



EXECUTIVE BRIEFING · HIGHLIGHTS · TEASER

Reimagining **Next** for African Broadcasting

The three-page read for busy leaders — how three days in Nairobi turned cloud migration, AI governance and the fight against piracy into one conversation for the region's broadcasters.

THE ONE SHIFT

Cloud, AI & content protection are now one balance sheet — not three.

INSIDE THE FULL REPORT

11 sections · Six Forces · figures, quotes & market signals.

THE CONVENING

Broadcasters Convention – East Africa 2026 · Nairobi, 26–28 May.

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EXECUTIVE BRIEFING

One Balance Sheet, **Not Three.**

Cloud migration, AI governance and content protection stopped being separate conversations in Nairobi. Across three days, East African broadcasters, regulators and distributors put them on a single balance sheet — and kept a human accountable at every point.

A year of AI headlines gave way, in Nairobi, to something concrete: named tools, named costs, named failures. Infrastructure is shifting from owned hardware to rented cloud and IP capacity. AI has moved out of the governance debate and into daily newsroom work — where it is tested, and occasionally breaks, in public. And piracy, the region's oldest unsolved problem, is starting to be treated as an unbuilt distribution channel rather than only a crime to police.

The organisations pulling ahead treat cloud as a **baseline cost**, AI as a **supervised tool** rather than a decision-maker, and piracy as a **market worth converting**. The ones moving fastest without the guardrails — a human sign-off, a sandbox, a legal review — are the ones most exposed when something goes wrong. The question is no longer whether to modernise, but how fast, and who stays in control of it editorially.

— The headline numbers

\$2.2m/day

lost to piracy in Kenya alone (~\$800m/yr, KES 92bn) — 528m pirated streams in a single year, 42% via one site

\$3k/mo

buys the cloud software doing a job that needed a \$10m infrastructure build twenty years ago

94%

of Ethiopian TV homes now reached by satellite, up from a fraction in 2017 — hybrid distribution at scale

THE ONE LINE

“AI is a brilliant assistant, not executor... the editorial responsibility must be strictly human, because algorithms do not have any ethics.”

DAVID OMWOYO · CEO, MEDIA COUNCIL OF KENYA

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HIGHLIGHTS · THE SIX FORCES

The Forces Rewriting East African Broadcasting

FORCE ONE · CLOUD & INFRASTRUCTURE

The New Baseline

IP production, hybrid satellite/DTT and always-on redundancy stopped being aspirational — and energy reliability joined them as a fourth thing to plan around.

Signal: \$3k/mo cloud software replaces a \$10m build; the grid “can’t wait for the wind to blow.”

FORCE TWO · AI IN OPERATIONS

Governance, Not Adoption

Nobody debates whether to use AI; the debate is who signs off when it gets something wrong. The fix is a named human at the point of publication.

Signal: a year of public failures — six-fingered images, a lightened anchor, a premature obituary.

FORCE THREE · CONTENT & CO-PRODUCTION

The Advantage Not Yet Banked

Global demand for African stories is rising while commissioning budgets have fallen by roughly four-fifths in a generation.

Signal: children’s content is under 7% of African media; “partner with us — don’t always charge us.”

FORCE FOUR · SMART MONETISATION

From Spot Ads to a Portfolio

Neither legacy advertising nor first-generation OTT has solved revenue; the money is moving to brand-funded content and first-party data.

Signal: 70% of African OTT users prefer ad-supported; one national broadcaster has zero OTT subscribers.

FORCE FIVE · REGULATION & DATA SOVEREIGNTY

Borderless Cloud, Territorial Law

Cloud is borderless; Kenya’s media policy dates to 1998 and its broadcast data sits across roughly 19 jurisdictions.

Signal: zero harmonised EAC frameworks; France 24’s “no unverified AI” rule is the working model.

FORCE SIX · PIRACY & CONTENT PROTECTION

The Threat That’s Also a Market

The sector’s biggest unresolved threat is also its biggest untapped market: convert offline pirate demand into legal, low-cost distribution.

Signal: \$2.2m/day lost; piracy still isn’t classed as the cross-border cybercrime it is elsewhere.

BOTTOM LINE

The organisations that pull ahead will treat cloud, AI and content protection as **one investment decision, not three** — and keep a human accountable at every point where craft, judgement and trust are on the line.



READ THE FULL REPORT

To access the full “*Reimagining Next for African Broadcasting*” report — with the complete data, quotes, market signals and notes — go to resources.broadcastmediaafrica.com or email info@broadcastingandmedia.com.