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The Identity Trap: How DStv's Broadcast Legacy Constrained Platform Adaptation in Africa

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ABSTRACT

The paper examined how DStv continued to operate on a pipeline broadcasting model as global digital platforms were being developed on the continent. This study employed a qualitative case study approach by analysing 53 documents using thematic analysis. The results demonstrate that there are three main dimensions of this conceptual failure to transform: the continuation of a gatekeeping architecture, a lack of investment in data-driven content ecosystems, and limited involvement in the emerging creator economy in Africa. Over the last decade, the African media landscape has gone through a dramatic shift in its consumption pattern. Although numerous international media corporations have been able to respond to this change by developing platform-based business approaches, traditional broadcasters in emerging markets have found it difficult to redefine their place in the digital world. Unlike existing studies that attribute DStv's decline to technological disruption, this paper argues that the failure is fundamentally conceptual. This study contributes to Platform Ecosystem Theory by advancing discussion on the notion of institutional identity as a platformisation hurdle, and it illustrates the platformisation of Africa's creator economies as distinct from the Western ones.

Keywords: Platform ecosystems, African media industries, digital transformation, gatekeeping, creator economy.

ABSTRAK

Makalah ini mengkaji bagaimana DStv terus beroperasi menggunakan model penyiaran linier (pipeline) di tengah berkembangnya platform digital global di benua tersebut. Studi ini menggunakan pendekatan studi kasus kualitatif dengan menganalisis 53 dokumen melalui metode analisis tematik. Hasil penelitian menunjukkan adanya tiga dimensi utama dari kegagalan konseptual dalam melakukan transformasi ini: kelanjutan arsitektur penyaringan konten (gatekeeping), kurangnya investasi pada ekosistem konten berbasis data, serta keterlibatan yang terbatas dalam ekonomi kreator yang sedang berkembang di Afrika. Selama satu dekade terakhir, lanskap media Afrika telah mengalami perubahan drastis dalam pola konsumsinya. Meskipun banyak perusahaan media internasional mampu merespons perubahan ini dengan mengembangkan pendekatan bisnis berbasis platform, lembaga penyiaran tradisional di pasar negara berkembang justru kesulitan mendefinisikan ulang posisi mereka di dunia digital. Berbeda dengan studi-studi sebelumnya yang mengaitkan kemunduran DStv dengan disrupsi teknologi, makalah ini berargumen bahwa kegagalan tersebut pada dasarnya bersifat konseptual. Studi ini memberikan kontribusi pada Teori Ekosistem Platform dengan memperdalam pembahasan mengenai identitas

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kelembagaan sebagai hambatan dalam proses platformisasi, serta menggambarkan bagaimana platformisasi ekonomi kreator di Afrika memiliki karakteristik yang berbeda dibandingkan dengan yang ada di dunia Barat.

Kata Kunci: Ekosistem platform, industri media Afrika, transformasi digital, (*gatekeeping*), ekonomi kreator.

INTRODUCTION

The last ten years have seen a surge in the adoption of smartphones and the declining prices of mobile data, as well as the spread of digital platforms altering how audiences in Africa listen to, read, and watch media content (GSMA Intelligence, 2023; ITU, 2022; Nyabola, 2018). New kinds of participatory media cultures have emerged mainly because YouTube and TikTok allow audiences to be not only consumers of media but also creators, distributors, and commentators within networked communication systems (Cunningham & Craig, 2019; Jenkins, Ford, & Green, 2018). Further, the emergence of digital platforms has radically changed how media is distributed and consumed by the audience. Netflix and other global streaming providers have penetrated the African market on the back of algorithmic recommendation schemes, content-based strategies that rely on data-driven content, and on-demand streaming infrastructure, which threaten the traditional broadcasting models (Foxman, 2020; Lotz, 2021; Srnicek, 2017). This paper argues that the declining relevance of DStv in the changing African media ecosystem is not necessarily a technological glitch but a conceptual one. The corporation had not properly grasped the digital transformation in African media and remained stuck in an older format of the linear broadcasting model when the global news industry had transitioned to platform ecosystems (Poell et al., 2022).

To understand MultiChoice's institutional problem requires understanding the type of organisation that has dominated African pay television up to now, namely DStv. MultiChoice's commercial logic was closely tied to pay television, channel packages, premium content and the satellite and decoder infrastructure that delivers linear television. The legacy produces organisational path-dependency: existing revenue structures, technology investments, and capabilities were tightly bound to broadcasting arrangements, making a sudden pivot to platform-based, internet-delivered services difficult. This institutional tension mattered particularly in Africa, where digital transformation unfolded amid uneven mobile infrastructure, inconsistent connectivity, and persistent affordability concerns (Mare & Matsilele, 2023; Avle, 2022; Bosch, 2020). MultiChoice's challenge was not simply to access digital technologies but to shift organisational resources and

decision-making processes from a mature satellite subscription business toward a data-driven, participatory, platform-based one. Its response through Showmax and related video efforts shows the organisation was aware of the coming digital threat, but the persistence of a full restructuring of the business never occurred. This is consistent with scholarship showing that technology adoption alone is insufficient for digital transformation, which also requires organisational and institutional reconfiguration (Hein et al., 2020; Poell, Nieborg & Duffy, 2022). DStv's challenge was thus not only shifting viewer preference towards Netflix and YouTube and other OTT services, but reorganising as an institution optimised for linear broadcasting, whose infrastructure, revenue model and processes were built around that logic.

This study focuses on the period from 2015 to 2025, when the digital media landscape in Africa has been undergoing a rapid change due to mobile connectivity, social media, and streaming services (Cisco Annual Internet Report, n.d.; GSMA Intelligence, 2023). The central argument is that DStv's strategic difficulties stem from its inability to transform a gatekeeper broadcaster into a facilitator of a platform ecosystem, a manifestation of the institution inertia that legacy media organisations have experienced under platform capitalism more broadly (Srnicsek, 2017; Van Dijck et al., 2018). Little research has examined how African legacy broadcasters are navigating this shift from gatekeeping to platform ecosystem logics. Prior studies have emphasised technological disruption and market competition as drivers of DStv's problems without sufficiently exploring the conceptual and institutional conditions shaping strategic adaptation, or the role of organisational identity, creator economies, and platform logics in the relevance of legacy media organisations within Africa's emerging digital ecosystems. DStv's dominance, its reliance on exclusive sports rights, and its dependence on legacy hardware infrastructure further hindered its ability to reallocate the resources for systemic digital transformation (Warner & Wager, 2019). This study therefore examines how DStv's continued reliance on a traditional gatekeeping broadcasting model affected its ability to adapt to emerging platform ecosystems in Africa's rapidly evolving digital media landscape.

To address this objective, this study poses the three research questions:

Q1: How did DStv's institutional identity and gatekeeping practices constrain its transition to a platform ecosystem?

Q2: How did emerging platform ecosystems and creator economies challenge DStv's traditional broadcasting model?

Q3: What does the DStv case contribute to understanding platformisation in the African Global South context?

RESEARCH METHOD

This paper uses a qualitative case study research design to explore the strategic path of DStv as one of the important institutional agents of Africa's changing digital media landscape. Qualitative case study methods are especially applicable in exploring complex organisational phenomena in real-life settings, when the boundaries between the phenomenon and the surrounding environment are not well established (Yin, 2018). Case studies are often used in media and communication research to examine how institutions approach change, how technological infrastructures and media organisations transform their relationship (Cui, 2021; Hepp, 2020).

DStv is justified as a case because it historically controlled African pay television markets, and it became one of the most powerful media distribution infrastructures on the continent. As a subsidiary of MultiChoice, DStv has, for decades as a key facilitator between global content creators and African viewers (Tomaselli et al., 2020). Analysing this organisation is therefore useful in understanding how traditional broadcasting organisations respond to the structural upheavals of media platformisation; case study research enables in-depth contextual analysis alongside theoretical trends that extend beyond the case itself (Hepp, 2020; Yin, 2018).

The study uses qualitative document analysis to analyse DStv's strategic responses in the African context from 2015 to 2025, a period selected because it aligns with the growth of streaming, creator economies and platform-based consumption in Africa. The launch of Showmax in 2025 became MultiChoice's response to digital disruption. Document analysis enabled systematic analysis of organisational discourse, strategic decision-making, and industry developments with existing textual material (Bowen, 2009; Kiger & Varpio, 2020).

Data were gathered from 53 documents: 10 MultiChoice annual and integrated reports, 5 investor presentations and executive statements, 12 industry reports (including those from the International Telecommunication Union), 3 media industry and market intelligence reports, 18 peer-reviewed journal articles on platformisation, digital transformation, streaming and creator economies, and African media, and 5 policy and regulatory documents. Academic sources were identified through databases such as Google Scholar. Documents were chosen using purposive sampling because of their relevance to the

research question and the aim of the study. The following were the inclusion criteria: documents must include references to DStv, MultiChoice, African broadcasting, streaming services, platform ecosystems, or digital media transformation in the African context. Those documents not directly related to these themes were not included in the analysis. Thematic analysis followed Braun and Clarke's (2022) approach. Analysis began with repeated readings of all documents to build researcher familiarity, followed by open coding to identify recurring concepts related to platformisation, gatekeeping, digital transformation, creator economies, and organisational adaptation. Codes were then iteratively compared across documents and clustered into three overarching themes: (1) gatekeeping structures remain, (2) platform ecosystems compete, and (3) creator economies flourish.

A structured coding framework (Table 1) tracked the source document, relevant excerpt, initial code, developing category and final theme, maintaining an audit trail linking initial code, developing category, and final theme. Maintaining an audit trail (Castleberry & Nolen, 2018; Kiger & Varpio, 2020). Evidence of gatekeeping included centralised curation, channel bundling, premium sports rights, and controlled distribution (Shoemaker, 2020; Jaksic et al., 2020). Evidence of platform competition included recurring references to algorithmic recommendation, on-demand viewing, and audience analytics (Lotz, 2022; Poell et al., 2022). The evidence from the creator economy theme included user-generated content, creator monetisation and decentralised production and distribution platforms such as YouTube and TikTok (Cunningham & Craig, 2019, 2024). The themes emerged inductively from the evidence rather than being pre-established. Each document was also evaluated for authenticity, relevance, credibility and potential bias. Institutional sources such as corporate documents, industry reports and policy papers were analysed with attention to organisational interests and possible promotional or strategic framing, while peer-reviewed literature was used mainly to contextualise and theorise the analysis. This process reduced the risk of treating the thematic interpretation as a neutral account and strengthened the credibility and dependability of the analysis.

Table 1: Coding Framework Used in Thematic Analysis

Initial Code	Analytical Category	Final Theme
Centralised content selection	Institutional control	Gatekeeping structures remain
Channel bundling	Institutional control	Gatekeeping structures remain
Algorithmic recommendation	Platform-based discovery	Platform ecosystems compete
Audience analytics	Data-driven personalisation	Platform ecosystems compete
User-generated content	Creator participation	Creator economies flourish
Initial Code	Analytical Category	Final Theme
Creator monetisation	Participatory economics	Creator economies flourish

RESULTS AND DISCUSSION

The documents analysed comprises MultiChoice own corporate reporting, academic literature on digital platform economies and media commentary on the growth of streaming in Africa (Table 2). Together, these sources provide contextual insights into the position of legacy broadcasters within the emerging digital economy.

Table 2: Data Sources Analysed in the Study

Data Source	No. of Documents	Time Frame	Purpose of Analysis
MultiChoice Annual and Integrated Reports	10	2015–2025	Corporate strategy, digital transformation initiatives, subscriber trends, and responses to platform competition.
MultiChoice Investor Presentations and Executive Statements	5	2015–2025	Strategic priorities, platform development plans, and management perspectives on digital disruption.
Industry Reports	12	2015–2025	Trends in mobile connectivity, streaming adoption, digital media consumption, and platform growth across Africa

Media Industry and Market Intelligence Reports	3	2015-2025	Developments in African broadcasting, streaming economies, and competitive dynamics
Peer-Reviewed Journal Articles	18	2015-2025	Theoretical and empirical insights into platformisation, ecosystems, creator economies, and media transformation in Africa.
Policy and Regulatory Documents	5	2015-2025	Regulatory environment influencing broadcasting and digital platform development.
Total	53	2015-2025	Analyse DStv's strategic adaptation to platformisation within the African media ecosystem.

Table 3 summarises the empirical evidence supporting the three themes that are discussed. The study developed a multi-stage analytical process to achieve thematic analysis (Castleberry & Nolen, 2018; Kiger & Varpio, 2020). To begin with, the relevant documents were thoroughly examined to acquaint the researcher with the material and to determine the common concepts in the sphere of digital transformation of the African media industries. Second, the main themes were created during the process of open coding of the materials collected. These codes were subsequently clustered into broad thematic groupings, which represented structural transformations in the media distribution systems.

This analytical process has revealed overarching themes, such as the continuing nature of the legacy broadcasting paradigm, the proliferation of digital platform ecosystems across the world, and the increasing power of creator economies in African media landscapes. These themes are the analytic basis for exploring how the institutional strategies of DStv are subject to larger tensions between the traditional forms of broadcasting and the new media system based on platforms. Table 3 shows the empirical evidence of themes chosen for this study. Thematic coding and development of themes: They were then analysed thematically through an iterative process of initial or open coding, focused coding and then the emergence of more abstract analytical categories and themes. In the first phase, the documents were read repeatedly in attempts to identify common themes across them on the topics of DStv's broadcasting practice, digital strategy, platform competition and audience transformation. These initial codes included subscriber packages, channel bundling, premium sports rights, centralised content curation,

algorithmic recommendations, on-demand viewing, creator participation and institutional inertia. Higher-order codes were then created, for example, subscription-based broadcasting, platform competition, creator participation and organisational identity. These categories were then compared across the 53 documents, and then the themes were grouped into overarching themes. Table 3 displays this audit trail, and how the initial codes identified in the documents were connected to the categories, documentary evidence and interpretations that determined the final themes.

When analysing the first theme, this meaning of ongoing gatekeeping appeared in MultiChoice annual reports and presentations to investors and was always linked to subscriber acquisition, channel bundling, premium sports rights and central curation. While it was clear that Showmax was a move towards digital expansion, documentary evidence suggested that it served as a rollout of the broadcast model and not as a viable ecosystem of an open platform. Likewise, the lack of creator participation in the platform, or of user-generated content infrastructures, illustrated the continuation of a gatekeeping logic.

The second theme was supported by industry reports and market intelligence documents, which indicated that the adoption of streaming was growing across Africa from 2015 to 2025. Netflix's rapid growth in on-demand viewing, algorithmic content suggestions, and investments in African originals were all clearly marked in documents. The developments were quite different from those of the traditional pay TV programming model and meant a move toward platform-based media ecosystems.

The researcher identified the creator economy theme; this was through recurring references in industry reports and academic studies to the growth of YouTube, TikTok and other creator-driven platforms. The documents highlighted how smartphone penetration and mobile internet access enabled independent creators to produce and distribute content at low cost.

This study employs a qualitative methodological approach, which makes it theoretically informed to explain industry developments rather than provide a descriptive account of media market trends. Integrating case study analysis and thematic interpretation of documentary materials, the study will produce further information about how legacy media organisations understand technological change and react to the platformification of communication systems in general.

Table 3: Empirical Evidence of Themes

THEME	INITIAL/OPEN CODES IDENTIFIED FROM DOCUMENTS	NO. OF DOCUMENTS	EXAMPLES OF EVIDENCE
Continuation of Gatekeeping	Subscriber packages; channel bundling; premium sports rights; exclusive content; centralised curation; controlled distribution.	21 documents	Subscriber bundles, sports rights, channel curation, Showmax as broadcaster extension
Platform Ecosystems Compete	Netflix growth; YouTube expansion; TikTok growth; Algorithmic recommendations; on-demand viewing; personalised consumption and mobile access	18 documents	Netflix growth, algorithmic recommendations, on-demand viewing
Creator Economies Flourish	YouTube creators; TikTok; user-generated content; creator monetisation; mobile-first production; audience participation	14 documents	YouTube and TikTok expansion, creator monetisation, mobile-first production

Persistence of Gatekeeping Structures

The results suggest that DStv's organisational rationale has not shifted significantly despite the rapid expansion of digital media. Consistent with Gatekeeping Theory, the firm has maintained centralised control over content selection, distribution, and time scheduling (Seuri and Ikäheimo, 2022). The broadcaster plays the role of an institutional mediator that determines how content flows between producers and audiences.

In the MultiChoice satellite model, content moves through a vertically integrated pipeline in which programming is commissioned or purchased, packaged into channels and transmitted via satellite infrastructure (Jaksic et al., 2020). This structure echoes the gatekeeping model articulated by Lewin (1947) and White (1950), in which institutional actors maintain editorial control of what is made available to audiences (Ikäheimo, 2022; Napoli, 2019). Gatekeeping and pipeline broadcasting are related but are distinct: gatekeeping refers to editorial processes of selecting, filtering, and prioritising content, while pipeline broadcasting refers to centralised one-to-many distribution architecture itself (Shoemaker, 2020; Ikäheimo, 2022). In DStv's case, satellite transmission and scheduled programming represent the pipeline structure, while commissioning and

curation represent gatekeeping practice and user-oriented content, increasingly diminishing the role of traditional editorial gatekeepers (Van Dijck et al., 2018; Lotz et al., 2022). This finding was corroborated in MultiChoice's own annual reports and investor presentations, which consistently framed digital initiatives in terms of subscriber acquisitions, bundling, and premium sports rights rather than open participation. Although Showmax marked a move toward digital distribution, the documentary evidence suggests it extended the broadcast model rather than establishing a genuine open-platform ecosystem, which limited creator participation or user-generated content infrastructure.

Platform Ecosystems Competition

The second important theme that appeared during analysis is the disruptive nature of the global streaming platforms on the African media markets. Over-The-Top (OTT) streaming services such as Netflix have also championed content personalisation processes based on data and on-demand viewing systems that have dramatically transformed the expectations of the audience as far as media consumption is concerned (Foxman, 2020; Udoapkpan & Tengeh, 2020). This finding is consistent with Samudodza and Franckle (2026), who stated that the OTT streaming platforms have disrupted South Africa's broadcasting industry. This was achieved by offering consumer-centric viewing experiences, flexible access, and AI-driven personalisation that challenge traditional broadcasters such as DStv. In contrast to traditional broadcasters whose programming grids are based on a programmed schedule, Netflix uses an algorithmic system of recommendations, which are based on analyses of user behaviour to customise the viewing experience for individual subscribers. Such systems allow the platform to dynamically arrange libraries of content based on viewing patterns, enhancing content discoverability and fostering higher player engagement (Lotz et al., 2022).

Besides algorithmic personalisation, streaming services have also unveiled more open-ended subscription services that vary from the bundled channel packages that have been provided by the pay television companies in the past. This trend is representative of the overall changes in audience behaviour that come with digital media settings, where users are becoming more demanding of their own autonomy and control of their patterns of media consumption (Lotz et al., 2022). This shift in audience behaviour is also evident in South Africa, where millennials increasingly preferred streaming platforms over scheduled television during the COVID-19 pandemic because of their flexibility, convenience, and greater control over viewing experiences (Viljoen-Stroebe, 2023). The opening of Netflix in the African markets is also an indicator of the interest in regional storytelling and local

production. The platform has invested in African productions, thus creating networks for the local creative industries and distributing these narratives to global audiences at the same time (Foxman, 2020).

Creator Economy Disruption

A third major observation is associated with the rise of the creator economy that has radically transformed the framework of media production and distribution in Africa. The digital ecosystems of YouTube and TikTok have enabled individual creators to create, share, and monetise content without depending on the traditional broadcasting institutions (Burgess & Green, 2018; Cunningham & Craig, 2019). They are open ecosystems that allow users to post content directly on them and have monetisation strategies such as advertising funds, audience subscriptions, and brand partnerships. This model radically decreases entry obstacles to the creation of media and enables creators to establish their own audiences that are uninterested in legacy media (Cunningham & Craig, 2019).

The creator economy has thrived in the African context as smartphone and mobile internet connections have allowed the production and distribution of digital video at relatively affordable prices (GSMA Intelligence, 2023). This has enabled more African creators to establish online communities that are competing with traditional television viewers in terms of size and viewership.

The change is a major turn in the relationship of power in media production. Unlike traditional broadcasters, who in the past operated as institutional gatekeepers and mediators of entry along with access to audiences, digital platforms allow more decentralised practices of cultural production where creators engage with the audience in participatory media spaces (Van Dijck et al., 2018). The emergence of this creator ecosystem is thus one of the greatest structural challenges facing legacy media organisations like DStv.

In full detail, the findings show that DStv has found itself in a position where it has not been able to pivot to the changing platform landscape in Africa due to its continued reliance on a gateway broadcasting model. Although Showmax was launched in 2015, it has a catalogue-driven approach to television, rather than a data-driven ecosystem. Despite Showmax's relaunch in 2023 with Comcast and NBC Universal, analysts observed that the platform has failed to gain a significant market share in the African streaming market compared to giants such as Netflix, Disney+ and Amazon Prime (BusinessTech, 2023).

This reflects DStv's strategic inertia, which is not just technological; it is conceptual, because the company did not reconfigure its institutional identity to fit platform logics.

Another factor is the lack of investment in data-driven content ecosystems. According to Netflix Media Centre (2023), Netflix has, for example, since 2016, spent more than €160 million on African productions, resulting in more than 12,000 jobs and original series like *Blood & Water* and *Savage Beauty*. In 2023, Netflix announced new partnerships with South African producers and revealed new African originals at Fame Week, further emphasising its localised and algorithmically optimised content strategies (Netflix Media Centre, 2023). In contrast, the content strategy of DStv was more of a catalogue approach with little personalisation and poor use of audience analytics, thereby indicating that its strategy is not platform-ready.

The third theme is a lack of interaction with the booming creator economy in Africa by DStv. Conversely, with platforms like YouTube and TikTok, it has been possible for African creators to build audiences and monetisation opportunities without going through the traditional broadcaster system. In 2023, TikTok rolled out more monetisation options in South Africa, and YouTube creators in Nigeria generated a combined revenue of more than US\$25 million, demonstrating the extent of decentralised content economies (Africa Business Insider, 2023). According to TM Global (2024), the African creator economy was valued at US/ \$3.08/ billion in 2023 and is projected to reach US/ \$17.84/ billion by 2030, driven by youthful demographics and mobile-first consumers. However, DStv was not so much involved in this participatory ecosystem as it was simply a bystander, strengthening its position as an actor in a production process without being a facilitator (Comunian, Ikpe & Oni, 2024).

Institutional Identity As A Barrier To Platform Transition

The document analysis revealed that the technological disruption and the growing competition from streaming services do not completely account for the problems faced by DStv. The organisation remained a broadcasting organisation and not a platform ecosystem facilitator, as evidenced by annual reports, strategic communications and industry analyses (see Figure 1). MultiChoice's digital initiatives, like Showmax, did not change the organisational logics of broadcasting but rather reinforced the existing ones. The results imply that the institutional identities of the actors had a profound influence on DStv's reactions to the challenges it encountered in the context of its time as a dominant force in satellite television markets. As in recent research on media change, there is a tendency for organisations to use new technologies while not necessarily changing their

organisational cultures and governance models (Poell et al., 2022; Lotz, 2023). This meant that DStv's shift to platform-based media was not limited by a lack of technological resources but rather by an inability to redefine itself from a content gatekeeper to an ecosystem orchestrator.

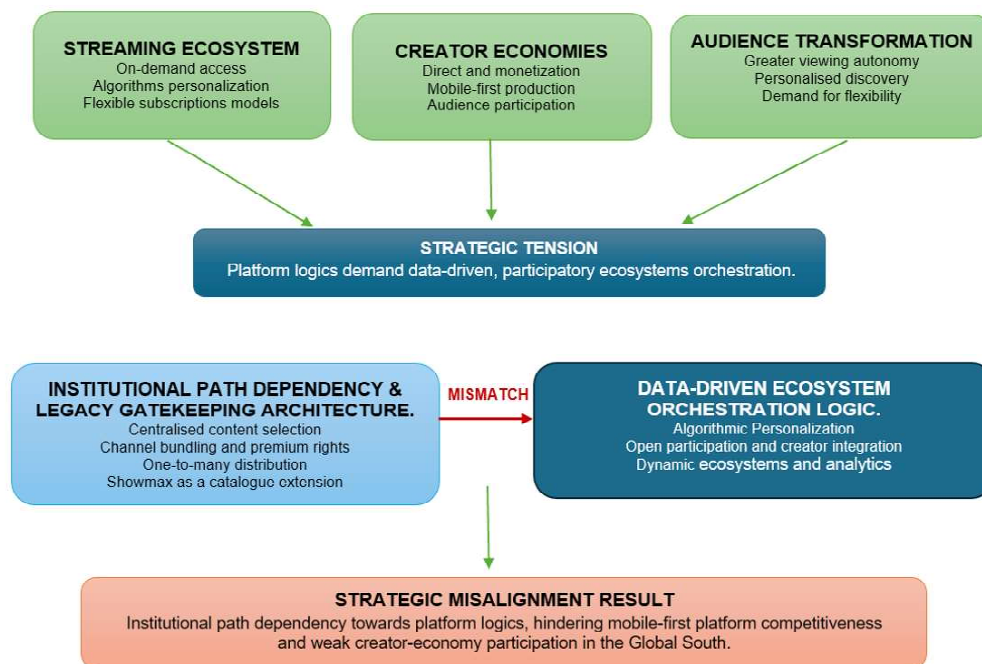


Figure 1: Conceptual Model of DStv's Platformisation Mismatch

Systemic Interaction of Components in the Platform Ecosystem Misalignment Model

Institutional inertia sits alongside external drivers of digital change, conceptualised as a dynamic in Figure/ 1, which creates a misalignment between DStv and the mobile first media landscape in Africa. The three external forces that shape legacy broadcasters are streaming ecosystems, creator economies and audience transformation. All converge to put pressure on legacy broadcasters to embrace participatory and data-driven orchestration logics.

Streaming ecosystems are the technological and infrastructure transition towards algorithmic personalisation, flexible subscription methods and on-demand consumption (Lotz/ 2022; Foxman/ 2020). These systems introduce new temporal and spatial dynamics to access media that stand in contrast to the traditional ways of accessing mass media and require constant information feedback loops that cannot be easily replicated in the traditional broadcaster model.

Creator economies involve new production and monetisation systems that allow for decentralised creation. Mobile-first platforms like YouTube and TikTok allow creators to directly connect with viewers rather than relying on the traditional set of broadcasters and make content a participatory economic activity (Cunningham/ &/ Craig/ 2024).

Audience transformation is the reflection of the behavioural and cultural changes in the audience's relationship with autonomy, personalised discovery and flexible viewing patterns (Viljoen-Stroebe 2023). The concept of algorithmic curation and interaction stands in stark contrast to the one-to-many distribution logic of satellite broadcasting, and is now becoming a received audience expectation.

All of these external forces come together in a strategic tension which requires data-driven ecosystem orchestration, algorithmic and dynamic (Poell, Nieborg, Duffy 2022). DStv's legacy gatekeeping architecture, institutional path dependency and structural inertia, which are based on centralised content curation, channel bundling and premium rights, however, is a force that resists this change. The organisation is consistently connected with pipeline broadcasting, and the model of operation is based on control and exclusivity (Seuri/ &/ Ikäheimo/ 2022).

The cross-disciplinary relationship between these two logics creates strategic misalignment: external pressures of digitalness call for participatory orchestration while internal pressures of institutional identity reinforce hierarchical gatekeeping. This misalignment is reflected in low platform competitiveness, low participation in the creator economy and restricted innovation in Africa's mobile ecosystem.

The model contributes to the Global South framework of Platform Ecosystem Theory and Gatekeeping Theory by systematically mapping the relationship. It illustrates how institutional identity is a conceptual obstacle to the platformisation process, showing how the institutional legacy of the broadcasters is resistant to the transformation towards a participatory and data-driven media environment (Srnicsek/ 2017; Van/ Dijck/ et/ al./ 2018).

Meanwhile, it builds on the concept of Gatekeeping Theory by presenting gatekeeping as an organisational resistance that stifles open participation and creator integration, bringing into view how legacy broadcasters in the Global South do not align with the data-driven orchestration of the ecosystem (as introduced in Srnicsek, 2017 and Van Dijck et al., 2018). This articulation places the digital transformation of Africa in the context of platform capitalism, thus positioning strategic misalignment as a conceptual, rather than merely technological, issue.

THEORETICAL AND CONTEXTUAL IMPLICATIONS

Gatekeeping Theory

The theory was first developed by Kurt Lewin (1947) and later applied to journalism by David Manning White (1950). The gatekeeping theory conceptualises media institutions as intermediaries between producers and audiences. In this context, editors, broadcasters, and media organisations function as gatekeepers who determine what information enters the public. The theory has been applied in the past to elucidate the influence of institutional frameworks, professional standards and editorial decision-making processes in the production and circulation of news and media content (Shoemaker, 2020). Traditional broadcasting systems support the concept of gatekeeping since it is based on centralised institutional control over the distribution of media. Television networks, among others, decide on the types of programmes commissioned, channels carried on broadcasting platforms, and the type of cultural content that will be given priority in the programming schedules (Lotz, 2021). This model positions viewers as passive recipients of media content curated by producers and distributors rather than active participants in content production or distribution. Within the satellite broadcasting model, DStv was a dominant gatekeeper by controlling access to a substantial proportion of television channels and programming across Sub-Saharan Africa. This model enabled MultiChoice to exert considerable influence over media distribution across Sub-Saharan Africa, positioning DStv as a key intermediary between content producers and audiences while shaping viewers' access to television programming (Foxman, 2020; Jaksic et al., 2020; Tomaselli et al., 2020).

Gatekeeping and pipeline broadcasting need to be understood as related but distinct dimensions of media power. Gatekeeping refers to the institutional and editorial processes through which media organisations select, filter and prioritise content and determine which voices become visible to audiences (Shoemaker, 2020). Pipeline, or linear broadcasting, refers to the centralised one-to-many architecture through which content is distributed from broadcasters to audiences. In the DStv context, satellite transmission, channel packaging and scheduled programming represent the pipeline structure, while commissioning, content selection, curation and prioritisation represent gatekeeping practices (Jaksic et al., 2020; Ikaheimo, 2022). It is important to distinguish these concepts because DStv's platformisation challenge involves both the persistence of centralised distribution structures and institutional gatekeeping practices within an increasingly participatory and data-driven platform environment (Hein et al., 2020; Poell, Nieborg & van Dijck, 2023).

Platform Ecosystem Theory

The platform ecosystem theory offers an alternative approach to the organisation of contemporary digital media industries. Hein et al. (2020) have argued that digital platforms do not generate value through content generation, but rather through networks among various groups of users within networked ecosystems. These platforms represent technological systems that allow creators, viewers, advertisers, and developers to communicate in a common digital space. In contrast to the classical, linear broadcasting model where products or services are delivered through linear production chains, platform businesses use multi-sided markets, which create network effects with the increased number of users in the ecosystem (Srnicek, 2017). The more people on the platform, the more valuable the platform will be, and the type of competitive advantages that firms that can build huge user bases will develop.

In the media sectors, the digital platform has replaced traditional broadcasters as the key intermediaries in the distribution of content. Netflix operates as a streaming platform that is personalised by algorithmic analytics, which implies a data-driven content recommender, and YouTube is an open creator ecosystem where users can upload, distribute and monetise video content (Jenkins et al., 2018; Lotz, 2021). The platforms are blurring the old borders between producers and audiences, allowing a new participatory media culture where the users are consumers, creators, and distributors of media content (Burgess & Green, 2018; Cunningham & Craig, 2019).

This means that the introduction of digital technologies has affected media industries, generating academic research into the shift in power, distribution, and audience of media. Past research on media systems has focused on the role of central institutions and their control over access to information (White, 1950; Napoli, 2019), but new research has emphasised the shift towards networked interactions among users, creators, advertisers, and technological systems that are brought about by digital platforms (Van Dijck, Poell, & De Waal, 2018; Hein et al., 2020). However, this is not without controversy about how much platformisation constitutes a democratisation of media production, and how much it is a remediation of power.

Platform ecosystem theorists maintain that digital platforms create value through network effects and multi-sided interactions, instead of linear production and delivery processes found in traditional media organisations (Srnicek, 2017; Hein et al., 2020). This view sees Netflix, YouTube and TikTok as having revolutionised media industries, providing more opportunities for audiences and creators to participate, and using data-driven content discovery systems to power them. However, critical political economy

scholars contest celebratory narratives of platformisation, noting how platforms have enabled novel concentrations, surveillance, and labour exploitation practices by extracting and monetising user data (van Doorn & Badger, 2020).

The conflicting viewpoints indicate that platformisation is not just about technology; it is a broader restructuring of economic and cultural power. There is a strong focus on how digital platforms and mobile connectivity can open participation and cultural expression possibilities and generate audience engagement (Bosch, 2020; Nyabola, 2018). There are other scholars who warn of the reproduction of inequalities elsewhere in the world, particularly through platform expansion in Africa, which tends to rely on infrastructures and governance systems operated by multinational technology corporations (Avle, 2022; Mabweazara, 2022).

Studies on legacy broadcasters have tended to focus on the issue of technological disruption, subscriber loss, and increasing competition from streaming and over-the-top (OTT) television services (Foxman, 2020; Lotz, 2022; Udoakpan & Tengeh, 2020). They have paid less attention to the role of organisational identity, institutional cultures and inherited gatekeeping logics in the ability of legacy broadcasters to function in platform-based contexts. Prior studies, therefore, shed light on the challenges that broadcasters encounter, but fail to provide insight into why some organisations face difficulties in making the move from producer to consumer flow to a platform-based ecosystem.

Moreover, although there has been a significant body of literature on platform capitalism and digital transformation in Africa, the research focus has been limited to African legacy broadcasters, and the negotiation of the transition from gatekeeping architectures to platform ecosystem logics has been neglected. Traditional broadcasting institutions are also overlooked in the literature regarding the emergence of creator economies and participatory digital cultures as strategic problems. The gap is especially pronounced for DStv, which has long been a force in African media markets and is now impacted by global streaming platforms and creator-focused platforms.

This study seeks to fill those gaps by not only studying DStv as a broadcaster dealing with technological disruption, but also as an institution facing a more fundamental challenge, that of moving from a broadcasting gatekeeping logic to a platform ecosystem logic. The study extends and builds on the current global debates on platformisation, institutional adaptation and media transformation in the African context by articulating two theories: Gatekeeping Theory and Platform Ecosystem Theory. The study applies

these theories in the context of African media, thereby contributing to the ongoing debates on platformisation, institutional adaptation and media transformation in the Global South.

The DStv case highlights that platformisation in Africa is not just a technological shift from broadcasting to streaming but a broader shift in institutional power and in how audiences engage with media and media distribution. Some existing scholarship posits that platformisation is not about linear production and distribution flows, but about data-driven interactions between users, creators, advertisers and technological infrastructures (Srnicek, 2017; Van Dijck et al., 2018; Hein et al., 2020). The results of this study indicate that the strategic responses of DStv were still mainly following a gatekeeping logic despite the presence of digital services like Showmax. The company has embraced streaming technologies, but it has stayed wedded to a centrally controlled content model, subscription pricing programs, and institutional oversight of distribution, reminiscent of broadcasting-era organisational practices. This discovery aligns with Lotz's (2021) claims that legacy media companies tend to adopt digital technologies without questioning their organisations' core models.

The study also shows that platformisation in Africa is deeply linked to socio-economic processes on the continent. Mobile internet connectivity and penetration of smartphones, and the growing use of social media, have spread the production and consumption of media across the continent (GSMA Intelligence, 2023; ITU, 2022). According to Bosch (2020) and Nyabola (2018), African audiences are now active in digital cultures where the production and dissemination of content are no longer dominated by traditional media institutions. The DStv case thus shows how, in Africa, platformisation is a technological, economic, and cultural shift that is questioning media power structures.

The results show that institutional inertia is one important but unexplored aspect of Platform Ecosystem Theory. While DStv possesses significant financial resources, market power and technology, it did not make a full shift to a platform ecosystem approach, as its focus was still tied to legacy broadcasting logic. This is in line with studies indicating that the transformation of media is mostly not redefined as an organisational reconfiguration but as a use of the existing institutional structures (Lotz et al., 2022; Van Dijck et al., 2018). Previous theories focus on the importance of network effects, data infrastructure, and ecosystem involvement (Hein et al., 2020), but the DStv case also demonstrates the need to redefine the organisation's identity, shifting from a content gatekeeper to an ecosystem facilitator.

The digital transformation in Africa has been mobile-first. Digital platform development in Europe and North America started with broadband Internet and the desktop computer, while audiences in Africa have mostly accessed digital platforms via their smartphones and mobile connectivity (GSMA Intelligence, 2023; ITU, 2022). This has created unique media consumption behaviours based on mobility, affordability and flexible content access. African platformisation takes place in a context of unequal digital infrastructure, socio-economic disparity, and high linguistic and cultural diversity (Mabweazara, 2022; Mare & Matsilele, 2023). African media systems have been criticised for creating new forms of dependency on technological platforms, data systems and governance structures run by multinational corporations (Avle, 2022; Mabweazara, 2022). The situation is similar in the DStv case because it has not just local rivals, but also the likes of Netflix and YouTube, both of which are more powerful technologically and have far more data. This also corroborates the calls for a more context-specific notion of platformisation in the Global South (Mabweazara, 2022).

REFLECTIONS

Table 4: Key Findings Summary

Key Findings	Empirical evidence	The strategic implication
Persistence of Gatekeeping Structures	The continued reliance on channel bundling, premium sports rights, centralised content curation and subscription packages. Showmax replicated broadcaster logics.	There is limited ability to facilitate participatory and networked media ecosystems.
The rise of Platform Ecosystems	The growth of Netflix, YouTube and TikTok is supported by algorithmic recommendations, on-demand access and ecosystem participation.	Audience expectations shifted from scheduled broadcasting to personalised consumption.
Expansion of Creator Economies	The growth of African content creators on YouTube and TikTok was supported by mobile-first connectivity and platform monetisation systems.	Traditional broadcasters lost their historical monopoly over content distribution and audience access.

Institutional Identity Barriers	DStv continued to identify as a broadcaster despite digital transformation initiatives. Platform technologies were adopted without organisational restructuring.	Institutional inertia restricted the transition from gatekeeper to ecosystem facilitator.
African-Specific Platformisation Dynamics	Mobile-first internet access, youthful demographics, linguistic diversity and affordability concerns shaped platform adoption.	Platform transition in Africa differs from Western platformisation trajectories.

From the DStv case, the notion of platform transformation must not be seen only as a process of technological adoption but rather also as a process of institutional and organisational reconfiguration. While legacy media organisations may have the technical means, the financial resources and market presence to engage with digital environments, a change of organisational identity, governance and direction is a prerequisite for successful platform transition (Lotz, 2023; Hein et al., 2020). The findings of this study indicate that the challenges that DStv faced were not directly related to the inability to adopt digital technologies but can be linked to its ongoing broadcasting identity that prioritises gatekeeping, control of content and linear distribution logics. This observation is in line with the emerging research which suggests that institutional cultures and historically charged organisational practices often shape adaptation to platform-based ecosystems (Poell, Nieborg & Duffy, 2022; van Dijck, Poell & de Waal, 2018).

Moreover, the study demonstrates that the platformisation process is neither steady nor uniform across geographical settings. Instead, platform transitions are influenced by certain socio-economic, cultural and infrastructural conditions. Platformisation is defined by mobile-first connectivity in the African context, youthful population, unequal digital infrastructures, linguistic diversity, and persistent socio-economic inequalities that impact media production, distribution and consumption processes (Mare & Matsilele, 2023; Mabweazara, 2022). Thus, no theory based on North American or European experiences is sufficient to explain platform development in Africa. A more contextually aware and de-Westernised approach to understanding platformisation, therefore, is reinforced in the DStv case, as a recognition of the unique journeys that digital transformation takes in the Global South (Mabweazara, 2022; Avle, 2022).

In recent years, the concept of media ownership in Africa has been expanding beyond the traditional news media companies to incorporate new media platforms, such as social media, streaming services and other digital media tools and platforms for content creation and dissemination (Mukhongo, Mwaura & Omwoha, 2024). Such transformations are especially noteworthy in broadcasting, where traditional media organisations now share the field with a mix of global technology firms and platform-based rivals, generating new competitive dynamics, as well as reinforcing the existing communicative power. The infrastructural level is linked to the ownership and control of digital networks, and platformisation cannot be understood outside of it in Africa. Multinational technology firms' efforts to expand their undersea cables and other internet infrastructure have led to an awareness of technological dependence, data extraction, and the unequal power of internet infrastructure in African societies (Mwema & Birhane, 2024). As well, the findings of this study show that the digital participation of 25 African countries is significantly linked to ICT infrastructure, policy environments and social inequality, indicating that the digital media ecosystem is not determined by the technology itself, but by the structural environment. Thus, from the perspective of digital inequality in the Global South, digital technologies should not just be considered as a matter of access, but also as a matter of how the users are being included in digital systems and if they are being included in a way that leads to equitable or adverse outcomes (Heeks, 2022). This is also seen on global platforms expanding into African markets, with Free Basics and Facebook in Africa, as an example, as a platform of connectivity, platform expansion, regulation and corporate interests in the governance of digital communication (Nothias, 2020). Therefore, the platformisation of Africa should not be seen solely as a process of technological uptake, but as a political-economic and infrastructural shift that includes the media's transitional ownership and concentration, regulation of broadcasting, unequal access to the digital and technological infrastructures, and new relationships between local media institutions and platforms.

RECOMMENDATIONS

DStv's dependence on contracts with established commercial partners, exclusive content rights and centralised distribution infrastructure exemplifies financial and institutional dependencies that help to restrict organisational adaptation and reinforce the pipeline broadcasting model (Lotz, 2022; Poell, Nieborg & van Dijck, 2023). While platformisation in the context of Africa is defined by various infrastructural inequalities, economic constraints and the increased importance of mobile and participatory media,

more attention should be paid to the governance of access, participation and visibility (Avle, 2022; Mabweazara, 2022).

Transition from Gatekeeper to Network Orchestrator

Traditionally, DStv's business model focused on gaining exclusive rights to content, bundling channels and restricting access via subscription fees. But value is added in the act of participation, not control (Srnicsek, 2017; Hein et al., 2020). Through this arrangement, DStv will not be a broadcaster, but a facilitator for content creation, distribution, and the digital economy in Africa. This implies that the company's extensive subscriber base, premium sports rights, trusted brand, and continental content infrastructure should serve as the foundation or on-ramp for building a broader digital ecosystem. These assets provide DStv with the scale, relationships, and market presence necessary to orchestrate an open platform that enables creators, partners, and audiences to co-create value. In the era of increasing significance of algorithmic recommendation for content discovery, algorithmic decision-making is a new dimension of media gatekeeping. It is especially crucial in the context of African media landscapes, where hidden recommendation algorithms can perpetuate inequalities of visibility and cultural underrepresentation. The transparency of algorithms can thus be interpreted as a crucial development in current media accountability. With the increasing significance of audience analytics and platform-based personalisation, data governance is also becoming a key objective of the transformation of broadcasting. Data should not be regarded solely as a commercial product and should be seen as being part of the wider platform and audience relationship. The issue of data ownership and privacy, as well as how to be accountable, and how to act with consent and use the information of the audience in platform decisions, needs to be managed appropriately. In African contexts, in particular, where there is a growing interconnectedness of data infrastructures between global technology companies and local media institutions, this is particularly relevant.

Leveraging DStv's Continental Ecosystem Advantage: A Platform Strategy for Africa

The Canal+ acquisition of MultiChoice, the parent company of DStv, offers valuable lessons and insights into the strategic relevance of African media platforms in today's platform economy. The acquisition demonstrates that DStv's value lies primarily in its accumulated legacy assets; this includes its extensive subscriber base, exclusive sports

broadcasting rights, established content production capabilities, and pan-African distribution infrastructure. The acquisition of MultiChoice (DStv's parent company) by Canal+ presents a different narrative from the one that is currently being peddled about DStv being a struggling broadcaster and one of the world's biggest streaming services. This was driven not so much by DStv's current technological strength, but by its proven market penetration, sports broadcasting rights and subscriber base in Africa as well as its existing content infrastructure. In its own words, Canal+ named MultiChoice as the largest pay-television operator in Africa, serving over 19 million subscribers in some 50 countries, and one of the biggest media distribution networks in the Global South (CANAL+, 2025).

Canal+ executives said the deal is a strategic partnership to create a global media and entertainment group, headquartered in Africa, and will benefit from scale, high-growth markets and operational synergies. It is this, rather than the technology of satellite broadcasting, that is the core value that DStv brings, as it is based on existing relationships with millions of African consumers, local content producers, advertisers and creative industries (BusinessDay News, 2025; TechCentral, 2026; Moneyweb, 2026). This represents a significant strategic opportunity from a Platform Ecosystem Theory point of view (Hein et al., 2020).

The revamped DStv platform, on the other hand, could generate revenue from ads, subscription services, audience participation/membership and performance-based incentives. This solution would enable local content producers in these countries to create localised content and reach audiences across the continent via DStv's distribution network. If participation is still limited due to affordability, connectivity, infrastructure, and digital literacy, then platform transformation is not deemed successful. Digital inclusion should thus be part of the wider communication aspects of platformisation. African media platforms should be aware that the process of digitalisation is not uniform and hence the availability of content and opportunities for participation vary due to socioeconomic and infrastructural factors. The goal should thus be to be more communicative than just more digital.

An African Creator Ecosystem is under Development

A major problem with DStv's strategy has been its lack of involvement with the growing creator economy. While platforms such as YouTube and TikTok enable producers and content creators to upload, distribute, and monetise content, DStv continues to rely heavily

on institutional commissioning channels (Cunningham & Craig, 2024). A redesigned DStv ecosystem should include user-generated content channels integrated into Showmax, creator analytics dashboards, revenue-sharing mechanisms, regional creator incubators supporting local content production, and a new monetisation model could be introduced by DStv. This could be where a Creator with a specific number of followers can share revenue with DStv. Creator economies are evidence of the fact that audiences are no longer just consumers but also creators and distributors of media content. This should therefore include mechanisms for meaningful participation of African creators in content production, distribution and monetisation in media organisations. This should not only involve the integration of user-generated content within the present broadcasting frameworks, but the creation of these frameworks as well, in which the creators are acknowledged as active agents in the platform ecosystem. The results also indicate the need to ensure visibility of African content in the increasingly competitive platform context. While streaming platforms can offer opportunities for African content to be more widely seen and heard, they can also put African content in a competitive global recommendation system. Platform governance needs to, therefore, think about the representation and discoverability of African languages, cultural forms, local productions and historically marginalised voices. Content visibility should be seen as a cultural representation and communicative power issue instead of just a demand of the audience. The results indicate that broadcasting in platformisation should be assessed not only from the perspective of platformisation but also in terms of the opportunities for participatory communication it opens up. The historical broadcasting model places the audience in the role of receiver of content selected by the state or producer, while platform conditions may enable more interaction, production and dissemination of information. However, it is not automatically democratic because digital technologies make it possible for users to create content. Building an institutional mechanism to give audiences and creators more control over the production, circulation and visibility of media content is a necessary condition for meaningful participatory communication.

Table 5: Comparative Platform Redesign Model

Title	Structural issue	Communication implication	Broader African media implication
Persistence of the Gatekeeping Model	DStv's organisational structure remained strongly associated with channel bundling, subscription packages, premium sports rights, centralised content curation and control over content distribution. Showmax initially operated alongside these established broadcasting logics rather than representing a complete organisational departure from them.	Communication remained largely organised around a broadcaster-to-audience model in which the organisation controlled content selection, packaging and distribution. This limited audience participation and reduced opportunities for networked communication between audiences, creators and the platform.	The persistence of gatekeeping demonstrates the difficulty experienced by African legacy broadcasters in moving from centralised control of media distribution towards participatory and platform-based communication environments.
Organisational Identity and Institutional Inertia	DStv continued to operate primarily as a broadcasting institution despite introducing digital technologies. The adoption of digital services was not accompanied by sufficient organisational restructuring, creating institutional inertia in the transition from gatekeeper to ecosystem facilitator.	Technological adoption alone did not fundamentally change the organisation's communication logic. Digital tools were incorporated into an existing broadcasting structure rather than being used to create a more open, participatory communication ecosystem.	African media organisations undergoing digital transformation need to reconsider organisational identity, governance and decision-making structures rather than treating digital transformation as merely a technological upgrade.
Transition from Linear Broadcasting to On-Demand Communication	DStv's traditional model was based on scheduled, linear television, while competing platforms such as Netflix, YouTube and TikTok increasingly organised media around on-demand access, personalised consumption and algorithmic recommendations.	Audiences increasingly expect flexibility, personalisation and control over when and how they consume content. The communication relationship therefore shifts from scheduled institutional broadcasting towards personalised and interactive media consumption.	African broadcasters must adapt their distribution models to changing audience practices, particularly as mobile connectivity expands and younger audiences increasingly engage with on-demand platforms.

Rise of Participatory Platform Communication	Platforms such as YouTube and TikTok enable users and creators to participate directly in content production, distribution and monetisation, challenging the historical monopoly of broadcasters over audience access and content circulation.	Communication becomes multidirectional rather than broadcaster-controlled. Audiences can become creators, distributors, commentators and participants within the same media ecosystem.	African media industries have an opportunity to develop more inclusive communication ecosystems in which local creators, audiences, advertisers and media organisations participate in value creation.
Limited Integration of African Creator Economies	DStv continued to rely substantially on institutional commissioning while platforms such as YouTube and TikTok enabled African creators to produce, distribute and monetise content through mobile-first systems.	The limited integration of creators restricts participatory communication and reduces the diversity of voices able to enter the DStv ecosystem. A creator-oriented model would enable content producers and audiences to interact more directly.	African broadcasters need to engage with creator economies as an important component of the continent's emerging digital media industries, rather than treating creators as external competitors.

Algorithmic Infrastructure Investment

The findings indicate that DStv has historically been following a catalogue-driven approach for content distribution and not data-driven for content discovery. (Lotz et al., 2022). DStv should, therefore, invest in: AI recommendation systems, real-time audience analytics, predictive content demand modelling, personalised advertising systems and content discovery tools that use machine learning. The investments would allow DStv to shift from a broadcasting paradigm to a platform ecosystem paradigm focused on participation and personalisation.

Organisational Identity Transformation

Therefore, there is a need for restructuring of organisations. This change would entail establishing a “Creator Economy Division”, hiring Data Scientists and Platform Engineers, and incorporating ecosystem performance metrics (Van Dijck et al., 2018).

From Fixed Pricing to Participatory Economics

The traditional subscription model is becoming incompatible with how African consumers consume media, as they prefer flexibility and mobility (Mare & Matsilele, 2023). DStv should adopt creator subscription channels. These include micro-payment systems, ad-supported free tiers, mobile-only packages, and revenue-sharing advertising models. The move would bring DStv closer to the modern models of platform business and address affordability concerns raised by the markets across Africa.

Three-Year Platform Transformation Roadmap

Table 6: The Suggested Three-Year Platform Transformation Roadmap

Structural Dimension	DStv Case: Critical Finding	Communication Implication	Policy/Governance Implication	Participatory Media Implication
Year 1: Ecosystem Foundation	DStv remains structurally embedded in a centralised broadcasting and gatekeeping model. The first transformation therefore requires organisational restructuring, establishment of a Creator Economy Division, recruitment of data specialists, and redesign of Showmax infrastructure.	Communication must shift from a predominantly one-way broadcaster-to-audience model towards networked communication between DStv, creators, audiences, advertisers, and other ecosystem actors.	Governance structures should support organisational flexibility, data governance, creator inclusion and transparent rules for participation and revenue sharing.	The launch of the Creator Programme should create initial opportunities for African creators to produce, distribute and monetise content through the DStv ecosystem.

Year 2: Platform Expansion	DStv needs to move beyond its catalogue-driven model by introducing recommendation algorithms, audience analytics and creator monetisation systems. The critical problem is therefore not simply digital access but the ability to use data to facilitate personalised participation.	Communication becomes increasingly personalised, interactive and data-driven, allowing audiences to discover content according to their interests rather than relying primarily on fixed schedules and centralised curation.	Governance must address algorithmic accountability, privacy, data protection, transparency in recommendation systems and fair creator monetisation arrangements.	Creators become active economic participants rather than commissioned content suppliers, while audiences gain greater control over content discovery, interaction and consumption.
Year 3: Ecosystem Maturity	DStv should evolve into an ecosystem orchestrator by expanding the creator marketplace across African markets. The organisation's continental subscriber base, distribution infrastructure, content relationships and brand become resources for ecosystem development rather than mechanisms of gatekeeping.	Communication develops into a multi-sided ecosystem in which creators, audiences, advertisers, and DStv interact continuously, creating network effects and expanding content circulation across African markets.	Governance should establish sustainable ecosystem rules covering creator rights, revenue distribution, platform accountability, cross-border operations, cultural diversity, and equitable participation.	Participation becomes embedded in the platform's core structure, enabling large-scale creator production, audience engagement, user-generated content, monetisation, and co-creation across African media markets.

LIMITATIONS AND FUTURE STUDY

This study has limitations that need to be taken into consideration when interpreting these findings. The analysis was based solely on documentary evidence from 53 selected documents, meaning that it is a reflection of the perspectives and representations in the documents, not necessarily of the experiences of the DStv executives, employees, content creators and the audiences themselves; corporate and industry documents may also include institutional interests or strategic framing. The study does not claim that the findings can be extrapolated to the African and broader African media environment without considering regulatory, infrastructure, language, market structure and audience behaviour variations. The qualitative approach offers an interpretation of platformisation, institutional gatekeeping and algorithmic transformation, but these are not directly measured by recommendation algorithms, audience engagement or subscription behaviour. Future studies can thus draw on both documentary analysis and interviews with media executives, employees, producers, and audiences, and with consumers focusing on how they experience algorithmic recommendation and personalised consumption. Comparative analysis of DStv and other African broadcasters and streaming platforms could also help to determine if the institutional tensions observed in this case are a trend across the African media landscape, and further studies could examine the role of algorithmic gatekeeping on the visibility, reach and discoverability of African content and creators within platform ecosystems.

CONCLUSION

The study shows that technological disruption alone, or the availability of digital technologies, is not enough to explain the challenges that DStv faces in the process of adapting to the new platform ecosystem in Africa. The results indicate that the organisation's transition has been hampered by the fact that broadcasting-related institutional structures and practices have persisted, such as central control of content selection, channel bundling, controlled distribution and audience management. In this regard, the study brings three main contributions to the academic debate on media transformation and platformisation. The study's empirical contribution is that it shows how the broadcasting and gatekeeping logics persist in a media company that is in the process of digital transformation. The DStv case demonstrates that the introduction of digital technologies does not always bring an end to traditional modes of media control. Instead, aspects of the broadcasting model can be translated into digital environments, especially in how content is curated, how people can subscribe to it, and how it is

distributed. This discovery challenges the notion that digital transformation means there is a shift away from gatekeeping towards open and participatory media systems. The analysis of the documentary data in this study thus confirms that the broadcasting logic is still very relevant in a new platform context.

The study has a theoretical dimension that suggests that the concept of institutional identity should be more clearly integrated into the field of Platform Ecosystem Theory. While existing platform perspectives help understand the network effects, platform ecosystem competition, algorithmic distribution and the shifting dynamics of platforms and users, as illustrated in the case of DStv, technological and market forces do not suffice to explain the response of legacy media organisations to platformisation. The level of institutional change that a broadcaster experiences can be determined by organisational identity, institutional history and previously held organisational understandings of its role, with the former often leading to a superficial adoption of platform technologies. The results therefore imply that institutional identity should be considered as a mediating factor in the platform ecosystem literature, linking up technological change with organisational change. This further supports the argument in this study that the challenge was not just about the adoption of digital technologies by DStv, but also about the continuing association with broadcasting, gatekeeping and linear distribution logics.

The study makes an African contribution, because it shows that it is not possible to understand platformisation sufficiently based on models largely developed from Western media markets. Mobile-first access, socioeconomic inequality, infrastructure challenges and scarcity, cost, linguistic and cultural differences, and media-market conditions in Africa are the key factors of the platform environment. These are all factors that impact platform access, platform circulation and media organisation response to digital competition. The results thus confirm the contextual analysis of platformisation in Africa, in which platforms and their technological changes are not seen as a universal process that unfolds in a uniform manner across geographical areas, but as part of existing inequalities and infrastructural contexts. The study thus concludes that it is not a matter of technology adoption alone that makes a transition from a broadcaster to a platform ecosystem player. It entails a shift in institutional assumptions about the nature of content, audiences, participation and control in media organisations. The African case of DStv, therefore, offers an opportunity to rethink the connection between legacy broadcasting and institutional identity and emerging platform ecosystems.

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