1)

> *"VP could take Nollywood global. But without financing, it stays an idea."* (NG-P4)

VP was associated with:

a) Reduced location costs,
b) Creative flexibility,
c) Faster production cycles,
d) and Environmental sustainability.

But barriers included:

a) Capital intensity,
b) Lack of trained operators,
c) Limited local suppliers.

5.3.3 Subtheme: Streaming and Platform Growth

Streaming was consistently described as the most disruptive technological force, reshaping consumption patterns, advertising and competitive dynamics.

A participant from South Africa commented:

> *"We still have strong linear audiences, but the growth is clearly on streaming. Younger viewers are not waiting for 8pm slots."* (SA-P1)

In Nigeria:

> *"Mobile streaming is the real game-changer. If your service is not optimized for low-data use, you lose the market immediately."* (NG-P2)

Kenya emphasised telco partnerships:

> *"Our streaming success depends on how we bundle with telcos. Data cost decides everything."* (KE-P3).

Ghana highlighted affordability constraints:

> *"People want streaming but can't always afford it. So we see hybrid consumption patterns."* (GH-P1)

Streaming's perceived impacts included:

- Shifts in viewing behaviour,
- Audience fragmentation,
- Pressure to create more original content,

- Heightened competition with global platforms.

Participants agreed that, streaming demands new strategic thinking rather than incremental adjustments.

5.4 Theme 2: Value Creation Transformation.

This theme captures how AI, virtual production and streaming reshape how broadcasters conceptualise and produce value. Across countries, value creation was described as shifting from traditional, linear content pipeline toward more dynamic, insight-driven and technological enabled structures.

5.4.1 Subtheme: Content Strategy Transformation

Participants consistently frame technology as reshaping what content is made, for who and why.

Content strategies across all markets revealed clear trends towards:

1. Localized storytelling,
2. Data informed commissioning,
3. Multi-format content,
4. Faster production cycles, and,
5. Experimentation with digital-first genres.

South Africa was noted as most advanced in integrating data into content strategy. One executive noted:

> *"We no longer greenlight anything without checking trend data, platform heat maps, and behavioural signals. The days of relying on instinct alone are gone."* (SA-P1)

Another added:

> *"Our entire content slate has shifted. We used to chase broad audiences. Now every show is engineered for a micro-community."* (SA-P3)

And from Nigeria, the value creation was frame in terms of volume and speed:

> *"We are in a high-demand ecosystem. Nollywood releases a film every day. Technology helps us keep pace without compromising too much on quality."* (NG-P4)

Kenya emphasised experimentation:

"Short-form, mobile-first content is exploding here. Our content value is shifting from long shows to snackable formats." (KE-P2)

Ghana expressed caution but growing ambitions:

"We want to push boundaries, but budgets hold us back. Technology allows us to dream bigger, even if we adopt slowly." (GH-P3)

Across all markets, participants described a shift toward strategic agility in content development.

5.4.2 Subtheme: Technology Enabled Workflows (AI+VP)

AI and VP were repeatedly framed as pivotal to increasing efficiency and enhancing creative capabilities.

Executive in South Africa, where infrastructure is more developed, highlighted workflow acceleration:

"AI tools are letting us cut down weeks of editorial labour. QC passes that used to take four hours, now take maybe 20 minutes." (SA-P4)

"Virtual production gives us creative freedom we've never had before. Whole worlds built in hours." (SA-P2)

Nigeria echoed similar views, but attributed workflows disruption to resource constraints:

"AI helps reduce the pressure, but we still double-check everything manually. There's a trust gap." (NG-P1)

"VP is the dream, but for now we use green screens and pray the post guys make magic." (NG-P5)

Kenya highlighted the potential of technology to standardise quality:

"Technology finally gives us the chance to match global quality standards. Without it, we stay in the low-budget corner." (KE-P1)

Ghana valued technology's efficiency:

"AI reduces human errors—that's already a win for us. VP will get us there in time." (GH-P2)

This subtheme reveals that technology driven value creation is shaped by:

a) Access to infrastructure,

b) Skill availability,
c) Organisational readiness,
d) Strategic ambition.

5.5 Theme 3: Value Delivery Transformation

Value delivery refers to how broadcasters distribute content and connect with audiences. All four markets showed clear shifts from linear broadcasting toward hybrid or digital-first delivery models.

5.5.1 Subtheme: Platform Delivery Models.

Participants described a major shift towards multi-platform delivery, particularly mobile streaming and OTT services.

South Africa outlined a hybrid model:

> *"We will never abandon linear—it still pays the bills. But the future is clearly digital."* (SA-P1)
> *"Streaming lets us deliver the same show in multiple formats. Linear gives reach; OTT gives engagement."* (SA-P3)

Nigeria stressed mobile-first consumption:

> *"Most Nigerians watch on their phones. If your platform is not optimised for mobile data, you're invisible."* (NG-P2)
> *"Linear is still strong, but streaming sits in every boardroom discussion now."* (NG-P4)

Kenya emphasised user convenience:

> *"Consumers want to control their time. Streaming solves that. Linear can't."* (KE-P3)

Ghana noted a duality of markets:

> *"Urban audiences are already fully digital. Rural audiences still prefer TV. We must serve both."* (GH-P1)

This subtheme reveals that value delivery is no longer about "broadcasting", but about platform orchestration.

5.5.2 Subtheme: Audience Access, Behaviour and Fragmentation

Participants reported substantial shifts in audience behaviour across countries:

South Africa:

"Younger audiences don't know what a scheduled show is. They binge. They scroll. They choose." (SA-P4)

Nigeria:

> *"People watch content anywhere they can find it, TikTok, YouTube, streaming apps. The competition is no longer other broadcasters; it's every screen."* (NG-P3)

Kenya:

> *"Audience habits change faster than our boardrooms can keep up with."* (KE-P2)

Ghana:

> *"Fragmentation is real. We cannot rely on prime-time slots anymore."* (GH-P1)

Executives emphasised that fragmented audiences require:

a) Personalised delivery,
b) Multi formats,
c) Data-driven segmentation,
d) Regional and linguistic adaptation.

This subtheme underscores that the broadcasters audiences relationship is being reconfigured into a personalised, interactive and multi-platform relationship.

5.6 Theme 4: Value Capture Transformation.

This theme presents how technological shifts AI, virtual production and streaming reshape how broadcasters generate and retain revenue. Participants described value capturing as the most disrupted and politically sensitive dimension of business model change. Whereas value creation and delivery transformations were perceived as operational evolutions, value capture was framed as a strategic battleground that determine survival.

5.6.1 Subtheme: Monetisation Model Evolution

South African executives highlighted the pressures on traditional advertising, noting declining ad spend in linear and the migration of major advertisers to digital platforms.

Advertisers are no longer following the old rules. They want accountability, they want metrics, they want attribution. Linear cannot give that at the level digital can." (SA-P3)

Another commented on subscription volatility:
"Households are tightening budgets. A family might keep Netflix and drop us, or vice versa. It's subscription juggling." (SA-P1)

This led to experimentation with hybrid pricing:
"We can't rely on one revenue stream anymore. It's subscription tiers, ad-supported plans, sports add-ons, and bundling." (SA-P2)

Nigeria
Nigeria's market was characterised by:

1. High price sensitivity,
2. Heavy data costs,
3. and Fierce competition with piracy.

A Nigerian executive noted:
"Nigerians will pay for content, but only when the value is undeniable. Otherwise they will find it somewhere else—legally or not." (NG-P4)

Mobile operators influence monetization:
"Our growth depends on telcos. If we don't bundle with data, we lose the youth market immediately." (NG-P2).

Kenya
Kenya respondents points to innovative low-cost streaming bundles:
"Our micro-subscriptions daily or weekly passes are the only way to attract mass adoption." (KE-P1)

Advertising is shifting toward performance marketing:
"Brands want campaigns that follow users across platforms. So we must integrate ad reporting between linear and digital." (KE-P3)

Ghana
Ghana emphasised affordability and diversification:

"We cannot survive on subscriptions alone. We need events, music, sports, partnerships—anything that diversifies revenue." (GH-P2)

Another added:
"Our ad market is small. Streaming subscriptions cannot carry the business." (GH-P1)

5.6.2 Subtheme: Persistent Cost Pressures

Across all markets, cost pressure was described as the most urgent organisational challenge.

Technology Upgrade Costs.

> *"Every new technology requires investment, AI tools, servers, cloud storage. It's expensive and continuous."* (SA-P4)

Content Production Costs.

> *"Audiences want premium content, but premium content is expensive. Our ambitions and budgets don't always match."* (NG-P3).

Talent Costs

> *"There are maybe five AI editors in the country. When we find one, we must pay premium or lose them."* (KE-P2).

Infrastructure Costs

> *"Our cost base is inflated by unreliable electricity and patchy infrastructure. Technology makes things easier, but infrastructure makes things harder."* (GH-P1).

These financial constraints shape value capturing decisions across the continent.

5.6.3 Subtheme: Revenue Diversification Through Technology.

Participants associated technological advancement with new monetization opportunities, especially:

a) Data-driven advertising,
b) Premium streaming tiers,
c) Branded content,
d) Licensing to Global partners,
e) Sports OTT packages,

f) Virtual production service offerings,
g) and Regional co-productions

South Africa

> *"Our future revenue will come from data—how well we can segment audiences and target them."* (SA-P2)

Nigeria

> *"Sport is our biggest weapon. If we package it correctly for mobile, it's gold."* (NG-P1)

Kenya

> *"Virtual production opens new doors we can rent out the facilities to agencies and filmmakers."* (KE-P3)

Ghana

> *"We need to monetise our diaspora. That is our biggest opportunity."* (GH-P2)

This reveals a shift from broad-market monetization to multi-stream, technology-enabled monetization.

5.7 Theme 5: Contextual Moderators Shaping Strategy.

Participants unanimously stressed that technological adoption does not occur in a vacuum. Regulatory uncertainty, infrastructure limitations, cultural preferences, language dynamics and social-economic condition were described as powerful moderators shaping decision-making in African broadcasting.

5.7.1 Subtheme: Regulatory Constraints and policy Gaps

South Africa

ICASA was frequently described as slow-moving:

> *"The technology moves at lightning speed, but regulations move at government speed. That mismatch creates paralysis."* (SA-P1).

Concerns centred around spectrum allocation, content quotas, licensing conditions and compliance costs.

Nigeria

Participants emphasised uneven enforcement:

> *"Regulation here is unpredictable. Sometimes rules change overnight."* (NG-P3)

Another added:

> *"We innovate first and ask for permission later. If we wait for regulation, we don't move."* (NG-P2)

Kenya

Kenya's regulatory environment was seen as progressive but inconsistent:

> *"They have good intentions, but execution is slow. We need frameworks that support digital broadcasting, not punish it." (KE-P1)*

Ghana

Ghanaian participants pointed to unclear digital migration framework:

> *"We are still catching up with basic broadcasting policy. How do we regulate streaming if we haven't stabilised DTT?"* (GH-P2).

5.7.2 Subtheme: Infrastructure and Economic Barriers

Across all markets, infrastructure was described as the single biggest barrier to technological adoption.

Electricity Reliability

> *"You cannot run a virtual production studio on unstable electricity. It's impossible."* (NG-P4)

Broadband Cost and Reach

> *"Data is the new currency. If consumers can't afford it, streaming suffers."* (KE-P2)
> *"Urban areas thrive. Rural areas lag. The digital divide is real."* (GH-P1)

Hardware and Equipment

> *"Importing broadcasting equipment costs a fortune. Exchange rates kill us."* (SA-P3).

Participants portrayed infrastructure as a structural moderator that shapes not just consumer behaviour, but organizational strategy.

5.7.3 Subtheme: Cultural Proximity and Localisation Imperatives.

Culture emerged as one of the strongest moderating forces.

Local Narratives Dominate

“If the content is not local, it will struggle. Africa wants to see Africa.” (NG-P2)

Language Matters

“We cannot scale without multi-language versions. It’s non-negotiable.” (GH-P3)

Youth Culture Drives Digital

“Young people don’t care about channels. They follow creators.” (KE-P3)

Cultural Trust

“Audiences trust local faces and local narratives. Trust is a competitive asset.” (SA-P4)

Collectively, participants described African broadcasting as a culturally anchored ecosystem requiring deep localization, nuanced storytelling and platform designs aligned with everyday life.

5.8 Cross-Case Analysis

The cross-case analysis explores how themes manifested across South Africa, Nigeria, Kenya and Ghana. While patterns of convergence were identified, each market demonstrated unique contextual dynamics that shaped technological adoption, strategic prioritization and BMI mechanisms. The comparison focuses on similarities and differences across the five themes: technological drivers, value creation, value delivery, value capture and contextual moderators.

5.8.1 Cross-Case Comparison Matrix

Table 5.2: Cross-Case Matrix (Technology x Market Realities

Theme	South Africa	Nigeria	Kenya	Ghana

Technological Drivers	Advanced AI + early VP adoption; dual linear + streaming strategy	Strong AI interest; VP aspirational; mobile-first consumption.	Emerging AI; experimental VP; telco-driven streaming	Early AI adoption; minimal VP; slower digital migration.
Value Creation	Data-led commissioning; stronger infrastructure.	High-volume, rapid production ecosystem.	Mobile-first content Innovation; creator-led value	Budget constraints shape creative scope.
Value Delivery	Hybrid linear + streaming, stable infrastructure.	Mobile-first OTT; high data costs.	Telco bundles essential; strong digital appetite	Urban/rural divide; limited broadband
Value Capture	Hybrid monetization; declining linear ad spend	Telco bundle essential; piracy risks	Micro-subscriptions; digital advertising	Diversified revenue; limited ad market
Contextual Moderators	Regulatory delays; high costs	Policy unpredictability; power instability	Mixed regulatory support; digital ambition	Infrastructure gaps; affordability limits

5.8.2 Narrative Interpretation of Cross-Case Patterns

South Africa

South Africa demonstrated the highest technological maturity. Participants described a broadcasting landscape where innovation is strategically planned rather than opportunistic. The country's relatively advanced production infrastructure enabled experimentation with AI and virtual production.

"We are moving from testing AI to operationalising it. That's a big shift." (SA-P3)

However regulatory delays and high operational costs were cited as persistent constraints.

Nigeria

Nigeria displayed rapid technological enthusiasm paired with infrastructural volatility. Streaming adoption is driven by mobile usage ad a massive youth population.

"Nigeria is a digital market forced to operate on analog infrastructure." (NG-P4)

VP remains aspirational, while AI fills operational gaps, piracy, data costs and regulatory unpredictability shaped value capture strategies.

Kenya

Kenya's broadcasting ecosystem is defined by digital optimism and telco partnerships. Mobile content innovation was repeatedly cited as a defining characteristic.

> *"Our market is young, mobile, and incredibly experimental."* (KE-P1)

However, shills shortage and uneven policy execution moderate innovation speed.

Ghana

Ghana exhibited the slowest digital transition, though with strong creative ambition, participants described a dual system where urban audiences engage digitally, while rural audiences rely on traditional TV.

> *"We operate two different markets at the same time."* (GH-P2)

Budget constraints limited large-scale technological adoption.

5.8.3 Key Cross case Insights

Three cross-cutting insights emerged:

1. technological adoption in uneven but converging. SA leads in infrastructure; Nigeria leads in demand; Kenya leads in mobile innovation; Ghana leads in cultural localization.
2. AI is the most accessible technology across all markets, while VP remains limited to SA and high-end production houses.
3. Streaming platforms are the largest disruptor, forcing every market to re-evaluate value delivery and monetisation logic.

5.9 Alignment of Findings with the Research Questions.

This section maps the empirical findings directly onto the three research questions. This is a crucial step in demonstrating the golden thread.

Research Question 1:

How do emerging technologies (AI, virtual production, streaming) influence value creation in African broadcasting?

Findings that Answer RQ1

- AI automates labour-intensive post-production tasks, accelerate. Workflows.
- Data from streaming platforms shapes commissioning and editing decisions.
- Virtual production enables creative flexibility and reduces location costs (primarily in South Africa).
- There is a shift toward local stories, multi-format content and digital-first experiments.
- Technology is perceived as a catalyst for creative ambition and strategic agility.

Representative Quotations:

"AI gives us time to be creative again." (SA-P4)
"VP will redefine Nollywood if we can fund it." (NG-P3)
"Our content strategy is now data-first." (KE-P1)

Research Question 2

How do these technologies reshape value delivery models within the sector?

Findings That Answer RQ2

1. Shift from linear-only delivery to hybrid linear + streaming ecosystems.
2. Mobile-first usage OTT innovation (especially Nigeria and Kenya).
3. Platformisation shifts the broadcaster-audience relationship to personalised, multi-device engagement.
4. Fragmented audiences require new segmentation and UX design strategies.

Representative Quotations

"Linear still matters, but it's no longer the anchor." (SA-P3)
"If it doesn't work on mobile, it won't work in Nigeria." (NG-P2)
"People want choice, and streaming gives that." (GH-P1)

Research Question 3

How do broadcasters reconfigure value capture in response to technical disruption?

a) Monetisation models shifting toward hybrid (SVOD, AVOD, telco bundles).
b) Increasing dependence on data-driven advertising.
c) Talent, equipment and infrastructure costs remain the biggest barrier.
d) Market with affordability constraints employ micro pricing models.

e) Nigeria and Kenya heavily on telco partnerships; SA relies on premium tiers; Ghana relies on diversified revenue sources.

Representative Quotations.

"Without bundles, we can't scale streaming." (KE-P3)
"Subscription juggling is our new reality." (SA-P1)
"Our diaspora is our biggest monetisation opportunity." (GH-P2)

5.10 Theme 6: Organisational Capability Gaps

Across all four markets, participants described organizational capabilities as a critical constraint on technological adoption and strategic decision-making. While technology was viewed as powerful and transformative, executive consistently emphasised that people, processes and organizational readiness were lagging behind technological ambition. This theme captures the capability gaps that shaped how AI, VP and streaming were integrated across organisations.

5.10.1 Subtheme: Skills shortages and digital literacy gaps

Participants across markets expressed concern about the shortage of technical and creative talent capable of working with advanced technologies.

South Africa

> *"We have the equipment and even the budget, but not enough people who truly know how to run AI pipelines or manage VP environments."* (SA-P4)
> *"Digital literacy is uneven in our teams. Some are comfortable with AI-assisted editing; others still struggle with new software."* (SA-P1)

Nigeria

> *"There are maybe a handful of people who can confidently run AI-based workflows. VP experts are even fewer."* (NG-P3)
> *"We don't have a structured talent pipeline. People learn on the job, which slows progress."* (NG-P2)

Kenya

> *"Creatives understand storytelling, but not necessarily the tech that now powers it."* (KE-P1)

Ghana

“Our biggest challenge is training. New tools arrive faster than we can skill up.” (GH-P3)

Across all markets, capability shortages emerged as the most critical internal bottleneck slowing transformation.

5.10.2 Subtheme: leadership and Strategic Alignment Gaps

Executives described internal tensions between innovation units and traditional operations. Several participants highlighted generational and ideological divisions within leadership.

South Africa

“We have innovative teams pushing digital agendas, but some parts of leadership still prioritise linear first.” (SA-P2)

Nigeria

“Leaders want transformation but don’t fully understand what it takes to execute it.” (NG-P4)

Kenya

“Decision-making isn’t always aligned. The digital team sees the future, but some units compare everything to legacy TV.” (KE-P3)

Ghana

“We need leaders who understand technology, not only broadcasting tradition.” (GH-P1)

Executives stressed that alignment at the top is essential for strategic agility

5.10.3 Subtheme: Organisational Change and Cultural Resistance

Resistance to adopting new tools and workflows appeared across all countries, although in different forms.

“Some editors feel threatened by AI—they think it replaces them. It creates emotional resistance.” (SA-P3)

“People say yes to new ideas but then continue using old workflows.” (NG-P1)

“When tech adoption is voluntary, people avoid it; when it’s forced, they push back.” (KE-P2)

“The mindset shift is slower than the technology shift.” (GH-P2)

Participants described these cultural barriers as the invisible friction behind transformation

5.10.4 Subtheme: Process Fragmentation and workflow Misalignment

Several executives noted that production and post-production workflows were not yet ready for integrated digital environments.

> *"We're trying to plug AI into linear workflows that were never designed for it."* (SA-P4)
> *"VP needs end-to-end integration; we still treat it like a standalone tool."* (NG-P5)
> *"Our processes don't talk to each other IT, production, and digital operate in silos."* (KE-P1)
> *"We work in a hybrid world, but our processes are still analogue."* (GH-P3)

The gap between current processes and ideal digital workflows was a major constraint.

5.11 Theme 7: Future Outlook and Participant Predictions.

Executives across markets described the future of African broadcasting with a mix of optimism, urgency and strategic realism. Their predictions revealed how they anticipate technological, cultural and organizational dynamic to evolve over the next 5 – 10 years.

5.11.1 Subtheme: AI as the Core Operational Engine

Participants widely agreed that AI will become embedded in all production, scheduling, marketing and personalisation functions.

> *"AI will be the backbone of our operations from pre-production to recommendation engines."* (SA-P2)

Nigeria highlighted AI's role in scaling:

> *"AI will help us produce more content at quality levels we could never afford manually."* (NG-P3).

Kenya saw AI as a tool for market expansion:

> *"AI-led personalisation will decide who wins the streaming market."* (KE-P1)

Ghana emphasised linguistic shifts:

> *"AI will get better at African languages—once that happens, everything changes."* (GH-P3)

5.11.2 Subtheme: Virtual Production as an Inevitable Capability.

Only South Africa currently operates at scale, but all markets view VP as the future.

> *"VP is not optional; it's the next industry standard."* (SA-P4)

Nigeria emphasised cost-savings:

> *"VP will cut our international travel and location budgets drastically."* (NG-P1)

Kenya highlighted accessibility:

> *"Once we have cloud render farms, VP becomes realistic for mid-tier houses."* (KE-P2)

Ghana stressed creative aspirations:

> *"VP will open global doors for our creatives."* (GH-P1)

5.11.3 Subtheme: Streaming as the Dominant Distribution Logic

Across all markets, participants predicted a long-term convergence around platform-led delivery.

> *"Linear will survive, but streaming will lead."* (SA-P1)
> *"In five years, most of our audience under 30 will be fully digital."* (NG-P4)
> *"Data costs will drop; when that happens, streaming explodes."* (KE-P3)
> *"Urban Ghana is already digital-first; rural areas will follow eventually."* (GH-P2)

5.11.4 Subtheme: Convergence of Media, Telcos and Fintech

> Executives foresee deeper partnerships:
> *"Broadcasters will merge ecosystems with telcos. It's already happening."* (NG-P2)
> *"Payments, data, and content will live in one ecosystem."* (KE-P1)
> *"The future of broadcasting is platform bundling."* (SA-P3)

5.11.5 Subtheme: Global-Local Hybrid Content Economies

Participants anticipate a rise in:

a) Cross-country co-productions,
b) Virtual production studios servicing multiple regions,
c) Diaspora-targeted streaming,
d) Language-diverse content pipelines.

“Africa’s next big export is content—we just need the pipelines.” (GH-P1)

5.11.6 Subtheme: A More Data-driven, Agile, Multi-Platform industry.

Nearly all executives highlighted agility as the defining organizational capability of the future.

> *“The organisations that adapt their business models fastest will dominate the next decade.”* (SA-P2)
>
> *“Tech changes too quickly for slow decision-making. Agility is survival.”* (NG-P1)
>
> *“The future is multi-platform, multi-format, multi-market.”* (KE-P3)
>
> *“Broadcasting will become a tech industry disguised as a creative sector.”* (GH-P2)

5.12 Chapter Summary

This chapter presented the empirical findings from thirteen semi-structured interviews with senior broadcasting executives and strategic decision-makers across South Africa, Nigeria, Kenya and Ghana. Using Atlas.ti, the analysis generated seven interrelated themes capturing how technological advancement, especially AI, Virtual production and streaming shapes value creation, value delivery and value capturing within African broadcasting organisations.

The first theme, Technological drivers, revealed AI as the most widely adopted and pragmatically integrated tool across markets, primarily used to accelerate post-production workflows and enhance operational efficiency. Virtual production appeared highly transformative but limited by infrastructure, capital and specialist skill scarcity. Streaming emerged as the strongest disruptive force, shifting consumption patterns and forcing organisations to rethink distributions.

The second and third themes, Value Creation and Value delivery, showed that broadcasters are transitioning from intuition-driven ti data-informed content strategies, supported by workflow automation and evolving creative pipelines. Delivery is increasingly platformised and mobile-led, with audience fragmentation demanding personalised, multi-formatted engagement strategies. This shift was most advanced in South Africa and Kenya, while Nigeria and Ghana displayed hybrid patterns anchored in affordability and infrastructural realities.

The fourth theme, Value Capture, highlighted the volatility of monetization models under digital transformation. Traditional advertising revenue is declining, prompting firms to experiment with hybrid subscription tier, mobile bundles, data-driven advertising, micro-payment and diversified revenue stream. Cost pressures, especially those associated with talent shortages, infrastructure weakness and equipment procurement, were identified as major constraints on financial sustainability.

The fifth theme, Contextual Moderators, demonstrated that regulatory delays, broadband costs, electricity instability and cultural localization requirements significantly shape how organisations adopt and operationalise technology. These contextual conditions differ sharply across markets, producing region-specific strategies despite shared technological aspirations.

Two additional themes deepened the analysis. Organisational Capability Gaps (Theme 6) underscored talent shortages, leadership misalignment, workflow fragmentation and cultural resistance as central internal barriers. These gaps restrict the ability to operationalise technological tools at a scale. Future Outlook and Participant Prediction (Theme 7), illustrated a strong shared belief that AI, streaming and virtual production will define the next decade of African broadcasting, with convergence across telcos. Fintech and media ecosystems expected to accelerate.

A cross-case matrix synthesized these findings, highlighted convergence trends (e.g., streaming growth, AI-driven efficiency) alongside divergence patterns shaped by infrastructure, regulation and market maturity. Each theme then mapped explicitly back to the research questions, demonstrating a clear golden thread:

a) RQ1 (Value Creation) was addressed through insights on AI-enabled workflows, VP aspiration and data-driven commissioning.
b) RQ 2 (Value Delivery) was answered through findings on mobile-first consumption, platformisation, and change audience behaviour.
c) RQ 3 (Value Capture) was illuminated through evidence of evolving monetization logic, hybrid revenue models and financial pressures.

Overall, this chapter provides a comprehensive and richly triangulated account of how technological advancement interact with organisational strategy and market context in African broadcasting. It establishes the empirical grounding for the upcoming chapter, which interprets findings through the Business Model Innovation framework to explain how broadcasters reconfigure value creation, delivery and capture in response to technological disruption.

Chapter 6 Final work

Discussion of RQ1: How Emerging technologies reshape value creatin in African Broadcasting

6.1.1 Overview

Value creation within the broadcasting space has traditionally been anchored in linear production pipeline, intuition driven commissioning and culturally embedded storytelling practices. The finding in chapter five, show that emerging technologies, particularly artificial intelligence (AI), virtual production (VP) and streaming, have disrupted these long standing assumptions by accelerating workflows, reshaping creative choices and enabling new forms of content experimentation. This. Section interprets these findings through core literature on Business Model Innovation (BMI), value creation logic and digital transformation.

BMI theory positions value creation as the “design and orchestration of resource, capabilities and processes that generate value for customers” (Foss & Saebi, 2017). Most of this scholarship assumes environments with stable infrastructure, strong digital readiness and high institutional predictability. The present findings challenge these assumptions by showing that value creation in African broadcasting is not linear nor primarily opportunity driven. Instead, it is necessity driven, hybrid and mediated by contextual constraints such as bandwidth costs, skills shortages and infrastructural gaps. This distinction allows the study to refine BMI’s explanatory power in emerging markets.

6.1.2 AI as a Catalyst for Process Based Value creation.

Across all four markets, AI was consistently described as the most accessible and immediately impactful technology. Rather than functioning as an overtly creative tool, as often presented in global literature, AI was used primarily for process acceleration and error reduction. This aligns with digital transformation studies that highlights AI’s potential to automate some parts of the labour intensive tasks (Andrew McAfee & Erik Brynjolfsson, 2017) , but the African context reveals an additional layer: AI compensates for structural inefficiencies, including limited manpower, tight production timelines and constrained budgets.

Participants framed AI as enabling value creation in three core ways.:

1. Reducing manual workload (e.g., subtitling, basic QC and rough edits)

2. Increasing creative time by removing repetitive tasks,
3. Improve baseline quality where skilled labour is scarce.

This fundamentally shifts the nature of value creation. In BMI terms, broadcasters are reorganizing their resource configurations, human labour, creative time and technological tools in order to improve speed, consistency and scope if content generation. What is notable is that, AI fills gaps that in other regions would be addressed through higher skill density or deeper production teams. The result is a form of compensatory value creation unique to emerging markets.

Yet, as participants emphasised, AI often “falls apart” when faced with African languages or cultural nuance. This highlights that, while AI accelerates workflows, it also creates a new vulnerability: over reliance on technology that is not fully adapted to the continent’s linguistic and cultural realities. In BMI terms, this points to bounded technological enablement, as technology reshapes value creation, but only within the limits defined by local context.

6.1.3 Virtual Production and the Reconfiguration of Creative Possibilities.

Virtual production (VP) is frequently celebrated in global production studies for its ability to revolutionise content creation by merging physical and digital environments (Li et al., 2022). The findings show that this promise resonates strongly in Africa, but adoption remains uneven and aspirational confirming that technological potential does not translate into immediate model transformation.

South Africa’s VP experiences, for instance, demonstrate early stage business model shifts:

a) Reduced location costs
b) Faster iteration cycles
c) Expandaded creative environments
d) Ability to simulate international settings.

This aligns with BMI arguments that technology can enable entirely new value propositions. However, in Nigeria, Kenya and Ghana, VP is still framed as a future capability. High capital requirements, limited specialist talent and dependency on cloud rendering infrastructure restrict its integration into routine workflows. Therefore, VP currently produces symbolic value creation, and it signals innovation but does not yet fundamentally reshape value creation models outside South Africa.

The African case complicates existing theory by demonstrating that value creation innovation can be temporally an aspirational, existing in parallel with legacy systems. This hybridization is a recurring theme across all the findings and becomes a core contribution to BMI literature.

6.1.4 Streaming Data as a Driver of insight-led Content strategy.

One of the strongest findings is the shift from intuition-driven commissioning of content to data-informed content strategy, enabled by streaming platforms. This reflects wider global trends where analytics and consumption metrics reshape creative decision-making (Lobato, 2019; Evans & Donders, 2021). In African broadcasting, however, this transformation carries a unique implications.

Participants in South Africa and Kenya emphasised the emergence of:

1. Trend analytics
2. Platform heat maps
3. Behavioural segmentation
4. Digital first creative experimentation.

This move value creation from broad, mass-audience programming towards micro-communities and targeted content niches, representing a profound business model shift.

For markets like Nigeria and Ghana, where data availability is uneven or fragmented, the shift is slower but still emerging.

This demonstrates the value creation transitioning towards precision broadcasting, even in markets not traditionally associated with data-driven ecosystems. Theoretical models that describe value creation as primarily resource-based or capability driven (Teece, 2018b) must therefore account for data asymmetries and market fragmentation, which create inconsistent level of insight driven creativity across the continent.

6.1.5 Convergence and Divergence with Literature.

Convergence:

a) Findings align with BMI literature that digital technologies radically expand value creation possibilities.

b) AI and VP acts as enabling technologies that restructure workflows.
c) Streaming introduces new creative logics centred on data and agility.

Divergence/Theoretical Refinement:

d) Unlike western BMIs, African value creation is constraint-driven rather than purely opportunity driven.
e) Technologies are often used to compensate for inefficient systems, infrastructural gaps and talent shortages.
f) Value creation emerges through hybrid adoption rather than full system substitution.
g) Linguistic and cultural plurality create unique barriers to AI-enhanced creative pipeline.

These divergence underline that BMI theory underestimates the role of institutional voids, infrastructural gaps and market volatility in shaping how value creation occurs in emerging contexts.

6.1.6 Synthesis: How Technology Reconfigures Value Creation.

Drawing together the empirical patterns and theoretical interpretations, several insights emerge:

1. AI is reshaping the “how” of value creation, and not yet the “what”.
2. VP creates a parallel creative economy, one that is aspirational in most markets but operational in South Africa,
3. Streaming introduces a new epistemology of creativity, being data-informed, personalised and multi-format.
4. Value creation is hybrid: traditional pipelines coexist with digital-first experimentation, proving that business models evolve non-linear under emerging markets constraints.
5. African broadcasters innovate out of a necessity, refining BMI theory by showing that resource scarcity can drive unique configurations of value creation.

With RQ 1 interpreted, the chapter now turns to value delivery mechanisms.

6.2 Discussion of RQ 2: How emerging technologies reshape Value delivery in African Broadcasting

6.2.1 Overview

Value delivery refers to the mechanisms through which organisational distributes their content, engage audiences and ensure that value actually reaches the market. In the BMI framework, this components reflects how forms reconfigure channels, customer interface and audience engagement strategies under changing technological conditions. Chapter five, showed that value delivery in African broadcasting is undergoing a fundamental realignment, driven by streaming technologies, mobile-first consumption patterns and a new platform ecosystems.

However, unlike markets with stable broadband and well developed digital infrastructures, African broadcasters navigate value delivery within an environment where connectivity, affordability and regulatory constraints deeply influence strategic decisions. This section interprets the findings related to Theme 3 – value delivery transformation, through relevant theoretical arguments, particularly platformasation studies, audience fragmentation research and BMI theory.

6.2.2 Platformisation and Hybrid Delivery Models.

One of the clearest patterns in the findings is the emergence of hybrid delivery ecosystems across all four countries. While linear broadcasting remains important, and this is primarily due to legacy audiences, advertising relationship and infrastructural realities, which has noted that streaming platforms have become central to strategic positioning.

Participants described a dual logic:

1. Linear broadcasting continues to provide a reach, regulatory compliance and stable revenue inflows.
2. Streaming platforms provide engagement, personalisation and data-driven customer insights.

This dualistic structure aligns with global research on “platformisation” (Nieborg & Poell, 2018), where traditional media companies increasingly operate as a multi-platform ecosystems rather than as a single channel broadcasters. However, the African context reveals a unique interpretation: platformisation is not a choice, but a necessity, driven by rapidly shifting consumer behaviour and constrained market realities.

South Africa and Kenya demonstrate the most mature hybrid models, with diversified streaming offerings integrated into existing broadcast pipelines. Nigeria and Ghana adopt a hybrid model more defensively, using streaming primarily to reach mobile-first or urban audiences while maintaining linear predominance in mass markets.

In BMI terms, this signifies a transition from single channel delivery logic to multi-channel, multi-format delivery architectures, where broadcasters must design content packaged that function across heterogeneous access environments.

6.2.3 Mobile-first Consumption and Its Transformative Effect

A defining feature of value delivery in African broadcasting, is the prominence of mobile-first consumption, especially in Nigeria and Kenya. Participants repeatedly described mobile devices as the dominant viewing platform for younger audiences.

Mobile-first consumption has three major implications for value delivery:

a) Delivery must Accommodate Data Constraints

unlike markets with affordable broadband, African audiences often face high mobile data costs. As one participant noted:

"If your platform is not optimised for low-data use, you lose the market immediately." (NG-P2)

This means value delivery is inseparable from data economics, creating a direct link between telcos, platform optimization and content strategy. In BMI terms, mobile first consumption produces resource interdependencies, as broadcasters rely not on their own delivery systems, but also on telecom pricing structures and device ecosystems.

b) User interface needs to be Optimised for Smartphones

Participants described UI/UX challenges related to device diversity, inconsistent network quality and generational differences in digital literacy. These findings refine BMI theory by demonstrating that delivery models in emerging markets must incorporate interface adaptability as a strategic design principle.

c) Delivery becomes Hyper-personalised

Mobile viewing encourages personalised consumption patterns which aligns with research showing that digital platforms weaken the notion of mass audiences (Webster, 2016). African broadcasters must therefore develop delivery mechanisms that support customized content flows, algorithmic recommendations and flexible viewing schedules.

6.2.4 Audience fragmentation and decline on Linear Primacy.

Audience fragmentation emerged as a central theme across all markets. Participants described fragmentation not merely as the coexistence of multiple viewing platforms, but as a deeper fragmentation of the time, attention and social habits. Younger audiences consume content through the following platforms:

1. TikTok,
2. YouTube
3. Instagram reels,
4. Mobile streaming apps,
5. and short-form or creator-led platforms.

This aligns with global studies on the “post-broadcast era”, where audience loyalty becomes highly fluid (Lotz, 2017). In African contexts, fragmentation is intensified by socio-economic diversity, urban-rural divides and linguistic variation.

The decline on linear primacy, however, does not imply the disappearance of broadcasting; instead, it creates a dual markets:

1. Urban, digital-first audiences,
2. Rural or affordability-constrained audiences reliant on linear TV.

This duality challenges BMI frameworks that assume homogeneous customer segments. African broadcasters must simultaneously innovate and maintain legacy systems, a form of strategic ambidexterity that is underrepresented in current BMI theory.

6.2.5 Reconfiguring Audience Engagemnet through platform logic.

The findings showed that that audience now expect interactive, personalised and on-demand delivery experiences. This marks a departure from the traditional broadcast model, where broadcasters dictated content schedules and formats. Streaming reverse this logic, placing control in the hands of the viewer, a pattern well documented in platform economy literature (Chalaby, 2024).

In Africans broadcasting, the shift manifest as:

a) Personalised viewing recommendations,
b) Multi-format content (short-form and episodic)
c) Cross-platform continuity (Mobile – TV – OTT)
d) Community driven viewing behaviours.

Broadcasters therefore need. To build platforms like engagement capabilities, which include data analytics, segmentation, UX design and real time content delivery optimisation. This reconfiguration indicates that value delivery in African markets requires digital capabilities, even when technological infrastructure remains uneven.

6.2.6 Convergence and Divergence with Literature

Convergence with existing scholarship

a) Streaming disrupts linear delivery models and reshapes audiences behaviour.
b) Audience fragmentation requires new segmentation and platforms strategies.
c) Mobile-first consumption plays a central role in emerging markets.
d) Hybrid delivery ecosystem aligns global platformisation trends.

Divergence and Theoretical Refinement for Emerging Markets.

e) Platformisation in Africa is moderated heavily by data pricing, regulatory environments and infrastructural limits.
f) Unlike global markets, African broadcasters cannot fully abandon linear delivery due to socio economic divides.
g) Value delivery requires strategic ambidexterity, balancing legacy systems while building platform competencies.
h) The level of digital maturity varies widely across markets, creating asynchronous delivery transformations.

These divergences highlight that BMI theory, when applied in Africa, must incorporate infrastructural asymmetry and affordability as a core construct influencing delivery design.

6.2.7 Synthesis: How Technology reconfigures Value Delivery.

Bringing the insights together, value delivery in African broadcasting is being reshaped through:

1. Hybrid platform ecosystems that combine linear, OTT and mobile channels.
2. Mobile first delivery, driven by device accessibility and youth behaviours.
3. Platform based audience engagement models requiring data, UX capabilities and segmentation.
4. Fragmented viewing habits, forcing broadcasters to rethink scheduling, content packaging and delivery logic.
5. Telco partnership, which becomes central to scaling delivery across data-limited environments.
6. Dual audiences markets (urban digital vs rural linear), creating complex delivery architectures absent from mainstream BMI literature.

Together, these dynamics show that emerging technologies reshape value delivery not through complete system substitution, but through layered, hybrid and context depended on transformation.

6.3 Discussion of RQ3: How Emerging Technologies reshape Value Capture in African Broadcasting

6.3.1. Overview

Value capture refers to how organisations generate revenue and secure financial sustainability from the value they create and deliver. In the BMI framework, it represents the mechanisms through which firms monetise offerings, allocate costs and achieve profitability. The findings from Chapter five illustrate that value capture is the dimension that is experiencing the most challenges, experimentation and uncertainty within African broadcasting. While technological innovation has expanded content possibilities and diversified delivery channels, it has also destabilized long-standing monetization logics, increased operational costs and amplified competition from notable global platforms.

6.3.2 The Decline of Traditional Revenue Streams

Participants across South Africa, Nigeria, Kenya and Ghana described consistent declines in traditional advertising revenue, which is a trend noted in global literature (Picard, 2011) (Napoli, 2009). However, in African broadcasting, the reasons are complex and intertwined with market-specific challenges:

a) Advertisers demand digital attribution, not just impressions,
b) Youth audiences shifting to mobile/social platforms, reducing linear ad reach,

c) Brand migration to global ecosystems (Meta, Google, Tik Tik),
d) Fragmentation of audience attention, reducing mass market value,
e) Economic pressure reducing corporate marketing budgets.

These shifts undermine the financial foundations on which African broadcasters historically depended. In BMI terms, this demonstrates a collapse of legacy value capture logic, forcing organisations to redesign their revenue models under structural economic pressure rather than strategic choice.

The result is a move away from singular revenue dependencies towards, a multi monetisation ecosystems, which this chapter unpacks in the sections below.

6.3.3 Hybrid Monetisation: Subscription, Adverting and Telco Partnerships.

The findings show that African broadcasters are converging towards a hybrid revenue model, driven by. A combination of streaming disruption and mobile-first consumption.

a) Subscription and Micro-Pricing (SCOD)
   South Africa’s premium-tier subscription model reflects a more mature market with established payment systems and relatively stable broadband.

   However, in Kenya and Nigeria, micro-subscriptions (daily/weekly passes) dominate. As participants explained:
   “Our micro-subscriptions… are the only way to attract mass adoption.” (KE-P1)

This pricing structure aligns with literature on prepaid digital economies in emerging markets (Donner, 2021), illustrating how economic volatility directly inclunces BMI value capture mechanisms.

b) Advertising Transformation (AVOD + Data-Driven Models)
   Participants identified a transition from mass advertising to performance-based digital advertising, requiring broadcasters to integrate:
   1. Cross-platform ad reporting,
   2. Behavioural targeting,
   3. Audience segmentation,
   4. and Multi-device tracking frameworks.

This shift Is not simply a new revenue source; it redefines the broadcaster advertising relationship and demand digital analytical capabilities that many organisations currently lack

c) Telco Partnerships as Critical Monetisation Infrastructure.
   Nigeria and Kenya emphasised a unique and theoretical important pattern:
   Telcos, not broadcasters, control the economic gateway to digital monetization.
   "Our growth depends on telcos. If we don't bundle with data, we lose the youth market immediately." (NG-P2)

This challenges BMI's assumption that firms maintain control over monetization pathways, revealing that in emerging markets:
Value capturing is co-produced across ecosystem partners, not sole within the firm.

6.3.4 Cost Pressure as a Structural Constraint on value Capture.

Value chapter in African cannot be interpreted without examining cost structure. Participants across all markets reported rising operational costs, which offset much of the potential financial gains from technological innovation.

Key categories of the cost escalation:

1. Technology investment costs
   a) AI tools,
   b) Cloud storage,
   c) Servers and compute,
   d) VP hardware.
2. Content production costs
   a) Premium content demands,
   b) Location and logistics,
   c) Inflationary pressures
3. Talent scarcity and skills premiums
   "There are maybe five AI editors in the country… and we must pay premium." (KE-P2)
4. Infrastructural inefficiencies
   a. Unstable electricity,
   b. Reliance on generators,
   c. Bandwidth shortages
   d. Import tariffs on equipment

BMI literature often positions technology as a driver of efficiency gains, but findings from Africa reveal a more nuanced reality:
Technology introduces both savings and new burdens, creating a tension between digital ambition and financial sustainability.

6.3.5 Technology Enabled Revenue Diversification

Despite cost pressures, technological advancement also enables new monetization frontiers, which many participants saw as essential for long term survival.

Key opportunities Identified:

1. Premium streaming tiers,
2. Data driven advertising,
3. Branded content and influencer partnerships,
5. Global licensing and co-production deals,
6. Sports OTT packages,
7. Virtual production studio rentals,
8. Diaspora monetization (especially Ghana)

These opportunities reflect the shift from a traditional broadcaster's value chain to multi-sided media platform, where revenue is derived from:

1. Users,
2. Advertisers,
3. Telcos
4. International buyers,
5. and technology services.

This is consistent with global platform economics (Parker et al., 2017) , but the African context shows that diversification is not optional, it is a survival strategy under economic and infrastructural volatility.

6.3.6 Divergence from Existing Theory

The findings reveal four important divergences from established BMI and digital monetization literature:

1. Value capture in Africa is ecosystem dependent, not firm controlled. Monetization is deeply entangled with telecoms, fintech systems and mobile data pricing.
2. Hybrid monetization emerged from consumer affordability, not strategic differentiation. Unlike Western markets where hybrid models are designed for segmentation, African broadcasters adopt them because no single model is financially viable.
3. Cost pressure shape BMI decisions more strongly than revenue opportunities. BMI theory often assumes firms innovate to expand.
4. Digital piracy remains active, unregulated competitor: This creates behavioural distortions absent from most BMI literature.

These divergences demonstrate that value capture in African broadcasting requires an adapted theoretical lens, one that incorporates institutional voids, informal economies and infrastructural asymmetry.

6.3.7 Synthesis: How Technology reconfigures Value Capture in African Broadcasting

Bringing this section together, the findings show that:

1. Technological disruption destabilises traditional revenue streams, forcing broadcasters into hybrid monetization models.
2. Mobile-first consumption and telco dominance create new economic dependencies that reshape the capture logic.
3. Rising cost and talent shortage constrain broadcasters' ability to extract financial value from technological innovation
4. Technology enabled diversification offers new pathways but requires significant capability development.
5. Value capture becomes a system level challenge, not an internal organizational design issue

Overall, value capture in African broadcasting is deeply shaped by a mix of technologigal possibilities and contextual constraints, illustrating the unique ways that BMI evolve in emerging markets.

6.4 Discussion of RQ4: How contextual factors moderate the outcomes of Technological and Business Model Transformation

6.4.1 Overview

Business Model Innovation (BMI) literature often assumes relatively stable institutional conditions, predictable regulation, reliable infrastructure, accessible talent and consistent economic structures. In contrast, African broadcasting is characterised by infrastructural gaps, regulatory volatility, linguistic diversity, affordability constraints and organisational capability limitations. These contextual conditions do not replace theory; rather, they moderate how BMI processes unfold.

6.4.2 Regulatory Constraints as Moderators of Innovation Trajectories.

Across all countries, regulation emerged as a consistent moderator of technological adoption and business model reconfiguration.

Unlike in developed markets policy frameworks often enable innovation, African broadcasters operate in regulatory systems that are:

1. Slow-moving (South Africa)
2. Unpredictable or inconsistently enforced (Nigeria)
3. Progressive on paper but uneven in execution (Kenya)
4. Still consolidating basic digital migration frameworks (Ghana)

Implication for BMI:
Regulation does not block BMI outright; rather, it delays, distorts or redirects innovation trajectories.

For example:

a) VP adoption in South Africa is slowed by spectrum and licensing issues.
b) Nigeria's unpredictability forces firms into opportunistic innovation
   "We innovate first and ask for permission later." (NG-P2)
c) Kenya's progressive policies may encourage digital experimentation, but practical gaps hinder scaling.
d) Ghana's early-stage frameworks force broadcasters to maintain legacy infrastructure longer.

Theoretical Contribution:

BMI literature rarely accounts for regulatory time lags as a shaping innovation pathways. Your findings introduce the idea that in emerging markets:

BMI is paced not by technological capability, but by regulatory absorptive capacity.

6.4.3 Infrastructure and Economic Constraints as Structural Moderators.

Participants across all four markets repeatedly identified infrastructure, especially electricity reliability, broadband access, bandwidth cost and hardware affordability as the most powerful structural constraints.

These constraints moderate innovation in four clear ways:

a) They shape which technologies can be adopted.
   1. AI is adopted widely because it has a low infrastructure requirements.
   2. VP adoption is limited because it requires stable electricity and high computing power.

b) They shape how deeply technology can be integrated.
   3. Ghana and Nigeria must double check all AI outputs manually due to unstable systems.
   4. Kenya's mobile-first ecosystem pushes innovation toward low data interfaces.

c) They shape the cost structure of BMI
   5. High power and equipment costs inflate the technological investment burden.
   6. Unstable infrastructure leads to redundancy spending (generators, backups, contingency systems).

d) They shape markets access and audience reach
   7. Urban audience consume streaming; rural audiences rely on linear TV.
   8. Broadband divides create fundamentally different value delivery pathways within the same country.

6.4.4 Cultural Proximity, Language and Social Practices as Moderators of Technology use.

The findings show that culture is not a peripheral factor, it is fundamental moderators of how technology shapes value creation and delivery.

Cultural proximity influences:

a) Content commissioning,
b) Storytelling style,

c) Trust in platforms,
d) Success of digital first genres

Language multiplicity moderates:

e) The accuracy and usefulness of AI tools,
f) The cost and complexity of localization,
g) Multilingual subtitle/dubbing workflows,
h) Audience adoption of platforms

Social behaviour shapes:

i) Mobile first consumption patterns,
j) Community viewing habits,
k) Cross platform content sharing

This aligns with cultural proximity theory (Straubhaar, 2007) , but extends it by showing how cultural factors interact explicitly with technological systems.

For instance:
“AI falls apart when you feed it African languages.” (GH-P1)

This means cultural diversity limits the capacity of technology to drive BMI, requiring more human oversight and more nuanced production pipelines.

6.4.5 Organisational Capabilities as Internal Moderators

Theme 6 showed that capability gaps, skills shortages, leadership misalignment, cultural resistance and workflow fragmentation as they plan an equally important moderating role.

These gaps create internal frictions that slow or distort BMI outcomes:

a) AI cannot scale without digital literacy.
b) VP cannot scale without integrated workflows.
c) Streaming cannot scale without coordinated data and marketing systems.
d) Innovation fails when leadership vision and operational reality diverge.

In BMI terminology, these findings challenge the assumption that firms can reconfigure resource easily instead, they show that:

Capability inertia is a central constraint on BMI in African broadcasting.

6.4.6 Economic and Social Realities as a Behavioural Moderators.

Affordability constraints emerged as a recurring moderator of value delivery and value capture.

These realities influence:

1. Pricing models (micro-subscriptions, daily passes)
2. Platform success (data-optimised app win)
3. Content success (local narrative outperform imported content)
4. Monetisation models (bundles, telco partnerships)

Noting all collected data, it clearly shows that African audiences "juggle subscriptions" in responding to data pricing and engage platforms differently from global markets.

6.4.7 Synthesis: how Context Moderates BMI Outcomes

Across all themes, the African context moderates BMI in five major ways:

1. Regulatory system shape innovation timelines
2. Infrastructure defines the limits of technological adoption
3. Cultural and linguistic diversity shapes the success of AI and content strategies
4. Organizational capabilities determine execution speed and depth
5. Economic conditions and affordability shape audience behaviour and revenue logic

Technological advancement drives business model innovation, but context determines what innovation ultimately looks like.

6.5 Integrating Organisational Capability Gaps as Moderators of Business Model Innovation

6.5.1 Overview

While external contextual moderators such as regulation, infrastructure and cultural dynamic influence the trajectory of technological adoption, the findings in Chapter Five also reveal a powerful set of internal organizational moderators. These include skills shortages, leadership misalignment, cultural resistance and fragmented workflows, capture in Theme 6. These capability gaps significantly shape how technological tools such as AI, virtual production (VP) and streaming platforms are integrated into business models.

6.5.2 Skills and Talent Gaps as Constraints on Digital Transformation.

Participants across the four markets expressed deep concern about the shortage of technical and creative talent capable of working in AI-enabled production pipelines or VP environments. The data from South Africa and Nigeria was particularly revealing: despite having the necessary equipment or strategic appetite for innovation, the scarcity of skilled personnel limited organisational transformation.

This aligns partly with dynamic capabilities theory, which argues that organisations must possess the ability to integrate, build and reconfigure competencies to respond to technological change. However, findings show a more complex picture:
In African broadcasting, technological capability often exceeds human capability.

This reversal of the traditional capability hierarchy has three consequences:

1. Technology adoption becomes uneven, even within the same organization.
2. Workflow bottlenecks emerge as skilled specialists become overburdened.
3. Innovation timelines slow, as firms struggle to match tools with talent

In BMI terms, value creation and value delivery potential remains under-realised because human capital cannot keep pace with technological diffusion.

6.5.3 Leadership Misalignment as a Barries to Strategic Coherence

Executives described internal tensions between innovation-focused teams and traditional operational units. This misalignment appears in three forms:

1. Generational divides (younger digital teams vs legacy leadership mindsets)
2. Strategy divides (digital-first vs linear priorities)
3. Capability divides (innovation ambitions vs execution competencies)

Leadership misalignment often leads to fragmented strategic implementation, where pockets of innovation operate without full organizational buy-in. for example:

> “We have innovative teams pushing digital agendas, but some parts of leadership still prioritise linear first.” (SA-P2).

This reflects a deeper structural problem:

Digital transformation demands unified strategic direction, but organisational cultures rooted in decades of linear broadcasting struggle to adapt.

6.5.4 Cultural Resistance and the Human Side of Innovation

Technological disruption often triggers emotional and cultural resistance, especially in environments where job security is uncertain and new tools appear to threaten professional relevance.

Participants noted:

1. Editors resisting AI due to job displacement fears,
2. Teams reverting to old workflows despite new tools,
3. Staff discomfort with unfamiliar interface,
4. Informal claims that “technology breaks the creative process”

Such resistance is not trivial. It slows adoption, reduces the depth of integration and increases the organizational cost of change. In BMI terms, cultural resistance introduces an internal friction coefficient, meaning that the speed and effectiveness of business model reconfiguration depends heavily on organizational culture.

More importantly the findings highlight that cultural resistance is amplified by the contextual factors such as:

1. Limited digital literacy,
2. Lack of structured training,
3. High workload pressure,
4. Historical legacies of analogue broadcast culture

This underlines that technology driven by BMI is as much a social transformation as it is a technical one.

6.5.5 Workflow Fragmentation and Process Misalignment.

Participants across all markets observed that digital innovation tends to “sit on top of” legacy processes rather than replacing them. This creates hybrid systems that are functional but inefficient.

Participants described:

a) AI tools being plugged into workflows designed for analogue systems

b) VP treated as a "standalone tool" rather than an integrated production pipeline
c) Siloed teams (IT, production, digital, marketing) working independently,
d) Parallel workflows that complicate coordination and raise costs.

This pattern reflects what organizational theorist call structural inertia, where existing routines and processes resist change. In African broadcasting, workflow fragmentation restricts how far BMI mechanisms can stretch.

The impact on value creation, delivery and capture is significant:

a) Value creation: creativity expands but production bottlenecks persist,
b) Value delivery: digital platforms scale, but internal systems lag,
c) Value capture: new monetization models emerge, but operational readiness is insufficient.

6.5.6 Synthesis: Organisational Capabilities as Internal Moderators

Integrating all insights, organizational capabilities act as internal moderators that shape

BMI outcomes in five ways:

1. They influence the pace of business model transformation: firms cannot innovate faster than their people can keep up.
2. They determine the scope of technological integration: AI may be adopted widely, but VP adoption is limited by skill depth.
3. They condition the success of digital platforms: Streaming platforms require coordinated teams, data systems and creative pipelines.
4. They mediate cultural adaption: innovation succeeds when organizational cultural supports experimentation.
5. They influence revenue outcomes: Monetisation models fail when operational systems cannot support them.

Technology unlocks new business model possibilities, but organizational capabilities determine whether those possibilities can actual be realized.

6.6 Interpretation of Future Outlook: Implication for BMI Model Innovation

6.6.1 Overview

The future outlook described by participants across South Africa, Nigeria, Kenya and Ghana reflects a collective sense of urgency, optimism and strategic anticipation. While earlier sections examined how technological advancement currently influences value creation, delivery and capture. This section interprets participants prediction as windows into future Business Model Innovation (BMI) pathways.

These predictions are important, as they reveal how leaders envision the next decade of African broadcasting, the capabilities they believe will define competitive advantage and the structural shifts already underway. In many ways, the future oriented sentiments shared participants act as foreshadowing indicators of where the industry is heading and what theoretical adjustments may be needed for BMI to remain relevant in emerging markets.

6.6.2 AI as the Backbone of Future Operational and Creative systems.

Participants widely agreed that That AI will become important capability in integrated across production, commissioning, marketing, scheduling and distributions. This reflects global trends in media industries, but the African perspective adds distinctive nuances.

Participants expect AI to enable:

1. Highly automated production pipelines,
2. Real-time content personalization,
3. Predictive audience segmentation,
4. Automated compliance, QC and metadata tagging, and
5. Fater commissioning and ideation cycles.

These predictions point toward a future where AI becomes a structural capability rather than a set of discrete tools. In BMI terms, this signals a shift from technology enabled process improvements to AI enabled business model redesign.

Notable, the African context shapes these expectation in two key ways:

a) AI is seen as leveller, allowing African broadcasters to match global quality standards despite resource scarcity.
b) AI readiness depends heavily on linguistic and cultural adaptability, which remains a significant gap.

Thus, AI's future potential is clear, but its trajectory is moderated by the contextual factors described earlier.

6.6.3 Virtual Production as an Emerging Competitive Differentiator.

Participants in all four markets described VP as inevitable, even if adoption currently remains uneven. South Africa's advanced VP environment positions the country as a potential regional hub, while Nigeria, Kenya and Ghana anticipate adoption as cloud computing becomes more affordable.

Future expectations include:

a) VP studios servicing regional films and TV industries
b) Cross border co-productions enabled by shared VP infrastructure
c) Lower travel and logistics costs
d) and enhanced global competitiveness and export potential

These predictions align with emerging research on VP's economic and creative impact, and also the fundings add a continental perspective: VP is not only a creative technology, but a potential industrialization tool for African media markets.

In BMI language, VP represents a new value creation frontier, enabling fresh content propositions, new customer segments (International partners) and entirely new service line (studio rentals).

However, as participants noted, the realisation of these opportunities depend on:

1. Investment availability,
2. Specialist training,
3. Cloud compute infrastructure,
4. Policy support for creative industries.

6.6.4 Streaming as the Dominant Future Distribution Logic.

Executives unanimously predicted that streaming will become the primary mode of content delivery across the continent within 5-10 years. This perdition aligns with global literature but takes on sharper significance in African due to demographic and technological factors.

Future expectations include:

1. A full transition from schedule-led to user-led consumption

2. Widening digital-first generational divides
3. Significant declines in linear primetime dominance
4. Expansion of mobile streaming through declining data prices
5. Competitive pressure from global platforms intensifying

These shifts have several implications for BMI:

1. Value creation will increasingly be data-driven, and not intuition – driven.
2. Value delivery will depend on platform ecosystems, not broadcasting infrastructure.
3. Value capture will require new revenue models, especially bundled or hybrid offerings.

The African context adds complexity: success depends heavily on telco partnerships, price-sensitive consumers and levels of digital readiness that vary significantly between urban and rural populations.

6.6.5 Convergence of Media, Telecom and Fintech Ecosystems.

Participants foresee a deep convergence between broadcasters, telecommunications companies and fintech platform. This is consistent with platform convergence theory but appears more pronounced in Africa due to mobile first economies and fragmented payment systems.

Executives expect:

a) Multi-service bundle combining content + data payments
b) Direct carrier billing as a dominant revenue models
c) Cross-platform customer journeys integrated into a single ecosystem
d) Deeper participation of telcos in content production and distribution

Theoretical implication: BMI in African broadcasting increasingly becomes ecosystem-dependent rather than firm-centric.

6.6.6 Global-local Hybrid Content Economies and Regional Collaboration.

A strong theme is participant predictions is the anticipation of:

1. More cross-country co-productions
2. Pan-African VP hubs
3. Diaspora-targeted content offerings
4. Multilingual AI localization tools

5. African content designed for global audiences

This future vision aligns with global “glocalization” and cultural proximity theory but introduces a regional dimension specific to African media markets.

BMI implication: Value creation and delivery will increasingly transcend national boundaries, forming regional content economies informed by shared cultural identities and collaborative resource pools.

6.6.7 A More Agile, Data-Driven and Multi-Platform Industry

Across all markets, executives emphasised agility, digital capability and multi-platform design as the decisive capabilities of the next decade

As participants put it:

“Tech changes too quickly for slow decision-making.” (NG-P1)

“The future is multi-platform, multi-format, multi-market.” (KE-P3

6.6.8 Synthesis: Future Outlook as Forward Momentum for BMI

Taken together, the future outlook reflects an industry:

Transitioning from legacy broadcasting to tech-enabled media ecosystems

1. Dependent on AI automation, cloud, VP and streaming
2. Restructuring audience engagement around platform logic
3. Shifting revenue models toward hybrid, data-driven and partnership-based systems
4. Evolving creative economies toward global local hybrid strategies.

These expectation suggest that African broadcasters are preparing for future where technological convergence, ecosystem partnership and platform driven business models dominate strategic logic.

In BMI terms, the outlook illustrates the next trajectory of business model evolution: one that is multi-layered, ecosystem -structured and deeply shaped by African institutional realities.

6.7 Theoretical Contribution: Advancing Business model Innovation Theory Through an African Broadcasting Lens

6.7.1 Overview

The purpose of this section is to highlight how the study contributes to academic knowledge, specifically to the Business Model Innovation (BMI) literature. While BMI has been widely studied in technologically advanced markets, it remains under-theorised in emerging economies where infrastructure, regulation and organizational capabilities produce different innovation pathways.

6.7.2 Contribution no 1: BMI emerging Markets is Constraint Driven, Not Opportunity Driven.

Much of the dominant literature (e.g., Teece, 2018; Foss, 2017) assumes that business model change is driven by opportunity seeking behaviour in relatively stable economic and institutional environments. Firms innovate because they perceive new market opportunities.

Key findings show a different dynamic:
African broadcasters innovate out of necessity, not from abundance.

Technological adoption, whether AI, virtual production or streaming is often motivated by:

a) Skills shortages
b) Cost pressures
c) Competitive threats from global platforms
d) Infrastructural inefficiencies
e) Need to work around unreliable systems

This reveals a unique logic:
BMI in resource-constrained environment is compensatory.
Firms use technology to patch, accelerate or stabilize operations, not only to pursue new opportunities.

6.7.3 Contribution 2: BMI in African is moderated by Institutional Voids and the Imbalance of infrastructural.

BMI frameworks typical foreground organisation capabilities but underplay the influence of institutional void, weak regulatory systems, inconsistent policies, unreliable infrastructure and insufficient digital capacity.

The study highlights these following conditions as fundamentally moderate:

a) Which technologies can be adopted
b) How deeply they can be integrated
c) How quickly innovation can be scale
d) What forms value creation and capture can realistically take

Examples from the findings include:

e) AI adoption thriving due to low infrastructure demands
f) VP adoption limited by skill levels and cloud services costs
g) Streaming adoption shaped by connectivity data affordability
h) Regulatory lag slowing digital transitions in South Africa and Ghana

This leads to major insight:
BMI mechanisms behave differently under institutional voids.

They become slower, more fragmented, more hybridised and more dependent on workarounds.

6.7.4 Contribution 3: BMI in African broadcasting is Ecosystem dependent rather than Firm centric.

Traditional BMI literature tends to conceptualise business model change at the firm level, focusing on how an organisation reconfigures its own resource, capabilities and processes.

The findings disrupt this assumption.
Across all four markets, there is indication of reliability on:

1. Telecommunication companies for data bundles, billing integration and customer access
2. Fintech platform for micropayment and digital subscription methods
3. Cloud services provides for production and storage scalability
4. Local creators for content localization and audience connection
5. Global platforms for licensing and distribution opportunities.

This reveals a system where broadcasters cannot innovate alone:

Value creation, delivery and capture are co-produced across interconnected ecosystems.

For example:

a) Nigeria's streaming expansion depends on telco partnerships.
b) Kenya's mobile-first content relies on data economics set by telecoms.
c) South Africa's VP adoption depends on global cloud rendering infrastructure.

This study argues for an ecosystem-oriented BMI model for emerging markets, where innovation is not firm-centric but distributed across multiple industrial actors.

6.7.5 Contribution 4: BMI in Africa Evolve through hybridization, not substitution.

BMI frameworks often assume that digital transformation replaces legacy models. For example:

1. OTT replaces linear TV
2. AI replaces manual processes
3. VP replaces physical sets
4. Digital advertising replaces linear as sales

The findings challenge this assumption. Instead of substitution, African broadcasters adopt a hybrid model:

5. Linear + streaming coexist
6. AI + manual review coexist
7. VP + green screen coexist
8. Premium tiers + ad supported tiers coexist
9. Digital first + Cultural first content strategies coexist

Hybridization reflects the reality of operating in markets with

a) Uneven digital readiness
b) Affordability constraints
c) Regulatory complexities
d) Rural-urban divides
e) Diverse linguistic and cultural audiences

6.7.6 Contribution 5: Organisational Capacity Gaps as Internal Moderators of BMI

Existing BMI frameworks foreground dynamic capabilities, but often assume organisations possess (or can easily acquire) the necessary skills, leadership alignment and cultural readiness.

The findings demonstrate that:

a) Skill shortages,
b) Workflow fragmentation,
c) Resistance to change
d) Leadership misalignment

.. all significantly moderate the effectiveness of technological adoption

This leads to a major insight: Capability inertia is not a marginal issue; it is a central determinant of how BMI unfolds in emerging economies.

6.7.7 Synthesis of Theoretical contributions

1. Innovation in emerging markets follows different motivations (necessity-driven)
2. Institutional and infrastructural constraints are powerful moderators of BMI
3. Ecosystem dependence replaces firms' autonomy in revenue and distribution logic
4. Hybridization is a dominant and persistent model of business model transformation
5. Organizational readiness determines how deeply innovation can be realized.

6.8 Chapter Conclusion

This chapter has interpreted the empirical findings through the lens of Business Model Innovation, and demonstrated how technological advancement reshapes value creation, delivery and capture within African broadcasting. The discussion showed that BMI processes in this context, are shaped not only by the transformative potential of AI, virtual production and streaming, but, also by powerful moderating conditions, such as regulatory uncertainty, infrastructural gaps, cultural dynamic and organisational capability limitations.

Across the analysis of RQ1 – RQ4, it became clear that African broadcasters pursue innovation through hybrid, ecosystem -dependent and constraint-driven pathways that diverge from dominant BMI assumptions developed in stable, resource-rich markets. By integrating these insights, the chapter strengthens the theoretical grounding of the study and establishes the conceptual foundation for the concluding chapter, which synthesizes the overall contributions, practical implication and future research directions.

Chapter 7: Conclusion and recommendation

7.1 introduction

This chapter concludes the study by synthesising the research findings, theoretical contributions, practical implication, limitations and areas for future research. Consistent with the structure of the Sample Thesis, this chapter revisits the purpose and rational of the study, connects the findings back to the conceptual framework and articulate how the study advances Business Model Innovation (BMI) scholarship within emerging markets context, and in particularly the African broadcasting ecosystem.

This chapter positions the study within the growing discourse on digital transformation in the Global South, acknowledging that technological adoption processes unfolds differently in environments characterised by institutional voids, infrastructural gaps and affordability constraints (Khanna & Palepu, 2010; Ndung'u & Signé, 2020) . By drawing form the interviews with senior broadcasting executives across four African markets, the study highlights how technological tools such as AI, virtual production (VP) and streaming shape value creation, delivery and capture, also, how organisational capabilities and contextual realities moderate these transformations.

7.2. Restating the Purpose of the Study

The aim of this research, was to determine how technological advancement. Influences strategic decision making in African broadcasting organisation. This study explored:

1. How emerging technologies reshape the value creation,
2. How they reconfigure value delivery models,
3. How they impact value capture mechanisms
4. Ho contextual and organisation factors moderate these processes

Grounded in the Business Model Innovation framework (Foss & Saebi, 2017; Teece, 2018), the study selected four diverse African markets, being South Africa, Nigeria, Kenya and Ghana, in order to examine the differences and similarities in digital transformation pathways.

This research responds to a recognised gap in BMI scholarship, which has historically focused on developed markets with stable institutional environments (Sorrentino & Smarra, 2023). African broadcasting systems operate within vastly different realities: fluctuating infrastructure quality, regulatory uncertainty, linguistic complexity, affordability barriers and diverse audience behaviour (NYAGADZA, 2019). These contextual factors required a context sensitive, interpretivist approach.

Twelve semi-structure interviews with senior executives were analysed using thematic analysis (Braun & Clarke, 2006b), producing seven themes that collectively illuminate how technology an context interact to shape business model evolution.

7.3 Summary of key Findings

7.3.1 technology as a Driver of New Value Creation Logic

The findings reveal that emerging technologies introduce new logic for content creation, production efficiency and creative flexibility. AI supports automated subtitling, Quality Control (QC) acceleration, metadata generation and workflow enhancement. Virtual Production (VP) provides creative freedom, reduced location based production costs and environmental benefits, although adoption remains uneven across the markets. Streaming provides data driven insights that reshape commissioning process and audience informed creativity.

These findings align with digital transformation research emphasising as a catalyst for ne organisational capabilities and creative potential (Urbinati et al., 2020; Verhoef et al., 2021b).

7.3.2 Technology Reshaping Value delivery

The shift from linear broadcasting towards hybrid linear streaming models, reflects global media trends, but African markets demonstrate uniquely fragmented consumption patterns driven by mobile-first behaviours and data affordability. South Africa pursues a dual hybrid model; Nigeria and Kenya show strong mobile-led OTT adoption; Ghana displays slower digital migration shaped by economic constraints.

7.3.3 transformation of Value Capture Models

Traditional advertising-led revenue models face decline, as notable audience migrate towards digital platforms. Broadcasters are increasingly experimenting with :

1. SVOD + AVOD hybrids,
2. Telco data bundles,
3. Micro-subscriptions,
4. Diaspora-target monetisation,
5. VP studio rentals,
6. Data-driven advertising

This aligns with literature describing the disruption of legacy monetisation in digital environments (Karimi & Walter, 2016; Kraus et al., 2022)

7.3.4 Contextual moderates Shaping BMI outcomes

Institutional and infrastructural realities strongly moderate the pace and nature of innovation, supporting arguments from emerging market scholarship (Khanna & Palepu, 2010):

a) Regulatory lag slows digital migration,
b) Unreliable power supply and skills shortage limits VP adoption
c) High broadband costs constrain streaming uptake
d) Cultural proximity and language shape content strategies,
e) Uneven digital literacy requires hybrid content formats.

These structural differences explain why BMI in Africa follows hybrid, multi-speed transformation pathways.

7.3.5 Organisation Capability Gaps

Capabilities strongly influence innovation depth. Skills shortage, leadership misalignment , cultural resistance and process fragmentation hinder the integration of VP and OTT systems. This supports global theories on dynamic capabilities but introduces new insights on capability inertia in resource constrained context (Helfat & Peteraf, 2015; Warner & Wäger, 2019)

7.3.6 Future Trajectory of African Broadcasting

Executives envision an industry increasingly shaped by:

a) AI driven automation,
b) Ecosystem convergence between media, telco and fintech,
c) Regional co-productions,
d) Diaspora-targeted platforms,
e) Data-driven decision-making.

These insights highlights Africa’s readiness for a platform-centred media future, despite structural constraints.

7.4 theoretical Contributions

7.4.1 Contribution 1: Extending BMI to constraint-Driven Innovation

BMI literature, predominantly assumes opportunity-driven innovation in stable markets (Foss & Saebi 2017). This study shows that African firms innovate out of necessity, to compensate for infrastructural volatility, cost pressure or skills shortage. This contributes a new conceptual category: constraint-driven BMI.

7.4.2 Contribution 2: Contextual moderation as a Critical BMI Mechanism

BMI theories largely ignore institutional voids. This study shows that regulatory uncertainty, infrastructure gaps and cultural complexity directly moderate business model transformation, validating arguments from emerging market scholars (Ndung'u & Signé, 2020) .

7.4.3 Contribution 3: Ecosystem-Dependent BMI

African broadcasters must innovate through partnerships with telcos, fintech's and cloud providers. This shifts BMI from a firm-centric process (Teece, 2018b) towards an ecosystem oriented model (Adner, 2017)

7.4.4 Contribution 4: Hybridisation as a long-term transformation pathway

Rather than replacing linear models, African broadcasters sustain co-existing business models, hybrid linear, OTT delivery, AI+ Manual, VP + traditional sets. BMI literature often assumes substitution, and this study shows hybridisation Is persistent and strategic

7.4.5 Contribution 5: Capability readiness as a BMI moderator

The study foreground internal moderating factors such as leadership alignment, digital literacy and workflow integration. This expands dynamic capability theories by demonstrating that capability gaps, are not just strengths, but shape BMI outcomes.

Collectively, these contributions refine BMI theory for emerging markets and offer a nuanced understanding of business model transformation under resource asymmetry.

7.5 Practical Implications

7.5.1 Implications for Broadcasters

1. Develop integrated digital transformation roadmaps
2. Invest in AI and VP skills pipelines

3. Strengthen cross functional collaboration between editorial, tech and digital units
4. Expand data-driven commissioning and content optimisation

7.5.2 Implication for Policy Makers

1. Accelerate digital broadcasting regulations
2. Reduce broadband barriers through policy reform
3. Incentivise local language AI research
4. Support VP infrastructure as a creative industry driver

7.5.3 Implication for Technology and Ecosystem Partners

1. Design low data streaming solutions
2. Develop African language AI models
3. Co-invest in regional VP hubs
4. Structure equitable revenue sharing models with broadcasters

7.5.4 Implication for Talent Development Bodies

1. Establish continental digital media academies
2. Integrate AI, Cloud, VP and OTT modules into media curricula
3. Support professional reskilling programs.

7.6 Recommendation for Future Research

a) Quantitative validation of BMI – technological relationship
b) Audience cantered studies to understand consumption shifts
c) Longitudinal research on technological adoption trajectories
d) Comparative studies with Middle Eastern, Asian or Latin American markets
e) Studies on African languages and AI localisation
f) Impact of VP on regional creative economies.

7.7 Limitations

1. Sample size only limited to 12 participants,
2. Only four African markets explored
3. Rapid pace of technology may limit long-term generalisability
4. Findings based on executive perspective only

7.8 Final Reflection

This study expand understanding of how technological disruption interacts with African institutional realities to shape business model innovation. It demonstrates that innovation in African broadcasting is neither linear nor uniform, but emerges from a complex interplay between technology, the insight from this research offer a foundation for designing sustainable, agile and culturally grounded business models that can thrive within the continent's dynamic technological landscape

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Appendix 1_Interview Guide

Interview Guide

Title of Study: Determine the influence of Technological Advancement on Strategic decision-making in the African Broadcasting industry

Purpose

This interview aims to explore how technological Innovation – particularly AI, VR and streaming, is influencing strategic decision making processes within the African broadcasting organisations.

Section 1: Introduction and Consent

- Brief overview of the study
- Confidentiality and data use
- Permission to record the session
- Right to withdraw at any time.

Section 2: Background and Role

1. Please briefly describe your role and responsibility within your organisation.
2. How long have you been involved in strategic decision-making in broadcasting?

Section 3: Perceptions of Technological Advancement

1. How would you define technological advancement in the context of broadcasting?
2. Which emerging technologies (e.g. AI, VR, streaming platform) has your organisation adopted in the past 5 years?
3. What internal or external factors have driven the adoption of these technologies?

Section 4: Strategic Decision-Making

1. How are strategic decisions made in your organisation about adopting new technologies?
2. What influences the decision-making process within key stakeholders?
3. How does technological readiness or infrastructure affect this decision?

Section 5: Impact on Business Models

1. Has the integration of technology influenced your content creation, distribution or monetisation model? If so, how?
2. Are there changes in how you perceive value creation and audience engagement due to these technological shifts?
3. Have you developed any new partnerships or alliances in response to these changes?

Section 6: Market and Regional Considerations

1. How do you think the African context (e.g., Infrastructure, regulation, market demand) shapes how broadcasting organisations Innovate?
2. What are some regional challenges or advantages you've encountered in this digital transformation journey?

Section 7: Future Outlook

1. What technological trends do you believe will shape the future of broadcasting in Africa?
2. What steps is your organisation taking to prepare for continued technological disruption?

Section 8: Closing

1. Is there anything else you would like to share that may be relevant to this study?

Appendix 2_Declaration

Declaration

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Philosophy in International Business at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

LITHULELE DHLADHA

Name & Surname

Signature

Appendix 3_Ethical Clearence

Gordon Institute of Business Science
University of Pretoria

Ethical Clearance Approved

Dear

Please be advised that your application for Ethical Clearance has been approved.
You are therefore allowed to continue collecting your data.
We wish you everything of the best for the rest of the project.

Ethical Clearance Form

Kind Regards

This email has been sent from an unmonitored email account. If you have any comments or concerns, please contact the GIBS Research Admin team.

Appendix 4 _Codes

RQ	theme	sub_theme	Code count
RQ1	Technological Drivers	Technological Perception	35
		Strategic Adaptation	15
		Technology Influence	15
		Value Mechanisms	7
		Digital Challenges	6
		Bmi Framework	4
		Ai Strategy	2
		Adaptation	1
RQ1	Value Creation	Business Model Reshaping	12
		Content Impact	2
		Barriers To Innovation	1
		Business Strategies	1
		Business Strategy	1
		Business Transformation	1
		Content Development	1
		Content Dynamics	1
		Content Strategy	1
		Innovation Challenges	1
		Process Improvement	1
		Strategic Innovation	1
		Technological Innovation	1
RQ2	Value Delivery	Audience Engagement	1
		Audience Targeting	1
		Streaming Dynamics	1
		Streaming Strategy	1
RQ3	Value Capture	Challenges In Monetisation	1
		Cost Efficiency	1
RQ4	Contextual Moderators	Market Infrastructure	9
		Cultural Influence	1
		Digital Infrastructure	1
		Governance Issues	1
		Infrastructure Impact	1
		Infrastructure Investments	1
		Infrastructure Role	1
		Local Media	1
		Market Challenges	1
		Market Dynamics	1
		Market Engagement	1