



The Technology Entertainment Media and Sports (TEMS) Sector

Fourth Quarterly Insights and Outlook for 2026

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**About the
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introduction

This Quarterly Insights examines significant developments across the Technology, Entertainment, Media, and Sports (TEMS) sectors in Nigeria and across Africa.



The quarter has been shaped by heightened regulatory engagement, increased cross-border commercial activity, and growing convergence between digital platforms, creative industries, and sports businesses. From evolving data-privacy disputes and intellectual property enforcement to major sponsorship realignments, media rights acquisitions, and regional expansion by African entertainment companies, the operating landscape has continued to evolve rapidly.

What emerges is a picture of deepening market sophistication: regulators are strengthening oversight mechanisms, global and regional players are repositioning for scale, and rights-holders are placing greater emphasis on monetisation, data governance, and long-term commercial resilience. At the same time, businesses are navigating rising compliance expectations alongside pressure to innovate and remain competitive.

This round offers a consolidated review of the quarter's defining developments, outlines their legal and commercial implications, and provides insight into the issues stakeholders should anticipate for 2026.

Technology Sector

Overview of the Quarterly Insights

a. Meta to Roll Out AI Chat Features for Personalised Content and Ads by December 2025

Meta has announced plans to deploy Artificial Intelligence (AI) chat assistants across its platforms, including Facebook and Instagram, by December 2025. The tools will use large language models trained on user activity to deliver personalised content recommendations, targeted advertising, and more interactive user engagement across Meta's services.

The rollout is aimed at increasing time spent on the platforms and improving advertising efficiency by embedding AI more directly into user interactions. Through this approach, Meta seeks to strengthen monetisation of its platforms while maintaining user control through transparency dashboards and opt-out features, positioning AI chat as a core layer of its future content and advertising strategy.

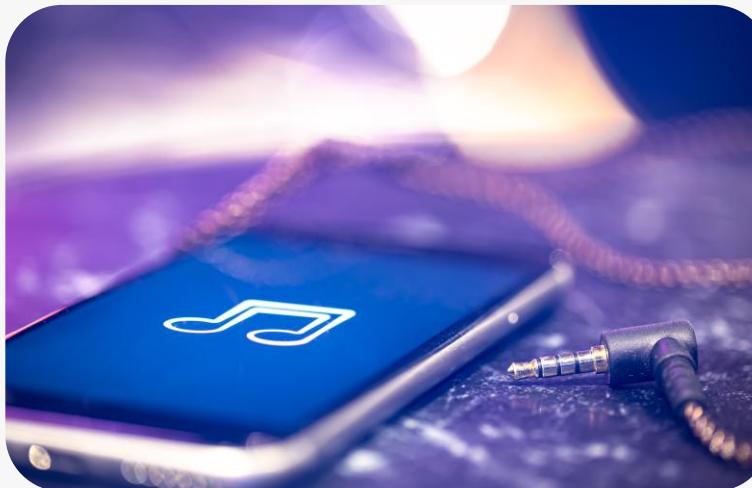
b. Nigeria Launches N-Atlas AI to Preserve Local Languages

The Nigerian government has launched N-Atlas AI, an indigenous artificial intelligence initiative designed to document and revitalise endangered local languages. The project will develop AI models trained on regional dialects to support translation services, voice recognition systems, and educational applications.

The initiative forms part of Nigeria's broader AI strategy for cultural preservation and digital inclusion, using language technology to counter linguistic extinction and expand access to digital services. By building datasets directly from native speakers, N-Atlas AI is intended to support local-language government interfaces, educational content, and media production, while also creating commercial opportunities for local content creators, voice-technology firms, and edtech providers seeking to localise products efficiently.

c. Major Music Publishers License Non-Generative AI Tools with Musixmatch

Musixmatch, a leading lyrics and music-data platform, has entered licensing agreements with Sony Music Publishing, Universal Music Publishing Group, and Warner Chappell Music. These deals give Musixmatch access to over 15 million musical works and are focused on supporting non-generative AI tools such as lyric search, metadata analytics, discovery tools, and language or sentiment analysis, rather than creating new music.



The licensing is currently structured as a trial, with rights-holders compensated under agreed terms. Significantly, this positions Musixmatch as one of the first companies to partner with all three major publishing houses on ethically licensed catalogues for AI use.

This development sets a precedent for monetising non-creative AI uses of musical works. Intellectual Property (IP) advisors can assist local and international publishers, as well as lyrics and music-data firms in Nigeria, by structuring licensing deals, advising on royalty and metadata terms, ensuring compliance with copyright law, and drafting usage, audit, and reporting clauses.

d. India Proposes Strict Rules to Label AI-Generated Content Amid Deepfake Concerns

India's government has proposed draft IT rules requiring platforms and AI services to prominently label AI-generated content, including minimum coverage for visual or audio elements, and to obtain uploader declarations on AI use. The rules also mandate metadata traceability and automated labelling at the point of creation, aiming to curb deepfake misuse and misinformation in the country's large, diverse market.

The move reflects global regulatory trends seen in the European Union (EU) and China, where governments are setting quantifiable visibility standards for synthetic media and tightening accountability for content that could inflame social tensions or affect elections. Platforms and content creators would need to invest in automated labelling, updated upload flows, and content provenance systems, with non-compliance potentially carrying legal and operational risks, particularly in politically sensitive contexts.

e. Universal Strikes First Licensing Deal for AI Music

Universal Music Group (UMG) has announced a landmark licensing deal with AI music generation startup Udio, marking an industry-first partnership to launch an AI music creation platform in 2026. The agreement follows a 2024 copyright infringement case in which UMG, Sony Music, and Warner Records accused Udio and Suno of using their recordings without authorisation to train AI music systems.

The platform, still unnamed, will leverage generative AI trained on authorised and licensed music, signalling a path toward a commercially sustainable AI ecosystem that benefits artists, songwriters, music companies, and technology firms. This move comes amid growing concern among creators over AI models potentially replacing human-produced content, as streaming services report a surge in AI-generated songs.

f. Character.AI Restricts Teen Chat Access on Its Platform

AI chatbot platform Character.ai has announced that, from 25 November, teenagers will no longer be able to chat with its AI characters, and under-18s will be limited to content generation like videos. The change comes amid concerns over risky interactions and potential lawsuits in the US, with regulators and safety specialists highlighting the emotional risks AI chatbots may pose by feigning empathy or offering misleading encouragement.

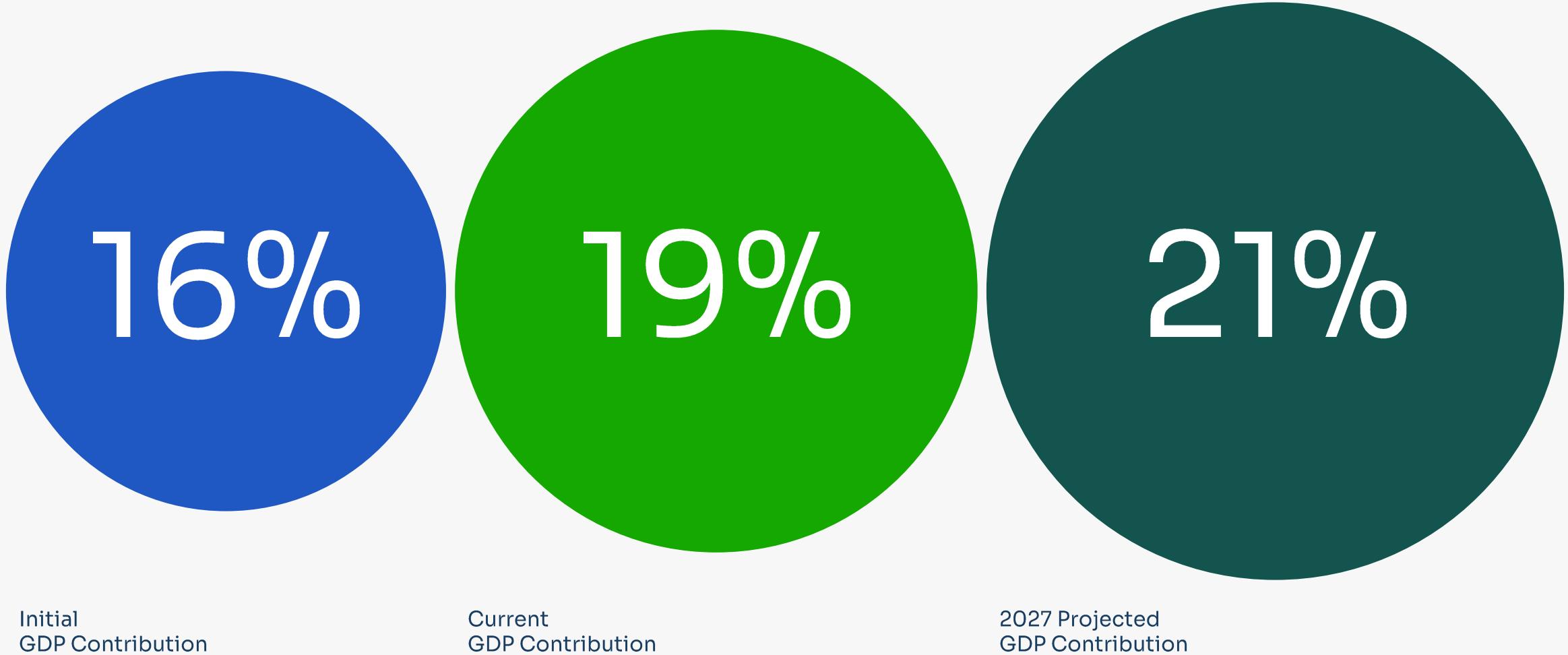
In response, Character.ai plans to implement age verification systems, fund a research lab on AI safety, and enhance role-play and storytelling features designed to be safer for teens. This move reflects a broader trend in the AI industry toward child protection and regulated oversight as platforms balance innovation with user safety.

g. President Tinubu Set to Assent to the Digital Economy and E-Governance Bill

Nigeria is preparing to launch a landmark legislation as President Tinubu moves to assent to the National Digital Economy and E-Governance Bill, aimed at regulating the governance of the digital economy. The announcement followed a high-profile public hearing by the Senate and House Joint Committee on ICT and Cybersecurity. The legislation comes amid the digital economy's growing contribution to GDP, which rose from 16% to 19%, with a target of 21% by 2027.

The Association of Licensed Telecommunications Operators of Nigeria (ALTON) has urged caution, highlighting provisions that grant regulatory powers to the National Information Technology Development Agency (NITDA), which overlap with the mandate of the Nigerian Communications Commission (NCC). ALTON recommends that lawmakers avoid overriding the NCC's authority and instead ensure the bill complements existing frameworks.

The chart illustrates the increasing contribution of Nigeria's digital economy to national GDP, rising from 16% to 19%, with a projected target of 21% by 2027.



h. Seequre Partners With Nigeria Data Protection Commission (NDPC) To Develop SME-Focused Data Compliance Framework

Seequre, Africa's leading enterprise cybersecurity posture management company (formerly Smartcomply Secure), has signed a Memorandum of Understanding (MoU) with the Nigeria Data Protection Commission (NDPC) to advance national data governance and privacy compliance across Nigeria's SME ecosystem. The partnership aims to develop a practical, scalable compliance checklist tailored to SMEs, helping embed data protection into daily operations and enhance regulatory compliance, trust, competitiveness, and long-term digital sustainability.

Dr Vincent Olatunji, NDPC's National Commissioner/CEO, described the collaboration as "an important step in strengthening data governance nationwide". He highlighted the need for tools that make compliance accessible to businesses of all sizes and proposed the creation of a dedicated working group to ensure the successful implementation of the framework.

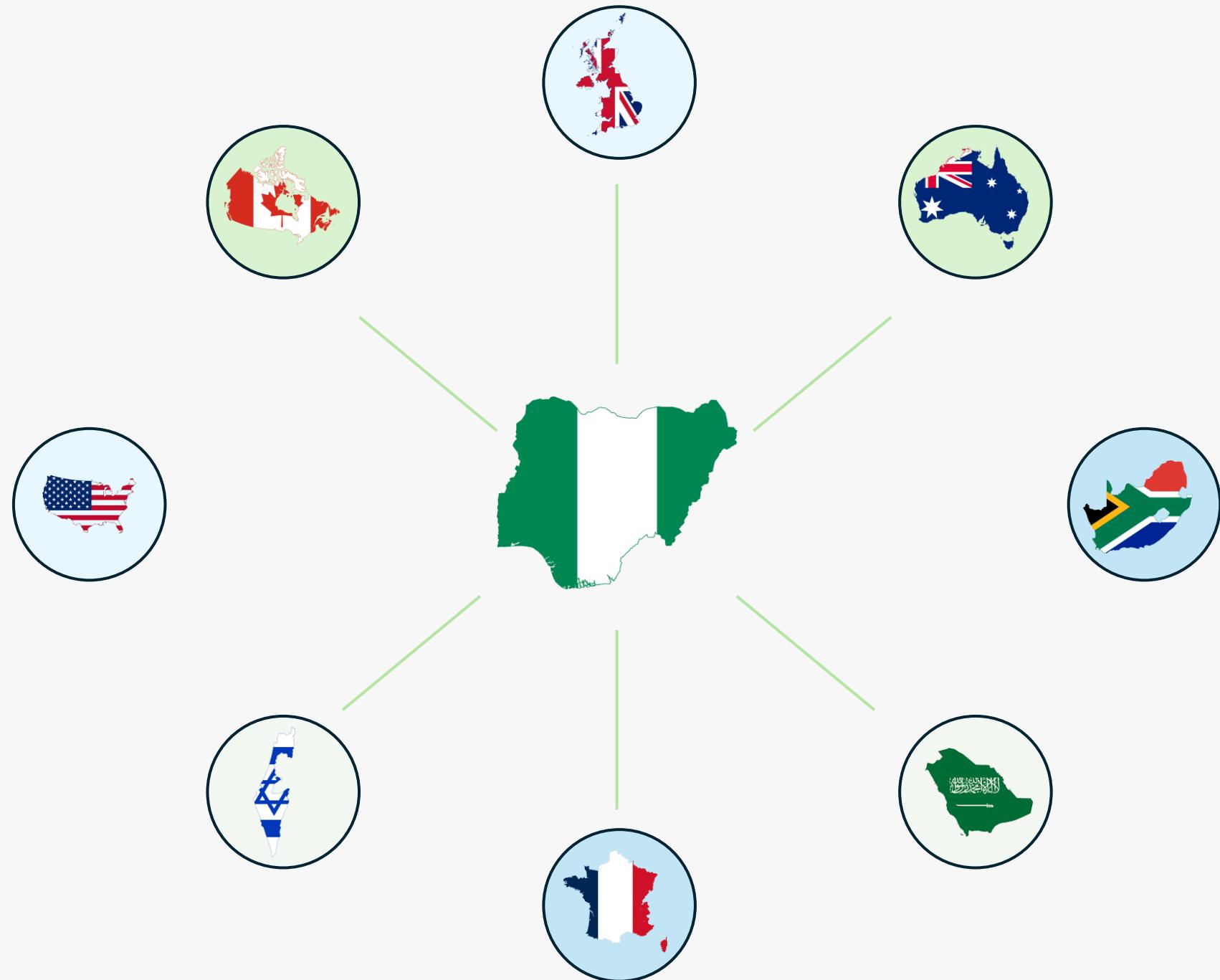
i. Alliance Between Thunes and MoMo PSB to Enable Instant Cross-Border Remittances into Nigeria

On 25 November 2025, global cross-border payments provider Thunes partnered with MoMo PSB, MTN Nigeria's fintech platform, to allow Nigerians to receive international remittances instantly. Customers can now receive funds from major markets, including the USA, UK, Canada, France, Australia, Saudi Arabia, Israel, and South Africa, directly into their mobile wallets and use them immediately for airtime, bill payments, peer-to-peer transfers, and digital commerce.

The partnership enhances convenience, security, and accessibility in cross-border payments, aligning with efforts to boost financial inclusion and integrate remittances into Nigeria's digital economy. By embedding remittances into a widely used mobile wallet ecosystem, the alliance supports increased digital transactions, reduced cash reliance, and seamless fund transfers for millions of Nigerians with family or business links abroad.

Thunes x MoMo PSB:

Nigerians can now receive instant international remittances directly into their MoMo wallets.



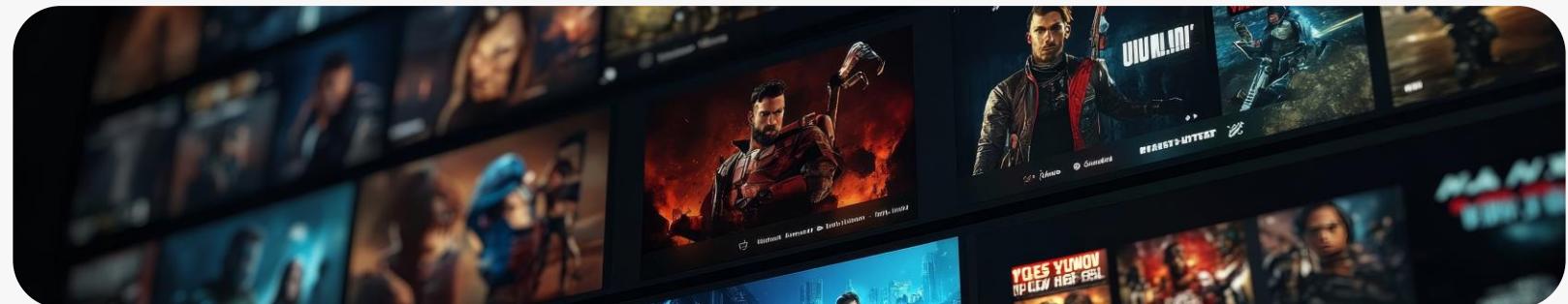
Entertainment Sector

Overview of the Quarterly Insights

a. Netflix Agrees to Acquire Warner Bros. Streaming and Studio Assets

In early December 2025, Netflix reached a definitive agreement to acquire Warner Bros. Discovery's film and television studios, including the HBO Max streaming service, in a deal valued at approximately \$82.7 billion. The acquisition, comprising roughly \$72 billion in equity and debt assumption, allows Netflix to integrate Warner Bros.' vast content library, including DC Comics, Game of Thrones, and Harry Potter, into its global platform. Completion depends on the planned spin-off of Warner Bros.' Global Networks division and regulatory approvals, with finalisation expected in 2026.

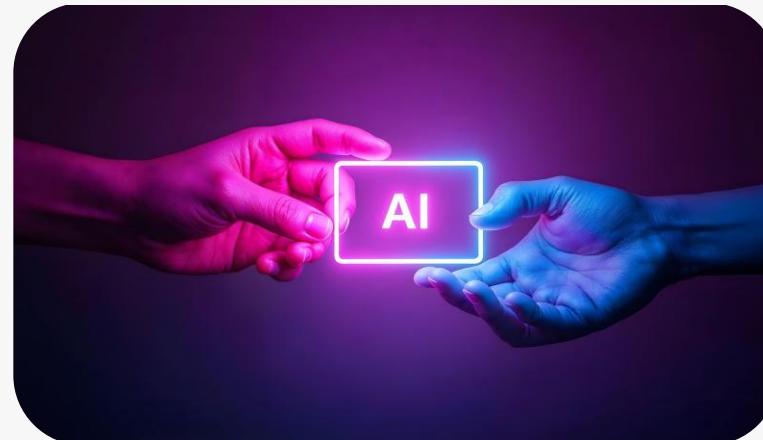
The deal is reshaping the global media landscape, intensifying competition, prompting operational shifts, and accelerating mega-mergers and platform consolidation. In Africa, MultiChoice has warned that 16 DStv channels could go dark as Paramount Africa restructures. For IP and media advisors in Nigeria, the transaction underscores the need to anticipate impacts on local content acquisition, distribution rights, and regulatory compliance amid growing global consolidation.



b. Disney And OpenAI Strike Landmark AI Collaboration

Disney has entered a groundbreaking agreement with OpenAI, licensing over 200 Disney, Marvel, Pixar, and Star Wars characters to OpenAI's Sora video-generation platform. The deal includes a \$1 billion investment by Disney and grants OpenAI rights to generate short fan-prompted AI videos using approved characters. Selected AI-generated content may also be integrated into Disney+ and internal creative workflows, representing a major shift in how legacy studios interact with generative AI.

This marks the first time a major studio has formally licensed its iconic IP to an AI model, moving content generation from unlicensed use toward licensed, monetised partnerships. The deal establishes new standards for AI governance, rights management, creator compensation, and safe AI deployment in entertainment. This underscores the importance of seeking advice on AI licensing, character rights, derivative works, copyright ownership, compliance frameworks, and contractual protections by local creators and platforms as they increasingly adopt generative AI.



c. Hollywood Stars Outraged Over 'AI Actor' Tilly Norwood

A UK-based AI firm has unveiled Tilly Norwood, a fully AI-generated actress for film and television, sparking significant backlash in Hollywood. Industry stakeholders argue that using hyper-realistic virtual actors without proper consent or credit to human models infringes on likeness rights and threatens traditional acting roles, raising concerns over job displacement and creative authorship.

Actors' unions and advocacy groups are calling for updated legal frameworks to govern AI representation, focusing on likeness rights, residuals, and credit attribution when real human features inspire AI characters. This debate is intensifying as negotiations between the Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA) and studios increasingly address the legal implications of AI-generated likenesses and digital doubles.

d. Dapper Music Quietly Ventures into Accra to Build Cultural Bridge

Dapper Music & Entertainment has deepened its presence in Ghana's music ecosystem, adopting a culturally integrated approach rather than a loud market entry. The label emphasises that its expansion is not about imposing Nigerian templates but investing in Ghanaian musical textures and leveraging the cultural flow between Lagos and Accra.

This move follows Dapper's ongoing investment in artist development, music distribution, and publishing infrastructure across Africa, and includes onboarding Ghanaian talents like Lasmid, signalling its ambition as a pan-regional label. The expansion reflects a broader trend of African record labels pursuing regional diversification to enhance market resilience, catalogue licensing opportunities, and cross-border brand partnerships.

e. Gema Wins Landmark Ruling Against OpenAI for ChatGPT's Use Of Song Lyrics

On 11 November 2025, a German court ruled that ChatGPT's unauthorised use of song lyrics infringes copyright laws. The case arose from a 2024 lawsuit by Gesellschaft für musikalische Aufführungs- und mechanische Vervielfältigungsrechte (GEMA), Germany's music collecting society, which alleged that OpenAI systematically used copyrighted material without payment, unlike other licensed internet services. The court found that ChatGPT stores and reproduces original works in response to user prompts, constituting copyright infringement, and that OpenAI should have acquired licenses for the German song lyrics before using them in training its models.



The court rejected OpenAI's claim to be a privileged research organisation and held that legal allowances for text and data mining do not justify storing or outputting copyright-protected lyrics. This decision is a landmark, marking the first time a European court has legally upheld the rights of creators against generative AI systems.

g. Blue Ant Media Acquisition of Thunderbird Entertainment



US \$63 million

Blue Ant Media acquisition of
Thunderbird Entertainment

Blue Ant Media has acquired Thunderbird Entertainment for US \$63 million, marking a significant move in the ongoing consolidation of the global media landscape. The deal unites two established Canadian companies with complementary strengths, allowing mid-sized studios to scale, diversify revenue streams, and strengthen negotiating positions amid pressure from global streaming platforms and major media conglomerates.

Thunderbird, renowned for premium scripted series, children's programming, and animation via its Atomic Cartoons division, has partnerships with platforms like Netflix and Disney+.

The acquisition provides Thunderbird with greater financial backing and access to global distribution, while Blue Ant benefits from enhanced scripted and animated content offerings, crucial for audience retention and international competitiveness. This transaction underscores how strategic consolidation is becoming essential for mid-sized studios navigating a market dominated by global streamers and large media conglomerates.

Media Sector

Overview of the Quarterly Insights

a. MCSN And BON Sign Groundbreaking MOU To Strengthen Copyright Compliance in Nigeria's Broadcast Industry

The Musical Copyright Society Nigeria (MCSN) and the Broadcasting Organisations of Nigeria (BON) have signed a Memorandum of Understanding (MOU) to strengthen cooperation, transparency, and compliance in the use of musical works and sound recordings across broadcast platforms. The agreement establishes a framework for efficient licensing, equitable royalty payments, and ensures that creators are fairly rewarded while broadcasters operate within the Copyright Act 2022.

Dr John Asein, Director General of the Nigerian Copyright Commission (NCC), praised the MOU as a groundbreaking step that supports Nigeria's music and creative industry. The agreement lays the foundation for a vibrant and harmonious entertainment ecosystem, aligned with government efforts to revamp the creative sector. Both organisations are committed to fostering innovation, promoting lawful content use, and deepening stakeholder collaboration to drive the growth of Nigeria's creative economy.

b. Consumers Seek \$2.36 Billion From Google After Privacy Verdict

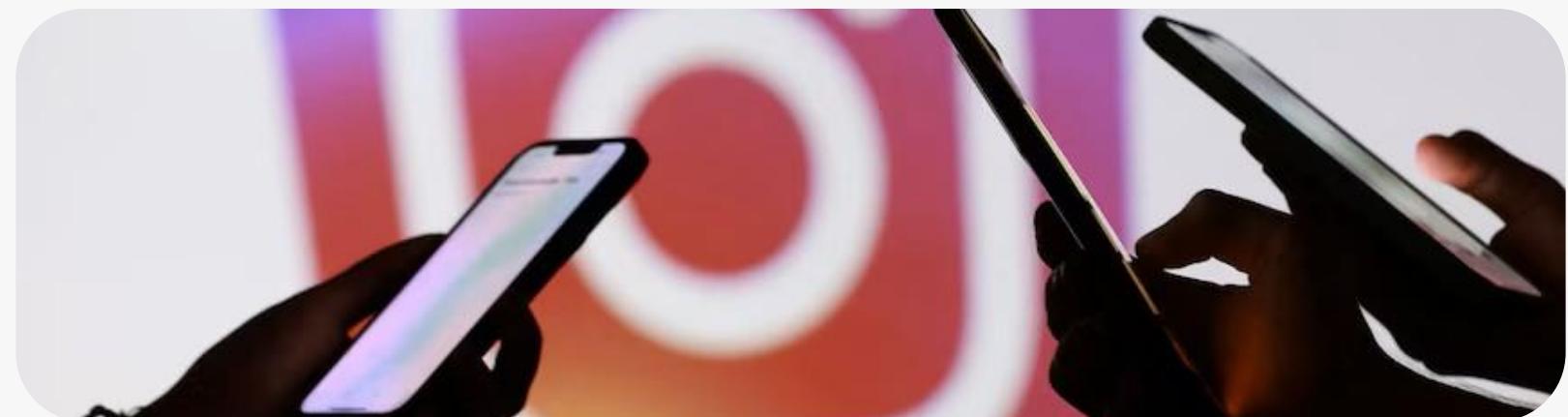
Following a recent privacy verdict, claimants are pursuing approximately \$2.36 billion in damages from Google in a collective action alleging unlawful tracking and data-processing practices. The claims focus on breaches of privacy rights and consumer protections related to how Google collected and used personal data for advertising and profiling.

The substantial claim highlights growing trends in private enforcement, where plaintiffs seek large damages and statutory penalties under data-protection and consumer laws. A successful outcome could recalibrate settlement dynamics, encourage broader compliance investments, and prompt tech companies to adopt defensive policies to mitigate exposure to class-action litigation.

c. Motion Picture Association Demands Meta Drop PG-13 Label from Instagram Teen Filters

The Motion Picture Association (MPA) has sent a cease-and-desist letter to Meta Platforms, demanding the removal of all references to the PG-13 label from Instagram's teen safety filters. The MPA argued that Meta misleadingly suggested its automated content moderation aligns with the association's established movie rating standards, describing the claim as "literally false and highly misleading". The PG-13 rating, the MPA stressed, is a registered certification mark reflecting a human-led consensus process, not algorithmic moderation.

The dispute follows Meta's October announcement of teen content filters "inspired by PG-13", intended to limit exposure to sensitive material for under-18 users. While Meta stated it never claimed a formal partnership with the MPA, the association warned that such use risks diluting the credibility of its rating system and confusing parents and teens. The exchange underscores the growing sensitivity around tech companies framing online safety features, the need for transparency in content moderation, and the importance of protecting established IP and industry standards in digital contexts.



d. The Federal Executive Council Approves Reforms to Boost Intellectual Property, Digital Trade and Service Exports

The Federal Executive Council (FEC) has approved four major initiatives aimed at strengthening intellectual property, digital trade, and service exports in Nigeria. The policies include the National Intellectual Property Policy and Strategy (NIPPS), ratification of the African Continental Free Trade Area (AfCFTA) Protocol on Digital Trade, the establishment of a National Coordination Mechanism for Service Exports led by National Agency for Prohibition of Trafficking in Persons (NATEP), and the implementation of a Product Authentication and Tracking System.



The NIPPS aims to create a framework where intellectual property can be converted into tradable, bankable assets, developed with input from the World Intellectual Property Organisation and over 200 stakeholders across government, academia, and the private sector. Through ratifying the AfCFTA Digital Trade Protocol, Nigeria moves from participation to leadership in harmonising digital trade regulations across Africa, signalling a strategic push to strengthen its position in the regional digital economy.

Sports Sector

Overview of the Quarterly Insights

a. Suns, Mercury Ink 10-Year Arena Naming Deal with UWM

The Phoenix Suns (NBA) and Phoenix Mercury (WNBA) have signed a 10-year naming rights agreement with United Wholesale Mortgage (UWM), officially rebranding their home arena as the Mortgage Matchup Centre. The deal, valued at approximately \$115 million, is one of the most significant naming rights partnerships in U.S. basketball.

Beyond arena branding, UWM's consumer brand Mortgage Matchup becomes the official mortgage partner of the Suns, Mercury, and their G League affiliate, creating a unified sponsorship across all franchise levels. The partnership will enhance fan engagement, co-branded digital content, and mortgage education outreach programs, embedding community initiatives into the teams' activities while continuing the arena's legacy of evolving sponsorships.

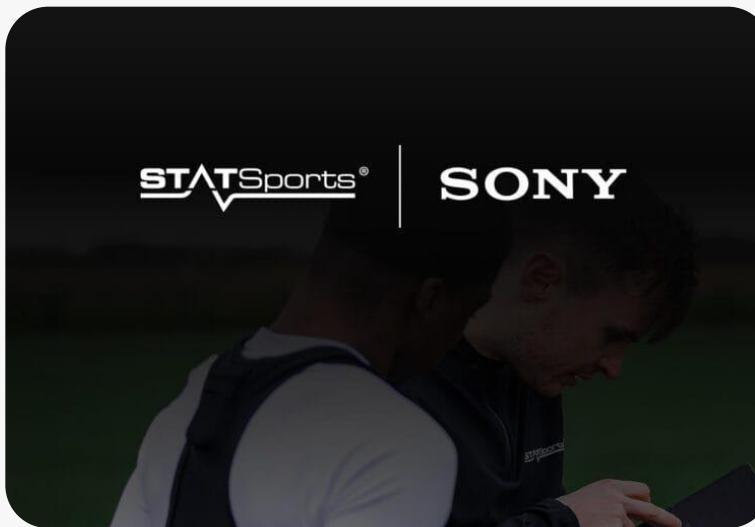
b. Enterprise Extends Sponsorship with NHL And NHLPA

Enterprise has extended its multi-year partnership with the National Hockey League (NHL) and the NHL Players' Association, remaining the league's official rental car partner while expanding rights across used vehicle sales, car-sharing, and ride-sharing promotions. The renewal includes integrated marketing, player engagement, and hospitality activations across NHL touchpoints, continuing a long-standing commercial relationship.

The extension reflects a broader trend of category-lead sponsors seeking deeper activation rights and multi-brand integration across league and player assets, leveraging content and endorsements to amplify value. Such sponsorships also highlight the importance of exclusivity, IP usage rights, player-image licensing, and data-sharing, requiring careful contractual governance to mitigate reputational and regulatory risks.

c. Sony Acquires STATSports Group to Expand Sports Data Capabilities

Sony has acquired a majority share in STATSports Group, a leading wearable and athlete performance tracking firm. The company plans to integrate STATSports' wearable tracking with its existing optical tracking and visualisation technologies to build a comprehensive sports data analytics engine.



The acquisition strengthens Sony's presence in sports tech and data, reflecting a growing trend of combining multiple data sources to deliver richer insights for teams, sponsors, and content producers. The move intensifies competition in sports data and analytics, raising standards for data quality, integration, privacy, and monetisation at both elite and grassroots levels. Sports federations, wearable companies, and analytics providers should seek counsel on data privacy frameworks, IP ownership of collected data, licensing of analytics outputs, athlete consent, device regulation, and commercial agreements around broadcasting or fan-data usage to keep up with emerging trends.

d. Apple Secures Exclusive U.S. F1 Media Rights in Multi-Year Deal

Apple has acquired exclusive U.S. media rights for Formula 1 races under a multi-year agreement, highlighting streaming platforms' growing appetite for premium live sports and the strategic importance of exclusive content to drive subscriptions and ecosystem engagement. The deal covers both broadcast and digital rights, reshaping how U.S. audiences access F1 coverage.

This move reflects a broader trend of tech platforms securing premium sports rights to differentiate content portfolios. It raises considerations around territorial distribution, sublicensing, ad inventory management, and contractual guarantees on streaming quality and blackout rules. Legacy broadcasters and rights-holders must navigate increasingly complex carriage and audience-access negotiations.

e. Budweiser Brewer AB InBev Set to Replace Heineken As Champions League Beer Sponsor

AB InBev, brewer of Budweiser, is set to end Heineken's 30-year run as the official beer sponsor of soccer's Union of European Football Associations (UEFA) Champions League under a potential six-year deal with the competition's new global sales agent, Relevent. The agreement, expected to start in 2027, would cover all UEFA men's club competitions and is valued at approximately €200 million (\$232 million) per season.

This marks the first major commercial deal orchestrated by Relevent since being appointed by UEFA and the European Football Clubs (EFC) group, aimed at maximising sponsorship revenue and prize money across the Champions League, Europa League, and Conference League. The deal highlights the growing strategic role of commercial partners in global sports monetisation and the evolving landscape of high-value sponsorships.

f. CAF and QNET Renew Partnership to Boost African Football Development

The Confédération Africaine de Football (CAF) has renewed its partnership with QNET, a global lifestyle and wellness e-commerce company, for the 2025/2026 CAF Interclub Football Season. The agreement, signed on 3 November 2025 in Casablanca, Morocco, covers the TotalEnergies CAF Champions League, CAF Confederation Cup, and CAF Super Cup, and was formalised by CAF General Secretary Véron Mosengo-Omba and QNET's Sub-Saharan Africa Regional GM Cherif Bassirou Abdoulayede.

The renewal comes amid a dynamic era for African club football, with record participation in preliminary stages, supported by over USD 13 million in CAF financial assistance for club operations and travel. CAF President Patrice Motsepe welcomed QNET's renewed commitment as a step toward expanding community-driven programs, connecting elite football with grassroots development. The deal reflects a broader trend of strategic collaborations between sports bodies and private-sector partners, promoting inclusive, commercially sustainable football ecosystems that nurture talent, empower communities, and strengthen African football's long-term progress.

USD 13 million

Support in CAF financial assistance for club operations and travel

Technology Sector

Sector Outlook for 2026

AI Licensing and Content Governance Expansion

There is likely to be increased AI licensing agreements and regulatory scrutiny across media and creative industries, as companies follow Disney–OpenAI, Musixmatch, and Universal–Udio precedents. Businesses dealing with AI content and tools in Nigeria and Africa may need to seek legal advise on copyright, character rights, derivative works, and monetisation frameworks for AI-generated content.

Data Privacy and Regulatory Enforcement

Following high-profile cases like Google's \$2.36 billion privacy claims and German copyright rulings against ChatGPT, data protection and consumer rights litigation will likely rise. Companies will need stronger privacy compliance programs, data ownership clarity, and class-action risk mitigation strategies.

Sports Tech and Sponsorship Evolution

With Sony–STATSports, Apple–F1, and Enterprise–NHL developments, the integration of wearable analytics, streaming exclusivity, and multi-platform sponsorships will accelerate. Leagues and sponsors will demand enhanced IP governance, data-sharing agreements, and athlete consent protocols.

Regional Media and Creative Industry Consolidation

Deals like Blue Ant–Thunderbird and Dapper Music's pan-African expansion signal mid-sized studio and label consolidation and regional diversification. There should be continued cross-border partnerships, content licensing expansion, and strategic M&A activity to maintain competitiveness against global platforms.

Digital Economy Policy and IP Modernisation

With Nigeria's National Digital Economy & E-Governance Bill and FEC approvals for IP and digital trade policies, the next quarter will see policy implementation and regulatory guidance affecting startups, digital platforms, and service exporters. Businesses should seek advisory on IP commercialisation, AfCFTA digital trade compliance, and product authentication frameworks.

Entertainment Sector

Sector Outlook for 2026

AI-Generated Content Licensing Growth

Following deals like Disney–OpenAI and Universal–Udio, more studios, labels, and platforms are expected to license their IP to generative AI systems, creating monetised and legally compliant pathways for AI-driven content creation.

Posthumous and Likeness Rights Enforcement

With cases like Johnny Cash estate vs. Coca-Cola and Tilly Norwood in Hollywood, entertainment IP owners will increasingly enforce rights over deceased artists' voices, AI-generated likenesses, and tribute performances, prompting companies to secure explicit permissions.

Regional Music and Media Consolidation

African labels like Dapper Music and partnerships such as MCSN–BON indicate a trend toward pan-regional expansion, catalogue licensing, and structured royalty compliance, supporting cross-border distribution and sustainable revenue growth.

Streaming and Exclusive Content Competition

Deals such as the Netflix–Warner merger and exclusive rights acquisitions by Apple highlight the continued race for premium content, reshaping distribution, licensing, and monetisation strategies globally.

Regulatory and IP Compliance Pressure

With global moves on AI content labelling in India, copyright enforcement in Germany, and national IP policy reforms in Nigeria, entertainment companies will face tighter regulatory oversight, requiring proactive legal frameworks for licensing, AI usage, and digital content governance.

Media Sector

Sector Outlook for 2026

AI and Generative Media Regulation

We can expect continued regulatory scrutiny of AI-generated media, following trends in India, Germany, and the U.S., including mandatory labelling, transparency requirements, and copyright enforcement. Media firms will need compliance strategies for AI content, metadata traceability, and responsible deployment.

Global Media Consolidation and Streaming Wars

The Netflix–Warner merger and other mega-deals highlight ongoing industry consolidation, which will prompt media companies to reassess content acquisition, distribution rights, and licensing agreements in both global and regional markets.

Local IP and Licensing Enforcement

Partnerships like MCSN–BON in Nigeria and regional IP policy reforms signal stronger enforcement of copyright, royalties, and licensing agreements, creating opportunities for firms to advise on compliance, contract drafting, and dispute resolution.

Exclusive Content and Platform Competition

Streaming platforms will continue to pursue exclusive content rights as seen in the Apple F1 and Disney–OpenAI collaborations, to drive subscriptions, forcing traditional broadcasters to innovate in digital distribution and audience access models.

Content Monetisation through AI and Data Analytics

Media firms are increasingly leveraging AI for analytics, discovery tools, and non-generative applications such as the Musixmatch licensing. This will create new revenue streams while requiring clear IP frameworks and ethical AI use policies.

Sport Sector

Sector Outlook for 2026

Sponsorship Expansion and Multi-Platform Activation

Deals like Enterprise–NHL and UWM–Phoenix Suns/Mercury show sponsors seeking deeper rights across multiple platforms, including rental services, car-sharing, fan engagement, and digital content to drive more integrated commercial activations.

Sports Tech and Data Analytics Growth

With Sony–STATSports and other wearable analytics integrations, teams and leagues are increasingly relying on multi-source data from wearables, optical tracking, and visualisation to enhance performance insights, fan engagement, and monetisation, raising standards for data privacy, IP, and athlete consent.

Premium Live Sports Rights Competition

Exclusive media deals like Apple–F1 signal continued competition for live content, emphasising the strategic value of premium sports rights to streaming platforms and the need for careful licensing, territorial rights, and blackout management.

Regional Football Commercial Growth

Partnerships like CAF–QNET and UEFA sponsorship shifts highlight increasing commercial investment in African and European club football, creating opportunities for community programs, prize money growth, and sustainable sponsorships.

Regulatory and IP Governance in Sports

As sponsorship, analytics, and AI-driven content expand, leagues and federations face growing obligations around IP usage, licensing, athlete-image rights, and data-sharing agreements, requiring robust contractual governance to avoid reputational or legal risks.

About Stren & Blan Partners

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