Sustainability of Video Streaming Services in South Africa: A Review of Digital Business Models and Strategies

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SUSTAINABILITY OF VIDEO STREAMING SERVICES IN SOUTH AFRICA

ABSTRACT

This research paper examines the success and failure factors of Video Streaming Services (VSSs) in South Africa, specifically focusing on telco and broadcaster-launched platforms. Grounded in the Resource-Based View (RBV) theory, the study utilises a mixed-methods approach to identify critical factors within the context of business models and compare sustainability factors between successful and failed VSS ventures. The research highlights telcos' challenges in content leadership and business model alignment as key contributors to their struggles, in contrast to broadcasters who strategically leverage resources for sustained competitive advantage. The study offers practical recommendations for developing sustainable digital video platforms in South Africa while laying the groundwork for future investigations into cross-cultural dynamics and technological innovations within the evolving VSS landscape.

KEYWORDS

Business model sustainability, Competitive advantage, Digital Content, Digital transformation, Video Streaming Service (VSS), Platform business models, South African telecommunication

DECLARATION

I, **Phumelele Wanda Mkhize**, declare that this research report is my own work except as indicated in the references and acknowledgements. It is submitted in partial fulfilment of the requirements for the degree of Master of Management in the field of Digital Business at the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in this or any other university.

Name: **Phumelele Wanda Mkhize** Signature:

Signed at **Johannesburg**

On the **19th** day of **February** 20**24**

DEDICATION

This research report is dedicated to my family, whose unwavering love and encouragement have been my anchor throughout this endeavour. Their unwavering support has fueled my determination and provided me with the strength to persevere through challenges. I extend my heartfelt gratitude to all those who have touched my life and supported me along this journey. Your influence has made a lasting impact, shaping my perspective and inspiring me to strive for excellence.

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AVOD	Advertising-based Video-on-Demand
BMC	Business Model Canvas
DSTV	Digital Satellite Television
IPTV	Internet Protocol television
OTT	Over-The-Top
OTT TV	Over-The-Top Television
RBV	Resource Based View
SABC	South African Broadcast Corporation
SVOD	Subscription Video-on-Demand
Telco	Telecommunications Company
TV	Television
TVOD	Transactional Video-on-Demand
VOD	Video-on-Demand
VSS	Video Streaming Service
VSSs	Video Streaming Services

CHAPTER 1 INTRODUCTION

1.1 Statement of Purpose

The case study analysis aims to identify the factors that led to the failure of video streaming services or over-the-top television launched by telecommunication companies in South Africa.

1.2 Background

In many markets worldwide, digital convergence has been characterised by integrating industries and establishing new digital platforms that combine assorted products, services, and audiences (Bradley et al., 2019). In response to this trend, the telecommunications industry in many markets has launched video streaming services as one of several ways to attain a sustainable competitive advantage. It is argued by Armstrong & Lee (2021) that sustainable competitive advantage is essential for an organisation's survival and is the purpose of its strategy.

Internationally, many telcos have been able to sustain their video streaming services (VSSs) and differentiate their offerings from those of their competitors, thereby augmenting their revenue streams. However, in South Africa, the same response by its four largest telcos (Cell C, MTN, Vodacom, and Telkom) has yet to yield the same result, but it ended up with the shutdown of their VSS.

1.2.1 International Market Overview

International telecommunications companies have implemented various models for delivering video content to consumers over the Internet, introducing both Over-The-Top (OTT) and Internet Protocol Television (IPTV) services, as can be seen in the review of some international companies and their strategies in Table 1. It is important to understand the differences between these services, their interactions, and their impacts on the market.

OTT services deliver video content directly over the internet, bypassing traditional cable or satellite distribution. These services are accessible to consumers via the Internet on various devices, such as smart TVs, smartphones, tablets, and PCs. The business models for OTT services include subscription-based (SVOD), ad-supported (AVOD), or transactional (TVOD).

These services are generally more flexible, allowing users to watch content on-demand and across different devices.

On the other hand, IPTV services deliver television content over Internet Protocol (IP) networks, often within a managed network provided by Internet Service Providers (ISPs) or telecommunications companies. IPTV content is delivered through a set-top box or application the service provider provides, usually as part of a subscription bundle. These services are commonly bundled with other services like internet and phone and may involve subscription fees. Operating within a managed network, IPTV services generally offer higher quality and reliability.

1.2.2 Sustainability in a Changing Market

A business's strategy and ability to achieve a sustainable competitive advantage is critical to its survival. The telecommunications industry is undergoing rapid technological change driven by digital convergence, the digital vortex, and digital transformation strategies. To effectively adapt to this evolving landscape, telcos must ensure that their substantial investments in network infrastructure do not result in them becoming a mere "dumb pipe" - a provider of ever-increasing bandwidth capacity solely supporting third-party over-the-top services (Telecoms, 2019). Globally, this has already manifested in the plateauing of mobile growth and intensified competition among operators, resulting in reduced prices (ITU, 2018). The same ITU article quotes the Juniper Report on the "Future Mobile Operator Business Models: Challenges, Opportunities & Strategies 2018-2022" as stating that the revenue generated by global operator-billed voice and data services is projected to decline by more than $50 billion by 2022, to $785 billion. Telecommunication companies should adopt alternative strategies and business models to ensure sustainability and competitive advantage.

The emergence of several VSSs in South Africa shows a strategic ambition and drive for some competitive advantage through market expansion. However, the subsequent cession of these services begs whether these strategies work in the South African market, resulting in the country being termed by industry players as the graveyard for streaming platforms (Watson, 2023). Valuable insights can be gathered by identifying the key factors contributing to the broadcaster-launched VSS sustainability in South Africa. It is envisioned that this insight will enable the four largest telcos and any other telcos within South Africa to in future launch sustainable VSSs, maintain their competitive advantage, and capitalise on the projected high growth profits within the media and entertainment industry as well as seek to ensure their continued relevance and sustainability in the shifting digital ecosystem. The study was therefore conducted to investigate the factors contributing to the sustainability of VSSs in South Africa, focusing on the four telco and broadcaster VSSs.

Table 1: International Telco VSS Analysis[1]

VSS	Type of VSS	Telco	Country	Launch	Subscribers (2021)	Sustainability Strategies
HBO Max	OTT	AT&T[2]	United States	2005	1,9m	**Content Investment:** Significant investment in original content, including exclusive series, movies, and access to WarnerMedia's extensive library. **Partnerships and Bundles**: Partnered with various telecom providers for bundling services, offering HBO Max subscriptions with AT&T wireless and broadband plans. **Global Expansion**: Focused on international markets to expand subscriber base, adapting content for regional preferences. **Technology and User Experience**: Enhanced user experience with features like profiles, personalised recommendations, and high-quality streaming (4K, HDR). **Differentiation strategy**: Exclusive content and leveraging WarnerMedia's extensive content library.
Xfinity TV	IPTV	Comcast	United States	2015	22,6m[3]	**Convergence of Services**: Bundling TV with broadband and mobile services, offering a seamless experience across devices. **X1 Platform**: Integration of live TV, on-demand content, Digital Video Recorder (DVR), and streaming apps into a single interface. **Investment in Content**: Securing exclusive sports and entertainment content, including partnerships with NBCUniversal. **Advanced Features**: Voice remote, 4K content, personalised recommendations. **Competitive Strategy**: Emphasis on convenience and value through bundled services and technological innovation.

[1] Collated data from various telco financial statements, media statements and corporate websites

[2] WarnerMedia was owned by AT&T until it merged with Discovery, Inc. in April 2022 to form Warner Bros. Discovery. This merger aimed to create a stronger content provider to compete more effectively with other streaming giants like Netflix and Disney+

[3] Includes revenues from NBC & Sky

BT TV	IPTV	BT Group	United Kingdom	2006	1,7m	**Exclusive Content**: Secured exclusive sports rights, including Premier League football, to attract subscribers. **Bundling**: Offers packages combining TV, broadband, and phone services. **Partnerships**: Collaborations with streaming services like Netflix and Amazon Prime Video to provide integrated offerings. **Hybrid Technology**: Combines digital terrestrial television (DTT) with IPTV, offering flexibility in content delivery. **Differentiation strategy**: Exclusive sports content and competitive bundling offers
Telstra TV	OTT	Telstra Corporation Row	Australia	2015	800k	**Device Integration**: Telstra TV device combines free-to-air TV, catch-up services, and streaming apps in one platform. **Partnerships**: Collaborated with Roku for the streaming device technology. **Bundling**: Offers Telstra TV with broadband and mobile plans to enhance value proposition. **Local Content**: Invests in local content and partnerships with Australian broadcasters. **Competitive Strategies**: Providing a comprehensive entertainment solution with flexible access to multiple content sources.
Orange TV	IPTV	Orange S.A.	France	2005	1,3m	**Broad Service Offering**: Combines IPTV, satellite, and on-demand content, catering to diverse customer needs. **Bundling**: Offers attractive bundles combining TV, broadband, and mobile services. **Exclusive Content**: Invests in exclusive content and channels, including sports and movies. **Technology Innovation**: Advanced set-top boxes, 4K content, and integrated streaming apps. **Competitive Strategies**: Leveraging bundling and exclusive content to differentiate from competitors.

Magenta TV	IPTV	Deutsche Telekom	Germany	2013	4m	**Content Strategy**: Offers exclusive series and movies, along with popular streaming services like Netflix and Amazon Prime Video. **Bundling**: Combines TV service with Deutsche Telekom's broadband and mobile packages. **Advanced Features**: Cloud DVR, multi-screen viewing, personalised recommendations. **Technology and Innovation**: Integration of live TV, on-demand, and streaming services in one platform. Competitive Strategies: Providing a comprehensive and integrated entertainment experience with advanced features and exclusive content.

1.3 SA Market Overview

1.3.1 SA Market Demographics and Telecommunications Penetration

December 2014 saw the launch of the first video streaming service in SA. This launch was against the backdrop of the South African economy experiencing slow growth and challenging socioeconomic conditions (2014 to 2022). While the country's population reportedly increased from 54 million in 2014 to approximately 61 million in 2022, as shown in Table 2, the economy, on the other hand, only experienced an average annual growth rate of 0.8% during the same period (World Bank in SA, 2022).

Table 2: South African Population by Age Group[4]

Age Group	Total 2014	%	Total 2022	%
Children (Age 0-14)	16 179 765	30%	17 012 769	28%
Youth (Age 15-24)	10 484 677	19%	9 780 700	26%
Adult (25-59)	22 795 443	42%	28 212 263	47%
Elderly (60+)	4 542 065	8%	5 599 260	9%
Total	**54 001 950**		**60 604 992**	

As depicted in Table 2, South Africa had an estimated population of 61 million in June 2022, and over half of the population (53%) was below 30. Comparing this to 2014, the estimated population was 54 million, and a higher percentage (59%) were below 30 years old. The Adobe (2019) Brand Content Survey identified the two dominant digital segments as Millennials[5] and Gen Z[6], further indicating that these demographics favour digital content, with Gen Zs spending an average of 11.4 hours per day consuming it, while Millennials average 10.8 hours. South Africa's demographic profile suggests that a sizeable portion of the population may be potential consumers of digital content, including video streaming services (VSS). However, it is essential to note that Millennials and Gen Z penetration alone does not guarantee the uptake

[4] Stats SA (2022)

[5] Millennials, born between 1981 and 1996 and aged between 27 and 42.

[6] Millennials, born between 1981 and 1996 and aged between 27 and 42.

of VSSs, especially when South Africa's highest unemployment rate among its youth aged between 15 and 24, which is around 66.5% (World Bank in SA, 2023).

Mobile or fixed, broadband access is critical for accessing VSSs. South Africa's telcos have seen significant growth in mobile and broadband subscribers in recent years; see Table 3.

Table 3: SA Broadband Subscribers[7]

	2014	2015	2016	2017	2018	2019	2020	2021
Mobile Braodband Subscriber (millions)	25	32	34	40	45	60	66	69
Fixed Braodband Subscriber (millions)	1,7	1,4	1,1	1,1	1,1	1,3	1,3	1,7
Total	**27**	**33**	**35**	**41**	**46**	**61**	**67**	**71**

ITU (n.d.) shows that broadband penetration in SA has grown cumulatively by 16% from 2014 to 2021, indicating a substantial potential market for users accessing VSSs through telcos' mobile connections. This growth represents a sizable potential market for VSS, offering higher bandwidths that could translate into improved streaming experiences. As broadband access expands, the demand for high-quality video content will likely rise, making South Africa a ripe market for VSSs. According to Statista Market Insights (2023) report, the SVOD market is projected to generate US$248.00 million in revenue in 2024, with a user penetration rate anticipated to increase from 13.3% in 2024 to 15.3% by 2027. Additionally, they describe the video streaming market in South Africa as booming, driven by the growing demand for affordable entertainment options.

PricewaterhouseCoopers (2023) predicts rapid growth in OTT revenue over the next five years, outpacing increases in TV subscription revenue across various markets. Despite this, the overall revenue is expected to remain low due to the initial small base.

However, despite the market potential, direct access to data, broadband customers, and existing mechanisms for billing subscribers (such as airtime, debit orders, or mobile wallets), all leading telcos in South Africa have seen their launched VSS services shut down. Telcos across the world, however, have successfully launched VSS and are currently operational and thriving, as demonstrated in Table 1.

[7] Collated data from (ITU, 2023)

Although there has been significant growth in broadband connectivity in South Africa, the regulatory framework has significantly hindered telecommunication companies' ability to offer Internet Protocol Television (IPTV) services. IPTV is considered a regulated service in South Africa, necessitating a broadcast license for operation. This regulatory requirement has created considerable barriers for telecommunication companies seeking to enter the IPTV market.

As depicted in Table 1, the majority of successful international telecommunication companies have introduced IPTV services. This global trend underscores the potential advantages of IPTV solutions, which are largely untapped in the South African market due, in part, to regulatory limitations.

In 2016, the Independent Communications Authority of South Africa (ICASA) launched a Market Inquiry into Subscription Broadcasting Services. This followed the Authority's recognition that despite the issuance of five licenses in 2007 and an additional two in 2015 for subscription television broadcasting services, only three licensees had commenced operations. Additionally, the Authority noted that two of these licensees were facing sustainability challenges, while the others had not yet launched their services (ICASA, 2021).

Further exploration of the licensing regime in South Africa could reveal contributing factors towards the cessation of telco-launched OTT services. However, this aspect is not explored in this research study.

1.3.2 Digital Convergence

Digital convergence is merging different media forms, communication technologies, and content into a single interconnected system, particularly within the media and entertainment industry (Jenkins, 2006). The widespread adoption of digital technologies and the Internet has enabled the convergence of various technologies. Three key elements that characterise digital convergence are identified by Jenkins; the first element is technological convergence, which refers to the integration of previously distinct devices into a single platform, such as the integration of TV and Internet streaming on a single device. The second element is economic convergence, which describes media companies and industries coming together to adapt to the changing digital landscape, such as the merger of television (TV) and telcos. The third element is cultural convergence, which pertains to integrating media content across different platforms and media forms, such as the distribution of TV shows through online streaming services.

This market realignment has paved the way for the growth of VSSs, which leverage digital convergence to deliver on-demand access to a vast array of multimedia content across multiple devices and screens. In South Africa, the four largest telcos and four largest broadcasters have all launched VSSs, see

Table 4.

Table 4: SA Telco and Broadcasters Launched VSS

Telco	VSS Name	Broadcaster	VSS Name
Cell C	Black	eTV	eVOD
MTN	FrontRow/Vu	Multichoice	Showmax
Telkom	TelkomONE	SABC	SABC+
Vodacom	Video Play	StarSat	StarTimes ON

In December 2014, MTN introduced the first telco VSS with the launch of MTN FrontRow. This service was rebranded to MTN VU and shut down in May 2017, less than two years after its launch. Subsequently, the other three telcos launched different iterations of VSSs, all of which have also shut down, as reflected in Table 5.

Table 5: SA Telco Launched VSS

VSS	Telco	Launch	Shutdown
MTN FrontRow	MTN	Dec-2014	May-2017
VideoPlay	Vodacom	Sep-2017	Jul-2022
Cell C Black	Cell C	Nov-2017	Dec-2019
TelkomONE	Telkom	Nov-2020	Nov-2022

1.3.3 Digital Vortex

The digital age has ushered in a rapid and overwhelming pace of technological change, commonly called the digital vortex (Bradley et al., 2019). This phenomenon is marked by the swift evolution of digital technologies that disrupt established industries, business models, and social norms. Bradley et al. outlines four fundamental forces propelling the digital vortex: exponential increases in computing power, the proliferation of data, the rise of digital platforms, and the blurring of industry boundaries. The media and entertainment sectors are the most affected among the industries impacted by digital disruption. In contrast, the telecommunications industry holds the third position, as illustrated in Figure 1, depicting the changes in ranking from 2017 to 2019 (Yokoi et al., 2019).

Figure 1: Digital Disruption Impact by Industry Shift 2017 – 2019 (Yokoi et al., 2019)

Nevertheless, Nwaiwu (2018) highlights a notable limitation in this framework, highlighting its failure to consider internal dynamics within firms. The success or failure of transformative business models is determined by their internal dynamics, according to Nwaiwu. This insight prompts a deeper exploration of the specific dynamics within the media and entertainment industry, highlighting the need for a nuanced understanding.

In this context, Nwaiwu's observation becomes particularly relevant when examining the survival and adaptation of VSSs within South Africa. Notably, the distinction between broadcaster VSS and telco VSS becomes crucial. Despite the overarching challenges posed by the digital vortex, South Africa's media landscape has witnessed the survival of broadcaster VSSs. This resilience may be attributed to the internal dynamics within broadcasting firms, a factor that the digital vortex framework might not explicitly capture. Nwaiwu's perspective prompts the consideration of the intricate interplay of internal factors that could make South Africa an exception to the broader trends observed in the media and entertainment industry.

1.3.4 Telecommunications Companies Strategic Response to Digital Disruption Through Media

While opinions may vary, there is a consensus that the digital vortex undeniably impacts businesses. This disruption and subsequent technology transformation often likened to 'the cyclone' (Kane et al., 2019), have torn across business landscapes, compelling firms globally, including those in South Africa, to re-evaluate their traditional business models. As 'the cyclone' reshapes industries. The impact on broadcasters may require further exploration. The same holds for telcos, who, like their broadcaster counterparts, are navigating the complexities of the digital vortex in their pursuit of viable and competitive strategies.

Internationally, several telcos have successfully launched VSSs and acquired media companies to diversify revenue streams and capitalise on the growing consumer demand for content and transformed entertainment consumption (McCutcheon, 2014; Tomyuk & Avdeeva, 2022). Notable examples include AT&T and Comcast, as depicted in Table 6. AT&T's acquisition of Direct TV in 2016 directly increased its video contribution to total revenue, and the subsequent acquisition of WarnerMedia in 2018 facilitated the launch of its own VSS, HBO Max. Comcast has also significantly enhanced its video streaming capabilities through strategic acquisitions. The purchase of NBCUniversal in 2011 and 2013 brought extensive content assets, enabling the launch of the Peacock streaming service in 2020. Acquiring Sky in 2018 expanded Comcast’s presence in Europe, while the 2020 acquisition of XUMO diversified its offerings with a free ad-supported streaming platform. Additionally, the acquisition of FreeWheel in 2014 bolstered Comcast’s advertising technology, improving the monetisation of its streaming content. These acquisitions have collectively strengthened Comcast’s competitive position in the global streaming market.

The deployment of video streaming services represents a critical response by these companies to digital convergence as they seek to ensure their continued relevance and sustainability within a rapidly shifting digital ecosystem.

Table 6: AT&T and Comcast Media Revenues Contributions[8]

	2014	2015	2016	2017	2018	2019	2020	2021
AT&T Inc								
Total Operating Rev $m	132 447	146 801	163 786	160 546	170 756	181 193	171 760	114 730
(Video Entertainment) $m	6 826	20 271	36 460	6 728	33 357	32 110	30 442	35 632
% contribution to Total Operating Revenue	5%	14%	22%	23%	20%	18%	8%	31%
COMCAST								
Total Operating Rev $m		74 510	80 403	85 029	94 507	108 942	103 564	116 385
Total Entertainment	-	49 988	53 950	73 983	78 030	75 456	67 742	61 477
% contribution to Total Operating Revenue		67%	67%	87%	83%	69%	65%	53%

1.3.5 Digital Transformation Strategies and Business Models

The South African market was the focus of this study, and a comprehensive evaluation of the impact of digital disruption on the strategies of both telcos and broadcast companies was conducted. The review delved into the factors that contributed to the success and sustainability of broadcaster VSS. Moreover, it encompassed an analysis of the reasons behind the cessation of telco-launched VSSs, which provided valuable insights into the challenges faced in this rapidly changing environment.

An analysis was required to examine the digital transformation strategies employed by companies within these two industries in the face of digital disruption. Digital transformation strategies are the plans that organisations use to leverage digital technologies to transform their business processes, operations, products, services, and customer experiences. Digital transformation aims to enable organisations to be more agile, innovative, and customer-centric. This transformation can involve implementing new digital technologies, creating new business processes, developing new products or services, and engaging with customers in new ways (Westerman et al., 2015).

[8] Collated data from AT&T Annual Reports (2014-2021) and Comcast Annual Reports (2015-2021)

1.4 Research Problem

This study analysed factors contributing to the sustainability of broadcaster VSSs and telcos' failure to sustain their VSSs in South Africa. The critical factors contributing to VSSs success were analysed through qualitative interviews and document analysis. The aim was to identify crucial elements such as business models and analyse VSSs specific dynamics and challenges in the South African market. The research sought to discover critical factors that will assist organisations, new and existing, in developing sustainable digital video platform businesses in South Africa. It also contributes towards the body of work within this area.

1.5 Research Questions

This study set out to address critical questions surrounding the sustainability of VSSs in South Africa. Through qualitative interviews and document analysis, an investigation into the factors influencing the success of broadcaster VSSs and the challenges faced by telco VSSs was conducted. The exploration focused on understanding the relevance of the Resource Based View (RBV) framework in assessing competitive advantage, the role of business models in driving strategic renewal amidst digital transformation, and the key factors shaping subscriber acquisition and launch strategies. By delving into these research questions, the researcher sought to provide valuable insights for organisations navigating the dynamic landscape of the South African VSS market.

1.5.1 Research Question 1

What is the relevance of the RBV framework in assessing competitive advantage and sustainability in video streaming services?

1.5.2 Research Question 2

What is the role of business models in maintaining competitive advantage and driving strategic renewal in the face of digital transformation?

1.5.3 Research Question 3

What are the key factors influencing the effectiveness of subscriber acquisition and launch strategies in the success and growth of video streaming services in South Africa?

1.6 Research Objectives

There were two primary objectives for this study:

1.6.1 To identify the critical success and failure factors of SA broadcaster and telco VSSs, focusing on their business models and analysing the specific dynamics and challenges they face in the South African market.

1.6.2 To compare the factors contributing to sustainability between successful and failed VSSs in SA and provide recommendations for developing sustainable digital video platform businesses in SA.

1.7 Rationale

The research aimed to contribute to the existing literature and practical understanding of platform businesses in the South African telecommunications and media industries by examining the critical success and failure factors of telco-launched and broadcaster-launched VSSs. Building upon the works of Armstrong & Lee (2021), Täuscher & Laudien (2017), and Teece (2018) in the field of platform businesses, this research specifically focuses on the unique context of the South African market. By exploring the factors contributing to VSSs sustainability, as highlighted by Allam & Chan-Olmsted (2021) and Simon (2021), this study aims to bridge existing knowledge gaps and enhance the understanding of platform businesses in South Africa.

The research contributes to the academic literature on platform businesses and offers practical implications for industry practitioners. It helps them understand the role of resources, business models, protection mechanisms, and marketing strategies. Stakeholders in the telecommunications and media industries will be better equipped to navigate the challenges and capitalise on the opportunities presented by the evolving landscape of VSSs. The research provides actionable recommendations for developing sustainable digital video platform businesses in South Africa.

1.8 Delimitations of the Study

The study focused on the VSSs launched by the four major telecommunication companies and broadcasters in South Africa between 2014 and December 2022. Any services founded by these companies outside of South Africa were excluded.

The following was also excluded from the study:

- Traditional TV services, such as Free-To-Air analogue,
- Satellite and digital TV services (e.g., DTT, DTH, Openview HD and DSTV)
- Subscription TV services offered via analogue or satellite (e.g., DSTV, StarSat), and
- TV Everywhere services such as DSTV Stream.

As a potential avenue for future research, investigating the role of operational efficiency elements, such as engagement drivers and consumption drivers, in contributing to the sustainability of video streaming services is crucial. While not explored in this qualitative study, their significance warrants a separate dedicated investigation. Additionally, in-depth analyses of currently operational video streaming services are needed to gather specific information on their strategic frameworks and matrices. However, limited accessibility to detailed insights arises from some of the analysed services in this study, which have primarily ceased operations.

Stork et al. (2017) highlights the defensive tactics adopted by major African telcos to protect their revenues from over-the-top services, which include blocking or reducing OTTs' capabilities, lobbying for OTT regulation, and embracing or offering their own OTT services. Further research is necessary to determine the most effective means of countering declining revenues, particularly regarding the defensive strategy of creating their VSS.

The study used the conceptual models of the Business Model Canvas (BMC) and VRIO. These models provided a solid basis for the analysis and contributed to the study's success. Although the study was limited by the constraints and properties of the models, the researcher could work within these boundaries to achieve their goal and produce valuable outcomes.

1.9 Definition of Terms

IPTV - Internet Protocol television, "is defined as multimedia services such as television/video/audio/text/graphics/data delivered over IP-based networks managed to support the required level of QoS/QoE, security, interactivity, and reliability" (ITU, n.d.). Users can stream live TV and on-demand content and access interactive services on various devices, including TVs, computers, smartphones, and tablets. Time-shifted TV and cloud recording are also available. Unlike traditional broadcasting methods, IPTV offers greater flexibility and control over the viewing experience, allowing users to customise and access content on various devices.

Mobile subscriber - Individuals who have registered and paid for access to a mobile network service and have access to a range of telecommunication services offered by the mobile network operator, such as voice calling, messaging, and internet connectivity, as well as other value-added services such as mobile banking, entertainment content offered by the operator and over-the-top services provided by third-party providers such as video streaming services, is typically granted to these subscribers.

Over-the-top (OTT) services are applications or services delivered over the Internet using a telecommunication network without the involvement of traditional network operators (Bilbil, 2018). These services are typically offered through applications installed on smartphones, tablets, or computers. Access to content, such as streaming video, music, and other multimedia services, can also be provided to users by OTT service providers.

Subscribers - Individuals who have registered and paid for access to a video streaming service. Access to the service's library of video content and the ability to watch it on-demand, usually through an internet-connected device, is typically granted to these subscribers. Based on their subscription tier, such as exclusive movies, TV shows, and other video content, a range of content may also be accessible to subscribers. Depending on the service offering, subscribers may also have the option to customise their viewing experience by creating watchlists, setting preferences, and receiving personalised recommendations based on their viewing history.

TV Everywhere – broadcasters that provide the same or comparable service offering within SA but online, and such service forms part of its subscription TV offerings, e.g., DSTV Stream (Cape, 2013).

1.10 Assumptions

The following assumptions were made before conducting the case study analysis:

(i) Where qualitative interviews were not possible with some executives within certain VSS businesses due to the time that had passed since their cession or their unavailability, document analysis would become the sole source of information on these VSSs.

(ii) Respondents were assumed to provide honest and accurate recollections in response to all questions.

(iii) It was assumed that reputable news agencies/publications from which document analysis would be collected would provide fair and accurate reporting on VSSs.

1.11 Chapter Outline

This study analysed factors contributing to the sustainability or failure of video streaming services (VSS) in SA by comparing successful and failed platforms. Qualitative interviews and document analysis were conducted to evaluate the business models and specific dynamics and challenges they faced and continue to meet in the South African market. Valuable insights for new entrants and existing businesses in the media and entertainment industry can be provided by this research, which is significant in the context of rapidly shifting digital ecosystems. The study's primary objective is to develop sustainable digital video platform businesses in South Africa.

In setting the stage for the exploration of business models within the South African market, **Chapter 2** will give special attention to reviewing different frameworks to establish a theoretical definition of competitive advantage. The literature review will comprehensively examine theoretical, empirical, and conceptual perspectives, providing insights into the dynamics and challenges associated with business models in this context. Additionally, the chapter will involve a conceptual framework based on the Business Model Canvas and VRIO frameworks, contributing to a structured analysis of the specific dynamics and challenges businesses face in the South African market.

Chapter 3 will discuss this study's qualitative interview and document analysis methodology. This section will comprehensively outline the research design, define the study population and sample, elaborate on the data collection methods, detail the strategies for data analysis, and discuss the interpretation of findings.

Building on the foundation in the preceding chapters, **Chapter 4** comprehensively analyses the critical success and failure factors of South African broadcaster and telco video streaming services. By delving into qualitative data obtained from interviews and document analysis, the chapter aims to dissect the intricacies of their business models. Emphasis is placed on how these platforms have adapted to the challenges and dynamics unique to the South African market, providing valuable insights into the factors contributing to their sustainability or demise.

Chapter 5 is a comparative analysis examining the factors contributing to sustainability between successful and failed video streaming services in South Africa. Utilising the insights gathered from the qualitative interviews and document analysis, the study will delve into the nuanced differences that set apart thriving platforms from those that faced closure. The aim is to draw actionable recommendations for developing sustainable digital video platform businesses, addressing the specific challenges in South Africa.

The final chapter, **Chapter 6**, synthesises the study's findings into actionable recommendations for existing and prospective players in the South African media and entertainment industry. Drawing upon the critical analysis and comparative study, this section offers strategic insights to enhance the sustainability of video streaming services. Additionally, the chapter outlines avenues for future research, identifying gaps in the current understanding and proposing areas that warrant further exploration. This holistic approach ensures that the study contributes to current industry practices and lays the groundwork for continued scholarly inquiry.

CHAPTER 2 LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.1 Introduction

The rapid growth of digital transformation and widespread internet connectivity has led to the immense popularity of video streaming services (VSSs) (Insightslice, 2023). Telecommunications companies (telcos) have recognised this trend and are leveraging VSSs to establish a competitive advantage. However, more empirical studies must address these services' critical success and failure factors, particularly in the South African market. Understanding these factors is essential for service providers and industry stakeholders to optimise their offerings and gain a sustainable competitive edge.

Therefore, this study examines the critical success and failure factors of VSSs provided by South African broadcasters and telcos to address this gap. The study offers practical insights and recommendations to enhance video streaming services and drive growth. This research aims to provide valuable implications for strategic decision-making in the South African telecommunications industry through a comprehensive literature review.

2.2 Definition of Topic or Background Discussion

Academic literature and industry experts are currently engaged in a widespread debate about the definition of VSSs, which are also known as over-the-top TV (OTT TV) (Mulla, 2022). Due to variations in definitions across platforms and regions, there has been an ongoing debate about the precise characterisation of this phenomenon. However, there has been a growing consensus in recent years regarding the role of VSSs as competitors to traditional TV providers (Mulla, 2022) and telcos (Stork et al., 2017). These services offer an alternative method of delivering TV programming online, providing a viable option for content consumption (Mulla, 2022).

Using the Resource-Based View (RBV) theoretical framework, the Business Model Canvas (BMC), and VRIO conceptual frameworks, the researcher evaluated their business models and analysed the specific dynamics and challenges they faced or continue to face in the South African market.

The researcher comprehensively analysed competitive advantage using the BMC and the VRIO framework. BMC focuses on analysing and understanding the key components and interactions of a company's business model, providing a holistic view of the business and how it creates value for customers (Osterwalder & Pigneur, 2010). The VRIO framework allows for a more in-depth analysis of the specific resources and capabilities contributing to a firm's competitive advantage (Barney, 1991).

2.3 Theoretical Framework

Competitive advantage refers to a company's ability to outperform its competitors in a particular market or industry, achieving superior performance and gaining a superior position (Barney, 1991; Teece et al., 1997). It is often seen as a critical determinant of a company's long-term success and profitability (Grant, 1991).

The theoretical definition of competitive advantage can be explored from different distinct perspectives. Wang (2014) identifies two dominant theories of competitive advantage as being the resource-based theory and the market-based theory, which form the primary focus of the analysis. Additionally, alternative views contribute to a multifaceted understanding of competitive advantage within varying contexts.

2.3.1 Resource-Based View Framework

Edith Penrose, in her 1961 book 'The Growth of a Firm', highlights the role of management within the firm, which is said to be the foundation of the resource-based view (RBV) framework (2015, as cited in Peteraf, 1993). The RBV theory argues that firms are heterogeneous, and through the utilisation of their resources, they can increase their economic efficiency and enhance customer satisfaction through improved production methods (Collis, 1994; Maijoor & Witteloostuijn, 1996; Peteraf, 1993). By leveraging these strategic resources effectively, a firm can differentiate itself in the market, achieve superior performance, and outperform its rivals, thereby attaining sustained competitive advantage (Helfat et al., 2023; Teece, 2018). In his earlier work, Porter (1985) and Grant (2019), in his more recent analysis of contemporary strategy, emphasise an organisation's value chain in achieving a differentiation advantage. They underscore the primary activities of a firm, such as inbound logistics, operations, outbound logistics, marketing and sales, and service, along with the secondary and or support activities, as crucial components for attaining competitive advantage. However, Porter further argues that industry structure and competitive forces play a more significant role in determining firm performance than the firm's internal resources alone. Porter's work emphasises the external environment and the importance of positioning within the industry as critical factors for competitive advantage (Porter, 1985, 1996, 2008).

Whilst (Barney, 1991) has made significant contributions to the RBV of the firm, he does, however, acknowledge the need for dynamic capabilities, suggesting that firms must possess the ability to adapt and reconfigure their resource base over time. Eisenhardt & Martin (2000) and Grant (2019) highlight the alignment between the RBV and dynamic capabilities. They emphasise that dynamic capabilities, including employees' skills and experience, marketing activities, alliances, and product features and performance, can be effectively leveraged to manipulate resources and create valuable strategies. In the self-review of his 1991 article ‘Firm Resources and Sustained Competitive Advantage’, Barney (2001) does acknowledge that further analysis is required to examine the value of resources using theoretical frameworks that outline the market circumstances in which various resources become valuable or lose their value.

2.3.2 Market Based View (MBV)

This theoretical perspective emphasises the importance of understanding market dynamics, customer preferences, and market orientation in achieving competitive advantage (Day, 1994; Slater & Narver, 1995). It aligns a firm's activities and strategies with customer needs and market conditions (Day, 1994; Porter, 1996). It argues that a firm's performance is primarily determined by industry factors and external market orientation (Porter, 1985, 1996, 2008). Companies frequently evaluate their competitive positioning by analysing the external conditions using Porter’s Five Forces Model (Porter, 2008).

Wang (2014) does, however, point out that Porter's Five Forces Model operates under the assumption of a traditional ideal market and a stable market structure, which is rarely observed in today's dynamic markets. Prahalad and Hamel (1994) argue that traditional strategy models, which focus on industry analysis, competition, and the pursuit of sustainable competitive advantage, must be revised in the face of rapid technological advancements and globalisation. They emphasise that the current business landscape is characterised by increasing complexity, uncertainty, and interdependence, rendering traditional strategies less effective.

Prahalad and Hamel (1994) advocate for a shift in strategic thinking to address this inadequacy, emphasising the importance of core competencies and innovation. They propose a new paradigm emphasising a firm's internal capabilities and resources rather than solely focusing on external market forces. By identifying and nurturing core competencies, organisations can better adapt to changing circumstances and gain a competitive edge.

2.3.3 Alternative Frameworks

There are alternative perspectives, emphasising additional factors that can influence a firm's success; these factors include:

2.3.3.1. Knowledge-Based View (KBV) Framework

KBV can be considered a subset or an extension of the RBV, which is a broader theoretical framework. KBV emphasises the role of knowledge as a critical strategic resource for organisations. According to this view, sustained competitive advantage comes from an organisation's ability to effectively acquire, create, apply, and leverage knowledge. Knowledge can include explicit (codified) knowledge and tacit (personal) knowledge possessed by individuals within the organisation (Grant, 1996; Nonaka & von Krogh, 2009; Spender, 1996). Organisations can gain a competitive edge by continuously developing and leveraging their knowledge assets. Leonard and Sensiper (1998) highlight the significance of tacit knowledge in fostering group innovation and knowledge sharing within organisations.

2.3.3.2. Dynamic Capabilities Based view

The dynamic capability perspective, an extension and refinement of the Capabilities Based View of the firm, emphasises a company's ability to adapt, innovate, and learn in response to changing market conditions (Helfat & Peteraf, 2009; Teece, 2007). Competitive advantage is achieved by continuously improving and renewing a company's resources, processes, and strategic capabilities. The authors further identify the development path for dynamic capabilities, which consists of three stages: sensing, seizing, and transforming (Helfat & Peteraf, 2009; Teece, 2007). This perspective recognises the importance of agility, flexibility, and the ability to seize new opportunities or respond to competitive threats (Teece, 2007).

2.3.3.3. Industry Structure

According to the industry structure view, the external environment and the characteristics of the industry in which a firm operates play a crucial role in determining its success. Factors such as market demand, competition, and structure can significantly impact a firm's performance, regardless of its resource capabilities (Downing, 2018; Porter, 1985; Sampler, 1998; Shahzad et al., 2013).

2.3.3.4. Institutional Theory

This perspective highlights the influence of social and institutional factors on an organisation's success and sustainability. Institutional factors such as laws, regulations, norms, and cultural values shape the behaviour and outcomes of firms. Compliance with institutional pressures and legitimacy within the institutional environment are critical determinants of success (Bhuiyan et al., 2023; Moré et al., 2016).

2.3.3.5. Network Theory

Network theory argues that a firm's success is influenced by its network of relationships with other organisations. The strength and quality of these relationships, including partnerships, collaborations, and alliances, can provide access to resources, knowledge, and opportunities contributing to firm success (Black & Boal, 1994; Pillai, 2006).

2.3.4 Selection of Resource-Based View (RBV) as the Theoretical Framework

In reviewing various theoretical frameworks pertinent to assessing competitive advantage in the context of video streaming services, the study initially explored multiple perspectives, including the Market-Based View (MBV), Dynamic Capabilities Based View, Knowledge-Based View (KBV), Industry Structure, Institutional Theory, and Network Theory. While these frameworks offer valuable insights into different aspects of competitive dynamics, the Resource-Based View (RBV) emerged as the most suitable theoretical lens for this research.

RBV, rooted in the seminal work of Penrose (1961) and later refined by scholars such as Barney (1991) and Teece et al. (1997), provides a comprehensive understanding of how firms leverage their unique resources to attain sustained competitive advantage. By focusing on internal resources, capabilities, and core competencies, RBV offers a robust framework for analysing the strategic decisions and actions of firms operating in the video streaming services market.

While acknowledging the relevance of other frameworks, such as KBV and Dynamic Capabilities-Based View, RBV's emphasis on the internal determinants of competitive advantage resonates strongly with this study's research objectives and empirical findings. Therefore, RBV is the cornerstone theoretical framework for analysing competitive dynamics, strategic positioning, and sustainability within the South African video streaming services market."

2.3.1 Noted Limitations of Resource-Based View (RBV) as the Theoretical Framework

While Porter's work emphasises the external environment and the significance of positioning within the industry as critical factors for competitive advantage, there is a need to acknowledge the significance of dynamic capabilities in addition to the firm's RBV. Dynamic capabilities, such as employees' skills, marketing activities, alliances, and product features and performance, can be effectively leveraged to manipulate resources and create valuable strategies, as highlighted by scholars.

The MBV theoretical perspective emphasises the importance of understanding market dynamics, customer preferences, and market orientation in achieving competitive advantage. However, in the face of rapid technological advancements and globalisation, it is necessary to reevaluate traditional strategy models that focus on industry analysis, competition, and the pursuit of sustainable competitive advantage. Scholars advocate for a shift in strategic thinking towards emphasising core competencies and innovation, proposing a new paradigm that focuses on a firm's internal capabilities and resources.

Additionally, there are alternative perspectives such as the Knowledge-Based View (KBV) framework, which emphasises the role of knowledge as a critical strategic resource for organisations. The Dynamic Capabilities-Based View asserts the importance of a company's ability to adapt, innovate, and learn in response to changing market conditions. Industry Structure and Institutional Theory perspectives also play crucial roles in determining a firm's success.

While RBV has been selected as the theoretical framework, there is an awareness of its limitations that would require additional exploration outside of this research. Priem and Butler (2001) highlight several key limitations of RBV. They critique the static nature of RBV, noting that it primarily focuses on resources at a given point in time without considering how these resources and capabilities evolve. Additionally, they underscore RBV's internal focus, suggesting that the perspective often neglects important external factors such as market dynamics, competitive actions, and regulatory changes. This internal focus limits RBV's ability to fully explain competitive advantage in rapidly changing industries. Furthermore, they point out that RBV's neglect of dynamic capabilities, emphasising that the framework does not adequately address how firms can develop and adapt their capabilities over time. By suggesting the need for integrating demand-side factors, the authors call for a more comprehensive approach that includes both internal and external factors to enhance the explanatory power of RBV. These critiques highlight the necessity for future research to address these limitations and develop a more robust theoretical framework for understanding competitive advantage.

2.4 Empirical Review

Through their empirical research on business models, George and Bock (2011) highlight how multiple authors support the notion that the resource-based view (RBV) often connects business models with the acquisition and allocation of resources. Furthermore, integrating knowledge and dynamic capabilities into the RBV has facilitated stronger connections between the business model and RBV.

2.4.1 Business models

A business model is a conceptual tool that elucidates how a company creates and delivers value to its customers. It subsequently devises a competitive strategy to gain an advantage over its rivals (Chesbrough, 2007). This innovative approach enables the company to acquire and sustain its competitive edge in the market. It also describes the structure of revenues, costs, profits and the value chain related to the business's delivery of value (Chesbrough, 2007; George & Bock, 2011; Lambert & Davidson, 2013; Mignon & Bankel, 2022; Osterwalder et al., 2005; Teece, 2010).

Maintaining a sustainable competitive advantage requires continuously innovating its products, services, operations, and business model (Chesbrough, 2007; Teece, 2018). “The bad news is that no great business model lasts forever” (Chesbrough, 2007).

A critical link exists between business model revitalisation and digital transformation (Bocken et al., 2014). Digital businesses are especially challenged on how they create value, as increasingly, customer expectations of internet-based services are that “basic services should be free” (Teece, 2010).

According to Foss & Saebi (2017), business model innovation is recognised as a new and substantial source of innovation. Their perspective is consistent with that of George and Bock (2011) and Lambert and Davidson (2013), who also acknowledge that business models provide an additional level of analysis in organisational studies. Business model innovation offers a framework that complements and renews strategic management (Foss & Saebi, 2017).

Companies should strive to innovate their business models proactively rather than being compelled solely due to financial pressures. Chesbrough (2007) advises that companies should establish internal mechanisms to safeguard their business model experiments and prevent direct competition with mainstream initiatives to ensure the success of these innovative endeavours. He further highlights that it is essential to note that expansion can create competition for resources between the new and established models, necessitating careful resource allocation and management (Chesbrough, 2007).

Numerous studies have leveraged the notion of the business model to offer a vantage point from which to examine an industry or group of organisations; there is, however, a lack of unified definitions and constructs thereof (Lambert & Davidson, 2013), which has hindered comprehensive and progressive research on business models, and particularly outside the e-business sector (Chesbrough, 2007). These authors have subsequently built frameworks to help generate a unified firm assessment of business models.

Lambert and Davidson (2013) further noted that digital transformation has significantly impacted the business models of digital music, online news providers, content providers, and network service providers in the media and telecommunications industry, owing to the influence of electronic commerce and the Internet.

2.4.2 Video Streaming Service Business Models

Given the varying application of business models across industries (Herbert et al., 2019), it is crucial to comprehend the diverse business models utilised by VSSs. The rapid expansion of VSSs has revolutionised the traditional television and movie industries, fundamentally changing how people consume entertainment content (Mulla, 2022; Sadana & Sharma, 2021; Tengeh & Udoakpan, 2021; Udoakpan & Tengeh, 2020). With their increasing popularity and the on-demand access they provide to extensive content libraries, understanding the underlying business models of VSSs is vital for their ongoing success and sustainability.

The significance of studying VSS business models lies in their transformative impact on the media landscape and their potential to shape consumer preferences and behaviours (Herbert et al., 2019; Mulla, 2022; Sadana & Sharma, 2021). Industry players and researchers can gain valuable insights into practical strategies and potential pitfalls in the highly competitive video streaming market by identifying the critical success factors and failures of different business models. Mulla (2022) identifies this as an area of future study due to the limited research literature.

Further empirical research is needed to understand better the different business models influencing the sustainability of VSSs in South Africa. More empirical research is required to understand the different business models affecting the sustainability of VSSs in South Africa. The existing literature, within the South African context, primarily focuses on the consumption behaviour changes due to the introduction of VSSs (Tengeh & Udoakpan, 2021) and the drivers of adoption and their impact on traditional Pay-TV (Udoakpan & Tengeh, 2020).

Although often called business models in the media and entertainment industry, the VSS revenue models are just a subset of the broader definition of business models (Chesbrough, 2007; George & Bock, 2011; Lambert & Davidson, 2013; Mignon & Bankel, 2022; Osterwalder et al., 2005; Teece, 2010). Table 7 details the different revenue models falling under VSSs. The revenue models include subscription-based models (SVOD), ad-supported models (AVOD), transactional models (TVOD), hybrid models and live-streaming models. Table 7 also highlights the innovative ways VSSs structure their revenue models (Mulla, 2022), including Hybrid and Freemium models. Also included in Table 7 is an exploration of how these models have been implemented by VSSs globally and their implications for revenue generation, customer acquisition and retention, content acquisition and distribution, and overall market positioning. VSSs may adopt hybrid revenue models or experiment with new ones to adapt to market trends and user preferences.

Table 7: VSS Business / Revenue Model Analysis[9]

Business Model	Description	VSS Examples	Benefits/ Successes	Challenges
Subscription-based Business Model (SVOD)	Users pay a monthly or annual fee to access a wide range of content, including movies, TV shows, and original productions. This model offers unlimited streaming with on-demand access to a library of content, often with multiple subscription tiers offering unique features or content availability(Glass, 2020).	Netflix and Showmax	• Predictable Revenue: Proven model that generates consistent revenue from every user (N. Jordan, 2023; Mulla, 2022). • Flexibility and Convenience for subscribers	• More prone to subscription cancelling because of changes in content, price, or subscription fatigue (Mulla, 2022). • Content acquisition costs due to large, diverse libraries
Content Licensing Business Model	VSS focus primarily on licensing and distributing content from various studios and production companies. These services do not create original content but curate a library of licensed movies, TV shows, and documentaries. They generate revenue through licensing agreements and potentially subscriptions or ad placements.	TelkomONE and Cell C Black	• Diverse content Library: By licensing content from various studios, production companies, and content creators • Established content: Licensing established content from well-known studios and networks often means accessing popular and critically acclaimed titles. • Cost Savings: Licensing content instead of creating original content can be more cost-effective, especially for new streaming services.	• Limited Exclusivity: Since licensed content can be made available to multiple streaming services, it reduces the exclusivity factor. Subscribers may find similar content on different platforms, making it more challenging for a service to differentiate solely based on content offerings. • Dependency on Licensing Agreements • Competitive Landscape: With many streaming services entering the market, securing licensing agreements for desirable content can become increasingly competitive
Advertising-supported Business Model (AVOD)	Provide free access to content while generating revenue through advertisements displayed during video playback (Glass, 2020; N. Jordan, 2023). Ad-supported models may include pre-	YouTube, eVOD and SABC+	• YouTube has experienced tremendous success with its ad-supported model. It has built a vast user base and generates substantial revenue through	• Premium content owners do not want their content to be licensed on AVoD platforms because it receives less revenue from other market models (Deloitte, 2018)

[9] Table created from information variety of sources.

	and mid-roll ads, allowing users to access content without paying a subscription fee but with periodic ad interruptions.		advertisements displayed before, during, or alongside videos.	
Hybrid Model	It is not a business model but an innovative way to structure service offerings by offering a combination of SVOD, AVOD and or TVOD models (Jordan, 2023). Users can access a limited content selection for free, supported by advertisements. Users have the option to either use the free version with ads or subscribe to a premium version for an ad-free experience and access to exclusive content.	Hulu, VIU and TelkomONE	• Diversified Revenue Streams: serving different audience groups. • Increased Accessibility: By offering different pricing options, Hulu makes its content more accessible to a broader range of users. • Enhanced User Experience: Premium subscribers receive additional benefits such as ad-free viewing, higher video quality, and exclusive content, creating a more satisfying user experience.	• Striking the right balance between ad-supported content and user experience, managing user expectations, effectively monetising free users, and optimising the conversion of free users to paying subscribers • Carefully curated content and pricing strategies. Continuous evaluation of user preferences to maintain a sustainable business model.
Freemium Model	Freemium models offer a combination of free and premium content. The basic service is free, often with limited features or access to a subset of content. Premium features or a broader content library are then offered through paid subscriptions (Deubener et al., 2016). This model allows VSS to attract a more extensive user base with the free tier and upsell premium subscriptions for enhanced content or additional features.	Showmax, YouTube & YouTube Premium	• User Acquisition and Upselling: The free version attracts users, who can be converted into paying subscribers through upselling. • Market Testing and Feedback: The free version helps gather user feedback and assess demand for specific features or content. • Brand Exposure and Awareness: The free version increases brand exposure and generates word-of-mouth recommendations, expanding the user base.	• Striking the right balance between ad-supported content and user experience, managing user expectations, effectively monetising free users, and optimising the conversion of free users to paying subscribers • Carefully curated content and pricing strategies. Continuous evaluation of user preferences to maintain a sustainable business model.
Pay-per-view or Transactional Business Model (TVOD)	Users are required to make individual purchases or rentals to access specific movies, sporting events, or live broadcasts (Glass, 2020). This model allows users to pay for and view content	DSTV's BoxOffice, Google Play Movies & TV Play and Apple TV	• Apple TV - additional revenue stream complements their subscription-based model and provides users with flexibility in accessing specific content. • It works well for services with limited libraries and is an effective medium for	• Continuous customer acquisition and retention (transactional level) • Competition from SVOD services • Value Perception for Customer vs SVOD type offerings

	per item rather than committing to a recurring subscription.		premiering movies or one-time sporting events (Mulla, 2022).	• Prevalence of Piracy and Copyright Infringement
Live/Linear Streaming Business Model	Broadcast real-time events such as sports matches, concerts, gaming, or news (Kirton & David, 2013). They generate revenue through partnerships, sponsorships, advertisements, and pay-per-view models for exclusive live content.	Twitch, ESPN+ and SABC+	• Real-time Engagement: Viewers can engage through live chat, comments, and Q&A sessions, fostering a sense of community and immediate feedback. • Authenticity and Fear of Missing Out (FOMO) • Expanded Reach and Accessibility: Live streaming enables content creators to connect with a global audience without any geographical limitations. • Cost Efficiency: It makes it more accessible for individuals, small businesses, and organisations with limited resources by eliminating the need for physical venues and equipment.	• Technical Challenges: Live streaming relies on stable and reliable internet connections. • Limited Control: Unlike pre-recorded content • Time Sensitivity: Live streaming requires viewers to be available at the specified time of the broadcast. • Monetisation Challenges: Monetising live streaming can be more complex than on-demand content. Advertising, sponsorship, or revenue generation through live streams may require a large and engaged audience, strategic partnerships, or additional marketing efforts.
Free Ad Supported Television (FAST)	VSS service allows viewers to access video content supported by advertisements at no cost. Unlike traditional subscription-based services, FAST platforms provide free access to streaming content, offering viewers an alternative to PayTV services (Moreno et al., 2023).	SABC+, Pluto TV, Tubi, Roku Channel	• Cost-Free Entertainment: Viewers can access a wide range of cost-free entertainment without subscription fees. • Advertising Revenue: FAST platforms generate revenue through advertising. Advertisers pay to showcase their products or services to a potentially large audience, creating a sustainable revenue stream for the platform. • Content Variety: FAST services often host a diverse array of content, including movies, TV shows, and original programming. This variety attracts a broad audience with different interests, contributing to the platform's success. • Accessibility: FAST platforms are easily accessible to a global audience with an	• Ad Overload: While advertising is a crucial revenue source for FAST, excessive, or intrusive ads can be a drawback. Viewers may become frustrated if ads interrupt content too frequently or disrupt the viewing experience. • Limited Content Quality: Some FAST platforms may need help securing premium or exclusive content, impacting the overall quality of the available content library compared to subscription-based services. • Dependency on Advertisers: The success of FAST is heavily reliant on advertisers' willingness to invest in the platform. Economic downturns or changes in

	internet connection. This accessibility expands the platform's reach and allows it to tap into diverse markets.	advertising trends can affect revenue and, consequently, the platform's sustainability. • Competitive Landscape: The growing number of FAST platforms and increased competition within the streaming industry pose challenges. Platforms must continually innovate and differentiate themselves to stand out and attract viewers.

2.4.3 Subscriber Acquisition and Launch Strategies in Video Streaming

Over and above the business models, the importance of marketing and launch strategies for VSSs must be considered in today's digital landscape. Netflix's international recognition has been attributed to its "production level, marketing strategies, and alliances" (Ojeda et al., 2022).

With the rapid growth of video streaming platforms like Netflix, Hulu, Amazon Prime Video, and Disney+, competition in the industry has become fierce, making effective marketing and differentiation strategies crucial for success (Dittmann, 2022; Jain, 2021).

Dittmann (2022) argues that content and the strategic action that the firm makes within the SVOD industry are the main differentiators and elements of Disney's platform differentiation strategy. He indicates that more than large content catalogues will be needed to guarantee success; instead, the service must differentiate itself in the eyes of the consumer (Dittmann, 2022).

Industry partnerships are vital in the launch and marketing strategies of video streaming platforms (Wayne & Castro, 2021), as they provide brand alignment with established and recognised brands. Collaborations between broadcasters and telcos enable VSSs to complete the value chain for subscribers, offering both quality content and affordable data for streaming. These strategies have proven successful, as evidenced by the impressive market share of services like Disney+Hotstar, capturing over 50% of the subscriber market in India, despite launching four years after Netflix (Anand, 2022; Jain, 2021).

Ensuring early adoption of subscribers, driven primarily by the services business model, value proposition and launch strategies, can foster network effects (Ellis & Brown, 2020; Fong & Riddersen, 2016; Hagiu & Rothman, 2016; Reillier & Reillier, 2017). These are vital for the long-term sustainability of VSS, contributing to user lock-in, a positive feedback loop, revenue generation, and the ability to innovate and adapt (Reillier & Reillier, 2017). By capitalising on these advantages, VSS can establish a strong market position, retain users, and remain relevant over time, ensuring their long-term sustainability in the ever-evolving digital landscape.

According to Hagiu and Rothman (2016) and Stummer et al. (2018), platforms must exercise caution when pursuing rapid early growth, as success cannot solely be determined by being the first mover.

At a country level, limited literature is available on the marketing strategies employed by VSS providers to drive user adoption in South Africa. However, Tengeh & Udoakpan (2021) touch on VSS adoption drivers, which are the growing number and increased affordability of smart TVs, smartphones, and tablets.

The effectiveness of subscriber acquisition and launch strategies is crucial for the success and growth of video streaming services. Factors such as marketing strategies, strategic differentiation through content, industry partnerships, and early adoption of subscribers play vital roles. Caution is necessary, however, as being the first mover does not guarantee success. Future efforts should focus on developing effective strategies to drive the success of video streaming services in South Africa.

2.5 Conceptual Framework and Propositions

The video streaming industry has experienced tremendous growth and disruption in recent years, becoming a dominant form of entertainment consumption. In this dynamic landscape, the role of business models becomes crucial in determining the competitive advantage and long-term sustainability of video streaming services. A well-crafted and effectively executed business model can differentiate a service from its competitors, attract and retain subscribers, and drive financial success. “A better business model often will beat a better idea or technology” (Chesbrough, 2007).

Moreover, the emergence of digital transformation has intensified the need for robust and adaptable business models in the media, entertainment and telecommunications industries. Digital technologies have reshaped consumer behaviours and expectations, requiring companies to reassess their strategies to stay competitive. In this context, the Resource-Based View (RBV) framework provides a relevant lens to analyse how a firm's unique resources and capabilities, embedded within its business model, contribute to sustainable competitive advantage.

2.5.1 Business Model Canvas

To examine and compare the resources and business models of telco-launched and broadcaster-launched video streaming services in South Africa, the business model Canvas (BMC) has been selected as the conceptual framework. The BMC, developed by Osterwalder and Pigneur (2010), offers a comprehensive and structured approach to understanding the various components of a business model and how they interrelate. The BMC, as designed by Osterwalder and Pigneur, consists of nine fundamental building blocks: customer segments, value proposition, channels, customer relationships, revenue streams, essential resources, key activities, key partnerships, and cost structure, as depicted in Figure 2.

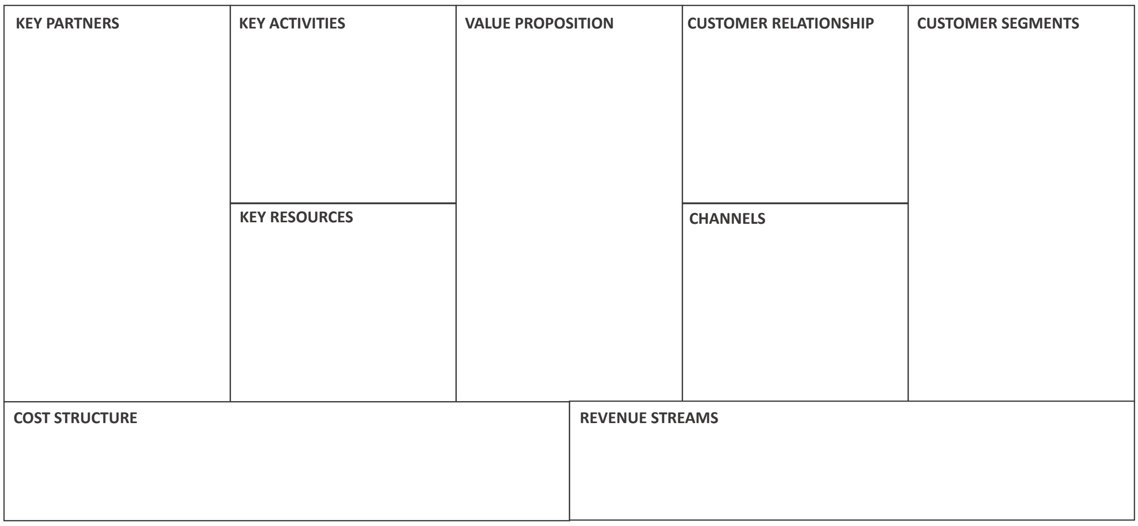

Figure 2: Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Collectively, these building blocks represent the essential elements that shape a company's strategy and value-creation process (Osterwalder & Pigneur, 2010).

By employing the BMC, the aim is to analyse and compare the business models of telco-launched and broadcaster-launched video streaming services in South Africa. This analysis provides valuable insights into the similarities, differences, strengths, and weaknesses of the business models employed by telco-launched and broadcaster-launched services. Additionally, the framework enables evaluating how well these models align with changing market dynamics and the requirements for digital transformation.

Using the BMC framework, the researcher can assess the strategic elements of video streaming services in South Africa. This will help identify the factors contributing to their success, competitive advantage, and long-term sustainability.

2.5.1 VRIO

In providing a comprehensive analysis of competitive advantage, particularly a sustainable competitive advantage, the VRIO framework will also be used to assess the VSS.

The VRIO framework, established by Jay B. Barney, is a resource-based approach that evaluates a firm's strategic resources and capabilities to determine their potential for sustainable competitive advantage (Barney, 1991). VRIO, which stands for Value, Rarity, Imitability, and Organisational support, highlights the internal elements of a firm, and it assesses whether a resource or capability is valuable, rare, difficult to imitate, and effectively organised within the company (Hesterly & Barney, 2014).

Valuable?	Rare?	Costly to imitate?	Exploited?	Competitive Implication
No	–	–	No	Competitive disadvantage
Yes	No	–	No	Competitive parity
Yes	Yes	No	No	Temporary competitive advantage
Yes	Yes	Yes	Yes	Sustained competitive advantage

Figure 3: VRIO Framework adapted from Hesterly and Barney (2014)

Using the VRIO framework, as depicted in Figure 3, allows for a more in-depth analysis of the specific resources and capabilities contributing to a firm's competitive advantage. It helps identify strengths and weaknesses, understand the uniqueness of resources, and assess the sustainability of competitive advantages.

Combining both BMC and VRIO frameworks will provide a more comprehensive and robust analysis, as they offer different perspectives and insights into various aspects of competitive advantage.

2.5.2 Research Propositions

Based on the above review, the study put forward the following propositions:

2.5.2.1. Research Proposition 1

The inability to establish a sustainable competitive advantage is a crucial reason for the demise of the telco-launched VSS in South Africa. Given that the same and/or similar industry factors apply to telco and broadcaster VSSs, how do the firms' resources influence the success or failure of their VSSs?

2.5.2.2. Research Proposition 2

The failure of telco-launched VSSs in SA is attributed to challenges in aligning with sustainable business models, emphasising the need for strategic adjustments in the face of digital transformation.

2.5.2.3. Research Proposition 3

Telcos inadequately protect new VSSs as business model innovations, resulting in a swift shutdown due to insufficient safeguards against resource competition with mainstream telco initiatives.

2.5.2.4. Research Proposition 4

Effective marketing strategies are pivotal in influencing VSS's competitive advantage in South Africa.

CHAPTER 3 RESEARCH METHODOLOGY

Establishing a robust research methodology is imperative to comprehensively explore the factors leading to the failure of video streaming services (VSS) launched by telecommunications companies (telcos) in South Africa. This chapter outlines the research methodology implemented in this study, encompassing the research design, data collection methods, and analytical approaches utilised to identify these factors. The aim is to ensure the research findings' transferability, dependability, credibility, and conformability.

3.1 Research Approach

In this study, grounded in the interpretive research philosophy, a comprehensive mixed-methods approach was employed, integrating deductive reasoning and qualitative methods to test the propositions guided by the resource-based theory empirically. Interpretivism, as the chosen research philosophy, acknowledges the subjective nature of social phenomena and emphasises understanding the meanings individuals attribute to their experiences (The Sage Handbook of Qualitative Research, 2018). The mixed-methods approach involved a combination of deductive reasoning and qualitative data collection methods, specifically semi-structured interviews and document analysis.

The deductive approach guided qualitative data analysis by systematically comparing it with existing theories or models relevant to telco-launched VSS's failure and broadcaster-launched VSS's success. Specifically, the BMC conceptual model was utilised within the deductive approach to standardise the analysis for benchmarking purposes (Saunders et al., 2019).

Through this research approach, the study aimed to align with the research propositions, investigating the factors influencing the success and failure of telco-launched and broadcaster-launched VSS in South Africa, including resources, business models, protection mechanisms, and marketing strategies.

3.1.1 Assumptions

The following assumptions underlying the research approach:

3.1.1.1. Theory Applicability

It was assumed that existing theories utilising the BMC and VRIO conceptual models were relevant and applicable in assessing and understanding the factors contributing to VSS failures and successes. The qualitative interview data was analysed and interpreted using these theories as frameworks.

3.1.1.2. Data Accuracy and Reliability

The research acknowledges the factual nature of the qualitative interview data collected, ensuring accuracy, reliability, and representation of the perspectives and experiences of the participants. It is assumed that the participants provided truthful and comprehensive information, enabling a thorough analysis of the factors influencing VSS failures.

3.1.1.3. Assumption of Generalisability

The research's assumption of generalisability posits that the insights gleaned from the analysis of multiple case studies involving telco-launched and broadcaster-launched video streaming services in South Africa hold relevance beyond the confines of these specific cases. By delving deeply into the strategic manoeuvres, challenges, and competitive dynamics within this niche, the study aims to offer insights that can be extrapolated to similar contexts within the South African market. Through a comprehensive exploration of the factors influencing the success or failure of VSS initiatives, the research endeavours to contribute to a broader understanding of the dynamics shaping the South African media landscape.

3.2 Research Strategy

This study merges the real-world application of management with academic rigour, leveraging the diverse perspectives offered by business research.

The research design for this study employed a comparative case study approach, which included qualitative interviews, to investigate the factors influencing the success or failure of telco and broadcaster VSSs in South Africa.

3.2.1 Comparative Case Study Analysis

Within the framework of case study research, comparative document analysis has gained substantial recognition in the field of business research (Saunders et al., 2019) and was considered the most suitable data collection technique for this study. The comparative analysis research strategy is well-suited for examining complex incidents within their authentic context (Saunders et al., 2019; Yin & Campbell, 2018). Yin and Campbell further emphasise that case studies are particularly effective for studying a “contemporary set of events over which a researcher has little or no control” (Yin & Campbell, 2018), aligning with the nature of this study. Multiple cases will be selected, representing both telco-launched and broadcaster-launched VSS. Selecting multiple telco and broadcaster VSS cases facilitated comparing their experiences and outcomes, providing a comprehensive understanding of the research questions and propositions.

As part of the multiple case study analysis, the primary data collection method was qualitative interviews with employees and service providers involved in VSS operations. These interviews enabled the collection of detailed and contextualised information about the firms' resources, competitive advantages, business models, marketing strategies, and other factors relevant to the research questions and propositions.

The document analysis phase served as a crucial component of the research, particularly in cases where interviews with representative individuals from the respective organisations were not feasible. This approach allowed for valuable insights from publications and media statements, contributing significantly to understanding strategic approaches, decision-making processes, and industry dynamics related to telco and broadcaster VSS.

The study analysis, coupled with qualitative interviews and document analysis, provides rich and detailed data (Creswell & Creswell, 2018). Thereby enabling an in-depth exploration of the factors influencing VSS success or failure.

3.2.2 Conceptual Framework

The study employs a multi-faceted approach to analyse online streaming firms' business models and success factors within the South African market. Initially, the Business BMC serves as a comprehensive tool for capturing and examining the intricacies of various business models deployed by these firms. The BMC allows for the systematic identification and assessment of critical components such as value proposition, customer segments, channels, and revenue streams, providing a structured foundation for understanding the operational strategies of each firm.

Subsequently, the VRIO framework is utilised to delve deeper into the business models' competitive dynamics and long-term viability. VRIO analysis enables evaluating a company's resources and capabilities regarding their value, rarity, inimitability, and organisational support, shedding light on the factors driving its competitive advantage and potential for sustained success. By applying the VRIO framework to each firm under study, this research seeks to uncover insights into the unique success factors of telco-launched and broadcaster-launched video streaming services in South Africa.

However, it's important to note that the information gathered through semi-structured interviews and document analysis will not be solely confined to the BMC and VRIO frameworks. Instead, a reflective thematic analysis approach will be employed to analyse and interpret the qualitative data collected systematically. This approach allows for identifying recurring themes, patterns, and insights across the data set, providing a deeper understanding of the critical success and failure factors within the South African video streaming market.

This research aims to derive meaningful insights that transcend individual cases and inform recommendations for developing sustainable digital video platform businesses in South Africa. By integrating academic theories with practical insights gathered from industry stakeholders, this study aims to bridge the gap between theory and practice, ultimately contributing to a comprehensive understanding of the challenges and opportunities inherent in the evolving landscape of video streaming services.

3.2.3 Strengths of the Chosen Research Approach

The chosen research approach for this study, integrating document analysis with a multiple case study design, presents several notable strengths. Firstly, adopting a multiple case study design allows for an in-depth exploration of VSS initiatives, facilitating a comprehensive understanding of the intricate factors influencing their success or failure. This approach captures the complexities and nuances of the real-world context, providing detailed insights that may not be achievable through alternative research methods. Secondly, examining multiple cases within the telco and broadcaster VSS landscape in South Africa allows the study to contextualise its findings within a specific industry and geographical context. This contextualisation enhances the understanding of the research phenomenon and enables a more thorough analysis of the factors at play. Lastly, incorporating qualitative interviews and document analysis generates rich and detailed data. This multi-method approach, complemented by triangulation, ensures a substantial amount of information that can be thoroughly analysed and interpreted, thereby enhancing the validity and reliability of the findings in this study.

3.3 Data Collection Methods

The research utilised a multiple case study analysis approach, incorporating purposeful sampling to select participants for in-depth interviews. Additionally, snowball sampling was employed to expand the sample pool, ensuring a more thorough exploration of diverse perspectives aligned with the research objectives. The aim was to gather extensive data to identify and compare factors influencing VSS sustainability, differentiating between successful and unsuccessful services. The insights gained from these robust data collection methods will provide valuable contributions to understanding the roles of resources, business models, protection mechanisms, and marketing strategies in determining the success or failure of VSS in the South African market.

3.4 Population and Sample

This study's population includes broadcasters and telcos that have launched their own VSSs in South Africa as seen in Table 4. A purposive sampling strategy was employed to ensure the research focuses on the most influential entities within the industry. This approach allows for selecting subjects most relevant to the research objectives, ensuring a comprehensive analysis of the competitive dynamics between broadcaster-launched and telco-launched VSS.

3.4.1 Broadcasters

The sample of broadcasters consists of the four largest broadcasters in South Africa by audience size, each of which has launched its own VSS. These broadcasters are:

3.4.1.1. SABC (South African Broadcasting Corporation):

As the national public broadcaster, SABC holds the largest audience share in South Africa. Its VSS offerings include platforms such as SABC News and SABC Education, which cater to a diverse range of viewers.

3.4.1.2. e.tv:

A significant player in the free-to-air television market, e.tv has a considerable audience base. Its VSS, eVOD, provides a mix of local and international content, enhancing its reach and engagement with viewers.

3.4.1.3. DStv (Multichoice)

DStv is the leading pay-television service in South Africa, offering a wide range of channels and content through its VSS, Showmax. Showmax is a prominent OTT service providing both local and international content.

3.4.1.4. StarSat

StarSat offers a variety of channels and has launched its own VSS to cater to its audience, focusing on affordability and diverse content offerings.

These broadcasters were selected due to their significant audience sizes and their strategic moves to launch VSSs, making them critical to understanding the competitive landscape in the video streaming industry.

3.4.2 Telcos

The sample of telcos includes the four largest telecommunications companies in South Africa by subscriber numbers, all of which have launched their own OTT services. These telcos are:

3.4.2.1. Vodacom

As the largest mobile network operator in South Africa, Vodacom has a substantial subscriber base. It entered the VSS market with Vodacom Video Play, offering a variety of content to its users.

3.4.2.2. MTN

MTN, another major mobile network operator, has a large subscriber base and launched its own VSS, MTN Vu, formally Frontrow, to provide on-demand video content to its customers.

3.4.2.3. Telkom

Telkom, a leading fixed-line and mobile telecommunications provider, offered the TelkomONE platform, which included both live TV and on-demand video content, catering to its extensive subscriber base.

3.4.2.4. Cell C

Cell C, a significant player in the mobile telecommunications market, launched its own VSS, Black, to provide diverse content options to its subscribers.

These telcos were chosen based on their large subscriber numbers and their strategic initiatives to launch OTT services, which are essential for analysing the competitive dynamics and sustainability of telco-launched VSS in the South African market.

3.4.3 Justification of Sampling Strategy

The sampling strategy ensures that the study focuses on the most influential broadcasters and telcos in South Africa, providing a comprehensive understanding of the competitive dynamics in the VSS market. By selecting entities with significant audience and subscriber bases, the research captures a representative view of the industry’s key players and their strategic approaches to launching and sustaining VSS.

3.5 Data Collection Techniques

Multiple methods were employed to gather comprehensive data, including case study analysis and in-depth interviews.

3.5.1 Case Study Analysis

Multiple case studies were conducted on telco-launched and broadcaster-launched VSSs in South Africa. This approach aimed to gain profound insights into these services' unique dynamics and challenges. In addition to interviews, a meticulous examination of relevant documents such as financial reports, press statements, releases, and archive records was conducted. This document analysis was crucial for extracting valuable information concerning the business models, operations, strategies, strategic initiatives, market positioning, and anticipated responses to market challenges of the selected telcos and broadcasters.

3.5.2 In-depth Interviews

Complementing the case study analysis, the researcher conducted in-depth interviews with professionals employed or formerly associated with the telco and broadcaster VSSs. Participants were chosen based on their professional characteristics and expertise in VSSs. The semi-structured interview questions were designed to explore the factors influencing the success or failure of their respective platforms. The number of interviews conducted was determined to ensure a robust collection of data points, addressing the various elements of the BMC and VRIO frameworks. These interviews provided first-hand insights into the specific challenges and dynamics encountered by telco and broadcaster-launched VSS in South Africa. In cases where interviews yielded insufficient information, document analysis was employed to further the understanding of the specific dynamics and challenges unique to telco and broadcaster-launched VSS.

3.6 The Research Instruments

This study utilised semi-structured interview guides as research instruments to gather data. This method has been selected based on its relevance in addressing the research questions, literature, and theoretical framework. This approach enabled a comprehensive investigation of the selected telco and broadcaster VSS, allowing for an in-depth exploration of their strategies, market positions, and outcomes. The case study guide have been provided in APPENDIX B.

The in-depth interviews will provide a deep understanding of the telco-launched VSSs and broadcaster-launched VSSs. Two separate in-depth semi-structured interview guides have been developed for the telco and broadcaster VSS interviews (see APPENDIX E). These interview guides assisted in ensuring consistency and structure in the data collection process.

3.7 Procedure for Data Collection

In pursuit of a comprehensive understanding of the factors influencing the success or failure of VSSs in South Africa, the study employed purposeful sampling, snowball sampling, and document analysis.

The research study gathered rich data from industry professionals and relevant documents by combining purposeful and snowball sampling and document analysis. This synergistic approach facilitated a holistic understanding of factors contributing to the failure of telco-launched VSSs in South Africa, enabling a comparative analysis with the currently operational broadcaster-launched VSSs.

3.8 Data Analysis Strategies and Interpretation

Reflective Thematic Analysis, aligned with the interpretivism philosophy, was employed as the primary mechanism for analysing the gathered data. This qualitative method systematically identifies analyses, and reports patterns or themes within the dataset (Byrne, 2022). Byrne further indicates that, unlike other approaches, reflective thematic analysis emphasises the researcher's subjective reflections and interpretations during the analysis process. This approach recognises the significance of individual perspectives in shaping the understanding of the data. It involves a recursive and iterative process, allowing for nuanced data exploration to uncover underlying meanings and patterns (Byrne, 2022). It allowed the researcher to reflect thoughtfully, continually refining themes to ensure a comprehensive and nuanced interpretation of the rich qualitative data collected through interviews and document analysis (Braun & Clarke, 2006). This approach enhances the depth and contextual understanding of the factors influencing the success or failure of VSSs in the South African market.

3.9 Quality Assurance

In pursuing rigorous research, the study has systematically addressed key dimensions to enhance its findings' overall quality and validity. In ensuring transferability, the research aimed to make its outcomes applicable beyond the specific context, promoting broader relevance. Dependability was prioritised to establish the reliability and consistency of the study, ensuring trustworthy and replicable results. Credibility has been a focal point, guaranteeing the believability and authenticity of the findings. The researcher also emphasised confirmability, fostering objectivity and neutrality throughout the study.

The study employed meticulous documentation, rigorous methods, transparency, member checking, reflexivity, and integration of multiple data sources to achieve these aspects. These efforts collectively bolster the trustworthiness and relevance of the research, aligning with established principles in the research methodology (Creswell & Creswell, 2018; Greener, 2008; Saunders et al., 2019).

3.9.1 Transferability

The researcher has used purposive sampling to select participants with relevant characteristics and experiences, ensuring diversity and representing different perspectives within the telecommunications and broadcasting industry (Creswell & Creswell, 2018; Greener, 2008; Saunders et al., 2019).

3.9.2 Dependability

In line with Creswell & Creswell's (2018) assertion on ensuring dependability, the researcher has maintained clear and systematic documentation of the research process, including data collection, analysis, and interpretation techniques. The researcher has also used peer debriefing to review and validate the interpretations and findings, reducing potential biases and increasing the reliability of the study (Tracy, 2010).

3.9.3 Credibility

The researcher employed triangulation, whereby multiple data sources, such as interviews, documents, and reports, were compared to cross-validate the findings (Saunders et al., 2019). Through reflective thematic analysis, the research again corroborated findings and enhanced the study's credibility (Tracy, 2010). Tracy recommends spending more time engaging with study participants during interviews to build a stronger rapport and establish trust. This can help to improve the credibility and accuracy of the data collected, and it is a practice that the researcher was committed to following when conducting interviews.

3.9.4 Confirmability

The researcher adopted a reflexive stance by documenting and reflecting upon their biases, assumptions, and preconceptions (Creswell & Creswell, 2018; Greener, 2008; Saunders et al., 2019).

The researcher has maintained an audit trail by recording decisions, interpretations, and changes made during data analysis, allowing for an external audit or examination of the researcher's decision-making process (Creswell & Creswell, 2018; Tracy, 2010).

3.10 Ethical Considerations

Ensuring the ethical conduct of research is of utmost importance, and the researcher has upheld ethical standards throughout the study. The researcher has taken several measures to ensure the ethicality of their research, such as;

3.10.1 Informed Consent

The researcher has obtained informed consent from all participants, providing them with clear information about the study's purpose, procedures, potential risks, and benefits. Participants were free to participate voluntarily and could withdraw at any stage without consequences.

3.10.2 Confidentiality & Anonymity

Strict measures were implemented to safeguard participant privacy and confidentiality. Personal information has been handled with the utmost confidentiality, and data has been anonymised, using pseudonyms to protect participants' identities. Any identifying information has been removed or disguised to ensure confidentiality. The researcher has securely stored all data and limited access to it to maintain confidentiality. Electronic data has been password-protected.

3.10.3 Participant Welfare and Communication

Potential risks and harm that participants might have experienced were considered throughout the research process. Without sensitive topics that would necessitate support, no assistance was required by any participants. Transparency was maintained, ensuring participants were neither deceived nor manipulated. Accurate and transparent information about the study's purpose and implications was provided to participants. Open and respectful communication was upheld, establishing a collaborative relationship. Any concerns or questions raised by participants were promptly addressed with sensitivity.

The necessary ethical approvals were obtained, and compliance with guidelines and regulations set by the relevant ethical review board was ensured. Through the implementation of these measures and adherence to ethical guidelines, the study was conducted with the utmost ethical consideration, prioritising the welfare, autonomy, and rights of the participants involved.

CHAPTER 4 PRESENTATION OF FINDINGS

4.1 Introduction

In this chapter, the presentation of findings adopts a structured approach. It begins by introducing the participants and detailing the selection process, providing insights from the case study document analysis. The second part explores the applied methodology, emphasising the use of Reflective Thematic Analysis as outlined in Chapter 3. The third part reveals the identified themes, offering a comprehensive understanding of the data. Finally, the results are discussed in the fourth part, aligning the themes with the research questions and propositions.

4.2 Participants

In line with the case study analysis, participants were chosen based on the specific case studies under investigation. Purposeful and snowball sampling methods were employed to identify individuals who have held positions within or collaborated closely with the selected organisations. Interviews were successfully conducted for all cases except for StarSat, which was exclusively examined through document analysis due to the unavailability of interview participants.

Given the research's focus, individuals selected occupied senior management or executive roles within their organisations. In safeguarding the identities of participants, specific positions are not disclosed. Additionally, an extra interview was conducted with Participant 11, who, while not having worked within the sample group of companies, possessed extensive experience within telco and broadcaster VSSs that have operated and continue to operate in South Africa. The inclusion of Participant 11 aimed to enrich the study with a broader perspective and expertise relevant to the South African market dynamics.

Table 8 provides a detailed outline of interview participants, the companies with which they are associated, and the interview mechanism employed.

Table 8: Interview Participants

Participant	Category	Organisation	Interview Method
P1	Employee	SABC+ TelkomONE	In-person
P2	Service Provider	Cell C Black MTN FrontRow Vodacom Video Play	Online
P3	Service Provider	Cell C Black MTN FrontRow SABC+ TelkomONE	In Person
P4	Service Provider	Cell C Black MTN FrontRow SABC+ TelkomONE	In Person
P5	Employee	eTV eVOD MTN FrontRow	In Person
P6	Employee	TelkomONE	Online
P7	Employee	Showmax	Online
P8	Employee	Showmax	Online
P9	Employee	Vodacom Video Play	In Person
P10	Employee	SABC+ TelkomONE	Online
P11	Employee	Kwese Play Vui	Online

4.3 Data Analysis Process and Concepts

In assessing the sustainability of VSSs in South Africa and examining digital business models and strategies, the reflexive thematic analysis (RTA) approach was chosen for data analysis. Following Braun & Clarke's (2006) six-phase RTA framework, the study aimed to identify critical success and failure factors of South African broadcasters and telecommunication companies' VSSs, focusing on their business models, dynamics, and challenges in the local market. Additionally, the research aimed to compare sustainability factors between successful and failed VSSs in South Africa, providing recommendations for developing sustainable digital video platform businesses in the country.

A reflexive thematic analysis approach for qualitative data was applied to information gathered through interviews with managers and executives within the selected telco and broadcaster video streaming services. Additionally, document analysis was conducted on the respective VSSs of these entities. The comprehensive RTA approach, as outlined by Braun & Clarke (2006, 2021, 2022) and Byrne (2022), assisted in uncovering patterns, themes, and critical factors related to the sustainability and success of video streaming services in the South African market. The utilisation of Nvivo 14 facilitated a systematic analysis of the collected data, contributing to identifying and interpreting essential insights.

Applying an essentialist approach grounded in philosophical perspectives (Byrne, 2022), the researcher embraced the notion of inherent, unchanging, and universal characteristics. Employing a deductive approach and latent coding resulted in 188 concepts, eventually refined to 141 through multiple coding interactions (refer to Table 9) for the view of the themes and APPENDIX F, Table 10, for the detailed research themes and codes.)

4.4 Themes

Identifying themes involved a comprehensive analysis, including assessing code names, descriptions, and their alignment with the research questions. Iterative interactions were conducted, refining the themes through careful consideration and scrutiny.

The final round of analysis resulted in 7 themes (refer to Table 9), spanning various aspects of the research questions. Several themes encompassed subthemes, adding depth and granularity to the analysis.

Table 9: Research Themes from Concepts

Theme	Description	Files
Research Question 1: What is the relevance of the RBV framework in assessing competitive advantage and sustainability in video streaming services		
1. Broadcasting Core Competence - Content Leadership and Strategies	Broadcasters focus on content leadership and strategic approaches within their core operations. Underscores the pivotal role of content and how broadcasters leverage their expertise and leadership in content-related strategies within the video streaming landscape.	25
2. RBV Driven Business Strategy & Challenges	Explores how telco and broadcaster entities strategically deploy and manage their resources within the South African video streaming services landscape.	37
Research Question 2: What is the role of business models in maintaining competitive advantage and driving strategic renewal in the face of digital transformation?		
3. Business Model Evolutions	Strategic recommendations for the evolutionary path of VSS, focusing on successful content business models and understanding the disparities between telcos and broadcasters.	43
4. Navigating Sustainability Challenges in Video Streaming Services through Business Model Alignment	Explores the intricacies of sustaining profitability within VSS by examining the challenges associated with business model alignment. It delves into how strategic alignment or misalignment with the business model can impact the long-term viability and financial success of VSSs in the dynamic digital landscape.	14
Research Question 3: What are the key factors influencing the effectiveness of subscriber acquisition and launch strategies in the success and growth of video streaming services in South Africa?		
5. Marketing Strategies for Competitive Sustainability	Scrutinises the challenges entities encounter in executing marketing strategies and expansion initiatives in the context of video streaming services.	26
6. Optimising Subscriber Acquisition for VSS Growth	Unravelling the intricacies of subscriber acquisition strategies in the South African video streaming landscape. This theme delves into challenges and strategic solutions, exploring market dynamics and practical approaches to enhance the success and growth of video streaming services through targeted subscriber acquisition initiatives.	47
7. Positioning for market expansion	Incorporating market expansion and market-specific strategies, competitive launch environment, telco-broadcasters collaboration, and audience trust.	25

4.5 Findings

In this section, the integrated results of the mixed-methods approach are presented, consolidating findings derived from both semi-structured interviews and document analysis. Consolidation of the findings was done to ensure clarity, as the cohesive nature of the research design underpins the approach employed here. The execution of semi-structured interviews and document analysis adhered to strategic guidance from the Business Model Canvas and VRIO conceptual models. This deliberate alignment ensured a unified exploration of critical success and failure factors within telco and broadcaster VSSs in South Africa.

The consistency in the data analysis process, complemented by document analysis as a supplementary tool addressing nuances not entirely covered in interviews, facilitates a comprehensive and integrated presentation of results for each research question and research proposition. This synthesis aims to furnish a holistic understanding of the factors influencing the sustainability and success of VSSs in the South African market. The method effectively addresses the research questions and propositions, with the thematic approach maintaining alignment with the overarching research framework.

4.5.1 Findings for Research Question 1

Research Question 1: *What is the relevance of the RBV framework in assessing competitive advantage and sustainability in video streaming services?*

Research Proposition 1*: The inability to establish a sustainable competitive advantage is a crucial reason for the demise of the telco-launched VSS in South Africa. Given that the same and/or similar industry factors apply to telco and broadcaster VSSs, how do the firms' resources influence the success or failure of their VSSs?*

4.5.1.1. Theme 1: Broadcasting Core Competence - Content Leadership and Strategies

This theme illuminates the fundamental emphasis broadcasters place on content leadership and strategic methodologies within their core operations. It underscores the crucial role of content, examining how broadcasters leverage their expertise and leadership in crafting content-related strategies within the evolving video streaming landscape. Additionally, the theme delves into the challenges faced by telcos, emphasising their struggles due to a need for more content core competency.

i. Competitive Advantage Through Content Leadership

In this predominant theme, the paramount significance of content within the video streaming landscape is accentuated, as emphasised by P1, *"in terms of competitive advantage, I think first and foremost, it's content."* This sentiment is echoed by P11, who underscores that *"Local content is king,"* highlighting how broadcasters leverage their expertise and leadership in content-related strategies and actions.

"*The best thing about being a broadcaster is access to content, and then in the local broadcaster space, it's the access to local content*" adds P3. In support of this, (Dosunmu, 2023) quotes Jason Njoku, co-founder and CEO of Iroko TV, saying, "The DNA of the company needs to be content. Live, breathe, and market it."

The challenges telcos face in launching their video streaming services are emphasised, with Daily Investor (2022) noting that video streaming is not the core business of a telco. Given the obstacles operators face in establishing successful streaming services, it is unsurprising that they encounter a high failure rate, compounded by conflicting objectives within the telcos.

This theme underscores the crucial role of broadcasters, their core competency, and their expertise in content creation in the reason behind the success of broadcaster-launched VSSs, as exemplified by P2's statement, *"For any video service to succeed in any market, you have to have local content. But particularly these services in South Africa that were targeting particular demographics, local was key."*

The findings suggest that the success of broadcaster-launched VSS can be attributed to their robust content strategies, where content development and management are their foundational strength.

ii. Telco challenges with access to and expertise in content.

In contrast, telcos' difficulties in establishing a sustainable competitive advantage are evident, primarily from challenges in devising effective content strategies and business models. This challenge is underscored by telcos' need for experienced content resources within their organisational framework. P1 highlights the substantial difference between telcos and broadcasters, emphasising, *"The huge difference between a telco and us, or any broadcaster, is content, [it's our] core business."* The limited understanding of the content ecosystem and a pronounced reliance on international content sources are further noted, as expressed by P2, who underscores the significant impact of international content on these VSSs, stating, *"The biggest cost, the spiralling cost, the bits that they can never get their heads around, and get the* *business case to work, was the cost of international content. Once you're in this space, it's an arms race."*

Noteworthy is that broadcasters, despite their success, grapple with challenges related to content prioritisation between their traditional and new business ventures, as indicated by P7, *"You know, your pay TV business wants it, your streaming business wants it, and it's a [juggling] act because you've got a business that's very mature on the one hand, and you've got a business that is in the very early-stage development that you need to nurture."*

A cross-cutting issue observed in both telcos and broadcasters is their struggle to compete effectively at the outset; as P1 indicates, "*If you look at the success of a lot of the big entities, what so-called big OTT players [have] is the fresh content they can offer, so-called Originals, as well as their library content."* Local VSSs need more extensive libraries that rival the depth of content these international VSSs offer.

iii. Theme 1: Research Proposition 1 Alignment

Theme 1 - Broadcasting Core Competence - Content Leadership and Strategies strongly aligns with Research Proposition 1 (RP1). The unanimous emphasis on content as crucial for competitive advantage, especially amongst local broadcasters, underscores the importance of content leadership in establishing a sustainable foothold in the South African video streaming market. Industry professionals' perspectives, endorsing local content as a critical success factor, reinforce that sustained competitive advantage in VSSs hinges on effective content strategies.

Telcos' challenges in establishing a sustainable competitive advantage, particularly in formulating a winning content strategy, further validate RP1. Telcos struggle with their content ecosystem, facing inherent difficulties competing with broadcasters, whose core business revolves around content creation and distribution. The findings support RP1 by revealing the pivotal role of content-related strategies in the success of broadcaster-launched VSS and the significant challenges telcos face in this domain, contributing to a broader understanding of competitive advantage dynamics within the South African VSS market.

4.5.1.2. Theme 2: RBV Driven Business Strategies and Challenges

i. Investment Strategies

The contrasting investment strategies of broadcasters and telcos in the South African VSSs market shed light on their distinct approaches to risk and financial management. As exemplified by MultiChoice, broadcasters demonstrate a commitment to substantial investments in their VSS endeavours, as evidenced by their significant financial injections, such as the notable R500 million investment in the Showmax revamp (Modise, 2023a). In contrast, telcos often exhibit a risk-averse stance, limiting their investments to mitigate financial risks, as highlighted by insights from the Daily Investor (2022). Despite lessons learned from past experiences, South African telcos frequently repeat similar mistakes when venturing into the VSS market. P2's observations underscore this trend, revealing a recurring pattern where new telco sector entrants tend to follow their predecessors' footsteps despite initial intentions to avoid past pitfalls.

ii. Collaborative Dynamics

This section intricately examines the symbiotic relationship between strategic alliances and business models within the dynamic landscape of VSSs. The research explores how partnerships, collaborations, and joint ventures influence South African video streaming business models.

In the context of broadcaster-telco partnerships, the significance of alliances as a key growth lever in scaling a streaming service is emphasised by P7, particularly in markets where broadband data is not readily accessible and remains relatively expensive. P5 further highlights that their most successful partnership as a telco was with a broadcaster.

The findings also delve into the complexities of partnerships between telcos and broadcasters' platforms. The importance of equity is emphasised by P5, stating that *"a stake in the game"* must be had when working with a broadcaster. The limitations of collaborating on a platform that one's organisation does not own are recognised by P10, noting that *"innovation may be restricted."* These viewpoints shed light on the difficulties of collaborating between entities with differing objectives and priorities.

The suggestion to acquire businesses with established content expertise, proposed by P4, stands out as a strategic alternative for telcos, allowing them to leverage the equity value of established broadcasters rather than investing in building or partnering from scratch. This approach gains further significance when considering missed opportunities due to unsuccessful partnerships.

The Showmax-Comcast partnership exemplifies this strategy, illuminating the belief and commitment of international entities within the South African media industry. This collaboration reflects a broader consolidation trend and strategic alliances across global media companies, aiming to gain a competitive advantage. As collaborative broadcaster mergers redefine VSSs in Africa, the combined resources and content diversity achieved through such partnerships illustrate the potential for strategic growth and industry transformation.

iii. Strategic Resource Deployment for Business Model Innovation

One critical failure observed in telcos pertains to their inability to ensure strategic optimisation by not recruiting experienced talent in their VSSs and broadcast expertise to guide the strategic direction of VSS initiatives. P6 emphasises the need for a different approach in entering the content space, stating that it is a specialised industry like Mobile Network Operators (MNOs), requiring specific expertise. He notes a need for more attention to technical hiring when telcos venture into the content business.

P3 and P4 use the Rubik's Cube analogy to illustrate the complexities of running a successful VSS. The right resources are essential for understanding and solving the intricate components of this metaphorical Rubik's Cube. P3 explains, *"If you look at a Rubik's Cube, it generally has nine sides. If you look at this as a service, you're going to say, 'tick for the tech, tick for the right price, tick for the right content, there was the marketing, tick and tick for the strategy."* The timing of these different components is crucial for success, influenced by unique combinations of factors and affected by elements like time. P4 adds that the approach varies for each business, emphasising that a holistic service offering, encompassing TVOD, SVOD, and AVOD, requires solving the entire Rubik's Cube. Each proposition requires careful consideration and execution within the broader strategy.

iv. Technological Advancements and Challenges

A shared commitment to technological innovation emerged among broadcasters and telcos exploring VSS business models. Both sectors stressed the need for innovation to stay competitive in the fast-evolving industry.

Digital transformation and innovation were driving forces behind the launch of South African VSSs, as highlighted by P1, who emphasised responsiveness to market trends and consumer behaviour. Despite various technological innovations introduced by telcos and broadcasters in their VSS platforms, none have established a distinctive competitive advantage.

In launching their VSS, telcos anticipated benefits such as churn reduction and increased Average Revenue Per User (ARPU) but faced challenges in acquiring broadcast-specific technical expertise to achieve this.

Telco's technical competency, as indicated by P11, is noteworthy: *"It's a pity that telcos are so terrible at launching OTT services because they've got all the makings of being successful streaming service providers."* P2 adds, *"In terms of support, network streaming, all of those technical challenges that telcos face when deploying video, I was always very impressed with the skill sets, expertise, and technology. I don't think any of these platforms, any part of their failure was down to technical challenges."*

User Experience (UX) and User Interface (UI) are ranked second, only to content by P7, indicating that *"Content is undoubtedly the primary factor. The user's experience with that content, including UX, platform functionality, quality, and intuitiveness, is another significant factor."* Unfortunately, neither of these entities had the internal expertise to drive this. P2 notes, *"On UI, all those folks relied on outsourced partners. They brought in technology experts to help them deliver the UI."*

In this realm, broadcasters outshine telcos, leveraging their broadcast technology competence. P4 stressed the need for a cultural shift and expertise within telcos. The international competitive landscape in OTT services has a cross-cutting effect, with telcos and broadcasters competing directly with global players in the OTT space and putting them under immense pressure to compete globally with services possessing strong broadcast technical skill sets. These organisations have invested continuously in platform features and functionalities to maintain a sustained competitive advantage. Challenges in this arena are evident, as articulated by the Daily Investor (2022) and C. Jordan (2022), who say that Netflix has invested billions of dollars in creating a great user experience on all devices.

Challenges also arose in meeting or surpassing the technological superiority of international platforms, reflecting user and market expectations. P9 highlighted the complexity and costliness of platforms, underscoring the importance of local VSSs UI benchmarked against platforms like YouTube. The narrative reveals the intricate interplay between technological advancements, competitive pressures, and pursuing a superior user experience in the South African VSS landscape.

v. Regulatory Dynamics - Aligning Business Models

The intricate interplay between the regulatory landscape and the business models of VSS in South Africa is explored. The influence of regulatory frameworks and policies on strategic decision-making, market positioning, and the overall business models adopted by VSS entities is sought to be understood. The highly regulated environment within which South African broadcasters operate is highlighted, and the challenges encountered in formulating competitive strategies and business models that can effectively compete with OTT players facing fewer regulatory constraints are brought to light. An illustrative example is given by Business Tech (2023) and Click Media Corporate (2023), indicating that in South Africa, digital services and streaming platforms do not have to obtain content licenses, unlike their traditional counterparts such as SABC and DStv, who are required to hold such licenses. Furthermore, it is noted that a level playing field is being created by South African regulators who are actively working towards distinguishing between traditional broadcasting services (linear), video-on-demand providers, and video-sharing platforms (non-linear) in a graduated fashion.

However, besides this regulatory challenge, which does not impact telcos, the broadcaster's VSSs have continued to operate, surpassing international players in Africa.

vi. Theme 2: Research Proposition 1 Alignment

The investigation into Theme 2, delving into RBV-driven business strategies and associated challenges, intricately aligns with the assertions of Research Proposition 1 (RP1). The emphasis on investment strategies reveals a distinctive dichotomy between broadcasters and telcos, with the former showcasing a robust commitment to VSS development. Conversely, telcos adopt a risk-averse approach.

Furthermore, a critical failure observed within telcos is the strategic optimisation oversight, particularly in recruiting experienced talent possessing VSS and broadcast expertise to guide the strategic direction of VSS initiatives and emphasising the need for specific expertise often overlooked in telcos' forays into the content business.

Despite initial commitments to differentiation, the recurrent observation of telcos making identical mistakes upon entering the VSSs market underscores the persistent challenges these entities face in navigating the intricate dynamics of the VSSs landscape. This alignment with RP1 elucidates the critical role strategic investment decisions play in shaping the trajectories of VSS ventures, providing valuable insights into the overarching challenges telcos face in establishing a sustainable foothold in the South African market.

This alignment with RP1 provides a nuanced perspective on the strategic resource deployment for business model innovation, shedding light on the complexities and challenges telcos face in the South African VSSs market, ultimately contributing to a better understanding of the market dynamics.

4.5.2 Findings for Research Question 2

***Research Question 2**: What is the role of business models in maintaining competitive advantage and driving strategic renewal in the face of digital transformation?*

***Research Proposition 2**: The failure of telco-launched VSSs in SA is attributed to challenges in aligning with sustainable business models, emphasising the need for strategic adjustments in the face of digital transformation.*

4.5.2.1. Theme 3: Business Model Evolutions

i. Business Strategies and Business Model Adaptations

Broadcasters strategically direct audiences towards OTT platforms to respond to South Africa's imminent analogue switch-off and persistent load-shedding challenges. This move addresses the disruption to regular programming and creates an additional channel for broadcasters, allowing them to protect their revenues and develop innovative revenue models. About their Telkom partnership on TelkomONE, the CEO of SABC highlighted the importance of collaboration as part of their business turnaround plan, emphasising the opportunity for increased revenue generation and the monetisation of their archives (Business Tech Africa, 2020). SABC later took over TelkomONE and launched its service, SABC+, to enhance this objective. These new business strategies showcase the adaptability of broadcasters to industry shifts, demonstrating a proactive approach to the challenges posed by the changing media landscape.

Telcos and broadcasters leverage their VSSs to reshape their revenue models. Showmax in 2020 introduced a subscription-free tier, allowing customers to sample award-winning content (Business Tech Africa, 2020; Goldstuck, 2020). Telkom adopted a dual model with subscription-free (AVOD and FAST model) and SVOD models. P11 notes the intricacy of making AVOD work in the South African market, highlighting its unique revenue dynamics.

Diversifying revenue streams is crucial to financial sustainability in the digital landscape. However, a critical finding emerges as the adaptations, while triumphant for broadcasters, proved insufficient to sustain telco VSSs, highlighting the disparity in the effectiveness of these business model adjustments across industry players and further shedding light on the unique challenges faced by telcos in the VSS domain.

ii. VSS Long-Term Sustainability

It is crucial to emphasise that VSS investment is a long-term venture, necessitating patience concerning the expectation for expected returns. At its launch, Kotsaftis, General Manager of Showmax, emphasised that "*this is a long-play*" venture (Donnelly, 2015).

However, the theme underscores a significant failure by telcos. Dosunmu (2023) states, *"Producing content requires mobilising significant financial or technical resources. This is why success can take longer to arrive and be limited compared to services with existing activities."* Telcos' underestimation of the patience and capital required is evident. As highlighted by P9, telcos typically operate with the expectation of achieving at least breakeven within a relatively short timeframe. Their payback periods differ significantly from the investment cycles necessary for content ventures, particularly when such ventures deviate from their core business operations. This impatience underestimation of the investment required is highlighted as a significant factor contributing to the challenges faced by telcos in the VSS domain.

Further to this is the impetus for telco’s VSS investments, driven by consultants selling stories of “Content as a lucrative new revenue stream" (Daily Investor, 2022) rather than the long-term investment that it is. The Daily Investor further notes that operators seeking alternatives to declining voice revenue were sold on content as a silver bullet. Despite poor track records, consultants continued to advise South African telcos to invest in video streaming, creating a stark contrast between promises and realities once the VSS has launched.

iii. Strategic Value Management

The strategies employed by telcos and broadcasters to manage and enhance the perceived value of their services, as integral components of the business model construct, are analysed. Despite broadcasters succeeding in expanding viewer accessibility through OTT, telcos, who own the infrastructure through which OTT services operate, grapple with and are challenged in delivering meaningful value. According to P2, who observed telco VSS endeavours lasting roughly a year each, highlighted that the aftermath of service closure was marked by backlash, resulting in negative press and public relations issues. P4 supplements this perspective, stating, *"I do genuinely believe that the telcos intended to add value. But it can be argued that the lack of adoption highlights a misalignment with their base [and] their targeted base."* The struggle to create value emerges as a noteworthy hurdle major telecommunications operators face in successfully launching video streaming platforms (Daily Investor, 2022).

Another of the failings in value creation is attributed to, as P9 highlights, a fundamental contradiction within telco VSS's business models; these models, designed to encourage high data consumption, clash with consumer perspectives as users express concerns about the potential costs associated with significant data usage when streaming videos. P1 emphasises the importance of market comprehension and underscores the need to align business models with audience needs and affordability to ensure success.

A critical factor in the success of broadcaster-launched VSSs is their ability to connect with consumers. While multiple factors contribute to this outcome, P4 specifically identifies the SVOD model as a hindrance, asserting, *"Why did they fail? All of them were subscription services. So, they were asking the consumer to pay for content."* This insight underscores the critical role of revenue models in determining the perceived value of customer propositions and influencing consumer interactions and outcomes.

Furthermore, Dosunmu (2023) underscores Telkom's struggle to present a compelling value proposition, a vital component of organisational business models. TelkomONE, initially launched in partnership with SABC, was later shut down and relaunched as SABC+. In explaining this departure from content, Telkom acknowledged that the SABC would excel in "sourcing and curating relevant content for existing and new customers." Cell C echoed this sentiment in its CEO's statement, admitting that thinking they could compete against players like Netflix was crazy (Daily Investor, 2022). Vodacom also cited an increasingly competitive landscape necessitating a business strategy and model change to the aggregation of existing platforms rather than competing directly within the content business. "The landscape has since evolved with many partners launching their services in South Africa, giving our customers access to a wide range of quality content which drove our change in strategy" (Labuschagne, n.d.).

In response to the challenges faced by telco-launched VSS and their subsequent failures, telcos are strategically shifting their focus away from direct competition in the content business. Instead, they are embracing a content aggregation approach. Often referred to as the 'Fat Pipe Strategy' by industry insiders like P3, this strategy revolves around integrating multiple streaming services and establishing partnerships with them, moving away from pursuing proprietary content services. Telcos have uniformly communicated this strategic shift strategy and shut down their individual VSS initiatives (Labuschagne, 2022; MyBroadband, 2019).

P3 suggests that the necessary shift in business models displayed a value misalignment by telcos and broadcasters. P8 supports this assessment by providing their insights into DSTV's missteps during the launch of Showmax, stating, *"They duplicated DSTV content, taking an existing library and launching Showmax with it, which initially did not contribute positively to Showmax's brand experience."* However, Showmax addressed this issue by investing in original programming two years after its launch. Similarly. The recent collaboration involving MultiChoice, Comcast’s NBCUniversal, and Sky has further amplified Showmax's content offerings, promising to launch "at least 21 new Showmax Originals in February" (Thomson, 2024).

iv. Financial Viability

The theme highlights a key finding related to service sustainability, with telcos and broadcasters struggling. P4 notes, *"I don't think anybody has as yet succeeded or achieved business success in the subscription video-on-demand space."* Sustainability, viewed as a significant concern, involves grappling with financial challenges. P4 emphasises, *"If you're going into the space, you need to have billions of Rands planned in your long-term strategy."*

An integral concern lies in the overarching worry about financial sustainability affecting broadcasters and telcos. Complicating matters, they all keep separate financial results for their VSS, posing a challenge for external observers attempting to evaluate their profitability. P3 delves into the survival predicament after the inaugural disclosure of Showmax's financials, exposing substantial losses and prompting the question: *"How does one recover from such significant losses and continue to thrive? It requires a substantial financial investment, perhaps having a powerhouse like DSTV or Big Brother supporting you; otherwise, it seems implausible for anyone else to endure."* Gavaza's (2023) article, 'Showmax sets sights on profit in 2027, further reinforces this perspective, indicating that Showmax has not achieved profitability since its inception and relies on its new partnership agreement for future profitability. The same thought is echoed by Jason Njoku, co-founder and CEO of Iroko TV, on Disney+, an international VSS. Even Disney, the 'king of content', has struggled to build a profitable streaming business, Njoku said. Since it entered the business in 2019, the company has sustained losses of over $11 billion, including the $512 million recorded in the most recent quarter."

A notable thread across broadcaster VSS is their continued investment in services to ensure sustainability. However, no mention of this commitment is found in interviews and publications related to telcos, except for ambitious pronouncements during their VSS launches.

While the challenge of financial sustainability resonates with telcos and broadcasters, the insufficient investment by telcos could have contributed to the downfall of telco-launched VSS. This challenge underscores the complexity of economic sustainability within the VSS landscape and its potential role in the struggles faced by telco-launched VSSs.

v. Research Proposition 2 Alignment

The above findings collectively reinforce Research Proposition 2 (RP2), pinpointing the failure of telco-launched VSS in South Africa to challenges in aligning with sustainable business models. This underscores the imperative for strategic adjustments amidst the ongoing digital transformation. Telcos' miscalculation of the patience required for VSS investments and a desire for rapid returns highlights the need for more alignment of their business models. Consultants' promises of content as a lucrative revenue stream contribute to this challenge.

In contrast, broadcasters like Showmax exhibit commitment and adaptation despite shared challenges, resulting in sustainable business models in the evolving VSS landscape. Their strategic shift and collaboration emphasise the critical importance of adapting to industry changes and aligning with long-term business models.

Broadcasters, locally and internationally, continue to invest in their business, underscoring the industry's requirement for long-term investment. In conclusion, examining implications for strategic renewal underlines the necessity for a long-term perspective in VSS investments. Telcos' impatience, underestimating the time required for content ventures to yield returns, directly aligns with RP2, highlighting the challenges in aligning with sustainable business models. The struggle to create value, leading to low adoption and negative repercussions, supports the overarching proposition that the failure of telco-launched VSS in South Africa is rooted in challenges related to aligning with sustainable business models, necessitating strategic adjustments amid digital transformation.

Research Proposition 3: *Telcos inadequately protect new video streaming services (VSS) as business model innovations, resulting in a swift shutdown due to insufficient safeguards against resource competition with mainstream telco initiatives.*

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vi. Protection, Competition & Prioritisation

A steadfast commitment to safeguarding VSS ventures is evident among broadcasters, as articulated by P10, highlighting the strategic imperative of enhancing their competitiveness. The extensive implementation of technological protection measures, as emphasised by P1, positions it as a crucial element contributing to success. However, challenges in navigating this protection are acknowledged as a delicate 'juggling act' by both P7 and P8, underscoring the complexities of balancing mature businesses with early-stage VSS development.

The certainty of cannibalisation is acknowledged by P7, who emphasises the importance of not viewing it as such but rather as a vital narrative within leadership. This perspective is deemed crucial within a large organisation, as the mindset of perceiving it as cannibalisation can be highly detrimental. This recognition highlights the potential negative impact on organisational culture when the innovation is perceived as undermining the core business, warranting careful management and strategic communication to foster support as the platform grows.

In stark contrast, the findings expose a pronounced need for more protection for telco-launched VSSs. P3 asserts a general inadequacy in safeguarding these initiatives across the board, emphasising the need for more dedicated budgets for sustained growth. The metaphorical description of the telco-launched VSS as an unpolished diamond relegated to the sidelines, as noted by P3, encapsulates the essence of the insufficient protection afforded to these innovations.

Furthermore, P3 recommends the establishment of standalone entities, aligning with the notion that innovations, especially those with unique demands, should operate independently of broader business strategies. This sentiment is echoed by P4, advocating for setting up innovations as standalone organisations.

The findings regarding the protection of innovations, particularly the stark contrast between broadcasters' diligent protection and telcos' neglect, strongly corroborate Research Proposition 3 (RP3). It becomes evident that while broadcasters ensure the safeguarding and nourishment of their VSS, telcos' insufficient protection and resource allocation contribute to the downfall of their VSS ventures. This protection aligns closely with the core assertion of RP3, emphasising the adverse outcomes stemming from inadequate protection and organisational strategies in the context of telco-launched VSS in South Africa.

In considering sustainability, it is suggested that telcos review their approach, viewing the sustainability of their VSS businesses not just as standalone entities but as integral components impacting the telco business holistically. P3 emphasises, *"Forget about this as a revenue spin. It's never going to make you any money. What you really want to do is to create stickiness, to get other products consumed, and to get customers."*

vii. Research Proposition 3 Alignment

The findings regarding innovation protection, particularly the stark contrast between broadcasters' vigilant safeguarding and telco's neglect, corroborate RP3. It becomes evident that broadcasters ensure the protection and nurturing of their VSS, while telcos' insufficient protection and resource allocation contribute to the downfall of their VSS ventures. This finding closely aligns with the core assertion of RP3, emphasising the adverse outcomes stemming from inadequate protection and organisational strategies in the context of telco-launched VSS in South Africa.

4.5.3 Findings for Research Question 3

Research Question 3: *What are the key factors influencing the effectiveness of subscriber acquisition and launch strategies in the success and growth of VSSs in South Africa?*

Research Proposition 4*: Effective marketing strategies are pivotal in influencing VSS's competitive advantage in South Africa.*

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i. Effective Marketing Communication Strategies

This theme underscores the critical role of marketing in conveying the value proposition and positioning of VSSs.

The communication gap within telcos emerges as a recurring issue, contributing to the downfall of telco platforms. Despite the availability of internal communication channels such as telco stores, magazines, and other marketing collateral, their effectiveness in promoting VSS initiatives remains limited. P2 highlights the disconnect between the proposition and its communication strategy, stating, *"The proposition was never right, and even when it would be going in the right direction, it was poorly communicated and never really understood by the consumer."*

In this context, marketing and content marketing proficiency emerge as critical internal resource deficiencies experienced by telcos. P5 elucidates the intricate nature of content marketing within the telecommunications industry, asserting, *"As telcos, we're just not emotional marketers, so it became difficult to market content."* As an emotional sale, content demands a skilful approach to communication, a facet that telcos found challenging to execute effectively.

Despite their original intentions, all telcos, except for Cell C, faced criticism for the inefficient utilisation of their internal channels. P3 notes, *"All of them went in with an intent to use internal channels as part of the process and procedure to be able to use this product to amplify their business; however, for various reasons, it may not have been successful."* Even though Cell C leveraged internal spaces, it, too, encountered challenges on the marketing front, specifically in its misalignment with the content propositions. P3 acknowledges the efforts made by all telcos to utilise internal channels to some extent.

P6 sheds light on the considerable challenge faced by telcos in establishing effective communication channels with their customers. According to P6, *"It's very difficult to get to that level of communication required with your clients to make the service succeed; you don't really have the channels available to do so."* The substantial challenge telcos face in establishing effective communication channels with their customers is significantly influenced by stringent marketing restrictions and consent rules mandated for them. These regulations create a scenario where telcos may prioritise communicating sales messages related to their core telecommunications products rather than effectively engaging customers on value-added services like VSSs.

P4 underscores the paramount importance of robust communication strategies for the overall success of VSSs: *"In the entertainment space, we must market to build brand equity, to build awareness, and to stay engaged with our customers. We need to continuously remind them of the content that we're bringing onto the platform".*

In stark contrast, broadcasters have successfully attained a competitive advantage by establishing themselves as prominent content brands. P1 attributes SABC+'s success to the robust brand established by SABC, stating that *"there are a lot of new brands, but from a local perspective, SABC is a very strongly established brand".* P1 further adds that this positioning gives them a distinct advantage over telcos, contributing to the rapid growth of SABC+. P10 also touches on this aspect, suggesting that telcos may have been less successful because they are not known to be broadcasters; their expertise lies in telecommunications.

Recognising a notable oversight within telco's strategic approach, particularly in contrast to broadcasters, is imperative. Telcos boast diverse customer touchpoints, encompassing owned stores, dealer networks, and outbound and inbound call centres. Unlike broadcasters, who predominantly engage customers through inbound call centres, telcos possess a more extensive infrastructure. Regrettably, the underutilisation of these diverse touchpoints has been evident in promoting their VSSs. This oversight underscores a missed opportunity for telcos, emphasising the untapped potential inherent in their infrastructure for driving awareness and engagement with their VSS offerings. P11 reiterates this by saying, *"It's a pity that telcos are so terrible at launching OTT services because they've got all the makings of being successful streaming services."* Integrating this perspective enhances the narrative of missed opportunities and underscores the need for telcos to strategically leverage their diverse touchpoints to promote VSS.

ii. Strategic Subscriber Acquisition Approaches

Telcos and broadcasters employ diverse strategies to acquire subscribers, leveraging their core competencies. For broadcasters, recognising the significance of market segmentation as an internal resource for gaining a competitive advantage is paramount. P3 pinpoints a common flaw among telcos, where the desire to cater to everyone results in a lack of a focused and engaging strategy. P7 underscored the broadcaster's commitment to end-user segmentation, highlighting significant investments not only financially but also in terms of dedicated team efforts and time allocation aimed at comprehensively understanding and effectively utilising segmentation data for informed decision-making purposes.

Understanding market segments and consumer behaviour is crucial for effectively tailoring strategies to achieve successful market penetration. eVOD recognised a significant consumer pain point: the high cost of data for streaming. To address this challenge, eVOD strategically harnessed its industry relationships and partnered with MTN when launching its service. Through this collaboration, MTN offered eVOD subscribers 4GB of free data per month (McLoed, 2021), alleviating the burden of data costs and enhancing the value proposition for consumers. This innovative approach addressed a key pain point for consumers and positioned eVOD as a customer-centric service provider in the competitive VSS market landscape.

On the other hand, telcos prioritise vital aspects such as add-to-bill, utilising airtime as payment, and demonstrating flexibility in product offerings as essential components of their market penetration strategies. Telcos offer diverse billing methods, including vouchers, e-wallets, add-to-bill, and mobile payments, exhibiting flexibility in product features and ensuring alignment with market preferences and needs (Conroy, n.d.). This approach allows telcos to access and acquire a broad consumer base by providing various payment options and adaptable product features. The strategic approach adopted by telcos aligns with market dynamics, effectively addresses consumer preferences, and should contribute to successful market penetration.

However, the effective communication of these market product value propositions is the linchpin for the competitive sustainability of VSSs. The challenges faced by telcos in utilising owned communication platforms underscore the critical nature of clear and impactful messaging to consumers. As articulated by participants, a misalignment in propositions and poor communication hampers the understanding and acceptance of telco-launched VSS in the market. This finding reinforces the vital role of strategic marketing and content marketing proficiency in ensuring the success, competitive advantage, and enduring sustainability of VSSs in a dynamic and competitive landscape.

iii. Market Positioning Endeavours

When delving into the strategic manoeuvres adopted by entities within the video streaming landscape for market positioning and revenue generation, broadcasters highlight strategies to expand their market reach beyond traditional terrestrial or satellite markets, creating new revenue streams while focusing on their core business. P4 emphasises entering into the VSS business, *"There is an additional revenue opportunity for you there. But in essence, broadcasters will always be in the entertainment business"*, underlining the dual objective of revenue generation and core business preservation.

AVOD emerges as a strategic proposition in South Africa to enhance market penetration further. eVOD, Telkom, and SABC actively drive the adoption of AVOD, targeting a wider audience. P8 acknowledges the growth potential in the lower-income mass market segment. However, challenges arise, particularly concerning the cost of data, limiting broadband penetration, and hindering access for this demographic. Addressing user concerns regarding data usage and the potential cost thereof is identified as significant for effective subscriber acquisition (Conroy, n.d.; Daily Investor, 2023; Donnelly, 2015; Labuschagne, 2022; Lourie, 2015; Modise, 2022, 2023b; Neethling, 2024)

MTN made strategic moves by being the first to introduce zero-rated data for its VSS in South Africa. The competitive landscape also influenced this decision with the imminent launch of Showmax (MyBroadband, 2015). The subsequent growth and emergence of new VSS players prompted a defensive move by MTN.

This strategic decision by MTN demonstrated a proactive approach to competition and highlighted the significance of addressing data accessibility and costs as a crucial market positioning strategy. A strategy in some way or form was replicated by all subsequent telcos when launching their VSSs.

The broader industry trend also acknowledges that managing data consumption is pivotal, with P6 stressing the importance of telco partnerships in addressing this challenge. P6 notes, *“It's also crucial to partner up with telcos. Data is precious to people; therefore, they prioritise the utilisation thereof on the services that they find the greatest value in.”* This strategic collaboration further illustrates the industry's commitment to ensuring sustainable and accessible VSS for diverse market segments.

In conclusion, telcos and broadcasters have undertaken proactive measures to address industry challenges through strategic market positioning endeavours, particularly in managing data accessibility and costs. However, the effectiveness of these efforts varies. Telecommunications companies needed to improve their unique capabilities to gain a competitive advantage and ensure sustainability in the ever-changing video streaming landscape.

iv. Content and Audience Engagement Strategies for Audience Growth

In reviewing the content consolidation, diversity, and engagement strategies of the VSS, the importance of localised content, audience-driven approaches, and compelling content to captivate and retain viewers becomes apparent.

Showmax has surpassed Netflix in Africa, with a focus on its growth tactics over the years, including investments in new content and subscription price reductions (Oladunmade, 2023). However, despite these efforts, it is recognised that the market pace could be faster.

eMedia and SABC strategically leverage original content and exclusive shows to attract and retain audiences. SABC took a bold step by withdrawing popular soapies from DStv Stream Catch-Up to maintain exclusivity on SABC+, emphasising the importance of high-quality content in subscriber acquisition (TVSA, 2023).

While telcos invested significantly in acquiring international content rights, some even delved into first-run rights, these did nothing to attract viewers to the service. *“MTN did dabble in first-run rights like Black Sails, Power, and Survivors Remorse. These had strong storylines, Black Sails was filmed in Cape Town and therefore had a South African connection, Power had a strong African American cast. So, these shows had some hooks. Everybody else kind of bought the same content from the same supplier.”* It is important, however, to note that none of these telcos invested in original content, which is exclusively produced for their platform. P4 highlights*, "Everybody else is investing in local content; [you need] to get those Originals because if you don't have original content, it's all being seen before, and you can discount the price as much as you like, but you're not going to get take up.”* P3 emphasises the significance of allocating a substantial budget to marketing, mainly focusing on original content promotion.

v. Holistic Value Proposition

Broadcasters adopt comprehensive approaches to entice Pay TV customers, offering incentives such as free or discounted subscriptions to VSSs like Showmax. These initiatives go beyond mere monetary considerations, emphasising understanding the emotional dimensions of consumer decision-making. Noteworthy examples include SABC+'s commitment to achieving universal access (SABC, 2022) and Showmax's support for local creators, reflecting their substantial investments in local content (Modise, 2023a). Nomsa Philiso, MultiChoice's CEO of general entertainment, elucidates on DSTV and Showmax's strategic orientation, stating, "We've invested in people, and we've invested in the different industries… So we position ourselves where we are needed and where we think we have an impact." (Broadcast Media Africa, 2024).

Conversely, there must be more evidence of telcos actively engaging in holistic value proposition initiatives. P5 highlights the imperative for telcos to enhance the value offered to consumers to incentivise desired behaviours. According to P5, *"you need to offer people more value on these services. That's the way you've got to start to look at it. How do I get more people to stream? For people that stream, stay on my network longer, recharge more, use more data."* Hence, telcos should redirect their efforts towards providing additional value to streaming users, potentially resulting in prolonged network engagement, heightened recharge rates, and increased data consumption.

vi. Research Proposition 4 Alignment

Research Question 3 (RQ3) findings illuminate the importance of strategic marketing, communication, and holistic value propositions for the success and sustainability of VSS. This finding aligns with Research Proposition 4 (RP4), affirming that effective marketing strategies contribute to competitive advantage and long-term sustainability in the dynamic video streaming market. The challenges faced by telcos underscore the necessity of impactful marketing approaches for enduring success.

4.6 Summary of the Findings

4.6.1 Findings for Research Question 1

The investigation into the relevance of the Resource-Based View (RBV) framework for assessing competitive advantage and sustainability in South African video streaming services (VSSs) reveals critical insights aligning with Research Proposition 1 (RP1). The success of broadcaster-launched VSSs is linked to robust content strategies. Theme 2 reveals a dichotomy between broadcasters and risk-averse telcos, aligning with RP1. Telcos' recurrent mistakes in the VSS market highlight challenges in navigating the landscape and supporting RP1. Overall, findings endorse RP1, emphasising content-related strategies' pivotal role in broadcaster success and telcos' challenges.

4.6.2 Findings for Research Question 2

Research Question 2 (RQ2) explores the role of business models in maintaining competitive advantage amid digital transformation. Research Proposition 2 (RP2) notes telco-launched VSS failures due to challenges in aligning with sustainable business models. RP3 suggests that telcos inadequately protect VSSs, leading to swift shutdowns. Findings show that telcos require assistance in making sustainable adjustments, financial viability, and value creation, supporting RP2. Regarding RP3, broadcasters protect their VSSs, while telcos lack the necessary safeguards, emphasising their downfall. In summary, telcos face challenges in aligning with sustainable business models and protecting VSSs, contributing to their failures.

4.6.3 Summary of Findings for Research Question 3

The findings shed light on the multifaceted strategies VSSs employ in South Africa for subscriber acquisition. Despite efforts, telcos' unique capabilities needed to be improved to ensure sustained competitive advantage in the dynamic landscape. The complexities of the South African video streaming market highlight the significance of strategic and user-focused approaches for effective subscriber acquisition and launch strategies. These insights align with and support the assertions made in Research Proposition 4.

CHAPTER 5 DISCUSSION OF FINDINGS

5.1 Introduction

In this pivotal chapter, the study delves into a comprehensive discussion of the research findings, drawing upon a nuanced mixed-methods approach that integrates insights from semi-structured interviews and document analysis. The interpretative lens is firmly grounded in the propositions guiding the Research Propositions 1, 2, 3, and 4. This chapter provides a holistic understanding of the factors influencing the sustainability and success of Video Streaming Services (VSSs) in South Africa, addressing the multifaceted dimensions encapsulated in the research questions.

5.2 Guided Case Study Analysis

The analytical journey unfolds through a focused case study analysis encompassing four prominent South African broadcasters and four leading telecommunications companies (telcos). This strategic selection allows for a close examination of the distinct approaches, challenges, and successes within the VSS landscape, providing valuable insights into the intricate dynamics of telco and broadcaster-launched services.

The exploration has been grounded in the three research questions in navigating the complex terrain of the South African Video VSS market.

5.3 Discussion on Research Question 1

Research Question 1: *What is the relevance of the RBV framework in assessing competitive advantage and sustainability in VSSs?*

Research Proposition 1: *The inability to establish a sustainable competitive advantage is a crucial reason for the demise of the telco-launched VSS in South Africa. Given that the same and/or similar industry factors apply to telco and broadcaster VSSs, how do the firms' resources influence the success or failure of their VSSs?*

Research Question 1 (RQ1) seeks to unravel this evolving ecosystem's strategies, challenges, and competitive dynamics. This inquiry serves as the guiding force, leading to the identification of two pivotal themes encapsulating the essence of the investigation.

5.3.1 Core Competency

At the core of the examination lies a profound scrutiny of broadcasters' core competence, mainly focusing on content leadership as a linchpin for success in the South African VSS market. As this theme unfolds, the spotlight is directed towards the strategic manoeuvres and content-related prowess employed by broadcasters to weather the challenges posed by digital transformation. The findings distinctly outline how content strategies act as a pivot for competitive advantage, offering a vivid portrayal of broadcasters' strengths in navigating the complexities of the digital era within the realm of RQ1.

Simultaneously, the exploration extends into the domain of Resource-Based View (RBV) driven business strategies. Dissecting the investment approaches, collaborative dynamics, and technological advancements that shape the landscape, unravelling how broadcasters strategically commit to VSS development and optimise their resources. This theme sharply contrasts telcos' approach, spotlighting the strategic shift towards content aggregation. The findings shed light on telcos' risk-averse strategies, recurrent market entry mistakes, and the evolving dynamics of the South African VSS market. This theme significantly contributes to the understanding of the competitive dynamics and challenges within the broader context of RQ1.

Barney (1991) and Teece et al. (1997) elucidated that competitive advantage refers to a company's capacity to surpass its competitors in a specific market, achieving superior performance and securing a stronger position. Grant (1991) underscores its pivotal role in determining a company's long-term success and profitability. The internal resources, crucial for enhancing economic efficiency, customer satisfaction, and overall production methods, are highlighted in the operational continuity of broadcaster-launched VSSs, in contrast to the telcos, who have faced numerous internal resource challenges and have since ceased operations.

The RBV theory posits that inherently heterogeneous firms can enhance economic efficiency and customer satisfaction by effectively utilising their resources (Collis, 1994; Maijoor & Witteloostuijn, 1996; Peteraf, 1993). The findings support this for the two organisational groups, telcos and broadcasters.

In addition to the RBV, the use of core competency aligns with the Knowledge-Based View (KBV) Framework. KBV can be considered a subset or an extension of RBV, which is a broader theoretical framework. KBV emphasises the role of knowledge as a critical strategic resource for organisations. According to this view, sustained competitive advantage comes from an organisation's ability to effectively acquire, create, apply, and leverage knowledge. Knowledge can include explicit (codified) knowledge and tacit (personal) knowledge possessed by individuals within the organisation (Grant, 1996; Nonaka & von Krogh, 2009; Spender, 1996). Organisations can gain a competitive edge over their rivals by continuously developing and leveraging knowledge assets. Leonard and Sensiper (1998) highlight the significance of tacit knowledge in fostering group innovation and knowledge sharing within organisations.

According to Teece, (2010), creating effective business models is a skill that requires an artistic touch. Entrepreneurs and managers have a higher likelihood of success if they can comprehend the needs of their users and be attentive listeners and quick learners. In this research, a trait broadcasters portray is their market segmentation focus and prioritisation. The research findings underscore that broadcasters, through adept utilisation of the RBV theory, have effectively harnessed their strategic resources, differentiating themselves in the market.

This differentiation, particularly in content curation and production, positions broadcasters to achieve sustained competitive advantage, aligning with Teece's assessment that a business model must meet specific customer needs to be a source of competitive advantage rather than just an effective way of doing business.

As with Porter’s argument that industry structure and competitive forces play a more significant role in determining firm performance than the firm's internal resources alone, the findings align with this perspective. Porter's work emphasises the external environment and the importance of positioning within the industry as critical factors for competitive advantage (Porter, 1985, 1996, 2008). These aspects were evident in the findings, especially regarding how telcos are compelled to limit communications to their base and the unevenly regulated environment that South African broadcasters must navigate compared to their international counterparts.

While RBV provides valuable insights into competitive advantage, the findings suggest it's not the sole framework in the dynamic VSS environment. KBV also influences competitive dynamics, emphasising the role of knowledge assets. Broadcasters' content leadership, supported by RBV principles, highlights the importance of strategic resource utilisation. Teece (2010) stresses effective business models meeting customer needs, while Porter's (1985, 1996, 2008) industry analysis underscores external factors. This highlights the interplay of RBV and KBV Theory in shaping competitive dynamics within South Africa's VSS market.

5.3.1 Technological Adaptation and Implications for Sustainability

Digital convergence, as defined by Jenkins (2006), signifies the integration of media forms, communication technologies, and content through digital technologies and the Internet. This transformation, encompassing technological, economic, and cultural dimensions, reshapes industries, business models, and societal norms (Bradley et al., 2019).

Technological adaptation is the paramount factor influencing competitive advantage within the VSS landscape. Both broadcasters and telecommunication companies find themselves navigating the challenges and opportunities of the digital vortex, which fundamentally alters the media landscape.

Broadcasters, equipped with established technological infrastructure, adeptly navigate the digital transformation, leveraging their core competence in content leadership and positioning them strategically in the competitive market, aligning with the RBV theory principles, which underscores the effective utilisation of internal resources for sustained competitive advantage (Collis, 1994; Peteraf, 1993).

Conversely, telcos face sustainability challenges rooted in internal cultural misalignment with the entertainment business. The research echoes Nwaiwu's (2018) emphasis on internal dynamics as crucial to business model success. The resilience exhibited by South African broadcasters in the face of digital disruption underscores the intricate interplay of internal factors in shaping success within the VSS domain.

5.3.2 Investment Strategies

In exploring RQ1 and the role of internal resources in creating competitive advantage, the findings illuminate the divergent investment strategies adopted by key players in the South African VSS market, focusing on broadcasters and telcos.

As exemplified by MultiChoice, broadcasters demonstrate a commitment to substantial investments in their VSSs. In contrast, telcos often display a risk-averse approach, limiting investments to mitigate financial risks. Despite lessons learned from past mistakes, telcos tend to follow a repetitive trajectory in entering the VSS market, potentially contributing to a higher failure rate.

The challenges telcos face are underscored by their unfamiliarity with the dynamics of the video streaming business. This misalignment with their core telecommunications business and conflicting objectives within telcos contributes to the high failure rate in launching successful video streaming services.

These findings resonate with the Resource-Based View (RBV) theory, emphasising the role of firm-specific resources and capabilities in achieving sustained competitive advantage (Barney, 1991). Through strategic investments, broadcasters fortify their content leadership, a critical factor in navigating the challenges of the digital era. Conversely, telcos face difficulties aligning their resources and strategies, contributing to a higher risk of VSS closure.

In exploring the role of internal resources in creating competitive advantage, the findings align with RP1, emphasising the critical importance of core capabilities, such as content leadership, in achieving competitive advantage.

5.3.3 Collaborative Dynamics

The collaborative landscape within the VSS industry is underscored by the pivotal role of industry partnerships, a strategic imperative echoed by Wayne and Castro (2021). These alliances are not merely operational synergies but serve as integral components in the launch and marketing strategies of VSS platforms.

The study recognises that partnerships between broadcasters and telcos transcend mere operational collaboration; they serve as a linchpin in completing the value chain for subscribers. This collaboration ensures a seamless offering, marrying quality content from broadcasters with affordable data for streaming from telcos. Such symbiotic relationships contribute significantly to VSS platforms' success by establishing a competitive advantage.

The importance of these collaborations is further underscored by the broader industry's acknowledgement of their role in shaping the adopted business models of entities in the South African video streaming landscape. Local broadcaster success stories, such as the eMedia and MTN partnership on eVOD and Showmax with Vodacom and Telkom, have demonstrated positive outcomes, highlighting the strategic importance of partnerships in launching and marketing VSS platforms. The findings also underscore the notable absence of such partnerships for telco VSSs; the absence thereof may have contributed to their lack of success. It emphasises the universal strategic importance of partnerships in the VSS industry globally and within specific regional contexts. This alignment supports RP1 and RQ1, as it illustrates how internal resources, particularly collaborations, have created competitive advantages for broadcasters, resulting in their sustainability.

5.3.4 Strategic Resource Deployment for Business Model Innovation

An essential aspect of RQ2 involves understanding how firms strategically deploy resources for business model innovation, mainly focusing on the observed challenges faced by telcos.

A critical failure observed in telcos is ensuring strategic optimisation by not recruiting experienced talent for their VSS initiatives. This finding aligns with the RBV theory and emphasises the role of valuable, rare, and non-substitutable resources in achieving a sustainable competitive advantage (Barney, 1991).

The Rubik's Cube analogy provided by P3 and P4 further illuminates the complexities of running a successful VSS. Success hinges on strategically combining the right resources at the right time, including technology, pricing, content, marketing, and strategy. The unique combinations of factors, influenced by time and specific business contexts, require a holistic and carefully executed approach. This insight supports the RBV theory's emphasis on strategically utilising firm-specific resources for sustained competitive advantage.

In conclusion, the findings on strategic resource deployment for business model innovation highlight the critical role of aligning valuable resources with strategic objectives. This emphasises the essence of RP1, showcasing how effective resource utilisation is pivotal in achieving sustainable competitive advantage, particularly in the dynamic landscape of VSS ventures.

5.4 Discussion on Research Question 2

Research Question 2*: What is the role of business models in maintaining competitive advantage and driving strategic renewal in the face of digital transformation?*

***Research Proposition 2:** The failure of telco-launched VSSs in SA is attributed to challenges in aligning with sustainable business models, emphasising the need for strategic adjustments in the face of digital transformation.*

In exploring the South African VSS landscape, Research Question 2 (RQ2) takes centre stage, guiding the investigation into the role of business models in maintaining competitive advantage and driving strategic renewal amidst digital transformation. This pivotal question unravels in two overarching themes, encapsulating the complexities and nuances of the business models adopted by industry players.

5.4.1 Business Model Evolutions

The exploration into the intricate realm of business models unfolds with a keen focus on the adaptations and evolutions undertaken by broadcasters and telcos within the South African VSS market. The strategic alignment of business models with the digital transformation wave becomes evident as the analysis dissects how broadcasters strategically direct audiences towards Over-the-Top (OTT) platforms, crafting innovative revenue models. In contrast, telcos grapple with challenges in sustaining VSSs, highlighting disparities in the effectiveness of business model adjustments. This theme highlights the crucial interplay between business strategies, model adaptations, and long-term sustainability within the dynamic VSS landscape. The findings underscore the transformative impact of VSS business models on the media landscape, shaping consumer preferences and behaviours, as emphasised by Herbert et al. (2019), Mulla (2022) and Sadana & Sharma (2021). These academics stress the profound impact of VSS business models on the media industry's sustainability.

Chesbrough (2007) and Teece (2018) stress that sustaining a competitive advantage demands continual innovation, extending to products, services, operations, and the business model. It accentuates the need for a business strategy oriented towards long-term sustainability, especially in shaping the design of the business model itself. The findings from this theme uncover how telcos' impatience, rooted in a short-term mindset, can lead to decisions prioritising immediate gains over sustained viability, creating a misalignment with the inherent nature of the VSS industry that demands patience and strategic planning. Johnson et al. (2008) emphasise the iterative nature of successful new businesses, stating that they typically revise their business models multiple times on the path to profitability. This misalignment, as evidenced in this research, poses challenges in developing a resilient business model, ultimately impacting the overall sustainability of telco-launched VSS ventures. Telcos often struggle due to a short-term mindset that conflicts with the longer investment cycles required for content-focused ventures.

In addition, Teece (2010) contends that identifying the optimal business model is seldom evident in the initial stages. Success is more likely for entrepreneurs and managers who are well-positioned and can learn and adapt as necessary, confirming the need to wait and review the success of a particular business model but also being mindful of the potential need to readjust their business model as they learn. Furthermore, Teece (2010) expands on this by asserting that setbacks are inevitable when establishing a new business. However, the likelihood of success increases when those shaping the business model can swiftly learn and adapt within a range that ensures a satisfactory profit.

In examining VSS business models, the research emphasises their transformative impact on the media landscape and their potential influence on consumer preferences and behaviours, as highlighted by Herbert et al. (2019), Mulla (2022) and Sadana and Sharma (2021), aligning with the existing literature that underscores the significance of understanding these models for their broader implications. Teece (2010) argues that a business model should specify how an enterprise creates and delivers value to customers, captures customer value, and converts that value into profit. The varying revenue models employed therein in the highly competitive video streaming market are outlined in the study. Revenue models form a subsection of the business model (Chesbrough, 2007; George & Bock, 2011; Lambert & Davidson, 2013; Mignon & Bankel, 2022; Osterwalder et al., 2005; Teece, 2010).

According to (Mulla, 2022), valuable insights into practical strategies and potential pitfalls in the highly competitive video streaming market can be gained by highlighting key success factors and failures associated with different business models, industry players, and researchers. Given the limited literature, it has been identified as an area warranting future research attention. While specific business models are not extensively delved into in this study, some notable successes within the South African market are explored. By comparing different revenue models employed by the other VSSs and their level of success, strategic recommendations for business models in the evolving landscape are discussed. Practical insights into the dynamics of VSS business models are offered, contributing to the literature and opening avenues for further exploration in this competitive domain.

In conclusion, exploring business model evolutions as practised by broadcasters has resulted in the survival of broadcast-launched VSSs. It underscores the critical role of strategic adaptation in sustaining competitive advantage amidst digital transformation, supporting both RQ2 and RP2.

5.4.2 Value Creation

Teece (2010) suggests that a business model's essence is in defining how the enterprise delivers value to customers, entices customers to pay for value, and converts those payments to profit. The challenges telcos face in delivering meaningful value aligns with the issues identified in RP2. Consistent with the perspective put forth by Bocken et al. (2014), which underscores the critical link between Business Model revitalisation and digital transformation. This viewpoint emphasises digital businesses' unique challenges in creating value, especially considering evolving customer expectations of internet-based services, wherein "basic services should be free" (Teece, 2010). Notably, within the VSS landscape, all SA broadcasters offering VSSs have incorporated some form of free service offering as part of their business model. In contrast, amongst SA telco-launched VSSs, only Telkom introduced a free tier.

In essence, telcos' challenges in delivering meaningful value, as highlighted in the exploration of VSS business models and the struggle with misaligned business strategies, directly corroborate with the issues identified in RP2. This alignment underscores the critical link between business model evolutions and digital transformation, as Bocken et al. (2014) advocates. The overarching theme of value creation and adaptability, now encapsulated in Business Model Evolutions, thus contributes significantly to understanding why telco-launched VSS ventures faced obstacles in sustaining a competitive edge. It reinforces the importance of a well-aligned and adaptable business model in the dynamic landscape of video streaming services, further emphasising the role of strategic adjustments amid digital transformation, as proposed in RP2.

Research Proposition 3: *Telcos inadequately protect new video streaming services as business model innovations, resulting in a swift shutdown due to insufficient safeguards against resource competition with mainstream telco initiatives.*

5.4.3 Protection, Competition & Prioritisation

In this section, the focus shifts to the protection and prioritisation of VSSs as business model innovations. This theme examines the stark contrast between Broadcasters' unwavering commitment to safeguarding VSS ventures and telcos' inadequate protection. The unfolding narrative encompasses challenges related to resource competition, the critical significance of protecting innovations, and the diverse approaches industry players embrace. As the findings are dissected, a comprehensive understanding emerges of how safeguarding VSS ventures addresses resource challenges and plays a pivotal role in driving strategic renewal and maintaining a competitive edge. Aligned with the overarching spirit of RQ2, the investigation peels back the layers of business model intricacies, strategic adaptations, and protective measures within the South African VSS market, contributing significantly to unravelling the multifaceted dynamics underpinning the role of business models in shaping competitive advantage and steering strategic renewal amid the digital transformation tide.

Within the intricate landscape of telco-launched VSSs in South Africa, the focal point is occupied by Research Proposition 3 (RP3). This proposition suggests that the rapid closure of telco-launched VSSs, stemming from inadequate protection, results from the failure to establish separate, well-resourced entities managed independently of the telco's executive team. The investigation underscores the necessity for establishing distinct and well-resourced entities to oversee telco-launched VSSs independently of the telco’s executive team.

The findings emphasise a commitment to sustainability by creating independent entities and offering a potential solution to challenges faced by telcos, as highlighted in RP2 and RP3. Chesbrough (2007) advises that companies internally safeguard their business model experiments to ensure success and avoid direct competition with mainstream initiatives. Christensen (2016) adds that established companies often struggle with disruptive innovations due to existing structures geared towards sustaining current products and technologies, aligning well with internal culture challenges in innovation.

O’Reilly & Tushman (2008) introduce ambidexterity to ensure dynamic capability, referring to a firm's ability to pursue exploration and exploitation simultaneously. However, this concept introduces an intriguing point of potential contradiction. While ambidexterity emphasises the simultaneous pursuit of exploration and exploitation within the same organisational structure, the proposition for separate entities in the telco framework advocates a division for protection, thereby raising questions about the compatibility of ambidexterity with the need for distinct entities to shield VSS initiatives from resource competition.

The research findings robustly align with RP3, unveiling challenges related to protection, organisational structure, and resource competition. The nuanced exploration underscores the necessity for dedicated leadership, strategic autonomy, and protective mechanisms to ensure the sustained success of telco-launched VSSs. Similar recommendations are presented by Christensen (2016), further emphasising the need for companies to be willing to cannibalise their products or services in the face of disruptive changes, an action demonstrated by broadcasters.

In conclusion, the nuanced exploration of RP3 within the context of telco-launched VSSs in South Africa reveals challenges stemming from inadequate protection and organisational structure. The failure to establish separate entities, protect them from resource competition, and ensure strategic autonomy within the telco framework is a pivotal factor contributing to the swift shutdown of these ventures. This detailed understanding, derived from a rigorous mixed-methods approach, adds depth to the broader discussion on the factors influencing the success and failure of telco VSSs in the dynamic South African market.

However, the literature points to ambidexterity as an alternative perspective on dynamic capability. While the proposition for separate entities advocates a clear division for protection, ambidexterity suggests pursuing exploration and exploitation simultaneously within the same organisational structure. The choice between establishing new entities and pursuing ambidexterity reflects differing approaches to achieving protection, each with merits and challenges. This diversity in strategic mechanisms emphasises the complexity of navigating the evolving landscape of telco-launched VSSs. It underscores the need for tailored solutions based on specific organisational contexts and goals.

5.1 Discussion on Research Question 3

Research Question 3: *What are the key factors influencing the effectiveness of subscriber acquisition and launch strategies in the success and growth of video streaming services in South Africa?*

Research Proposition 4*: Effective marketing strategies are pivotal in influencing VSS's competitive advantage in South Africa.*

In this integrated approach, broadcasters strategically harness several initiatives to propel subscriber acquisitions for VSSS. The focus on local content, audience-driven approaches, and compelling content amplifies the strategic role of content in captivating and retaining viewers.

The exploration of the theme 'Data-Driven Subscriber Acquisition Strategies' takes centre stage, emphasising the critical role of data provision as a strategic initiative. Through collaborations with telcos, broadcasters extended beyond conventional boundaries, providing free data for VSS subscribers. These collaborations exemplify a potent data-driven marketing approach designed to elevate subscriber acquisition.

Building upon the exploration of the theme 'Holistic Value Proposition and Consumer Behaviour' unveils an additional strategic layer. This analysis transcends the conventional focus on product features by delving into the emotional aspects of consumer decision-making. Taylor (2000) suggests incorporating emotions into marketing strategies can provide additional value when connecting with customers, offering a potential avenue for building brand loyalty and resonating deeply with consumers. This approach is underscored as a mechanism for creating value and fostering long-term relationships with consumers. SABC demonstrates this through its unwavering commitment to achieving universal access, while Multichoice invests in people and local industries, both aiming to connect with consumers on a deeper emotional level and deliver enhanced value. Delivering such value extends beyond mere marketing strategies; it underscores the pivotal role emotions play in sustaining growth within the competitive VSS landscape.

These initiatives by broadcasters collectively constitute a comprehensive and multifaceted approach. Drawing inspiration from Porter's principles of achieving differentiation and competitive advantage (Porter, 1985, 1996), this approach goes beyond mere customer acquisition; it ensures long-term subscriber retention for VSSs. Davcik & Sharma (2016) assert that marketing resources play a crucial role in a firm's business strategy, contributing to a competitive advantage and improving overall performance. The varying strategies highlighted in this analysis directly influence VSS's perceived value and serve as drivers of competitive advantage, aligning with Porter's foundational insights." The shift in business models underscores the fundamental role of media consumer engagement in driving value creation (Chan-Olmsted & Wang, 2019).

However, in the industry's dynamic landscape, the integration of dynamic capabilities becomes prominent. Eisenhardt & Martin (2000) and Grant (2019) underscore the alignment between the RBV and dynamic capabilities, emphasising effectively leveraging skills, marketing activities, alliances, and product features to manipulate resources and create valuable strategies.

While broadcasters exhibit a robust strategic approach, the discernible absence of comparable initiatives from telcos further reinforces the findings supporting RP4. The marked distinction in strategic approaches between broadcasters and telcos underscores the pivotal role of effective marketing strategies in influencing the competitive advantage of VSSs in the South African market.

5.1.1 Telco Strategies for Enhanced Subscriber Growth

In exploring the theme 'Flexible Billing and Payment Strategies,' telcos exhibit a nuanced marketing strategy to foster enhanced subscriber growth. The emphasis on diverse channels for billing aligns seamlessly with telcos' user-centric approach, offering flexibility and convenience to consumers. This strategic flexibility caters to various consumer preferences. It aligns with the overarching framework of RP4, which underscores the pivotal role of effective marketing in shaping the success of VSSs. Through their tailored billing strategies, telcos exemplify the application of marketing initiatives in driving subscriber growth within the South African VSS landscape.

While telcos have made commendable efforts in deploying user-centric billing and payment strategies to foster subscriber growth, the sustainability of telco-launched VSSs has yet to be achieved. Despite these well-aligned initiatives, the ability to maintain VSS viability still needs to be discovered. This observation underscores a critical need for a holistic value proposition strategy akin to the comprehensive approaches embraced by broadcasters. The findings suggest that beyond user-centric billing, telcos may benefit from adopting a more multifaceted approach to enhance the overall value proposition and, in turn, bolster the longevity and success of their VSS ventures. This includes developing strategies that foster emotional connection, build brand loyalty, and resonate deeply with consumers, aspects which have been important drivers of success for broadcasters in the VSS landscape.

5.1.2 Mobile Accessibility – A Cross-Cutting Strategy

Recognising the evolving landscape of user preferences and behaviours, both telcos and broadcasters strategically converge in acknowledging the critical role of mobile-centric accessibility. This cross-cutting strategy, 'Mobile Accessibility,' showcases a responsive approach to dynamic market demands. The recognition of mobile as a pivotal platform aligns with the essence of effective marketing, responding to the preferences of the modern consumer. Telcos and broadcasters, through their commitment to mobile accessibility, not only demonstrate an acute understanding of user behaviours but also underscore the importance of staying abreast of technological trends, aligning harmoniously with RP4, emphasising the significance of marketing strategies in ensuring the competitive advantage and success of VSSs in the South African context.

While telcos and broadcasters recognise the significance of mobile-centric accessibility as a cross-cutting strategy, the sustainability of telco-launched VSSs faces challenges. Despite acknowledging the evolving landscape of user preferences and behaviours, telcos' endeavours in this domain may not have been sufficient to ensure the enduring success of their VSSs. Reiterating this point, it becomes evident that beyond mobile-centric accessibility, telcos might find value in adopting a more comprehensive approach to address the nuanced aspects of consumer engagement, resonating with the multifaceted strategies implemented by their broadcaster counterparts, emphasising the need for a holistic value proposition that extends beyond technical considerations and aligns more closely with consumer expectations for sustained success in the VSS market.

5.2 Conclusion

This pivotal chapter presents a comprehensive discussion of the research findings, employing a nuanced mixed-methods approach that integrates insights from semi-structured interviews and document analysis. The focus is on Research Questions and Propositions, providing a holistic understanding of factors influencing the sustainability and success of VSSs in South Africa.

5.2.1 Discussion on Research Question 1:

RQ1 and RP1: In the discussion of RQ1 and RP1, it becomes evident that while the RBV framework offers valuable insights into competitive advantage in VSSs market, it may not be the sole determinant due to the industry's dynamic nature. The analysis reveals the critical role of core competency, particularly content leadership, in conferring competitive advantage that aligns with RBV principles. RP1 underscores the challenges faced by telcos in establishing content leadership, further emphasising the significance of core capabilities in competitive positioning. Overall, the findings highlight the complex interplay of theoretical frameworks in understanding competitive advantage in the South African VSSs market.

5.2.2 Discussion on Research Question 2

RQ2, RP2, and RP3 delves into VSS business models. Broadcasters adapt their business models effectively, aligning with digital transformation. Telcos face challenges sustaining VSSs due to misaligned models and a short-term mindset. Business model evolutions and value creation are pivotal themes, emphasising the need for strategic adjustments amid digital transformation.

5.2.2.1. Business Model Evolutions

The transformative impact of business models on the media landscape and consumer preferences is highlighted. Telcos' impatience conflicts with the longer investment cycle demanded by content-focused ventures, impacting sustainability.

5.2.2.2. Value Creation

The struggle to create value substantiates RP2, emphasising challenges in aligning with sustainable business models and contributing to telco VSS's failures. Aligning business models with long-term sustainability is crucial in the dynamic VSS landscape.

5.2.2.3. Protection, Competition & Prioritisation

Exploring RP3, telcos' inadequacy in protecting VSS ventures is evident. The research aligns with the need for separate entities, strategic autonomy, and protective measures for sustained telco VSS success. It contributes to the broader discussion on the factors influencing the demise of telco VSS in South Africa.

5.2.3 Discussion on Research Question 3

RQ3 and RP4 focus on marketing strategies. Broadcasters exhibit multifaceted approaches, emphasising local content, data-driven subscriber acquisition, and holistic value propositions. telcos have employed user-centric billing to attract customers. However, they still failed to remain viable. Mobile accessibility emerges as a cross-cutting strategy, emphasising the need for a holistic value proposition aligning with consumer expectations.

5.2.3.1. Telco Strategies for Enhanced Subscriber Growth

While telcos make efforts in user-centric billing, challenges in sustaining VSS viability are acknowledged. A call for a more multifaceted approach aligning with broadcasters' comprehensive strategies is emphasised for telcos.

5.2.3.2. Mobile Accessibility – A Cross-Cutting Strategy

Recognising the significance of mobile-centric accessibility, telcos and broadcasters demonstrate understanding but face challenges in ensuring enduring success. A comprehensive approach addressing nuanced aspects of consumer engagement is recommended for telcos, echoing strategies implemented by their broadcasting counterparts.

In conclusion, the findings from this extensive exploration provide a comprehensive understanding of the dynamics shaping the success and challenges of VSSs in South Africa. The interplay of resources, business models, and marketing strategies highlights the complexity of the VSS landscape, emphasising the need for tailored solutions and strategic adjustments to navigate the evolving market successfully.

CHAPTER 6 CONCLUSIONS & RECOMMENDATIONS

6.1 Introduction

In this chapter, the researcher begins by revisiting their research objectives and evaluating the extent to which they have been achieved. They then integrate critical findings from their exploration of telco and broadcaster-launched Video Streaming Services, providing insights into critical success and failure factors, business models, and sustainability dynamics in the South African context. Theoretical implications are discussed, situating the study within the Resource-Based View (RBV) theory and broader marketing discourse. Inherent limitations were acknowledged, and therefore, the scope and generalisability of the findings were transparently addressed. Lastly, the researcher outlines future research directions, encouraging scholars to delve deeper into cross-cultural comparisons, technological innovations, and longitudinal analyses within the dynamic landscape of Video Streaming Services (VSSs).

6.2 Summary of Research Objectives

The first research objective focused on identifying the critical success and failure factors of South African broadcaster and telco VSSs. In delving into the nuanced dimensions of their business models, the research explored the unique challenges and dynamics shaping the South African market. The researcher navigated the multifaceted terrain of the VSS sector through extensive case study analyses, semi-structured interviews, and document analysis. The comprehensive understanding gained laid the foundation for informed insights into the specific challenges faced by these industry players.

The second research objective directed attention towards a comparative analysis of factors contributing to sustainability amidst successful and failed VSSs in South Africa, entailing the dissection into the reasons behind the success stories and the factors leading to the demise of certain ventures. The comparative approach aimed to identify patterns, trends, and distinguishing factors between two outcomes. By synthesising these findings, the researcher sought to distil actionable recommendations for developing sustainable digital video platforms in South Africa.

6.3 Key Findings

6.3.1 Identifying Critical Success and Failure Factors

The exploration of the first research objective uncovered many critical success factors for South African VSSs. These factors ranged from the strategic emphasis on content leadership by broadcasters to the challenges faced by telcos in aligning with sustainable business models. The role of resources, technological advancements, and strategic shifts in content aggregation were scrutinised in the context of the unique challenges faced by telcos. The comparative analysis between telco-launched and broadcaster-launched VSSs revealed distinctive approaches, successes, and shortcomings.

6.3.2 Comparative Analysis of Sustainability Factors

The comparative analysis unearthed insightful contrasts between successful and failed VSS ventures. The role of business models, adaptability, and strategic alignment emerged as pivotal differentiators. Notably, the study illuminated the importance of value creation, protection mechanisms, and organisational structures in sustaining VSSs. The contrast between telcos and broadcasters in terms of embracing innovation, user-centric approaches, and the ability to protect business model experiments provided rich insights into the factors influencing sustainability.

6.4 Recommendations for Sustainable Digital Video Platform Businesses in SA

The synthesis of findings has culminated in a series of targeted recommendations tailored to address the challenges and leverage the opportunities identified in the South African VSS landscape. These recommendations span strategic business model evolutions, value creation, protection mechanisms, marketing strategies, and a comprehensive approach to mobile accessibility. Each recommendation offers actionable insights for industry stakeholders, policymakers, and businesses seeking to navigate the intricate dynamics of the South African VSS market.

6.4.1 Resource Alignment and Competency Enhancement

Telcos are encouraged to strategically align their resources and enhance core competencies, particularly in content leadership, to fortify their competitive position. This involves thoroughly assessing existing resources and identifying strengths and weaknesses in content acquisition, production, and distribution capabilities. Subsequently, telcos can invest in talent acquisition and training programs to bolster these competencies, such as recruiting experienced media professionals or partnering with content creation studios. Additionally, prioritising technological advancements is crucial, including investments in state-of-the-art streaming platforms, user interface enhancements, and optimised content delivery networks to ensure an impeccable viewing experience for subscribers. Collaborative initiatives with content creators, production houses, and technology providers also foster knowledge exchange and innovation.

Similarly, broadcasters are advised to leverage their content expertise while embracing technological advancements and collaborative opportunities. This includes investments in AI-driven recommendation engines to personalise content recommendations for viewers, enhancing user engagement and retention. Exploring collaborative partnerships with telcos can extend distribution channels, maximising content visibility and monetisation potential. Telcos and broadcasters should cultivate forward-looking expertise, including scenario planning and market understanding, facilitating the seamless integration of AI technologies into recommendation engines across various digital platforms. This holistic strategic approach ensures sustained competitiveness and fosters innovation in the dynamic VSS market.

By implementing these strategic recommendations, telcos and broadcasters can differentiate themselves, enhance customer satisfaction, and unlock new revenue streams. Moreover, integrating AI technologies and fostering collaborative initiatives can drive innovation and long-term sustainability in the evolving digital landscape, positioning them for continued success in the highly competitive VSS market.

6.4.2 Strategic Business Model Evolutions

Sustainable strategies must be adopted by telcos and broadcasters to adapt to the ongoing digital transformation to ensure the long-term success of VSSs. The development of comprehensive long-term plans that extend beyond immediate gains and accurate performance matrices to measure various aspects of the business over time should be prioritised by telcos. Broader organisational objectives beyond profitability should be aligned by measuring customer satisfaction, brand equity, and market share, ensuring that their VSS ventures' overall performance and sustainability can be evaluated.

To evaluate the success and sustainability of VSS ventures, adoption and engagement metrics should be incorporated alongside traditional performance indicators by telcos. Optimising the user experience, tailoring content recommendations, and driving customer engagement can be done by tracking metrics such as new subscriber acquisition rates, active user rates, average viewing time per session, frequency of usage, and user retention rates. Ultimately, this data-driven approach enhances the long-term sustainability of their VSS ventures.

Revenue share agreements over minimum guarantees should be considered by VSSs when negotiating content license deals as power dynamics shift within the industry. Aligning costs with revenue generation allows VSSs to manage their highest-cost input and content better. By implementing revenue share agreements, financial risks associated with fixed minimum guarantees can be mitigated while incentivising content creators to produce high-quality, engaging content. Exploring different revenue models within the media and entertainment industry can uncover valuable strategic recommendations and formulas for developing successful content business models, including subscription-based models, advertising revenue streams, pay-per-view options, and hybrid approaches.

6.4.3 Protection and Organisational Structure

Protection and organisational structure must be prioritised by telcos and broadcasters to safeguard their interests and foster strategic autonomy in the rapidly evolving VSS landscape. However, the nature of expertise required differs between the two entities. Media expertise must be prioritised by telcos to operate within the VSS domain effectively. This entails recruiting professionals with specialised content acquisition, production, and distribution knowledge, which is leveraged to curate compelling content offerings and negotiate strategic partnerships with content creators. By investing in media expertise, telcos can enhance their content leadership and competitive positioning in the VSS market, catering to diverse consumer preferences and driving subscriber growth.

Conversely, broadcasters possess deep media expertise, but they may lack proficiency in digital platform operations. To thrive in the VSS space, broadcasters should focus on digital platform expertise to leverage their existing media capabilities. This involves empowering digital specialists within the organisation to spearhead VSS initiatives, leveraging their knowledge to optimise content delivery platforms, enhance user experiences, and implement innovative monetisation strategies. Broadcasters can unlock new avenues for audience engagement and revenue generation in the digital realm by integrating digital platform expertise with their media prowess while preserving the integrity of their core broadcasting operations.

The potential benefits of adopting this tailored approach to expertise acquisition are significant for both telcos and broadcasters. By aligning their organisational structure with the specific expertise requirements of the VSS market, telcos and broadcasters can position themselves for sustained success and growth in this dynamic industry landscape. Subscriber acquisition and retention can be driven by investing in media expertise by telcos, strengthening their content leadership and competitive differentiation in the VSS market. Meanwhile, leveraging their existing media capabilities alongside digital proficiency allows broadcasters to capitalise on emerging digital opportunities while preserving their legacy in content creation and distribution.

6.4.4 Value Creation, User-Centric Approaches, and Marketing Strategies for Subscriber Acquisition

The importance of value creation and user-centric approaches in driving engagement, loyalty, and subscriber acquisition in the competitive VSSs landscape is emphasised. It is urged that telcos and broadcasters prioritise these strategies to deliver meaningful value to consumers and foster long-term relationships. Success in this dynamic market requires understanding and meeting consumers' diverse needs and preferences.

To enhance their efforts to create value for consumers, telcos are encouraged to adopt user-centric strategies and initiatives. This involves investing in comprehensive market research and data analytics to gain insights into consumer behaviour, preferences, and emotions towards content and entertainment propositions. By understanding the emotional drivers behind consumer behaviour, compelling narratives and experiences can be crafted by telcos that resonate deeply with their target audience, driving brand loyalty and differentiation.

Moreover, the overall user experience across all touchpoints, from content discovery to playback and customer support, should be focused on by telcos and broadcasters. This includes optimising user interfaces, streamlining content navigation, and providing personalised recommendations based on individual viewing habits and preferences. By prioritising user-centric design principles and delivering seamless, intuitive experiences, customer satisfaction and retention rates can be enhanced, ultimately driving long-term value and profitability.

In addition to user-centric approaches, effective marketing strategies for subscriber acquisition are crucial. By leveraging insights gained from market research and data analytics, marketing efforts can be effectively tailored by telcos and broadcasters to target specific audience segments. This may involve deploying targeted advertising campaigns, leveraging social media platforms, and partnering with influencers to reach and engage potential subscribers. By aligning marketing strategies with consumer preferences and emotions, subscriber acquisition rates can be increased, driving brand awareness, and strengthening competitive positions in the VSS market.

Numerous benefits can be unlocked by adopting a holistic approach that integrates value creation, user-centric design, and tailored marketing strategies, including increased subscriber acquisition and retention rates, higher customer satisfaction, and improved brand perception and loyalty. In the dynamic VSS landscape, prioritising these strategies can drive sustainable growth and success.

6.4.5 Comprehensive Approach to Mobile Accessibility

In today's digital era, ensuring mobile accessibility is paramount for telcos to effectively engage consumers in the VSS market. Mobile accessibility involves optimising websites, applications, and other digital platforms for smaller screens, touch interfaces, and varying network conditions to provide a seamless user experience for mobile users. It addresses factors such as user interface design, content delivery speed, and compatibility across various mobile operating systems and devices.

However, beyond mere accessibility lies the concept of mobile-centricity, which goes a step further by prioritising the mobile experience as a primary focus in the overall strategy. Telcos must not only ensure that their VSS offerings are accessible on mobile devices but also prioritise the development of features, functionalities, and content formats specifically tailored to meet mobile users' unique needs and preferences. This includes adopting marketing and engagement strategies that are tailored to mobile channels and recognising the central role of mobile in modern consumer behaviour.

By adopting a comprehensive approach to both mobile accessibility and mobile-centricity, telcos can enhance the overall value proposition of their VSS offerings, boost consumer satisfaction, and drive subscriber growth in the competitive VSS market.

In the fast-paced VSS world of VSSs, telcos and broadcasters must prioritise continual learning and adaptation. As consumer preferences, technology trends, and industry regulations shift, these organisations must remain agile and receptive to new challenges and opportunities. Setbacks should be embraced as learning opportunities, business models should be adjusted, and the flexibility to respond to evolving market dynamics should be possessed. By integrating these dynamic capabilities into their operational framework, telcos and broadcasters can leverage their experiences to proactively shape their strategies, ensuring they remain competitive and resilient in the ever-changing VSS market. This may involve investing in ongoing market research, monitoring trends, and staying current with industry regulations.

6.4.6 Targeting the Youth Market: Strategies for Engaging Millennials and Gen Z

The youth population in South Africa, specifically Millennials and Gen Z, presents a significant opportunity for VSS providers to tailor their offerings to meet this demographic's specific needs and preferences. With digital content consumption being a solid affinity for these age groups, VSS providers must develop targeted strategies that resonate with their interests, values, and cultural context.

To capture the youth market effectively, VSS providers must address affordability and accessibility. Creating affordable subscription packages tailored to the financial constraints of young consumers is a viable strategy. For example, Showmax's mobile-only subscription option offers a cost-effective alternative for users who primarily access content via their smartphones. Additionally, VSS platforms could introduce daily or weekly access subscriptions, providing flexible payment options that align with younger demographics' spending habits.

Ensuring accessibility across various devices, especially mobile phones, is crucial for reaching young consumers who rely heavily on digital technology for entertainment. VSS providers should optimise their platforms for mobile viewing, offering seamless user experiences that cater to the preferences of on-the-go audiences. By prioritising mobile accessibility, VSS platforms can effectively engage with the youth market and enhance user engagement.

Furthermore, exploring alternative business models such as AVOD (Advertising Video on Demand) and FAST (Free Ad-supported Streaming Television) can further enhance accessibility for young consumers. These free services align with the preferences of digital-native audiences who are accustomed to accessing content without traditional subscription fees. By embracing AVOD and FAST models, VSS providers can expand their reach and attract a broader audience, including cost-conscious youth demographics.

Overall, by combining affordability with accessibility through tailored subscription packages, optimised mobile experiences, and alternative business models, VSS providers can effectively capture the youth market and enhance user engagement.

6.4.7 Collaboration and Innovation

The importance of strategic partnerships and knowledge-sharing initiatives within the South African VSS market is emphasised. It is recommended that collective expertise and resources should be leveraged to drive innovation and address shared challenges by collaborating with industry peers, competitors, and technology partners. For instance, telcos and broadcasters could form strategic alliances to jointly develop and promote VSS offerings, pooling their strengths in content creation, distribution, and technology infrastructure. Collaborative ventures can also facilitate access to new markets and audience segments, expanding the reach and impact of VSS platforms.

A joint venture platform could be established by free-to-air broadcasters to further enhance collaboration and innovation within the South African VSS market, allowing them to provide consumers with diverse content choices, including local programming, international content, and niche genres. By pooling their resources and content libraries, broadcasters can create a comprehensive and compelling offering that rivals the budgets and variety of international competitors. This joint venture platform would serve as a centralised hub for consumers to access a wide array of content, catering to their diverse interests and preferences.

By collaborating on a joint venture platform, free-to-air broadcasters can leverage their collective strengths and capabilities to compete more effectively in the increasingly competitive VSS landscape. This strategic partnership allows broadcasters to combine their content portfolios, distribution networks, and marketing efforts to create a seamless and engaging user experience. Moreover, by offering diverse content on a single platform, broadcasters can attract and retain a more extensive audience base, driving higher viewership and advertising revenues.

Furthermore, regulatory considerations are crucial in shaping the VSS market's competitive dynamics and growth opportunities. Relevant regulations, policies, and industry standards governing content licensing, distribution, data privacy, and competition must be considered. By proactively engaging with regulatory bodies, industry associations, and legal experts, stakeholders can advocate for favourable policies, address compliance requirements, and mitigate regulatory risks. Furthermore, embracing regulatory compliance as a strategic priority can enhance trust and credibility with consumers, investors, and other stakeholders, fostering long-term sustainability and growth in the VSS ecosystem.

Ultimately, the potential benefits of prioritising collaboration, innovation, and regulatory compliance are manifold. By fostering a culture of collaboration and knowledge sharing, stakeholders can accelerate the pace of innovation, drive cost efficiencies, and unlock new revenue streams through joint ventures and strategic alliances. Moreover, by leveraging consumer insights and regulatory expertise, companies can enhance their market competitiveness, mitigate risks, and build stronger relationships with customers and regulatory authorities. A foundation for the successful development and sustainability of VSSs in South Africa can be created by embracing collaboration, innovation, and regulatory compliance as strategic imperatives.

6.5 Theoretical Implications

6.5.1 Contributions to Resource-Based View (RBV) and Knowledge-Based View (KBV) Theories

The study contributes significantly to the Resource-Based View (RBV) and Knowledge-Based View (KBV) theories by unravelling how telcos and broadcasters leverage their distinctive resources in the South African VSS market. Examining content leadership as a linchpin for broadcasters and the challenges telcos face in establishing a comparable foothold offers nuanced insights into how firms with heterogeneous resources navigate digital transformation. This study affirms the relevance of both RBV and KBV theories in understanding competitive advantage and sustainability within the context of VSSs. Knowledge, which is ringfenced within core competency, is the key to unlocking competitive advantage.

6.5.2 Advancements in Business Model Theory

This research advances the understanding of the role of business model evolution in sustaining competitive advantage amidst digital transformation. The study sheds light on telcos' challenges due to their impatience in adopting long-term sustainable business models, offering implications for business model theory. Furthermore, examining the interplay between ambidexterity and the need for separate entities in protecting VSS ventures contributes to the ongoing discourse on dynamic capabilities and business model innovation.

6.5.3 Marketing Strategies and Value Creation

The theoretical implications extend to marketing strategies and value creation, emphasising the significance of effective marketing in shaping VSS's competitive advantage. By drawing on Porter's principles and exploring the emotional aspects of consumer decision-making, the study enriches understanding of how marketing resources contribute to gaining a competitive advantage and improving overall performance in the VSS industry.

Furthermore, it is essential to note that more empirical research is needed to help understand the different business models influencing the sustainability of VSSs in South Africa. The existing literature primarily focuses on the consumption behaviour changes due to the introduction of video streaming services, the drivers of adoption, and their impact on traditional Pay-TV within the South African context.

6.6 Suggestions for Further Research

6.6.1 Understanding Business Models of Video Streaming Services in South Africa

Future research endeavours should prioritise an in-depth exploration of the diverse revenue models shaping the sustainability and success of VSSs in South Africa. While existing literature sheds light on consumption behaviour shifts induced by VSS introduction and their effects on traditional Pay-TV, a crucial gap exists in understanding the intricate interplay of various revenue models within the South African VSS landscape. Empirical investigations are warranted to unravel the nuanced dynamics of these models, including their effectiveness in revenue generation, market penetration, and customer retention. Additionally, comparative studies across different VSS providers, such as telco-launched and broadcaster-launched services, could offer valuable insights into distinct business approaches' relative strengths and weaknesses.

6.6.2 Cross-Cultural Comparative Studies

Future research could explore regional expansion strategies for VSSs in Africa, explicitly emphasising cross-cultural comparative studies. This research would investigate how VSS ventures navigate diverse cultural landscapes across the continent, including examining consumer preferences, regulatory environments, and industry dynamics in various African countries. By gaining insights into these factors, researchers can provide valuable recommendations for telcos and broadcasters seeking to expand their service's reach into other African territories. Additionally, this research could shed light on the challenges and opportunities of operating in different African markets and offer insights into how VSS ventures can effectively deliver their services in the region.

6.6.3 Technological Innovations and Industry Evolution

Given the rapid pace of technological innovations in the VSS industry, future research could focus on how emerging technologies, such as augmented reality or artificial intelligence, influence business models and competitive dynamics. Understanding how these innovations shape the future of VSSs will be crucial for industry stakeholders and policymakers.

6.6.4 Longitudinal Analysis

To address this study's time limitations, future research should utilise a longitudinal analysis to track the development of VSS ventures over an extended period. This approach would provide a more thorough comprehension of the sustainability factors of the industry and how they adapt to changing circumstances.

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APPENDIX F – RESEARCH THEMES AND CODES

Table 10: Research Themes and Codes

Name	Description	Files	References
Research Question 1: What is the relevance of the RBV framework in assessing competitive advantage and sustainability in video streaming services			
Theme 1: Broadcasting Core Competence - Content Leadership and Strategies	**Broadcasters' central focus on content leadership and strategic approaches within their core operations. Underscores the pivotal role of content and how broadcasters leverage their expertise and leadership in content-related strategies within the video streaming landscape.**	**25**	**145**
(Sub Theme) Broadcasting core competence	Content leadership and strategies challenges with this core competence also comes the challenges.	17	44
Broadcaster Advantage Spectrum	A collective spectrum of reasons outlining the broadcast industry's advantageous position over telcos in the realm of video streaming services	3	4
Competitive Advantage through Content	Challenges in delivering impactful local content for success in the South African market.	16	36
VSS Content Library Expansion	Challenges faced by video streaming services at their inception, marked by a limited library of available movies and series. It addresses the struggle to offer an extensive content catalogue	3	4
(Sub Theme) Telco challenges with access to and expertise in content	As a non-core business, telco's are in the backfoot on content and broadcasting expertise	18	82
AVOD content accessibility	Reflects the increasing willingness of international companies to make their content accessible through AVOD services	3	3
Content Data Strategy Disparity	Captures the disparities in approaches towards content data between telcos and broadcasters, emphasising differences in understanding, passion, and effective	5	7

Name	Description	Files	References
	leveraging of consumer data for personalisation. Addresses the challenges telcos face due to a lack of content-focused teams and their distinct priorities compared to broadcasters.		
Exclusive Content Vulnerability	Reviews the reliance on licensed content exclusivity deals for success	1	1
Expertise Gap in Digital Content Consumption	Highlights the deficiency in comprehensive knowledge about the multi-layered aspects of digital content consumption	3	3
Limitations of International Content Reliance	Highlights risks in relying solely on premium international content without aligning with local market needs	5	10
Technical Expertise Disparity	Highlights the disparities in technical expertise between broadcasters and telcos	2	3
Telco - Challenges with Content Rights Utilisation	Difficulties encountered by telcos in effectively leveraging international content rights	3	3
Telco - Challenges with Local Content	Difficulties and impediments faced in sourcing, licensing, and delivering local content on the streaming platforms despite acknowledging its significance in the service's success.	6	8
Telco - Competence gap	Internal disparities and expertise limitations within telcos affect their VSSs compared to other offerings, impacting competitive advantage and strategic adaptation. Includes the lack of expertise in tailoring content strategies to diverse audience segments	13	41
VSS Content Library Expansion	Challenges faced by video streaming services at their inception, marked by a limited library of available movies and series. It addresses the struggle to offer an extensive content catalogue	2	3
Broadcaster Communication Dominance	Highlights the substantial advantage held by broadcasters in leveraging diverse communication channels for effective promotion and dissemination of their Video Streaming Services	3	3
Content Windowing Strategies	Explore the relevance of content windowing strategies in shaping competitive advantage among different service providers	3	5

Name	Description	Files	References
Leveraging Existing Content Investments	Broadcasters leverage content investments made for traditional platforms to populate their streaming services, creating an opportunity for additional revenue	3	3
Local Content as Audience Catalyst	Emphasises how locally produced content on generates discussions and trends, fostering engagement and talkability among audiences.	7	8
Theme 2: RBV Driven Business Strategy & Challenges	**Explores how telco and broadcaster entities strategically deploy and manage their resources within the South African video streaming services landscape.**	**37**	**192**
(Sub Theme) Collaborative Successes - The Power of Strategic Alliances	Unlocking Business Model Synergies through Collaborative Success: Delving into the positive outcomes and successful dynamics of strategic alliances, this sub-theme emphasises how such collaborations become catalysts for business model synergies.	22	45
Navigating Challenges in Partnerships - Lessons from Alliance Struggles	Navigating Challenges for Enhanced Business Model Alignment: the hurdles, pitfalls, and challenges inherent in strategic alliances, offering insights into overcoming obstacles, mitigating risks, and ensuring the longevity of beneficial partnerships in the ever-evolving business landscape.	9	14
Outsourcing Challenges	Challenges with outsourcing content strategy, communication, and reliance on external expertise in their strategic decision-making	3	3
Telco - Outsourcing Challenges	Telcos' challenges with outsourcing content strategy, communication, and reliance on external expertise in their strategic decision-making.	4	7
Telco-OTT new entrant partnership dilemma	Explores the challenges faced by telcos when attempting to form partnerships with new, strong international OTT video streaming service players. Focuses on the crucial role of partnerships in driving data consumption and the complexities arising when telcos encounter reluctance from these players to collaborate, impacting strategic objectives.	4	4
(Sub Theme) Strategic Resource Deployment for Business Model Innovation	delves into how telco and broadcaster entities strategically deploy their resources through talent recruitment, corporate restructuring, strategic outsourcing, partnerships, and alliances.	7	14

Name	Description	Files	References
Resource Allocation Optimisation Strategies	Strategies aimed at managing and optimising resource allocation within telcos	7	14
(Sub Theme) Technological Innovation and Integration	Technological advancements, innovations, and integration strategies within the video streaming industry. It covers aspects such as UI/UX improvements, AI integration, platform optimisation, technological shifts and advancements pursued by both telco and broadcaster entities.	26	88
(Sub Theme) Emerging Technology Advancements		22	54
Broadcaster - Innovation and Market Response	Adapting to OTT growth and changing consumer behaviour, leveraging market trends for innovation.	8	14
Broadcaster - Technical Capabilities and Expertise	Assessing internal capabilities in technology, digital content, team expertise, and physical resources.	3	4
Platform Functionality Strengths	Highlights the superior platform functionalities of a video streaming service.	2	2
Telco - Digital TV Revolution	Accessible digital TV functionality for all, marking a significant leap in service accessibility	3	3
Telco - Innovation and Market Response	It encompasses the internal resources and strategies telcos employ to respond to market innovations and sustain competitive advantage within the video streaming services sector.	5	12
Telco - Technical Competence of Telcos	Recognition of the telcos' technical ability and capability in terms of platform delivery, network streaming, and other technical challenges in deploying video streaming services	2	4
User Interface -User Experience (UI-UX)	Refers to discussions emphasising the importance of the platform's interface for a smooth user experience and user interface	13	15
(Sub Theme) Technological Challenges	Identifies challenges experienced with technological advancements and innovations including culture realignment challenges	13	34
Live Event Streaming Challenges	Difficulties encountered while live-streaming events, encompassing instances	1	2

Name	Description	Files	References
	where users faced issues accessing or streaming live content due to technical glitches, platform limitations, or content exclusivity.		
Technical Competence in VSSs	Recognition of the lack of technical ability and capability in terms of platform delivery, network streaming, and other challenges in deploying video streaming services.	10	21
UI-UX expertise challenges	Scarcity of expertise in user interface and user experience design	5	7
Telco Specific Challenges		11	45
Telco - Internal Competition and Prioritisation	Challenges in resource allocation and internal prioritisation amid conflicting objectives within telcos	7	14
Telco Intentions in VSS Space	Encapsulates the various motivations and strategies behind telecom companies' entry into the VSS domain.	3	5
Telco Repetitive Mistakes	Telco mistakes that may influence competitive advantage and sustainability	6	15
Telco-Broadcaster Business Disparity	Captures the divergent perspectives and challenges between telcos and broadcasters in their business models and valuations	4	4
Telco-Driven Product Limitation	Challenges of telco/broadcaster partnerships and investments	5	7
Research Question 2: What is the role of business models in maintaining competitive advantage and driving strategic renewal in the face of digital transformation?			
Theme 3: Business Model Evolutions	**Strategic recommendations for the evolutionary path of VSS, focusing on successful content business models and understanding the disparities between telcos and broadcasters.**	**43**	**179**
(Sub Theme) Business Model Strategies and Challenges		24	53
Broadcaster - Business Model Innovations		19	33
Business Model for Competitive Advantage	Identification for VSS business models that create competitive advantage within the industry	7	8

Name	Description	Files	References
Incompatibility in VSS Sustainability Models	Reflects the discrepancy between traditional business models and the demands of sustaining VSSs. It addresses the clash between outdated models from both broadcasters and telcos, hindering the sustainability and adaptability needed in a digital era.	5	9
Telco Monetisation Challenges in AVOD	Challenges in ad-based business model and content valuation	3	3
(Sub Theme) Strategic Formulas for Content Business Success	Unveiling key strategic recommendations and formulas that pave the way for successful content business models. Actionable strategies, market insights, and business approaches essential for achieving excellence in the dynamic landscape of video streaming services.	4	10
Divergent strategies - content vs data as revenue driver	Investigates the role of business models in driving strategic decisions concerning content and data.	2	3
Telcos Content Aggregation Strategy	Emphasises the strategic shift of telcos towards content aggregation, partnering with multiple streaming services rather than focusing on creating their own content. This approach is aligned with the core business of providing a robust network infrastructure ('fat pipe') and forging collaborations with various content providers.	3	7
(Sub Theme) VSS Sustainability		33	116
Competitor Benchmarking	Evaluating performance against key competitors	10	12
Financial Viability		12	23
Broadcaster - Digital advertising revenue disparity	Navigating the Disparity Between Digital and Traditional Advertising Costs	1	1
Market Challenges and Financial Sustainability	Market struggles and ongoing efforts to maintain financial stability and sustainability of VSSs	9	14
Revenue influence indicators	Assesses the financial performance and strategies employed to maintain or grow revenue streams.	1	1
Telco - Financial viability concerns	The potential for sustainability and growth by dissociating the VSS from the	5	6

Name	Description	Files	References
	telco's Exco, enabling autonomy and facilitating independent resource management.		
Telco - Unforeseen financial obligations in content agreements	Additional costs may exist for service that need to be prepared for.	1	1
Long-term Investment Perspective	Emphasising long-term investment and patience in streaming industry	15	35
Service Sustainability	Sustainability and viability of the video streaming services over time, considering the challenges faced in content acquisition and cost implications	14	45
Failed VSS Ventures in South Africa's Streaming Landscape		5	12
Theme 4: Navigating Sustainability Challenges in Video Streaming Services through Business Model Alignment	**Explores the intricacies of sustaining profitability within Video Streaming Services (VSS) by examining the challenges associated with business model alignment. It delves into how strategic alignment or misalignment with the business model can impact the long-term viability and financial success of VSSs in the dynamic digital landscape.**	**14**	**48**
(Sub Theme) Protection Competition & Prioritisation		9	29
Acceptance of strategic evolution from traditional to OTT	Approach of embracing inevitable industry changes, encouraging proactive adaptation, and steering organisational strategies towards leveraging these changes for sustained growth and competitive advantage	4	4
Broadcaster - Internal Competition and Prioritisation	Prioritisation and protection of VSS from Internal conflicts within the broadcaster from traditional business	3	6
Protection of Innovations	Discussion on the protection or lack thereof for innovations within telcos	8	19
(Sub Theme) Strategic Adaptation to Regulatory Dynamics - Aligning Business Models	Delves into the intricate relationship between the regulatory landscape and the business models of VSS in SA. It investigates how regulatory frameworks and policy influences impact strategic decisions, market positioning, and overall business models of VSS entities.	4	10

Name	Description	Files	References
Addressing licensing and regulatory gaps in the digital content landscape	Draft Policy aims to address regulatory gap within the new digital broadcast landscape.	1	5
Broadcasters - Regulatory Impediments in Innovation	Challenges faced by the public broadcaster due to regulatory burdens impacting the pace of innovation in comparison to competitors	3	5
(Sub Theme) Strategic Value Management	Explores the diverse strategies employed by telecom and broadcasting entities to manage and enhance the perceived value of their services. It encompasses both successful value creation initiatives and challenges faced in delivering meaningful value to consumers.	6	9
Broadcaster - Universal Access & Value Enhancement	Prioritise expanding access to their services while simultaneously enhancing value offerings, aiming for financial sustainability and a broader consumer base.	1	1
Telco - Ineffective value creation	Telcos facing challenges in delivering value within video streaming, including issues with content ownership and service success.	5	8
Research Question 3: What are the key factors influencing the effectiveness of subscriber acquisition and launch strategies in the success and growth of video streaming services in South Africa?			
Theme 5: Marketing Strategies for Competitive Sustainability	**Scrutinises the challenges encountered by entities in executing marketing strategies and expansion initiatives in the context of video streaming services.**	**26**	**94**
Broadcaster Market Resource Strategies		6	13
Broadcaster - Competitive Advantage through brand	Being an established content brand in the industry has resulted in competitive advantage	5	10
Internal Staff Engagement for Product Improvement	Exploration of how internal resources, including staff knowledge and engagement, contribute to strengthening the product within the competitive landscape of video streaming services.	2	3
Cross Cutting Initiatives		22	53
Broadcaster - Market Expansion Strategies	Strategies implemented to expand the market reach outside of traditional market	7	8

Name	Description	Files	References
Broadcaster - Strategic Focus and Growth	Focus and strategies aimed at growth and sustainability	4	6
Consumer-Centric Content Evolution	Adapting broadcaster strategies to meet evolving audience preferences in the digital era.	2	4
Data Cost Mitigation Strategy	Strategies aimed at mitigating high data costs and improving data accessibility for the target market	11	13
Growth Potential of SVOD	Reviews the growth potential of SVOD services in Africa	3	4
Market Segmentation	The importance of understanding market segments and consumer behaviour as a critical internal resource for driving competitive advantage	9	18
Telco Market Resource Strategies		12	28
Data Provision for Streaming - Telco Competitive Edge	telcos gained a competitive edge by providing dedicated data packages or allowances tailored for streaming services. It highlights their strategic advantage in catering to consumers' data needs for seamless and affordable streaming experiences.	3	3
Strategies for flexible payment methods and or AVOD models		1	1
Telco - Customer Communication Gap	Relates to the RBV framework by highlighting the significance of communication strategies as a resource for competitive advantage	4	8
Telco - Differentiated streaming strategy	targeting unique market segments without competing directly with existing major streaming platforms	2	2
Telco - Internal Channels for VSS Promotion	Utilisation of internal spaces, such as telco stores, magazines, or other in-house marketing collateral, by telcos to promote their VSSs	4	5
Telco - Marketing Focus Conflicts	Conflicts arising due to shifts in marketing focus from core business to new services	3	5
Telco Billing and Product Flexibility	Telcos not only offer diverse billing methods but also demonstrate flexibility in their product offerings to align with market preferences and needs. It captures	4	4

Name	Description	Files	References
	scenarios where telcos provide various payment options alongside adaptable product features		
Theme 6: Optimising Subscriber Acquisition for VSS Growth	**Unravelling the intricacies of subscriber acquisition strategies in the South African video streaming landscape. This theme delves into challenges and strategic solutions, exploring market dynamics and effective approaches to enhance the success and growth of video streaming services through targeted subscriber acquisition initiatives.**	**47**	**148**
(Sub Theme) Content and audience engagement strategies to drive audience growth	Delving into the realm of content and audience engagement. This theme investigates strategies related to content consolidation, diversity, and engagement. It highlights the importance of localised content, audience-driven approaches, and compelling content to captivate and retain viewers	23	44
Adapting Customer Offerings	Reshaping services to meet changing customer demands	2	2
Compelling content as an audience driver		3	4
Comprehensive Content Diversity	cater to diverse audience tastes by combining renowned international entertainment with its strong local content, creating a diverse and appealing streaming platform as a key success factor.	4	4
Content Consolidation Strategy - Exclusivity Focus	Captures the strategic move by broadcasters to restrict certain popular content from third-party catch-up services. The objective is to drive viewership and subscription growth on the broadcaster's proprietary platform, emphasising the importance of exclusive content in attracting and retaining subscribers.	2	2
Content Windowing Strategies	Investigate how content windowing strategies impact subscriber acquisition or retention tactics among consumers	2	4
Hyperlocal Cultural Engagement	creating content in various African languages to deeply connect with diverse communities, recognizing the unique linguistic and cultural nuances within regions.	3	3
Local Content as Audience Catalyst	Emphasises how locally produced content on generates discussions and trends,	6	6

Name	Description	Files	References
	fostering engagement and talkability among audiences.		
Local Language Attraction	Shows how programming in local languages attracts subscribers to platform	1	1
Localised Content Relevance	Relevance of locally produced content for audience preferences	9	14
Sport as a audience drive	Highlights the importance of sport as an audience driver.	2	2
VSS User Surge	Notable success in the SA VSS landscape.	1	2
(Sub Theme) Data-Driven Subscriber Acquisition Strategies	Delves into the pivotal role of data provision as a strategic initiative employed by telcos to bolster subscriber acquisition. Examining how the offering of free data becomes a catalyst for enticing new subscribers, the theme explores the nuances of this approach and its implications for the success and growth of video streaming services in the South African market.	11	12
Data cost savings for streaming as subscriber acquisition strategy	telcos aim to increase subscriber acquisitions through the provisioning of free or cost effective data.	11	12
(Sub Theme) Flexible Billing and Payment Strategies	Highlight the various approaches and methods related to billing, product flexibility, and payment options, all contributing to user-centric strategies for growing subscribers	5	7
Billing and product flexibility	Offering diverse billing methods but also demonstrate flexibility in product offerings to align with market preferences and needs. It captures scenarios where various payment options were provided alongside adaptable product features	2	3
Strategies for flexible payment methods and or AVOD models		1	1
Telco Billing and Product Flexibility	Telcos not only offer diverse billing methods but also demonstrate flexibility in their product offerings to align with market preferences and needs. It captures scenarios where telcos provide various payment options alongside adaptable product features	3	3

Name	Description	Files	References
(Sub Theme) Holistic value proposition and consumer behaviour	Examining the holistic value propositions put forth by telecom and broadcasting services, this theme considers the emotional aspects of consumer decision-making, the construction of comprehensive value propositions, and the impact of such strategies on consumer behaviour.	12	20
Emotional Connection vs. Price Strategy	In content, building an emotional connection holds more significance than price alone.	1	1
Holistic Value Propositions & Product Construct	Consumers seek comprehensive value propositions from streaming services, emphasising the significance of a well-structured product offering to meet varied customer needs and preferences	10	16
Local TV still reigns	Local TV Triumph: Viewership Over Digital Subscriptions in South Africa's Top Shows"	2	3
(Sub Theme) Mobile Accessibility and Content	Covering Mobile-Centric Accessibility and Content, and Strategies for User Surge.	4	7
Empowering Mobile-First Creativity	Bridging market gaps through a competition fostering unique, user-centric local content for our VOD service, enriching our diverse content offerings.	3	3
Mobile-Centric Accessibility	Mobile-friendly content to drive convenient user access and engagement.	4	4
(Sub Theme) Navigating Challenges in Subscriber Acquisition	Delving into the challenges faced by video streaming services in SA during the subscriber acquisition process, with a focus on identifying obstacles and proposing solutions for overcoming them.	18	38
Broadcasters' Market Challenges	Broadcaster struggles in the market for VSS, encompassing declining share prices, subscriber loss, tepid investor response to new products, and adverse market conditions, reflect wider challenges faced by broadcasters in the digital streaming space.	1	1
Consumer Concerns - Data Usage and Cost	Users concerns regarding data usage and potential costs incurred while consuming streaming services. It emphasises the significance of addressing user concerns related to data consumption and associated expenses. It primarily touches upon the effectiveness of strategies related to subscriber acquisition and	9	10

Name	Description	Files	References
	user apprehensions regarding data usage		
Consumer Perception of Foreign Superiority	Prevailing consumer bias favouring international content over local offerings, contributing to the competitive advantage of foreign platforms	2	2
Disconnected Product Strategy	Examining the impact of product strategy alignment on subscriber acquisition and VSSs.	6	10
Evolving Market Expertise Development	Gradual learning process and the reluctance towards being the first to market, indicating a learning curve in market expertise and a cautious approach to market entry or adoption of new technologies, which directly relates to subscriber acquisition strategies	6	9
Limited Market Dominance by VSS Platforms	Market Prediction is that whilst growth is expected, traditional local TV will still dominate audiences.	1	1
Rising Competition in On-Demand Streaming Sparks Shifts	New Entrants Face Challenges, Established Players Evolve	3	4
SVOD in America	Mention of Americans' attitude toward SVOD services in relation to content availability in Africa	1	1
(Sub Theme) UI-UX enhancements for market growth	Exploring strategies that prioritise user experience and interface improvements, encompassing audience focus, consumer-centric success, and initiatives for enhanced access and user-friendly viewing options to drive market expansion and growth	12	20
Audience focus	Audience targeting indicating audience base and illustrating a strategic focus	4	7
Consumer-Centric Success	emphasising the pivotal role of meeting consumer needs and desires in achieving significant platform success.	5	6
Enhanced Access and User-Friendly Viewing Options	Viewing experience with enhanced accessibility and user-friendly options for seamless content enjoyment	3	3
User Adoption Habits Triumphs over Content	Underscores the pivotal role of user habits and accessibility in driving OTT service success.	4	4

Name	Description	Files	References
Theme 7: Positioning for market expansion	**Incorporating Market Expansion and Market-Specific Strategies, Competitive Launch Environment, and telco-broadcasters Collaboration and Audience Trust.**	**25**	**81**
Broadcaster - Audience Expansion and Retention	Strategies for retaining and expanding audiences by adapting to preferences and reaching younger viewers	6	9
Market Specificity	Analysing strategies tailored to Africa's unique market dynamics for effective business approaches	9	16
Pricing Strategies in Subscriber Growth		8	8
Strategic Marketing Challenges	Combining Key Success Factors related to Strategic Marketing, Brand Identity, and Financial Viability Concerns in telco-driven Services.	9	36
Disconnected Product Strategy	Examining the impact of product strategy alignment on subscriber acquisition and VSSs.	6	9
Key success factor- Strategic Marketing	Efforts to establish a distinct brand identity and market presence.	6	8
Telco - Customer Communication Gap	Intersects with the business model discussion as it emphasises the pivotal role of clear communication within the business model. In this case, ineffective communication adversely affected the implementation and reception of specific business strategies within the digital transformation context	4	6
Telco - Failed Differentiation Strategies	Ineffectiveness in devising strategies to distinguish services from existing market competitors	3	5
Telco - Marketing Misalignment	Highlights instances where marketing objectives or strategies were misaligned with the video services' goals or market positioning	5	8
Strategically Delayed Entry	Highlights the benefits of launching after a substantial period, leveraging industry knowledge, and shared experiences to make informed strategic decisions, even without possessing internal expertise.	1	1
Subscriber Retention and Pricing Strategy	Instances where VOD platforms implement pricing adjustments as part of a continuous strategy aimed at retaining existing subscribers and attracting new customers to their services.	6	9

Name	Description	Files	References
Telco Audience Trust Leveraging	Established customer trust and competency to forge successful partnerships, ensuring a competitive advantage	1	1
Review of Revenue Models		4	4
Strategic caution in media evolution	Lessons in South African media evolution pitfalls and the strength of traditional media. A strategic approach to digital transformation is needed.	1	1
Telco Missed Opportunities and Potential of VSSs	Missed opportunities for telcos by not acquiring businesses with content expertise	3	6

APPENDIX G – BUSINESS MODEL CANVASES

BUSINESS MODEL CANVAS - Black

KEY RESOURCES

What key resources does your value proposition require?
- Brand ✓
- Apps/website ✓
- Resources with media expertise ✗
- Content Producers ✗

What key resources do you need for customer relationship management?
- Customer Support Infrastructure ✓
- Customer Relationship Management Software ✓
- Data Analytics Tools ✗
- Personalisation Capabilities ✗
- Feedback Mechanisms ✗

KEY ACTIVITIES

What key activities does value proposition require?
- Fully functional VSS service with variety of content offerings ✓
- Content is refresued on a regular basis with exclusive content ⍻
- Sales & Marketing ✓

What key activities are required to deliver customer experience?
- Platform support teams ✓
- Good UX & UI ✓
- Data Analysis ✗

KEY PARTNERS
- Media Producers
- Regulators

VALUE PROPOSITION

What core value do you deliver to your audience?
- 24/7 On Demand Entertainment ✓
- Unlimited access ✓
- Local content ✗
- Black Exclusives ✗
- Black Originals ✗
- Live Sport ✓
- Free trial ✓
- No commercials ✓
- Low data usage mobile application ✗
- Offline viewing/Downloading ✓
- Catch up on missed TV ✗
- Free data provision for SVOD customers (Cell C only) ✓
- Cheaper data bundles (Cell C only) ✓
- Data usage billing in minutes not MB ✗

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?
- Personalised Recommendations ✗
- Self Service ✓
- Responsive Customer Support ✓
- Community Engagement ✓
- Continuous Improvement ✗

CHANNELS

Through which channel are audiences reached?

VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:
- In App Notifications. ✗
- Email ?
- Social Media ✓
- Website ✓
- SMS ✓
- Above the line ✓
- Outdoor ✓
- Owned channels/stores ✓

CUSTOMER SEGMENTS

Which groups of customers is value created for?

High end market appeal, , across all networks

What opportunities are there to reach new customers segments?

Whislt the intent was to attrct the mass market, the content proposition to attract that market was very limited.

COST STRUCTURE

What are the most important costs?
- Content production & licensing
- Technology
- Sales & Marketing
- Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?
- Revenue share agreements for content

REVENUE STREAMS
- Subscription (SVOD & Premium Linear Channels)
- TVOD

Legend: ✓ Provide offering ⍻ Partially comply ✗ Do not provide ? Information not Obtained

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 4: BMC Cell C Black

BUSINESS MODEL CANVAS - EVOD*

KEY RESOURCES
What key resources does your value proposition require?
- Brand ✅
- Apps/website ✅
- Resources with media expertise ✅
- Content Producers ✅

What key resources do you need for customer relationship management?
- Customer Support Infrastructure. ✅
- Customer Relationship Management Software ✅
- Data Analytics Tools ❌
- Personalisation Capabilities ❌
- Feedback Mechanisms ❌

KEY ACTIVITIES
What key activities does your value proposition require?
- Fully functional VSS service with variety of content offerings ✅
- Content is refresued on a regular basis with exclusive content ✅

What key activities are required to deliver customer experience?
- Platform support teams ✅
- Good UX & UI ✅
- Data Analysis ❌

KEY PARTNERS
- MTN Media Producers
- Film Makers
- Regulators
- Telkom

VALUE PROPOSITION
What core value do you deliver to your audience?
- 24/7 On Demand Entertainment ✅
- Unlimited access ✅
- Local content ✅
- eMedia exclusives ✅
- eVOD exclusives ❌
- Live Sport ❌
- 14 day free trial N/A
- No commercials ❌
- Low data usage mobile application ❌
- Offline viewing/Downloading ❌
- Catch up on missed TV** ⍻
- Free data provision for SVOD customers (MTN only) ✅
- Cheaper data bundles (MTN only) ✅
- Data usage billing in minutes not MB ❌

CUSTOMER RELATIONSHIPS
What relationship do the target audience expect VSSs to establish and maintain with them?
- Personalised Recommendations ❌
- Responsive Customer Support ✅
- Community Engagement ✅
- Continuous Improvement ❌

CHANNELS
Through which channel does audience want to be reached?
VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:
- In App Notifications ❌
- Email ❌
- Social Media ✅
- Website ✅
- SMS ❌
- Above the line ✅
- Outdoor ✅
- Owned channels/stores N/A

CUSTOMER SEGMENTS
Which groups of customers is value created for?
Targeted same customer base as core product

What opportunities are there to reach new customers segments?
Reach new customers through OTT provisioing

COST STRUCTURE
What are the most important costs?
Content, Technology & Marketing
Which Key Resources are the most expensive?
Content
What can be changed from a fixed cost to a variable cost?
Revenue share agreements for content

REVENUE STREAMS
- SVOD
- Freemium
- FAST** (limited)

Legend: ✅ Provide offering ⍻ Partially comply ❌ Do not provide ? Information not Obtained

* Assessement of eVOD is for period up to November 2023 - before launch of new eVOD platform

** eVOD only offered rebroadcast of prime time schedule during the week for views to catch up what they had missed during loadshedding

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 5: BMC eMedia's eVOD

BUSINESS MODEL CANVAS - FrontRow

KEY RESOURCES

What key resources does your value proposition require?
Brand ☑
Apps/website ☑
Resources with media expertise ✗
Content Producers ✗

What key resources do you need for customer relationship management?
Customer Support Infrastructure ☑
Customer Relationship Management Software ☑
Data Analytics Tools ✗
Personalisation Capabilities ✗
Feedback Mechanisms ✗

KEY ACTIVITIES

What key activities does value proposition require?
Fully functional VSS service with variety of content offerings ☑
Content is refresued on a regular basis with exclusive content ✗
Sales & Marketing ☑

What key activities are required to deliver customer experience?
Platform support teams ☑
Good UX & UI ☑
Data Analysis ✗

KEY PARTNERS

Media Producers
Regulators

VALUE PROPOSITION

What core value do you deliver to your audience?
24/7 On Demand Entertainment ☑
Unlimited access ☑
Local content ✗
FrontRow Exclusives ☑
FrontRow Originals ✗
Live Sport ✗
Free trial ✗
No commercials ☑
Low data usage mobile application ✗
Offline viewing/Downloading ✗
Catch up on missed TV ✗
Free data provision for SVOD customers (MTN only) ☑
Cheaper data bundles (MTN only) ☑
Data usage billing in minutes not MB ✗

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?
Personalised Recommendations ✗
Self Service ☑
Responsive Customer Support ✗
Community Engagement ☑
Continuous Improvement ✗

CHANNELS

Through which channel are audiences reached?
VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:
In App Notifications. ✗
Email ?
Social Media ☑
Website ☑
SMS ☑
Above the line ✗
Outdoor ☑
Owned channels/stores ☑

CUSTOMER SEGMENTS

Which groups of customers is value created for?
High end market appeal, only to MTN customers

What opportunities are there to reach new customers segments?
Whislt the intent was to attrct the mass market, the content proposition to attract that market was very limited.

COST STRUCTURE

What are the most important costs?
Content production & licensing
Technology
Sales & Marketing
Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?
Revenue share agreements for content

REVENUE STREAMS

SVOD
TVOD
EST (Electronic Sell Through)

Legend: ☑ Provide offering ✓ Partially comply ✗ Do not provide ? Information not Obtained

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 6: BMC MTN's FrontRow

BUSINESS MODEL CANVAS - SABC+*

KEY RESOURCES

What key resources does your value proposition require?
Brand ✅
Apps/website ✅
Resources with media expertise ✅
Content Producers ✅

What key resources do you need for customer relationship management?
Customer Support Infrastructure. ✅
Customer Relationship Management Software ✅
Data Analytics Tools ❌
Personalisation Capabilities ❌
Feedback Mechanisms ❌

KEY ACTIVITIES

What key activities does value proposition require?
Fully functional VSS service with variety of content offerings ✅
Content is refresued on a regular basis with exclusive content ✅

What key activities are required to deliver customer experience?
Platform support teams ✅
Good UX & UI ✅
Data Analysis ❌

KEY PARTNERS

Hi Sense TV
Partnered with SABC & Hollywood bets for acquisition of Rugby World Cup Rights however this was primarily for their terrestrial channels
Media Producers
Film Makers
Regulators
Telkom

VALUE PROPOSITION

What core value do you deliver to your audience?
24/7 On Demand Entertainment ✅
Unlimited access ✅
Local content ✅
SABC exclusives ✅
SABC+ exclusives ❌
Live Sport ✅
14 day free trial N/A
No commercials ❌
Low data usage mobile application ✅
Offline viewing/Downloading ✅
Catch up on missed TV ✅
Free data provision for SVOD customers (Telkom only) ✅
Cheaper data bundles (Telkom only) ✅
Data usage billing in minutes not MB ❌

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?
Personalised Recommendations ❌
Self Service ✅
Responsive Customer Support ✅
Community Engagement ✅
Continuous Improvement ❌

CHANNELS

Through which channel are audiences reached?
VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:
In App Notifications. ✅
Email ❌
Social Media ✅
Website ✅
SMS ❌
Above the line ✅
Outdoor ✅
Owned channels/stores N/A

CUSTOMER SEGMENTS

Which groups of customers is value created for?
Universal Access focus

What opportunities are there to reach new customers segments?
Through live sport i.e. Rugby World Cup, have been able to gain new audiences not wanting to subscriber to PayTV

COST STRUCTURE

What are the most important costs?
Content production & licensing
Technology
Sales & Marketing
Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?
Revenue share agreements for content

REVENUE STREAMS

AVOD
FAST

Legend: ✅ Provide offering ✓ Partially comply ❌ Do not provide ? Information not Obtained

* Assessement of SABC+ is for period up to November 2023 - before launch of new SABC+ platform

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 7: BMC SABC'S SABC+

BUSINESS MODEL CANVAS - Showmax*

KEY RESOURCES

What key resources does your value proposition require?

- Brand ✅
- Apps/website ✅
- Resources with media expertise ✅
- Content Producers ✅

What key resources do you need for customer relationship management?

- Customer Support Infrastructure ✅
- Customer Relationship Management Software ✅
- Data Analytics Tools ✅
- Personalisation Capabilities ❌
- Feedback Mechanisms ✅

KEY ACTIVITIES

What key activities does value proposition require?

- Fully functional VSS service with variety of content offerings ✅
- Content is refresued on a regular basis with exclusive content ✅
- Sales & Marketing ✅

What key activities are required to deliver customer experience?

- Platform support teams ✅
- Good UX & UI ✅
- Data Analysis ✅

KEY PARTNERS

- Media Producers
- Film Makers
- Consumer Electronic Companies
- Regulators
- Telcos
- Rewards & Loyalty Partners
- Content Delivery Network (CDN)

VALUE PROPOSITION

What core value do you deliver to your audience?

- 24/7 On Demand Entertainment ✅
- Unlimited access ✅
- Local content ✅
- DSTV Exclusives ✅
- Showmax Originals ✅
- Live Sport ✅
- Free trial ✅
- No commercials ✅
- Low data usage mobile application ✅
- Offline viewing/Downloading ✅
- Catch up on missed TV ❌
- Free data provision for SVOD customers ❌
- Cheaper data bundles (across MNOs) ✅
- Data usage billing in minutes not MB ❌

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?

- Personalised Recommendations ❌
- Self Service ✅
- Responsive Customer Support ✅
- Community Engagement ✅
- Continuous Improvement ❌

CHANNELS

Through which channel are audiences reached?

VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:

- In App Notifications. ✅
- Email ✅
- Social Media ✅
- Website ✅
- SMS ❌
- Above the line ✅
- Outdoor ✅

CUSTOMER SEGMENTS

Which groups of customers is value created for?

Target a wide audience providing tiered subscription packagages

DSTV Premium subscribers get Showmax for free and Compact Customers get it at reduced price

What opportunities are there to reach new customers segments?

Attracting the previouly PayTV customers who are exclusively streaming

Attracting Free To Air Customers seeking premium affrodable content

COST STRUCTURE

What are the most important costs?

- Content production & licensing
- Technology
- Sales & Marketing
- Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?

Revenue share agreements for content

REVENUE STREAMS

SVOD

Legend: ✅ Provide offering ✓ Partically comply ❌ Do not provide ? Information not Obtained

* Assessement of Showmax is for period up to November 2023 - before launch of Showmax 2.0

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 8: BMC MultiChoice's Showmax

BUSINESS MODEL CANVAS - StarTimes ON

KEY RESOURCES

What key resources does your value proposition require?

Brand ⍻
Apps/website ☑
Resources with media expertise ☑
Content Producers ☑

What key resources do you need for customer relationship management?

Customer Support Infrastructure ☑
Customer Relationship Management Software ☑
Data Analytics Tools ☑
Personalisation Capabilities ✗
Feedback Mechanisms ?

KEY ACTIVITIES

What key activities does value proposition require?

Fully functional VSS service with variety of content offerings ☑
Content is refresued on a regular basis with exclusive content ☑
Sales & Marketing ☑

What key activities are required to deliver customer experience?

Platform support teams ☑
Good UX & UI ☑
Data Analysis ?

KEY PARTNERS

Hi-Sense TV
Media Producers
Film Makers
Regulators

VALUE PROPOSITION

What core value do you deliver to your audience?

24/7 On Demand Entertainment ☑
Unlimited access ☑
Local content ☑
StarSat Exclusives ☑
StarTimesON Originals ✗
Live Sport ☑
Free trial ☑
No commercials ✗
Low data usage mobile application ☑
Offline viewing/Downloading ☑
Catch up on missed TV ✗
Free data provision for SVOD customers ✗
Cheaper data bundles ✗
Data usage billing in minutes not MB ✗

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?

Personalised Recommendations ✗
Responsive Customer Support ☑
Community Engagement ☑
Continuous Improvement ✗

CHANNELS

Through which channel does audience want to be reached?

VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:

In App Notifications. ☑
Email ✗
Social Media ☑
Website ☑
SMS ✗
Above the line ✗
Outdoor ✗
Owned channels/stores ☑

CUSTOMER SEGMENTS

Which groups of customers is value created for?

StarTimes Subscription TV Customers

What opportunities are there to reach new customers segments?

Seeking to acquire new PayTV customers through the provisioning of limited access to content thereafter PayTV subscription required

COST STRUCTURE

What are the most important costs?

Content, Technology & Marketing

Which Key Resources are the most expensive?

Content

What can be changed from a fixed cost to a variable cost?

Revenue share agreements for content

REVENUE STREAMS

SVOD
Freemium

Legend: ☑ Provide offering ⍻ Particially comply ✗ Do not provide ? Information not Obtained

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 9: BMC StarSat's StarTimesON

BUSINESS MODEL CANVAS - TelkomONE

KEY PARTNERS

What key resources does your value proposition require?
Brand ⍻
Apps/website ✅
Resources with media expertise ❌
Content Producers ❌

What key resources do you need for customer relationship management?
Customer Support Infrastructure ✅
Customer Relationship Management Software ✅
Data Analytics Tools ❌
Personalisation Capabilities ❌
Feedback Mechanisms ❌

KEY ACTIVITIES

What key activities does value proposition require?
Fully functional VSS service with variety of content offerings ✅
Content is refresued on a regular basis with exclusive content ⍻
Sales & Marketing ✅

What key activities are required to deliver customer experience?
Platform support teams ✅
Good UX & UI ✅
Data Analysis ❌

KEY RESOURCES

SABC
Media Producers
Regulators

VALUE PROPOSITION

What core value do you deliver to your audience?
24/7 On Demand Entertainment ✅
Unlimited access ✅
Local content ✅
TelkomONE Exclusives ❌
TelkomONE Originals ❌
Live Sport ✅
Free trial ✅
No commercials ✅
Low data usage mobile application ✅
Offline viewing/Downloading ✅
Catch up on missed TV ✅
Free data provision for SVOD customers (Telkom only) ✅
Cheaper data bundles (Telkom only) ✅
Data usage billing in minutes not MB ❌

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?
Personalised Recommendations ❌
Self Service ✅
Responsive Customer Support ✅
Community Engagement ✅
Continuous Improvement ❌

CHANNELS

Through which channel are audiences reached?
VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:
In App Notifications. ❌
Email ⍻
Social Media ✅
Website ✅
SMS ⍻
Above the line ❌
Outdoor ❌
Owned channels/stores ❌

CUSTOMER SEGMENTS

Which groups of customers is value created for?
Focused on Youth market segment particulary in the mass market segment, across all networks

What opportunities are there to reach new customers segments?
TelkomONE was open for use to any network subscriber with the data offers for Telkom subcribers. Aim was to attract non Telkom subscribers to Telkom network.

COST STRUCTURE

What are the most important costs?
Content production & licensing
Technology
Sales & Marketing
Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?
Revenue share agreements for content

REVENUE STREAMS

Subscription (SVOD & Premium Linear Channels)
AVOD
FAST
Advertising Audio on Demand (AAoD)
Live Radio

Legend: ✅ Provide offering ⍻ Partically comply ❌ Do not provide ? Information not Obtained

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 10: BMC Telkom's TelkomONE

BUSINESS MODEL CANVAS - VideoPlay

KEY RESOURCES

What key resources does your value proposition require?

Brand ✅
Apps/website ✅
Resources with media expertise ❌
Content Producers ❌

What key resources do you need for customer relationship management?

Customer Support Infrastructure ✅
Customer Relationship Management Software ✅
Data Analytics Tools ❌
Personalisation Capabilities ❌
Feedback Mechanisms ❌

KEY ACTIVITIES

What key activities does value proposition require?

Fully functional VSS service with variety of content offerings ✅
Content is refresued on a regular basis with exclusive content ✓
Sales & Marketing ✅

What key activities are required to deliver customer experience?

Platform support teams ✅
Good UX & UI ✅
Data Analysis ❌

KEY PARTNERS

Media Producers
Regulators

VALUE PROPOSITION

What core value do you deliver to your audience?

24/7 On Demand Entertainment ✅
Unlimited access ✅
Local content ❌
VideoPlay Exclusives ❌
VideoPlay Originals ❌
Live Sport ✅
Free trial ✅
No commercials ✅
Low data usage mobile application ✅
Offline viewing/Downloading ✅
Catch up on missed TV ❌
Free data provision for SVOD customers (Cell C only) ✅
Cheaper data bundles (Cell C only) ✅
Data usage billing in minutes not MB ✅

CUSTOMER RELATIONSHIPS

What relationship do the target audience expect VSSs to establish and maintain with them?

Personalised Recommendations ❌
Self Service ✅
Responsive Customer Support ✅
Community Engagement ✅
Continuous Improvement ❌

CHANNELS

Through which channel are audiences reached?

VSS customers primarily consisting of tech-savvy individuals and entertainment enthusiasts, prefers to be reached through digital channels that offer convenience and accessibility i.e:

In App Notifications. ❌
Email ?
Social Media ✅
Website ✅
SMS ✅
Above the line ✅
Outdoor ✅
Owned channels/stores ✅

CUSTOMER SEGMENTS

Which groups of customers is value created for?

High end market appeal, only to Vodacom customers

What opportunities are there to reach new customers segments?

Whislt the intent was to attrct the mass market, the content proposition to attract that market was very limited.

COST STRUCTURE

What are the most important costs?

Content production & licensing
Technology
Sales & Marketing
Infrusructure i.e. Web services & CDNs

What can be changed from a fixed cost to a variable cost?

Revenue share agreements for content

REVENUE STREAMS

Subscription (SVOD & Premium Linear Channels)
TVOD

Legend: ✅ Provide offering ✓ Partically comply ❌ Do not provide ? Information not Obtained

Business Model Canvas Framework adapted from Osterwalder & Pigneur (2010)

Figure 11: BMC Vodacom's VideoPlay

APPENDIX H – VRIOs

VRIO - Black

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	Yes	No	Yes	Yes	Temporary competitive advantage	At the time of launch, Telcos were seen to have financial resources to support content acquisition business. This was at a time when studio were feeling that they were being squeezed for margins by broadcasters
Media Human Resources	No	-	-	-	Competitive disadvantage	VSS was outsourced as no internal skill existed
Technology	Yes	No	Yes	Yes	Competitive parity	Whislt bolstering a similar ranking as MTN, the bar had been set within the market regarding VSS platforms and the Black platform was meeting the market expectation
Networks & Partnerships	No	-	-	-	Competitive disadvantage	Cell C had to establish networks and partnership within the media industry, utilising the services of a International Content Aggregator
Content	No	-	-	-	Competitive disadvantage	Despite high content licensing costs, Black failed to significantly attract users to the platform
Brand Equity	No	-	-	-	Competitive disadvantage	Although Cell C was a strong Telco brand, establishing a presence in the media space required significant investments and time
Marketing	Yes	No	Yes	No	Competitive disadvantage	Cell C is one of the telcos that made a significant amount of investment in marketing Black, however it was unability to gain a competitive advantage
Pricing Strategies	No	-	-	-	Competitive disadvantage	Black implemented a complex pricing strategy, which was further complicated by the introduction of linked Black data bundles. This strategy aimed to attract audiences to the platform without cannibalising their traditional data bundle revenue.

Figure 12: Cell C's Black VRIO

VRIO - eVOD

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	No	-	-	-	Competitive disadvantage	Despite not having the extensive financial resources of its competitor, Showmax, eVOD strategically leveraged its partnership with MTN to acquire its VSS platform.
Media Human Resources	Yes	Yes	Yes	Yes	Sustained Competitive advantage	eVOD strategically employs media and technology experts to manage its VSS, complemented by eMedia's management guidance.
Technology	Yes	No	Yes	No	Competitive parity	Research findings indicate that the eVOD platform faced limitations in expanding beyond its current capacity, hindering its ability to compete effectively against other VSSs in the market. However, eVOD has recently upgraded its platform in January 2024, aiming to address these challenges and enhance its competitiveness
Networks & Partnerships	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Leveraging the relationships and deals facilitated by eMedia, eMedia achieved sustained competitive advantage
Content	Yes	No	Yes	Yes	Competitive parity	Leveraging the content library of eMedia, eVOD achieved competitive parity. However compared to showmax and SABC+, eVOD's limited catalogue only allowed it to achieve competitive parity
Brand Equity	Yes	Yes	Yes	Yes	Sustained Competitive advantage	eVOD, although a new brand, benefited from the robust support of eMedia, a strong free to air brand. Additionally, eVOD strategically acquired well-established local productions from eMedia, further solidifying its position in the market.
Marketing	Yes	No	Yes	Yes	Temporary competitive advantage	Leveraging the support and expertise of a strong broadcasting entity, eMedia has effectively executed its marketing strategy, enabling it to gain a competitive advantage.
Pricing Strategies	Yes	No	No	Yes	Competitive parity	eVod launched with free and subscription tier, this was comparable with other market offerings

Figure 13: eMedia's eVOD VRIO

VRIO - FrontRow

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	Yes	No	Yes	Yes	Temporary competitive advantage	At the time of launch, Telcos were seen to have financial resources to support content acquisition business. This was at a time when studio were feeling that they were being squeezed for margins by broadcasters
Media Human Resources	No	-	-	-	Competitive disadvantage	VSS was outsourced as no internal skill existed
Technology	Yes	No	Yes	Yes	Temporary competitive advantage	VSS technology was licensed, and considering that there were so few players in the market at the time of launch the MTN VSS was the first true mobile VSS
Networks & Partnerships	No	-	-	-	Competitive disadvantage	MTN had to establish networks and partnership within the media industry, utilising the services of a International Content Aggregator
Content	No	-	-	-	Competitive disadvantage	Despite high content licensing costs, the MTN exclusives failed to significantly attract users to the platform
Brand Equity	No	-	-	-	Competitive disadvantage	Although MTN was a strong Telco brand, establishing a presence in the media space required significant investments and time
Marketing	Yes	No	Yes	No	Competitive disadvantage	While Telcos had the financial resources to invest in marketing, they often lacked the expertise needed to effectively promote content, resulting in an inability to gain a competitive advantage
Pricing Strategies	Yes	Yes	No	Yes	Temporary competitive advantage	At time of launch of MTN, it was most competitive pricing in the market.

Figure 14: MTN's FrontRow VRIO

VRIO - SABC+

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	No	-	-	-	Competitive disadvantage	Despite not having the extensive financial resources of its competitor, Showmax, SABC+ through its partenrship with Telkom, was able to acquire its VSS platform.
Media Human Resources	Yes	Yes	Yes	Yes	Sustained Competitive advantage	SABC+ strategically employs media and technology experts to manage its VSS, complemented by SABC's management guidance.
Technology	Yes	No	Yes	Yes	Competitive parity	Dispite some challenges during the Rugby World Cup (RWC), SABC's technology platform has allowed it to achieve its streaming objecctive, making it competitive in the market
Networks & Partnerships	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Leveraging the relationships and deals facilitated by eMedia, eMedia achieved sustained competitive advantage
Content	Yes	Yes	Yes	Yes	Sustained Competitive advantage	By leveraging the content library and linear channles of the SABC, SABC+ has sustained a competitive advantage. This is primarily attributed to its sports rights and the popularity of its most beloved soap operas whcih it made exclusivly avalialble for catch on SABC+. This significantly contributed to driving consumer appeal for the platform.
Brand Equity	Yes	Yes	Yes	Yes	Sustained Competitive advantage	SABC+, despite being a new brand, benefited significantly from the robust support of SABC, a strong free-to-air brand across TV and radio. Additionally, SABC+ strategically acquired well-established local productions from SABC, as well as major sporting rights such as the RWC and Cricket World Cup, all available for free. These strategic acquisitions further solidified its position in the market, contributing to its rapid establishment and competitiveness.
Marketing	Yes	No	Yes	No	Competitive parity	Despite having three terrestrial TV channels and 19 radio stations, SABC has not yet leveraged its strong marketing channels to effectively promote SABC+. As a result, it has only achieved competitive parity for the activities performed thus far.
Pricing Strategies	Yes	Yes	Yes	Yes	Sustained Competitive advantage	SABC has followed a free model with no charge for its service inclduing lucrrative sport, this has given it a sustainable competitive advanatege.

Figure 15: SABC'S SABC+ VRIO

VRIO - Showmax

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	Yes	No	Yes	Yes	Temporary competitive advantage	Supported by Multichoice, Showmax invests significantly in sustaining its VSS
Media Human Resources	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Showmax strategically employs media and technology experts to manage its VSS, complemented by Multichoice's management guidance.
Technology	Yes	No	Yes	Yes	Temporary competitive advantage	Showmax had their own inhouse development team support the platform
Networks & Partnerships	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Leveraging the relationships and deals facilitated by Multichoice, Showmax achieved sustained competitive advantage
Content	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Leveraging the content library and commissioning expertise and processes of Multichoice, Showmax achieved sustained competitive advantage
Brand Equity	Yes	Yes	Yes	Yes	Sustained Competitive advantage	Showmax, although a new brand, benefited from the robust support of Multichoice, a dominant force in the industry. Additionally, Showmax strategically acquired well-established local DSTV content brands, further solidifying its position in the market
Marketing	Yes	No	Yes	Yes	Temporary competitive advantage	Leveraging the support and expertise of a strong broadcasting entity, Showmax has effectively executed its marketing strategy, enabling it to gain a competitive advantage.
Pricing Strategies	Yes	No	No	Yes	Competitive parity	Showmax has adeptly managed to uphold a competitive pricing strategy, even amidst the emergence of international OTTs and local Telcos within the market. By comprehensively grasping the market dynamics, Showmax has introduced new bouquet options and flexibly adjusted pricing to align with evolving consumer preferences and demands.

Figure 16: MultiChoice's Showmax VRIO

VRIO - StarTimesON

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	No	-	-	-	Competitive disadvantage	StarTimesON does not not having the extensive financial resources of its competitor Showmax, however its has leverage its African operations to provide for its VSS platform.
Media Human Resources	Yes	Yes	Yes	Yes	Sustained Competitive advantage	StarTimesON strategically employs media and technology experts to manage its VSS.
Technology	Yes	No	Yes	Yes	Competitive parity	Technology meets the basic serivie requirements
Networks & Partnerships	Yes	No	No	Yes	Competitive parity	Leveraging the relationships and deals facilitated by StarTimes, StarTimesON achieved competitive parity
Content	Yes	No	No	Yes	Competitive parity	Compared to its competitor Showmax, StarTimeON has positioned itself more as a TV Everywhere solution rather than a VSS, making its its competitive parity rather than a source of competitive advantage.
Brand Equity	Yes	No	No	Yes	Competitive parity	StartimeON, although a new brand, benefited from the robust support of StarSat also know in the industry for media.
Marketing	No	-	-	-	Competitive disadvantage	Little media coverage is available for StarTimesON, aside from its website information. While it may be promoting the service on StartSat, research was unable to confirm this.
Pricing Strategies	Yes	No	No	Yes	Temporary competitive disadvantage	StarTimesON has followed a different pricing model to its competitors, providing for on demand pricing for sport which is resulting in a temporary competitive advantange

Figure 17: StarSat's StarTimesON VRIO

VRIO - TelkomONE

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	Yes	No	No	Yes	Competitive parity	Research shows that TelkomONE least amount of money compared to other Telcos, however delivering compelling enough value propositions
Media Human Resources	No	-	-	-	Competitive disadvantage	VSS was outsourced as no internal skill existed
Technology	Yes	No	Yes	Yes	Competitive parity	Whislt bolstering a similar ranking as MTN, the bar had been set within the market regarding VSS platforms and the TelkomONE platform was meeting the market expectation
Networks & Partnerships	No	-	-	-	Competitive disadvantage	Vodacom had to establish networks and partnership within the media industry, utilising the services of a International Content Aggregator
Content	Yes	No	Yes	Yes	Competitive disadvantage	TelkomONE's licensing of local content from SABC, coupled with international licensed content, served as a drawcard for users. However, the platform's lack of original and exclusive content ultimately hindered its ability to establish a competitive advantage.
Brand Equity	No	-	-	-	Competitive disadvantage	Although Telkom is a strong Telco brand, establishing a presence in the media space required significant investments and time
Marketing	No	-	-	-	Competitive disadvantage	Telkom struggled with marketing TelkomONE effectivly, with limited knoweldge of the brand and its proposition both within the Telco and externally.
Pricing Strategies	Yes	Yes	No	Yes	Temporary competitive advantage	TelkomONe's SVOD pricing was inline with other VSSs, with added beneffit of free advertiser funded content. This advanatge however didn't last long, as Showmax introduced a free teir and eVOD entered the market with a similar pricing strategy

Figure 18: Telkom's TelkomONE VRIO

VRIO - VideoPlay

	Valuable?	Rare?	Costly to imitate?	Organised by Org?	Competitive Impact	Comments
Financial	Yes	No	Yes	Yes	Temporary competitive advantage	At the time of launch, Telcos were seen to have financial resources to support content acquisition business. This was at a time when studio were feeling that they were being squeezed for margins by broadcasters
Media Human Resources	No	-	-	-	Competitive disadvantage	VSS was outsourced as no internal skill existed
Technology	Yes	No	Yes	Yes	Competitive parity	Whislt bolstering a similar ranking as MTN, the bar had been set within the market regarding VSS platforms and the VideoPlay platform was meeting the market expectation
Networks & Partnerships	No	-	-	-	Competitive disadvantage	Vodacom had to establish networks and partnership within the media industry, utilising the services of a International Content Aggregator
Content	No	-	-	-	Competitive disadvantage	Despite high content licensing costs, VideoPlay failed to significantly attract users to the platform
Brand Equity	No	-	-	-	Competitive disadvantage	Although Vodacom is a strong Telco brand, establishing a presence in the media space required significant investments and time
Marketing	Yes	No	Yes	No	Competitive disadvantage	While Telcos had the financial resources to invest in marketing, they often lacked the expertise needed to effectively promote content, resulting in an inability to gain a competitive advantage
Pricing Strategies	Yes	No	No	Yes	Competitive parity	Vodacom's pricing was inline with other VSSs in the market

Figure 19: Vodacom's VideoPlay