



Digital Switch-Over Policy Impact in Contemporary Media Industry: A Critical Review

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Abstract. Nigeria's Digital Switch-Over (DSO) policy, contrived under the International Telecommunication Union's GE06 Agreement of 2006 and ratified in the 2012 White Paper, has spent two decades pulsating between technological promise and implementation paralysis. This article offers a critical review of the policy's effects on three interlocking domains of the mass communication environment, the creative industry, advertising sector, and the financial gatekeepers who control access to broadcast infrastructure. Adopting a qualitative, document-based critical policy analysis grounded in political economy of media and gatekeeping theory, the study draws on regulatory dispatchers, industry association statements, and concurrent reporting on the 2026 "Big Picture" relaunch and the June 17, 2026 national launch. Findings indicate that while the policy holds genuine potential to expand distribution channels, formalise audience measurement, and unlock a projected ₦605.2 billion advertising market, its benefits are structurally mediated by a narrow group of signal distributors, set-top-box manufacturers, and satellite infrastructure operators whose financial interests increasingly shape policy direction. The review further identifies a governance conflict arising from the broadcast regulator's double as both rule-maker and platform curator, alongside affordability risks tied to a satellite-dependent access model. The article concludes that without deliberate structural checks, the DSO risks reproducing the very gatekeeping imbalances digitisation which is meant to be dismantled, and offers policy recommendations for a more equitable transition.

Keywords: Digital Switch-Over; broadcast policy; creative industry; advertising; financial gatekeepers; political economy of media; Nigeria

1. Introduction

The migration from analogue to digital earthly broadcasting has been one of the defining infrastructural projects of twenty-first-century mass communication policy. Framed globally by the International Telecommunication Union's 2006 Geneva Agreement (GE06), which set an original deadline of 17 June 2015 for the cessation of analogue television transmission, the Digital Switch-Over (DSO) was conceived as a technical upgrade with sweeping economic and cultural consequences such as more channels within the same spectrum, sharper audiovisual quality, and a structural opening for new entrants into content production and distribution (García Leiva & Starks, 2009).

In Nigeria, the policy has had an unusually long and contested gestation. The Federal Government's 2012 White Paper formalised a roadmap toward digital earthly television, yet the original 2015 deadline collapsed almost immediately, and by the government's own account, more than ₦60 billion was expended between 2009 and 2025 on pilot rollouts in Jos, Abuja, Lagos and a handful of other cities with little to show for it nationally (Guardian, 2026a). After nearly two decades of missed targets, the National Broadcasting Commission (NBC) unveiled a revised "Big Picture" strategy in 2026, combining Digital Terrestrial Television (DTT), Direct-to-Home (DTH) satellite delivery, and Internet Protocol (IP)-based platforms into a single hybrid model, with a national

launch fixed for 17 June 2026 and a final analogue shutdown scheduled for 31 December 2028 (Federal Ministry of Information and National Orientation [FMINO], 2026; Leadership, 2026).

This relaunch has reopened long-standing debates about who actually stands to benefit from digitisation. Government officials describe the DSO as “fundamentally an economic and creative industry project” capable of stimulating local manufacturing, expanding audience reach, and unlocking new advertising revenue (FMINO, 2026). Industry bodies, by contrast, have warned that the new satellite-centred model could impose hidden costs on millions of households and that the regulator’s expanding commercial role creates a conflict of interest at the heart of the policy (Broadcasting Organisations of Nigeria [BON], as cited in *BusinessDay*, 2026; *Arise News*, 2026). This article takes these competing claims as its point of departure and asks, how has the DSO policy, in both its design and its implementation, reshaped power and value distribution across the creative industry, the advertising sector, and the financial gatekeepers of Nigerian broadcasting? In doing so, it treats the DSO not merely as a technology transition but as a redistribution of gatekeeping power, in keeping with mass communication scholarship that reads infrastructural policy as inseparable from the political economy of media (Abikanlu, 2020).

2. Theoretical Framework

This review is grounded in two matching theoretical traditions. The first is the political economy of media, which examines how ownership, financing, and regulatory structures shape what content is produced, distributed, and monetised, and for whose benefit. Applied to Nigeria’s DSO, this lens draws attention to the “interplay of interests between political and corporate actors” that has historically slowed and reshaped the country’s digital migration (Abikanlu, 2020). The second is gatekeeping theory, traditionally used to describe the editorial filtering of news content but extended here, following its application to broadcast value chains, to the infrastructural “gates” through which content must pass before reaching audiences i.e set-top boxes, signal distribution networks, satellite transponders, and audience measurement systems (Open Society Foundations, 2011). Scholars working within African media studies caution that gatekeeping theory, conceived within Western institutional contexts, must be applied carefully to African media ecologies whose ownership structures, regulatory cultures, and informal practices differ markedly from those assumed in the original framework (Akpan, 2023). This caution is taken

seriously here, rather than assuming a single, neutral gate, the review treats Nigeria’s DSO infrastructure as a set of competing, commercially interested gates whose operators, signal distributors, set-top-box manufacturers, satellite operators, and the regulator itself are best understood as financial gatekeepers in their own right.

3. Policy Background: Two Decades of Switch-Over

Nigeria’s DSO journey began in 2006 when it joined 103 other countries in signing the GE06 Agreement, committing to migrate from analogue to digital broadcasting by June 2015, with African signatories granted a grace period extending to 2020 (Ezeaku, 2024). The 2012 White Paper subsequently set out Nigeria’s domestic implementation architecture, licensing of set-top-box manufacturers, the designation of signal distributors as carriers independent of content producers, and a phased rollout beginning with pilot cities. As Sanusi (2024) documents in a comparative doctoral study of Nigeria’s digitisation within the global digital broadcasting trend, the country’s experience split sharply from smoother transitions elsewhere because of recurring funding shortfalls and shifting institutional priorities.

Government’s own retrospective accounting severe the roughly ₦60 billion spent on the programme between 2009 and 2025, subsidised set-top boxes, partial transmission infrastructure, and pilot launches in a small number of cities absorbed the bulk of expenditure, while the overwhelming majority of Nigerian households remained on analogue signal well past the original 2015 deadline (Guardian, 2026a). Ezeaku (2024) attributes this stagnation principally to inadequate government funding, a shortage of skilled technical manpower, and weak public sensitisation about the switchover, while Abikanlu (2020) locates the delay more specifically in the restrictive structure of implementation and the NBC’s expanding regulatory discretion.

The 2026 relaunch represents a marked strategic pivot. Instead of persisting with a earth-only model, the NBC’s “Big Picture” framework adopts a converged DTT-DTH-IP architecture built around a satellite partnership with the Nigerian Communications Satellite Limited (NIGCOMSAT) and a new “FreeTV” platform that had aggregated more than 100 channels ahead of the June 2026 launch (Technology Times, 2026; *Arise News*, 2026b). Official projects that full implementation could unlock a ₦605.2 billion national advertising market and release digital

dividend spectrum in the 700/800 MHz bands valued at over US\$1 billion in potential auction proceeds, to be reinvested in broadband and rural infrastructure (Guardian, 2026b, Leadership, 2026).

4. Research Methodology

This article is a critical, document-based policy review rather than an empirical field study. It synthesises primary regulatory communications (NBC and FMNO statements, stakeholder communiqués), industry association position statements (notably from the Broadcasting Organisations of Nigeria), and a purposive sample of contemporaneous Nigerian and trade press coverage of the 2026 DSO relaunch, triangulated against the peer-reviewed and doctoral literature on Nigeria's digitisation experience (Abikanlu, 2020; Ezeaku, 2024; Sanusi, 2024). Consistent with critical policy analysis traditions in mass communication research, sources were read not for their literal claims alone but for the institutional interests embedded within them, attending, in particular, to the positions of distinct stakeholder categories (government, regulator, broadcasters, signal distributors, set-top-box manufacturers, advertisers) and the points at which their stated interests split. The limitations of this approach are acknowledged, because the national launch is concurrent with this review, conclusions about audience-level and revenue outcomes are necessarily provisional and should be revisited as implementation data accumulates.

5. Impact on the Creative Industry

5.1 The Promise: Lower Barriers, Wider Distribution

The structural logic of DSO has long been attractive to creative-industry advocates. By separating content production from signal transmission, the framework allows television stations to focus solely on producing content while licensed signal distributors handle broadcasting, which government officials argue “drastically lowers the cost of launching a TV station,” opening space for niche and specialised channels (The Cable, 2026). The NBC frames the DSO as “fundamentally an economic and creative industry project,” citing a creative economy already contributing an estimated ₦5 trillion to GDP and supporting more than 4.2 million jobs, which expanded digital distribution is projected to grow further through improved content monetisation (Leadership, 2026; FMNO, 2026).

5.2 The Critical Counterpoint

Yet the optimistic projection sits uneasily against two decades of evidence that infrastructural promises in this sector have repeatedly surpassed delivery. Ezeaku (2024) found that the absence of skilled technical manpower and weak capacity-building among media personnel has historically constrained producers' ability to exploit even the digital infrastructure that has been built. More structurally, Abikanlu's (2020) political-economy analysis of the DSO process found that exclusionary implementation arrangements have tended to advantage already well-resourced incumbents over the independent producers the policy seemingly aims to empower. The 2026 relaunch does little to resolve this imbalances, local set-top-box manufacturers have complained for years of being sidelined by cheaper imported alternatives despite their statutory licensing, even as government commits to “protecting investments already made” by those same licensed manufacturers a protection that, by definition, entrenches rather than opens the manufacturing gate (Guardian, 2026a; News Agency of Nigeria [NAN], 2026).

A further critical concern is distributional instead of purely economic. Expanded channel capacity does not automatically translate into expanded creative diversity if the underlying carriage and accumulation arrangements remain concentrated. With the regulator itself now curating the channel line-up on the FreeTV satellite platform, decisions about which of the “more than 100 channels” gain carriage become, in effect, an additional gate through which independent and regional content producers must pass, one governed by regulatory discretion rather than market competition (Broadcast Media Africa [BMA], 2026a).

6. Impact on the Advertising Industry

6.1 The Promise: Measurable Audiences, Larger Budgets

For the advertising industry, the DSO's central appeal lies in audience measurement. Officials argue that the digital infrastructure's integrated measurement software will allow advertisers to track exact viewership data for the first time at scale, a capability expected to unlock a substantial share of the projected ₦605.2 billion national advertising market that currently under-monetises television relative to its reach (The Cable, 2026; Arise News, 2026b). The Federal Government has directed the NBC and the Advertising Regulatory Council of Nigeria (ARCON) to jointly develop “a sustainable business framework” intended to strengthen audience measurement systems

and improve advertising revenue generation for broadcasters (FMINO, 2026; NAN, 2026).

6.2 The Critical Counterpoint

This promise, however, is dependent on governance issues that remain largely unresolved. Verifiable audience measurement is only as credible as the body that administers it, and with the NBC simultaneously acting as regulator, infrastructure partner, and platform curator, the independence of any measurement standard it co-develops with ARCON is open to question. Critics have already characterised much of the public contestation around the 2026 relaunch as a fight over economic “lease” among incumbents, “box manufacturers, signal distributors and the cottage industry that has fed on two decades of pilot phases” rather than a disinterested pursuit of audience transparency (BMA, 2026a). Where audience measurement infrastructure is built and controlled by the same actors who profit from advertising volume, the resulting metrics risk becoming a commercial instrument for the dominant platform rather than a neutral public good, a concern consistent with political-economy critiques of media measurement systems more broadly.

There is also an equity dimension, where advertising revenue unlocked by improved measurement is unlikely to be distributed evenly across the broadcast sector. Larger, well capitalised broadcasters already carried on NIGCOMSAT transponders and existing OTT platforms are positioned to capture disproportionate advertising gains from formal measurement, a dynamic the Broadcasting Organisations of Nigeria has implicitly flagged in alleging that the NBC is simply aggregating existing channels onto a new platform and relabelling the result as a switchover (BMA, 2026b).

7. Financial Gatekeepers: Who controls the gate?

The most significant and least examined, dimension of the DSO is the group of financial gatekeepers whose commercial positioning determines practical access to the digital broadcast environment. Four categories stand out:

7.1 Set-Top-Box Manufacturers

Licensed manufacturers occupy a foundational gate, without an affordable, compliant decoder, no household can receive a digital signal. Two decades of policy have left this gate only partially open. Local manufacturers have historically complained of being

sidelined by cheaper, non-compliant imports, even as the government has repeatedly pledged tariff relief and local-assembly mandates to make compliant equipment more affordable (Ezeaku, 2024; Guardian, 2026a). In 2026, this gate became a live political flashpoint, by which stakeholders clearly demanded that the NBC remain committed to protecting investments already made by licensed set-top-box manufacturers, a demand the Commission accepted (NAN, 2026; Channels Television, 2026). Protecting sunk investment, however, it is not the same as expanding access it preserves incumbents' financial position within the gate rather than testing whether that gate serves households efficiently.

7.2 Signal Distributors

Designated signal distributors hold an even more concentrated gate, since the DSO's architecture deliberately separates content production from transmission and routes all broadcast signal through a small number of licensed carriers. The Broadcasting Organisations of Nigeria's intervention in 2026 centred precisely on this point, warning that satellite-driven aggregation under NIGCOMSAT could bypass the established Signal Distributor framework altogether and that the matter required reconvening statutory stakeholders, including licensed signal distributors, set-top-box manufacturers, broadcasters, and the original DigiTeam implementation committee (Business Day, 2026; BMA, 2026b).

7.3 Satellite and Infrastructure Operators

The pivot toward a converged DTH/DTT/IP model elevates NIGCOMSAT from a peripheral technical partner to a central financial gatekeeper, since DTH satellite access typically requires a dedicated dish, compatible decoder hardware, and professional installation, costs of a different order than the simple rooftop-antenna decoder required for conventional DTT (BusinessDay, 2026). The Commission has marketed the new platform as “FreeTV,” yet the broadcasting industry's own trade body has cautioned that this framing obscures a “hidden financial burden” that the satellite-based model could impose on millions of Nigerian households unable to incorporate the upfront equipment cost (Arise News, 2026a).

7.4 The Regulator as Gatekeeper

Perhaps the most structurally significant finding of this review is that the NBC itself has become a financial gatekeeper instead of a neutral referee among them. Commentary on the relaunch has been blunt on this point, the regulator that licenses, polices, and

adjudicates Nigerian broadcasting is now also building, branding, and curating the platform through which 100 channels reach the living room, and calling it a market facilitator does not resolve the conflict; it dresses it up (BMA, 2026a). This is a textbook instance of regulatory capture risk running in the opposite direction from the classical model, instead of the incumbents capturing the regulator, the regulator has become a market participant whose institutional incentive to declare its own initiative a success now sits alongside its statutory duty of impartial oversight.

8. Convergence, Cost and Concentration

Reading the creative, advertising, and gatekeeping dimensions together reveals a consistent pattern the DSO's stated objectives that is, job creation, expanded content monetisation, verifiable audience measurement, and broader access, are not in dispute among any of the stakeholders reviewed here. What is contested is the distribution of the costs and benefits required to achieve them. The historical record gives reason for caution. Over ₦60 billion spent between 2009 and 2025 produced only partial pilot coverage (Guardian, 2026a), suggesting that financing failure, not technological ambition, financing failure has been the recurring point in Nigeria's DSO trajectory a pattern consistent with comparative findings that digital switchover outcomes worldwide are shaped less by the chosen technology than by the institutional and financial arrangements surrounding it (García Leiva & Starks, 2009).

The 2026 hybrid pivot toward satellite delivery, while pragmatic in addressing Nigeria's uneven environment infrastructure, introduces a new affordability risk that disproportionately affects lower income and rural households precisely the population segment the policy claims to be including (BusinessDay, 2026). Meanwhile, the consolidation of regulatory, infrastructural, and curatorial functions within the NBC raises governance concerns that are contestable and more significant than any single financial gate, because they affect the credibility of every downstream claim about audience reach, advertising value, and content diversity. Where Western gatekeeping theory assumes a relatively stable separation between gatekeeping institutions and the content they regulate, the Nigerian case illustrates Akpan's (2023) broader caution that imported theoretical frameworks require careful adaptation to local institutional realities, in this instance because the regulator-as-gatekeeper occupies a hybrid role with few precedents in the classical literature.

9. Conclusion and Policy Recommendations

Nigeria's Digital Switch-Over policy, twenty years in the making, stands at a genuine turning point in 2026. The potential gains for the creative and advertising industries are real and well documented by the policy's own architects. However, this review finds that those gains are currently mediated by a narrow set of financial gatekeepers that is the set-top-box manufacturers, signal distributors, satellite operators, and the regulator itself, whose commercial interests do not automatically align with the broader public-interest goals of affordable access, content diversity, and measurement integrity. On the basis of this analysis, the following recommendations are offered:

Separate regulatory and commercial functions. The NBC's roles as licensor and as platform curator/aggregator should be structurally separated, whether through an independent platform operator or an arm's-length oversight board, to remove the conflict of interest identified in this review.

Subsidise the DTH transition cost for low-income households. If satellite delivery becomes the default access route, a transparent, means-tested subsidy for dishes and decoders is necessary to prevent the DSO from becoming a regressive policy in practice.

Establish an independent, multi-stakeholder audience measurement body. Joint NBC-ARCON measurement standards should be insulated from the commercial interests of any single platform operator to preserve advertiser and broadcaster trust.

Reopen the manufacturing and distribution gates to genuine competition. Protecting sunk investment should not be conflated with protecting market position; local content and manufacturing incentives should be paired with periodic licence review.

Institutionalise independent financial auditing of DSO expenditure. Given the documented ₦60 billion spent with limited nationwide outcomes between 2009 and 2025, future disbursements should be tied to publicly verifiable milestones rather than administrative discretion.

Future research should track implementation data following the June 2026 launch particularly household decoder uptake, advertising revenue distribution across broadcaster tiers, and independent producer access to FreeTV carriage, to test empirically whether the structural concerns raised in this review materialise in practice or are resolved through the stakeholder

consultation processes the NBC has committed to undertaking.

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