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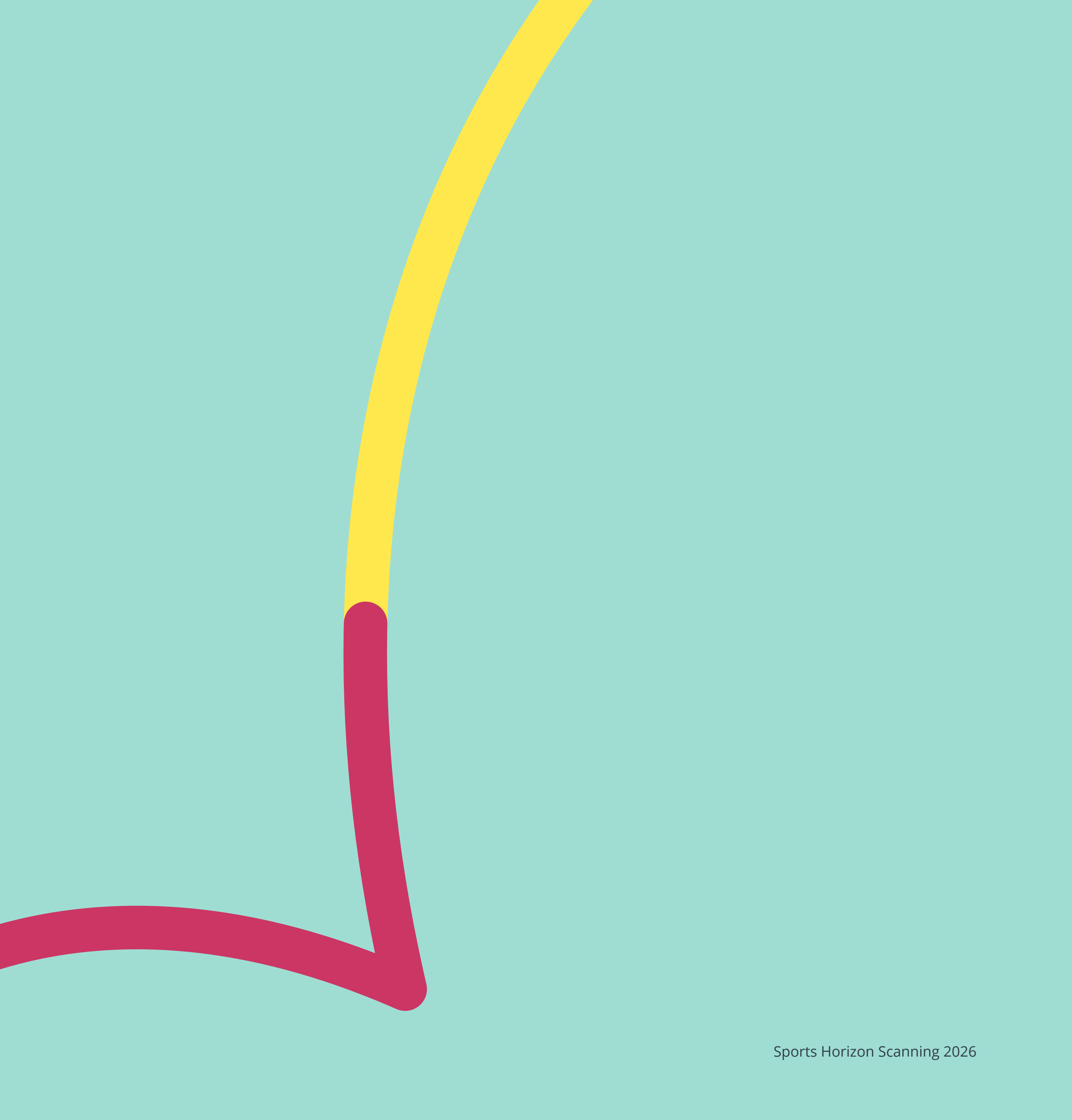
Ahead of the Game: Sports Horizon Scanning

2026



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2026: A turning point for sport - *where innovation meets accountability*

The sports industry enters 2026 amid shifting pressures that will redefine how organisations operate and compete. Regulatory changes around employment and safeguarding are reshaping talent strategies, while integrity and data protection concerns continue to challenge governance models. At the same time, investment priorities are evolving as stakeholders weigh commercial growth against compliance and ethical obligations.

Innovation is accelerating across the sector, with AI transforming everything from performance analysis and coaching, through to personalised fan engagement models. These developments bring both opportunity and complexity, as clients navigate questions of fairness, accountability, and security. The year ahead will test organisations' ability to adapt to, and stay ahead of, the digital curve.

How we can help

This report consolidates these emerging issues into actionable insights, helping you anticipate risks, seize opportunities, and make informed decisions in this rapidly changing landscape.

Key Trends in *Women's Sport*

What's happened in 2025?

2025 marked a breakthrough year for women's sport, with the Women's Rugby World Cup, UEFA Women's Euros and Women's Cricket World Cup all breaking viewership records within a few months. As we enter 2026, the focus shifts from proving the viability of women's sport, to capitalising on this momentum and sustaining growth. Women's sport is developing its own commercial ecosystem, attracting diverse investment, and commanding serious attention from broadcasters and sponsors worldwide.



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Key developments and predictions for 2026

Growth in sponsorship and media rights agreements

Sponsorship

Last year, we predicted that sponsorship opportunities in women's sport will increase in relation to volume, value and brand diversity. In light of this year's hugely successful year of women's sport, we have seen those trends not only continue, but reach new heights across a number of different sports:

- **Volume:** Sponsorship deals in women's sport have surged, with luxury, beauty and makeup brands expanding their presence. Notably, **e.l.f entered into a multi-year sponsorship with the NWSL**, and **Clinique partnered with the Red Roses** ahead of their victory at the Women's Rugby World Cup earlier this year. The NWSL is leading the way amongst women's sports properties with a **19 per cent year-on-year increase** in sponsorship deals.
- **Value:** The financial value of sponsorship deals in women's sport continues to increase significantly, and we saw record-breaking figures during the course of 2025. **The 2025 Women's Rugby World Cup secured 22 sponsorship deals worth \$14.7 million**, a record for women's rugby. **Gotham FC's**

landmark partnership with Dove represents the largest back-of-jersey sponsorship in NWSL. Notably, this was Dove's first major investment in a women's sports team, demonstrating that brands entering women's sport are increasingly willing to commit significant value immediately rather than testing the waters with smaller initial investments.

- **Brand diversity:** We expect to see continued diversification in sponsorship partnerships across women's sport in 2026, with financial services, consumer goods, and lifestyle brands increasingly recognising the commercial potential of women's sport. Recent examples include **State Street Investment Management becoming the WNBA's official investment partner in a multi-year deal**, and the **NWSL Washington Spirit expanding its CVS Health partnership in a multimillion-dollar multi-year deal**. Interestingly, other brands aligned with women's needs more broadly are coming into play, with **Paris Saint-Germain partnering with NUNA**, the premium international baby gear brand, and **Chelsea FC Women partnering with period care brand Here we Flo**.

Media rights

Last year, we predicted that the unbundling of media rights would become a significant trend in women's sport. We've seen multiple standalone deals this year that proves this, including the **WSL's new £65 million domestic partnerships with Sky Sports and the BBC** (running until 2030), the **UEFA Women's Champions League broadcast deal with ESPN across Asia, Africa, Australia, and Latin America**, and the **WNBA's 11-year agreement with USA Network** (running until 2036).

As most women's sport properties are still growing, striking the right balance between free-to-air broadcasting and subscription-based streaming platforms will remain a challenge. Free-to-air coverage remains essential for building audiences and increasing visibility, whilst paid-for streaming platforms offer higher revenue potential. How rightsholders navigate this tension in 2026 will likely shape the commercial trajectory of women's sport for years to come, determining whether leagues can transition from audience-building to revenue maximisation whilst maintaining the momentum generated during 2025's hugely successful year of women's sport.

Professionalisation of women's sport

We expect the professionalisation of women's sport will continue to evolve and develop in 2026:

League expansion and international growth

New professional leagues are emerging in lacrosse, football, and volleyball, while established competitions are scaling up, such as the **WSL's move to 14 teams from the 2026/27 season** and the **WNBA expanding to 18 teams by 2030**.

The Middle East is becoming a key growth market, with several Middle Eastern nations qualifying for the AFC Women's Asian Cup 2026 and **Golf Saudi driving generational growth with goals to have 47,000 players by 2030**. Saudi Arabia's Public Investment Fund has become the **title partner of the PIF Global Series** on the Ladies European Tour, featuring five tournaments across three continents with a collective prize pool of \$13 million.

World Rugby's new **first WXV Global Series (2026-2028)**, will feature 18 top women's rugby teams. In Australia, league expansion continues, with the WNBL welcoming the **Tasmanian Jewels in 2026** and potentially a tenth team soon after. Notably, women's and girls' participation in Aussie Rules now **accounts for a quarter of the record 625,000 participants in 2025**, reflecting a 14% year-on-year increase.

Employment standards and maternity policies

We are seeing encouraging improvements in both team and individual sports, with guidelines and policies created by leagues and governing bodies driving meaningful change across various sports. In team sports, developments include **WSL2 players becoming eligible to join the PFA**, addressing gaps in healthcare, medical insurance, and minimum wage protections. The World Players Association's **best practice guidance** (launched in May 2025) provides a comprehensive framework for team sports to follow when dealing with pregnancy and women's health. The **WTA's enhanced maternity provisions** (including protected rankings, financial support, and flexible return-to-play pathways) demonstrate how individual sport governing bodies are also prioritising athlete welfare. We have also seen developments in approaches to player contracting. Netball Australia and the Australian Netball Players' Association agreed a **landmark Collective Players Agreement** for Australia's national team, the Diamonds, which is underpinned by a revenue sharing model for player payments. While there is a positive overall trend, we anticipate further improvements throughout 2026 and beyond.

Professional standards in women's sport

Professional standards in women's sports are increasing. The WSL released (in November 2025) a world-first '[Design Guidelines for the Delivery of Elite Women's Stadiums](#)' so that stadiums are better catered for women and we also saw minimum salaries introduced for WSL and WSL2 with new financial sustainability rules in places. The [UK government announced in September 2025](#) that it is teaming up with industry experts and academics to 'supercharge' women's sport aiming to improve access, facilities and professionalism of women's sport. We expect to see the impact of this taskforce starting next year.

Investment in women's sport

Investment in women's sport is set to continue growing in 2026 as investors recognise the opportunity for growth and impact. The trend towards multi-club ownership in women's football is growing, with [Mercury/13 acquiring a majority stake in Bristol City Women](#) (the first deal of its kind in English football) following its [2024 acquisition of Como Women](#), and Crux Football completing its [first acquisition in Montpellier HSC Féminines](#) whilst reportedly [raising \\$50 million to purchase four additional women's teams](#). We expect to see further consolidation in this space as investors recognise the long-term potential of multi-club ownership models.

Investment funds focused on women's sport are also expanding, with [Monarch Collective growing from \\$150 million to \\$250 million in early 2025](#) and reportedly [pursuing a minority stake in West Ham United F.C. Women](#). Following [Unrivaled's oversubscribed Series B round](#) (valuing the league at \$340 million), we anticipate further investment rounds opening up for more clubs and leagues across women's sport in 2026.



Investing in Sport

What's happened in 2025?

Investment in sport has continued to surge through 2025, fuelled by a diverse mix of investors, private equity, sovereign wealth funds and even athletes. These stakeholders are keen to tap into both traditional revenue streams like broadcasting and sponsorship, as well as new technology-driven opportunities now emerging in the sector. With competition for media rights intensifying and global brands increasingly turning to sport to boost customer engagement, the industry's value, and its appeal to investors, looks set to grow even further in 2026.



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Key developments and predictions for 2026

Private equity's evolving playbook: Strategic investment and innovation in sport

Private equity and venture capital activity in sport has been especially active in 2025. Notable deals include the sale of the **Boston Celtics** to a consortium led by Sixth Street Partners and Apollo Sport Capital's majority stake in **Athletico Madrid**. In the UK, 'The Hundred' competition saw each franchise sold to private investors, such as the London Spirit's transfer from Marylebone Cricket Club (MCC) to a group of investors including Silver Lake, with **Bird & Bird** advising the MCC.

The approach of private equity involvement in sport is evolving. Leading firms are now deploying dedicated sports investment vehicles. CVC Capital Partners, for example, has launched a \$14 billion global sports group, enabling investment across multiple sports, geographies and investment types, from league equity stakes to media rights partnerships. Apollo Global Management's \$5 billion sports vehicle signals growing institutional confidence in sport as a specialised asset class. These funds bring sector expertise and support more strategic, long-term value creation, moving beyond opportunistic deals.

Looking ahead to 2026, private equity investment in sport is expected to strengthen further. There's growing interest in sports-adjacent properties, such as talent management, as seen in Goldman Sachs' private equity arm \$1 billion acquisition of **Excel Sports Management**. The rise of dedicated sports vehicles points to more sophisticated strategies, combining team ownership, media rights, technology platforms and ancillary businesses.

Athlete investment and new competitions

Athlete and celebrity investment in sports properties has become increasingly prominent in recent years. High-profile examples include with Tom Brady's stake in Birmingham City FC and the acquisition of Wrexham FC by Ryan Reynolds and Rob McElhenney. The trend continued in 2025, with **Luka Modrić** (joined later by Snoop Dogg), purchasing a stake in Swansea A.F.C, a **transaction co-advised by Bird & Bird**.

Looking ahead, athlete investments are set to play an even bigger role in 2026, especially in new competitions. For instance, Stephen Curry and Giannis Antetokounmpo invested in the three-on-three women's basketball league, **Unrivalled**, as part of a Series A funding round, and the APEX backed six-a-side football competition, **Baller League**, received investments from many high profile footballers. The natural chemistry between an athlete investor, offering lower profile properties an elevated platform, and the league, offering an individual investor a more accessible lower value entry point, will drive the continuation of this trend in 2026.

US investment: Breaking records and expanding influence in global sport

The NBA set new records in 2025 for the highest-value sports team acquisitions: first, the **Boston Celtics** at \$6.1 billion, followed by the **LA Lakers** at \$10 billion. Meanwhile, the NFL has attracted attention since a 2024 **rule change**, which allowed private equity funds to

acquire up to a 10% stake in franchises. Although market activity has been limited so far, notable deals include Arctos Partners' investments in the **Buffalo Bills** and the **Los Angeles Chargers**. With discussions underway about **raising the 10% cap**, 2026 could see a new wave of private equity investment in NFL teams.

US investment in European sport has also ramped up. Over the past year, highlights include the Friedkin Group's takeover of **Everton in December 2024** (after a failed bid by 777 partners) and John Textor's sale of Crystal Palace to Woody Johnson for \$190 million, prompted by multi-club ownership issues when both Lyon and **Crystal Palace** qualified for the Europa League.

Multi-club ownership: Building resilience and navigating regulation

Multi-club ownership models are gaining traction among football club owners as a way to pool resource, accelerate growth and create more resilient investment structures, helping clubs avoid the cyclical revenue swings tied to media and sponsorship rights that single-club models often face. In 2025, several notable acquisitions took place: Velocity Sports Partners (owners of Burnley FC) acquired **RCD Espanyol de Barcelona** and Best Intentions Analytics (owners of Brentford FC) acquired **Merida**.

This trend is likely to continue into 2026, especially if **current rules** on multi-club ownership are relaxed. However, regulation could still act as a barrier if investors view it as too restrictive or risky, as seen in the challenges faced by Crystal Palace in 2025. Clubs and investors will need to keep a close eye on regulatory developments to make informed decisions about future multi-club strategies.

Women's sport: Overcoming valuation challenges and unlocking global growth

Women's teams continue to face persistent challenges around scale and valuation. Traditional sports valuation methods, relying on historical revenue, comparable deals, and established media rights cycles (all of which we've previously **reported on**), don't always translate well to women's sports, where data is limited and structural issues like centralised IP rights and league-level governance can restrict value creation for team-level investors.

Despite these hurdles, **2025 has been a year of strong activity** and growing investor interest. Several women's football teams,

including Chelsea, Aston Villa and Everton, have been sold. The rise of the multi-club model, seen with investors like **Kynisca** (owner of the London City Lionesses, Washington Spirit and Lyon) and Mercury 13 (owner of Bristol City FC and Como Women), has sparked a wave of market activity.

Multi-club portfolios in women's football are a strategic response to the sector's unique investment landscape. By sharing best practices, aggregating commercial rights and achieving economies of scale in marketing, recruitment and content, investors can address the scale challenges individual teams face and position themselves for growth as the women's game expands globally.

With industry revenues expected to surpass **\$2.35 billion in 2025**, further market consolidation is likely in 2026 as investors look to capitalise on the multi-club approach. The sector is poised for a distinctive growth curve: slow development followed by rapid acceleration once visibility and commercial infrastructure reach critical mass. It will be interesting to see if investment spreads beyond Europe and North America, especially as new broadcasting deals signal a truly global reach (including the **WSL's broadcasting** agreements), including into key markets like the Middle East.

Saudi Arabia: Shaping the future of sport through strategic investment

Saudi Arabian investment in sport has been making headlines for several years, and the announcement that the country will host the 2034 FIFA World Cup has firmly established its status as a major player in global sport. In 2025, the Public Investment Fund (PIF) and SURJ Sports Investment made several high-profile international investments, acquiring a \$1 billion minority stake

in **DAZN**, launching a new **ATP Masters 1000** tournament in Saudi Arabia, committing \$1 billion to FIFA for global stadium development loans and taking a leading role in the \$55 billion acquisition of Electronic Arts (EA). The EA deal is particularly noteworthy, as it could serve as a springboard for further Saudi Arabian investment at the intersection of sports and technology in 2026.

On the club side, **Al Kholood** became the first Saudi Pro League club to reach full foreign ownership after its acquisition by the US investment firm Harburg Group. With more clubs now up for sale, 2026 could see a further wave of international investment into the Saudi Pro League, accelerating the country's ambition to shape the future of global sport.

The issuance of Saudi Arabia's new Sports Law under Royal Decree No. (M/121) in December 2025 has furthered the framework for investment in Saudi Arabian sports, for example by: (i) recognising the legal status of certain sports bodies (including clubs and leagues), who will be assigned specific legal status and will be registrable with the National Sports Registry; and (ii) enabling nonprofit clubs and leagues to convert to companies. Certain aspects of the framework remain subject to ministerial decisions, including foreign investment limits and requirements for M&A approvals in relation to sports bodies. As the Sports Minister will devise and issue the implementing regulations in the first half of 2026, more detail around these elements of the framework, and therefore the direction of travel for investment in Saudi Arabian sport, should become clearer in 2026.

Innovation in Sport



The artificially intelligent *club*

What's happened in 2025?

AI is rapidly transforming elite sport, moving high-level decisions, like recruitment, medical planning, commercial strategy, and daily operations to greater automation. Algorithms now promise not just speed and consistency, but measurable gains at scale. Over the past year, this shift has accelerated: teams across Europe and the US are adopting predictive injury systems, algorithmic player-valuation models, AI-powered ticketing, and workflow automation as standard tools, not just experiments.

For sports teams, the path forward is increasingly data-driven and reliant on automated judgment engines. As these technologies become embedded in core operations, the practical stakes are rising. Industry stakeholders need to consider how automation will impact careers, finances, and competitive integrity, and ensure their legal and governance frameworks are ready to keep pace with this new era.



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Key developments and predictions for 2026

High risk AI tools will face closer governance expectations

Regulatory attention on AI is increasing in the UK, even without the EU AI Act. Existing frameworks such as the UK GDPR, the Equality Act 2010, and sector guidance already place obligations on organisations when automated tools are used in recruitment, evaluation, workload planning, or decisions that could affect an individual's position or wellbeing. For teams using models for player recruitment, injury risk assessment, or performance analysis, the level of obligation will depend on how the tool is designed and how its outputs are applied. It is sensible to expect growing expectations around documentation, oversight, and transparency for systems that support working decisions.

Algorithmic management may raise employment law considerations

When teams use automated systems to inform decisions about training, performance, or player welfare, they bring into play with data protection and employment rules. Individuals have transparency rights when automated processing is used. Where a decision is made solely by automated means and has legal or similarly significant effects, they also have the right to request human involvement and to challenge the decision. These issues may arise if algorithmic outputs influence workload, safety, or contractual decisions. Clear information, human involvement, and fair use of data-driven tools will help reduce risk.

Directors may face increasing expectations on AI oversight

As AI becomes more embedded in team operations, boards are likely to face greater scrutiny over how such tools are monitored and governed. Directors are already required to exercise reasonable care, skill, and diligence, and UK governance principles emphasise risk management and internal controls. If AI systems contribute to decisions about welfare, operations, or strategy, directors may be expected to understand the associated risks and ensure that proportionate oversight mechanisms are in place.

What's the impact on sports organisations?

Automation is becoming part of sport's broader governance and risk landscape. It is prudent for organisations to identify where automated tools are used, ensure human oversight in significant decisions, review internal policies, and check that contracts provide appropriate transparency. Training leadership teams to ask informed questions about how these systems work can further reduce operational and legal exposure. Organisations that take a measured, structured approach are likely to be better positioned to benefit from automation while managing emerging risks.



AI in the sports, fans and business *ecosystem*

AI has moved from a back-office tool to a central resource in sport, influencing event delivery, performance, fan experience and revenue generation. By the end of 2026, it will be embedded across the entire sport-fan-business chain - driving personalised broadcasts, smarter stadiums, real-time coaching support and new ways to enhance the experience for everyone involved.

Rights holders are no longer experimenting; they are reshaping tournaments and business models with AI at their core.



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What's happened in 2025?

AI adoption has accelerated across global sport. FIFA's partnerships with Lenovo and Globant are set to make the 2026 World Cup the most AI-driven yet, with enhanced officiating technology, smarter stadium systems, improved broadcasts and a new integrated fan app.

Formula 1 has continued to develop its personalised viewing model, allowing fans to choose camera angles, data overlays and custom race feeds.

Meanwhile, the 2026 Winter Olympics plans to use AI for predictive simulations, interactive viewing layers and personalised storylines, pointing to a shift towards more dynamic experiences at major events.

Together, these examples show how quickly AI is becoming embedded in how competitions are run and how fans connect with them.

Key developments and predictions for 2026

The Broadcast Becomes 'You-First': Personalised Feeds Go Mainstream

The broadcast becomes 'you-first': Personalised feeds go mainstream. Commentary, graphics, camera angles and analysis can now adapt in real time to individual preferences. Features such as polls, shared watch-alongs and instant personalised highlights are becoming standard.

Recent innovations - including Amazon's Champions League Prime Vision feed with live data overlays - show this shift is already underway. By the end of 2026, personalised feeds are likely to be the norm, pushing rights holders and broadcasters to rethink the traditional *"one-feed-for-all"* model.

AI support for performance, coaching and officiating

AI is becoming a practical assistant across elite sport. It can predict performance, fatigue and injury risk, while real-time analytics support tactical decisions during play. Simulation tools help teams, referees and organisers model scenarios in advance, and officiating systems are becoming more automated in detecting incidents - with humans still making the final call.

Over the course of 2026, most major competitions are expected to use AI across coaching, refereeing and operations. Coaches will receive live tactical insights, referees will rely on semi-automated tools for key decisions and organisers will use AI to improve scheduling, crowd management and venue efficiency.

How AI is powering fan participation and revenue growth

AI is transforming how sport engages with fans and drives revenue. Fans can now help create content and shape club identity, while personalised shopping, targeted sponsorship, dynamic ticket pricing and predictive betting tools are becoming key commercial levers. Digital layers across tournaments, leagues and esports keep fans connected across platforms and communities.

A recent example is FC Barcelona's partnership with AI company Qloo, which helps the club tailor content, match-day experiences and communications to each fan based on their preferences and behaviour.

By the end of 2026, leading organisations will treat AI as core commercial infrastructure. Fan data and AI insights will shape products, engagement strategies and revenue models, creating a two-way relationship where fans don't just consume content, they help shape it.

What's the impact on sports organisations?

AI is reshaping how sport is produced, watched and commercialised. Organisations that act early will be best placed to benefit. Clients across the sports ecosystem should consider:

- 1 Preparing for personalised experiences:** Assess whether your broadcast, digital and fan-facing products can support AI-led customisation.
- 2 Adopting AI-assisted tools:** Explore technologies for coaching insights, officiating support, scheduling and venue optimisation.
- 3 Using fan data strategically:** Build the capability to collect, analyse and apply insights responsibly.
- 4 Strengthening governance:** Put in place clear policies around AI transparency, data protection and human oversight.
- 5 Experimenting with co-creation:** Test formats that let fans participate in content, storytelling and digital experiences.

AI won't replace human expertise, but it will reshape expectations across the industry. Organisations that prepare now will define the next generation of competition, fan engagement and commercial growth.

Data in women's sport

Data in women's sport will remain a major focus in 2026. Professional clubs will continue using athlete data to gain competitive advantages, while third-party researchers and governing bodies use data to improve performance, athlete welfare and fan engagement. Compliance with the UK GDPR and the Data Protection Act 2018 (as amended by the Data (Use and Access) Act 2025) will remain essential.



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What’s happened in 2025?

The use of data in women’s sport accelerated in 2025, both in volume and sophistication, as growing interest drove higher revenues and fresh investment. With global revenue expected to rise from \$981 million in 2023 to \$2.35 billion by the end of 2025, new opportunities are emerging to bridge the gap with men’s sport. Initiatives like FIFPRO’s Project ACL and the launch of the Centre of Excellence for Women in Sport in the UK, which aims to collect data and expertise to improve knowledge in women’s sport. These aims are reflected in research projects such as Project Minerva, a collaboration involving British Rowing, which focuses on the relationship between training load, the menstrual cycle and hormone function to optimise performance and reduce injury risk. Once this data is better understood, training methods can be adjusted to accommodate biological differences and improve performance.

Wales Women’s rugby team’s collaboration with Vodafone is another example. Menstrual-cycle and concussion tracking has been incorporated into the Vodafone PLAYER.Connect platform. This data is analysed to establish how the menstrual cycle impacts performance, wellbeing and recovery, and to explore its influence on concussion and recovery.

It is likely that the upward trend of female-specific data projects will continue into 2026 as interest in elite women’s sport continues to grow.

Key developments and predictions for 2026

A focus on data collection from young female athletes

With rising revenue and increased emphasis on talent pathways, clubs will invest more in collecting data from younger athletes. Monitoring factors such as growth patterns, maturation and menstrual cycles will support personalised training, better performance and reduced long-term injury risk. It will also help address female-specific challenges across an athlete’s lifespan.

An increase in the availability of women’s specific sports tech

We have already seen sports bodies adopt innovative athlete-monitoring technology. For example, the Football Association has partnered with The Well HQ to introduce menstrual-cycle tracking and other female-specific health initiatives across the Women’s Super League and Women’s Championship. Premiership Women’s Rugby has also partnered with Catapult, a GPS-based monitoring system that tracks training metrics such as speed, distance and workload.

As more organisations recognise the value of collecting data from female athletes, the market is expected to expand its range of women’s-specific technology.

Legal considerations

Under the lawfulness principle in the UK GDPR, any processing of athletes’ personal data must have a lawful basis, the most relevant being *consent* from the athlete, a *contractual obligation* that means that data collection is necessary for the organisation to fulfil a contract, or the sporting body’s *legitimate interests*. As more personal data is collected, the threat of challenges to the collection and sharing of that data increases.

For example, in men’s football, Project Red card was a legal challenge that raised awareness of the use of players’ performance and medical data by betting companies. Similarly, in America, the Major League Baseball Players Association has negotiated a clause prohibiting clubs from selling or licensing their training performance data or medical data.

Key stakeholders will need to continue to stay on top of changing legislation and regulation to ensure compliance with national and sports specific rules.

What's the impact on sports organisations?

Athletes must understand their data rights and ensure their information is not used without a lawful basis. Sports organisations will need robust, legally compliant data-collection strategies. This includes:

- 1 ensuring appropriate data-protection wording in player, research and commercial contracts;
- 2 providing clear transparency information to players;
- 3 carrying out and documenting data protection impact assessments where needed;
- 4 identifying the correct lawful basis for each type of data use; and
- 5 implementing governance frameworks for data access, sharing and retention.



Technology transformation in *sports stadiums*

The use of technology in sports stadiums is set to accelerate dramatically throughout 2026. Three key themes are driving this transformation: enhanced fan experiences through personalised offerings, improved connectivity infrastructure, and a stronger focus on accessibility and inclusion.

Venues are increasingly recognising that technology is essential to improving matchday operations and meeting rising fan expectations, with 2026 expected to mark a significant step change in how stadiums adopt and integrate digital solutions.



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What’s happened in 2025?

Significant developments throughout 2025, particularly in the United States, offer a glimpse of what UK and EU venues can expect in the coming year. MetLife Stadium in New Jersey has undergone extensive improvements, featuring updated video boards and audio systems, with expanded 5G cellular capacity being the most significant upgrade. The San Francisco 49ers enhanced their Levi’s Stadium app to deliver better matchday experiences. Meanwhile, in the UK, MK Dons’ stadium in Milton Keynes implemented new technology to improve signal strength and coverage throughout the ground. These examples highlight the growing prioritisation of both digital services and the infrastructure required to support them.

Key developments and predictions for 2026

Infrastructure: The foundation for innovation

Many stadiums currently struggle with data connectivity issues, particularly on matchdays when thousands of fans simultaneously access networks. In 2026, venues are expected to prioritise 5G and connectivity infrastructure upgrades to address these challenges. These improvements are critical not only for resolving current problems but also for supporting the transformative technologies that will reshape how fans experience live sport.

Transforming the fan experience

With stronger infrastructure in place, stadiums can deploy technologies that were previously impractical. AI is increasingly being used to analyse fan behaviour, identifying preferences from seating locations to food and merchandise choices. This enables personalised recommendations that enhance the fan experience, increase spending and reduce queue wait times. Technology is also advancing accessibility and inclusion. OneCourt, powered by Microsoft Azure, translates live gameplay into vibrations or audio commentary for those with visual impairments, while advanced radio mapping uses WiFi sensors and edge computing to track crowd movement and improve accessible routes for fans with mobility issues.

Legal considerations

The rapid adoption of these technologies requires careful legal consideration. Sporting organisations must ensure compliance with AI regulations, including the EU AI Act, as well as GDPR and consumer protection laws when advertising products or services. Robust agreements with technology suppliers are also essential, particularly regarding liability provisions, cybersecurity requirements and expected service levels.

What’s the impact on sports organisations?

The technological transformation of sports stadiums in 2026 promises new opportunities to enhance fan experiences and improve accessibility. To benefit, organisations should prioritise investment in connectivity infrastructure, understand where technology can meaningfully improve the matchday experience and ensure full compliance with evolving legal requirements.

Organisations that prepare now will be best positioned to deliver more engaging, efficient and inclusive stadium environments.

The future of *sports sponsorship*

The sports sponsorship market has largely settled into a 'new normal' following the COVID-19 pandemic, with rights holders and sponsors adapting to shifting dynamics. However, other external factors are adding layers of complexity to sponsorship negotiations and implementation. Looking ahead to 2026 and beyond, increased regulatory scrutiny, rapid technological change and evolving social and cultural pressures are set to make deals more nuanced.



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What’s happened in 2025?

Recent months have seen a regulatory tightening across multiple sponsorship sectors in the UK. Premier League clubs have collectively agreed to withdraw front of shirt gambling sponsorships from the 2026/27 season onwards. At the same time, the UK government has brought in restrictions on the advertising of less healthy food and drink.

Meanwhile, rightsholders are under increasing pressure from sponsors, fans and regulators to ensure that partnerships align with ESG and CSR values. Accusations of ‘sportswashing’ and ‘greenwashing’ mean that parties operating in this space tread a fine line between their partnerships being considered ethical and being perceived as performative.

Lastly, we’ve seen an increase in more dynamic relationships between rightsholders and sponsors, substantially driven by technology. Sponsors want to offer innovative, immersive forms of advertising and are pushing for rightsholders to use their goods and services. These changing preferences and the evolving regulatory landscape have introduced additional layers of complexity to sports sponsorship contracts and the relationships that underpin them.

Key developments and predictions for 2026

Restrictions on sponsorship in regulated sectors in the UK

Evolving UK regulations on gambling, cryptocurrencies and High Fat, Salt, Sugar Products (HFSS) are reshaping the sponsorship market. As sponsorship deals become increasingly global, inconsistencies between jurisdictions are putting greater emphasis on due diligence, warranties, indemnities and clear contract terms around suspension and termination rights when it comes to negotiation.

Gambling

Gambling sponsors have long been a major revenue source for Premier League clubs, especially outside of the ‘big six’. In fact, for the 2025/26 season, Premier League front-of-shirt sponsorships are worth \$525.4 million and gambling brands account for around 25% (\$129.6 million) of this **revenue**.

With a ban on these deals approaching, brands from other sectors will compete for these coveted spots, potentially shifting deal values and dynamics. Gambling sponsors, meanwhile, are likely to seek alternative opportunities, such as stadium naming rights or partnerships in other sports and markets.

Blockchain and cryptocurrencies

While the NFT boom of the early 2020s has faded, cryptocurrencies and blockchain sponsorships remain important. Increased regulatory scrutiny is driving greater stability and longer-term deals, signalling a maturing market. This is reflected in the draft legislation published earlier this year by HM Treasury, the FSMA 2000 (Regulated Activities and Miscellaneous Provisions) (Cryptoassets) Order 2025.

Since 2023, the promotion of cryptoassets to UK customers has been within the scope of the UK financial promotions regime. This means that a sports club communicating content on behalf of a sponsoring cryptoasset business must ensure that they are permitted to make the promotion under a specific ground – either the promotion is communicated by an FCA authorised firm, approved by an FCA-authorised firm or falls within an available exemption. Promotions must also comply with the FCA’s cryptoasset financial promotions requirements (including prominent risk warnings and restrictions on incentives), and be fair, clear and not misleading.

The government’s forthcoming cryptoassets regulated activities regime (expected to apply from October 2027) will add a further layer: firms carrying on specified cryptoasset activities “in or to” the UK (including where UK consumers are targeted from overseas) will generally need to be FCA-authorised for those activities. As a result, arrangements under which an offshore sponsor relies primarily on a UK authorised firm merely to approve UK-facing promotions may become less attractive or less available, because the sponsor may need authorisation for the underlying activity in any event.

Clubs should also ensure that sponsorship activations do not move beyond advertising into intermediation (for example, affiliate-style onboarding, tracked referral links or assisting fans to enter into transactions), which could risk the club carrying on a regulated activity under the new perimeter.

HFSS and “less healthy” food and drinks in the UK

Since 5 January 2026, products classified as “less healthy” food and drink now face strict new advertising restrictions, including a ban on paid-for online advertising and a TV watershed between 5:30 am and 9pm. To be classified as “less healthy”, products must fall within categories listed in the [Advertising \(Less Healthy Food Definitions and Exemptions\) Regulations 2024 \(SI 2024/1266\)](#) and meet the UK government’s Nutrient Profiling Model.

For years, HFSS and “less healthy” brands have been prominent sports sponsors, using everything from pitch-side ads to digital campaigns and athlete endorsements. The new rules will fundamentally reshape these partnerships, prompting brands to rethink their marketing strategies to stay compliant.

Practically, we expect brands to shift toward using generic logos or channels not subject to restrictions, such as their own platforms, podcasts, digital OOH and experiential events. With greater scrutiny, rightsholders and sponsors will need to play closer attention to approval rights and liability for compliance, making proactive contract review and clear communication essential for 2026 and beyond.

ESG and CSR integration in sponsorship strategies

Environmental and social governance (ESG) and corporate social responsibility (CSR) are becoming central to sponsorship strategies. As we look to 2026, we expect a sharper focus on these values, driven by both consumer expectations (especially among younger generations), and more proactive regulatory enforcement. The expansion of bodies like the Competition and Market Authority signals that compliance will be under closer scrutiny, following the coming into force of the Digital Markets, Competition and Consumers Act 2024.

Sponsors and rightsholders face new compliance risks, with frameworks like the UN Sports for Climate Action which contains five principles including promoting environmental responsibility, reducing impact and promoting responsible consumption, and the EU’s Green Claims Directive setting clear standards for responsible advertising and operations. Practically, this means sponsorship packages will increasingly include requirements for sustainability initiatives, net-zero commitments, and transparent reporting. Clauses around governance and impact data are likely to become standard, and collaboration on sustainability content and stakeholder communications will be key.

A shift to more dynamic sponsorships

In a world where many sponsorship categories are oversaturated and sponsors spend huge amounts to partner with rightsholders, potential partners are now looking for recognition which goes above and beyond standard designations and rights packages.

The technology sector is leading this shift, with sponsors now aiming for deeper integration, providing real services to rightsholders and creating partnerships that deliver immediate commercial benefits and more authentic connection with fans. In 2025, this trend was evident in a range of AI-driven and in-stadium technology collaborations, and its set to continue.

However, these dynamic arrangements require careful planning. Structuring deals that combine product or service supply with sponsorship rights can be complex, especially when it comes to managing dependencies and handling issues like termination. A multidisciplinary approach, bringing together marketing, technical, procurement, legal, and commercial expertise, will be essential for organisations looking to unlock the full value of these innovative partnerships.

Greater scrutiny of digital rights activation

As sponsors and rightsholders seek more innovative ways to activate partnerships, especially through digital rights, the regulatory landscape is becoming increasingly complex. In 2026, privacy, data protection, marketing, AI and online safety will be in flux, with different jurisdictions moving at different speeds.

This fragmented environment presents real challenges for organisations aiming to run creative, multi-territory campaigns. To navigate these complexities, sponsors will need to conduct detailed market analysis, understanding the risks and opportunities in each region before launching promotions or activating digital sponsorship rights. Taking a proactive, granular approach will be essential for maximising impact while staying compliant in a rapidly evolving regulatory landscape.

What's the impact on sports organisations?

The sponsorship landscape in sport is entering a compliance-intensive era where regulatory restrictions, ESG/CSR expectations, and technological developments are fundamentally reshaping commercial partnerships. Sponsors and rightsholders should:

- **Conduct regulatory audits** of their existing and proposed sponsorships in heavily regulated sectors, to ensure compliance with the changing regulatory landscape.
- **Ensure a sensible allocation of responsibility for regulatory compliance**, with sensitivity to differing approaches to a number of key issues between jurisdictions.
- **Ensure alignment on ESG/CSR commitments** as the focus moves from high level, principles-based commitments to more specific, definitive obligations.
- **Consider sponsor/supplier hybrid arrangements comprehensively** to ensure that both elements of the relationship can interoperate as required.

Stakeholders that proactively address these points will position themselves well to extract value from the evolving sponsorship landscape in 2026 and beyond. Those that fail to adapt put themselves at risk of regulatory sanctions, disputes and reputational damage.

Changes to the *media landscape*

The media landscape is undergoing an intriguing transformation, driven by developing technologies and changes in consumer tastes and consumption. This transformation is likely to bring both challenges and opportunities as we move through 2026 and beyond.

Traditional media consumption shows signs of stagnation, pressured by the affordability and flexibility of streaming platforms and social media. Deloitte reports that only 49% of consumers now have a cable or satellite TV subscription, a sharp drop from 63% just three years ago. The decline is most evident in live TV viewing, which has fallen dramatically. Gen Z, in particular, spends far less time watching traditional television, favouring social platforms and short-form content instead.

Yet, live sports remain a bright spot. While the steep rights fee increases seen in recent years have largely plateaued, sports continue to be a strategic asset for both traditional broadcasters and streaming services, driving subscriptions and reducing churn (the rate at which users cancel services). With more players entering the market for sports content, this could lead to some significant developments in the year ahead.



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Key developments and predictions for 2026

New entrants, mergers and consolidations

2025 closed with the news that Paramount was entering the UK sports streaming market, winning the rights to show UEFA Champions League games in the UK for four years starting in 2027. Rights holders will be watching closely to see whether this signals a broader push to expand sports coverage beyond the USA.

Rights holders will be similarly interested to see if any of the other major international media organisations will increase their sports offerings. Amazon has previously acquired a selection of rights covering the UEFA Champions League and Premier League football, alongside international rugby and ATP Tour tennis matches. DAZN already has a strong portfolio of rights in many markets, and it remains to be seen if the recent minority investment by Saudi Arabia's SURJ Sports Investment will lead to further expansion. Netflix has dipped its toes into the water with live WWE wrestling, celebrity boxing (such as Jake Paul's bouts with Mike Tyson and Anthony Joshua) and recently reported that its live coverage of the Christmas Day NFL match between the Lions and Vikings was the most streamed NFL game in US history.

Alongside these developments, the wave of mergers and consolidations in the media industry shows no signs of slowing. Netflix has agreed to acquire Warner Bros' film and television business, though a rival bid from Paramount could reshape the deal. Paramount already owns Channel 5 in the UK, while Sky has been linked to a potential acquisition of ITV. This heightened merger activity suggests broadcasters and streamers will seek greater flexibility in how they exploit sports rights, potentially acquiring packages that span both pay-TV and free-to-air platforms to maximise the value of their expanded portfolios.

Diversification in distribution strategies

To stay ahead of changes in media consumption, particularly amongst younger demographics, we expect to see a continued trend towards diversified distribution strategies, including partnerships with social media services. Gen-Z and millennial audiences increasingly consume content on these platforms and so we anticipate rights holders will continue to turn to hybrid distribution models – making content available through a mixture of traditional pay and FTA television services, streaming services and social media – as well as exploring shorter content formats and documentaries (both in relation to sporting action and to content created away from the pitch).

Some sports have been developing their own dedicated direct-to-consumer (DTC) offerings. World Rugby launched RugbyPass TV in advance of the 2023 Rugby World Cup to bring live content to 'dark' markets where there was no other televised coverage and provide other archive content and original programming to rugby fans on a global basis.

In 2025 Ligue 1 became the first major men's football league in Europe to launch its own DTC streaming service for live coverage in its domestic market, Ligue 1+, after failing to establish a successful broadcast partnership for all of its matches. Ligue 1 subsequently expanded the coverage of its service into the UK and Italy, and in January 2026 announced a match between Paris Saint-Germain and Olympique de Marseille would become the first European football match to feature live AI-translated commentary (with the French commentary being translated into Italian). However, broadcast revenues are reportedly significantly down on previous seasons, demonstrating that for now the optimum path for many rights holders may be to supplement third party broadcast coverage in their domestic and other primary markets with DTC coverage in markets where they are not able to attract a favourable broadcast partner.

Another developing option for rights holders comes from the rise of FAST (free ad-supported streaming television) channels, such as Paramount's PlutoTV, and Fox's Tubi. In 2023 DAZN launched a dedicated FAST channel for women's sports in Germany, featuring content from the Frauen Bundesliga (Germany), Primera Division (Spain) and Division 1 Feminine (France) and the Women's UEFA Champions League. In August 2024 Sky Sports launched its own first FAST channels, with Sky Sports Stories offering documentaries, Sky Sports Classics showing Premier League archive content, and Sky Sports Vault serving classic footage from other sports. May 2024 also saw a major sports body embrace FAST services, with the US launch of the Formula 1 Channel, bringing viewers a range of highlights, analysis, classic Grand Prix races and documentaries. We expect this trend to continue into next year, although with content primarily being repeats and highlights and magazine programming, rather than live coverage.

We also expect both rights holders and broadcasters will continue to engage more heavily in partnerships with social media influencers and creators as part of their core promotion strategies. The Deloitte media trends survey reports that 56% of younger generations watch content on streaming services after having heard about them from online creators and 63% of Gen-Z and 49% of millennials say that social media ads and product reviews are the most influential to their purchasing decisions. Cristiano Ronaldo is an example of an athlete taking this one step further – streaming live coverage of the Premier Padel semi-finals and finals on his official YouTube account, complementing the coverage from more traditional broadcasters.

We anticipate YouTube itself will remain a key distribution platform for rights holders, offering a platform to reach a mass global audience without the need to invest in producing and maintaining their own DTC service. The fact that YouTube has

publicly ruled out bidding for any sports media rights itself also makes it an attractive platform for broadcasters to use to distribute their content to a wider network. The popularity of YouTube also helps address another emerging issue facing sports rights holders – discoverability. Where rights holders grant rights to a wider range of platforms the more casual fan can find it increasingly hard to identify where to watch coverage of their desired sporting event, and YouTube is positioning itself as the primary platform for finding all content in one place – whether match action, magazine programming or creator-driven content.

Amendments to the listed events requirement in the UK

Whilst a large proportion of sports media rights analysis tends to focus on the emergence of streaming services, free to air broadcasters will remain the home for a large amount of premium sporting content. In the EU and UK, this is in part due to the 'listed events' regime, which is designed to help ensure that certain sporting or other events of national interest is available to audiences in that country on a free-to-air basis. In the UK, this affects events such as the FIFA World Cup, the Rugby World Cup, the UEFA European Championships and the Olympics.

In the UK the implementation of the Media Act 2024 is set to introduce significant reforms to the UK's listed events regime, including: (a) the extension of the rules to cover digital platforms as well as traditional broadcast channels; (b) amending the services that benefit from the rules so that these are restricted to the public services broadcasters (e.g. the BBC, ITV, Channel 4 and Channel 5) and their online offerings (such as iPlayer); and (c) updating the rules for multi-sport events such as the Olympics to clarify what "adequate live coverage" is required on PSBs.

Technological advancements

Emerging technologies such as virtual reality (VR) and augmented reality (AR) are reshaping sports broadcasting, delivering richer data, immersive experiences, and interactive features. Automated production is making previously un-filmed content affordable, with events like Wimbledon and the Masters using generative AI for commentary to expand coverage.

Younger fans, often 'second screeners', are driving demand for personalised experiences. Expect broadcasters to offer tailored highlights, custom camera angles, and data-driven features that let viewers follow their favourite teams and players. Rights holders will increasingly partner with tech providers to deliver these innovations and ensure legal agreements allow for the use of player data in these fast-evolving formats.

Piracy enforcement and countermeasures

2025 saw a series of high-profile prosecutions and arrests for roles within illegal sports-streaming and the battle against streaming piracy is likely to intensify, both in relation to illegal streaming devices and infringing websites and apps. Amazon and Google are rolling out new systems that seek to block unauthorised or 'sideloaded' apps that are identified as providing access to pirated content. We also anticipate that a range of rights holders will continue to work with social media services to identify and takedown infringing content, and to seek live blocking injunctions to combat the more prolific illegal streaming sites.

Safeguarding

Safeguarding and safe sport are rapidly climbing the agenda, both in the UK and internationally.

The UK sport sector is moving towards a unified, prevention-focused safeguarding framework with goals of (among others) establishing a new independent body to provide leadership and coordination for safe sport in the UK, and an independent complaint and resolution function for significant, sensitive and complex cases.

Internationally, the International Olympic Committee (IOC) and international federations are also dedicating increasing amounts of resource and driving towards more uniformity at the international level.



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What's happened in 2025?

In June 2025, UK Sport published the 'Safe Sport Report'. The report noted that (among other things) (1) the current system is fragmented, inconsistent, distrusted, lacks coherence, and has significant gaps in leadership, accountability and coordination, (2) sport is being consumed by managing cases of harm leaving limited time or resource to focus on prevention, and (3) the approach to safe sport and the systems supporting it are not person-centred leading to procedural, institutionalised and often adversarial approaches which are further harming complainants. These issues are significant, particularly when noting (for context) that Sport Resolutions' latest annual report details that safeguarding cases made up 46.9% of its caseload in 2024/25 (compared to 9.7% in respect of anti-doping, and 8.2% in respect of 'integrity and discipline').

To address these challenges, the Safe Sport Report made five key recommendations:

- 1 organisations should adopt an agreed set of design principles for a comprehensive and integrated safe sport system and culture
- 2 to develop and implement a clear framework for safe sport across the UK
- 3 to establish a new independent body to provide leadership and coordination for safe sport in the UK
- 4 to establish an independent complaint and resolution function across the UK to provide a trusted, trauma-informed and safe process to support complaints, respondents and NGBs to manage significant, sensitive and complex cases
- 5 to undertake a review of all current funding and delivery into safe sport to ensure it is having the maximum effect and is coordinated.

International developments also demonstrate the shift towards increased sophistication, uniformity and coordination in respect of safeguarding/safe sport. In March 2023, the IOC announced that it would create a \$10 million fund per Olympiad, alongside a dedicated working group, to bring together international federations and National Olympic Committees and bridge the gap between international and local safeguarding work.

Building on this foundation, the IOC established pilot regional safeguarding hubs in Southern Africa and the Pacific Islands in October 2023 as central coordination points providing athletes with independent guidance and access to psychosocial support, legal aid and assistance through local services in the athletes' own languages - overseen by an International Safe Sport Task Force and guided by an International Safe Sport Framework. The 2024 'IOC consensus statement: interpersonal violence and safeguarding in sport' aimed to synthesis evidence on interpersonal violence and safeguarding in sport, introduce a new conceptual model of interpersonal violence in sport and offer more accessible safeguarding guidance to all within the sports ecosystem by merging evidence with insights from Olympic athletes. That consensus statement concluded that a shared responsibility between all within the sports ecosystem is required to advance effective safeguarding through future research, policy and practice.

International federations are also starting to develop globally coordinated, standardised frameworks within their sports. A relatively longstanding example is 'FIFA Guardians', launched in 2019, which is a programme that provides a framework for FIFA's member associations to prevent any risk of harm to children in football and respond appropriately. Mor recently, in September 2025 the International Basketball Federation (FIBA) launched its 'Safeguarding Toolkit', with the aim of establishing core principles and minimum standards to assist its National Federations in developing and implementing robust safeguarding strategies.



Key developments and predictions for 2026

In the UK, the safe sport project will progress and conclude its next phase by March 2026, which will involve scoping out the recommendations from the report. It will include an outline of what the sports sector requires, an appraisal of the options and an implementation plan.

Particularly important early actions for the project are (1) “developing and confirming the core responsibilities, services and functions required and consider all potential delivery modes, along with a clear governance structure, resourcing and investment plan, and a final Business Case to determine the approach required to deliver the intended outcomes, and how it will be funded and be practicably deliverable”, and (2) “develop the Safe Sport Strategy, Framework and Code of Practice”.

In our view, during the course of 2026 it should be possible for sport in the UK to arrive at a consensus as to an overarching strategy and what sport seeks to achieve in respect of safeguarding/safe sport. Larger UK domestic governing bodies are genuinely world-leading in respect of safeguarding regulation, and there is a very solid basis upon which the rest of sport in the UK can learn from and adopt. However, it will be important that any consensus adequately takes into account (among other things) (1) the voices of victims/survivors and what they want sport to achieve, and (2) what sport can realistically achieve (with a view to finding a shared understanding, which in our view is likely to be some form of overarching risk management approach).

Whilst the Safe Sport Report rightly noted that sport is being consumed by managing cases of harm leaving limited time or resource to focus on prevention - and it is absolutely right to prioritise prevention – it is a sad inevitability that cases will arise, and they will continue to require significant resource (where cases do arise, the response is obviously exceptionally important in maintaining faith in any system). The key, in developing the independent complaint and resolution function, will be in making

sure that significant cases can be dealt with fairly, efficiently and consistently. Until that function is set up (which will be beyond 2026), governing bodies – and particularly smaller ones - will continue to struggle with the demands and complexities of safeguarding cases for which they might well not be sufficiently-equipped to address. However, with a focus on risk management and by adopting a person-centred approach, governing bodies can go a long way to addressing the problems identified in the Safe Sport Report before any centralised systems are put in place.

Funding will also be a challenge. The safe sport report noted that “Although there will be initial set up costs, it is expected that the lead entity and independent complaints and resolution function would be predominantly resourced through the better utilisation of existing funding, with other funding sources also considered”. Given the finite resources available, one hopes that the independent function will benefit from economies of scale - but it appears, realistically, that resource will need to be found from other budgets within sport (although given the importance of safeguarding/safe sport, that is something of a necessary evil).

Internationally, we expect to continue to see more International federations developing approaches to safeguarding/safe sport that can be adopted at national level, whether through guidance (such as ‘toolkits’) and/or through regulation (e.g., introducing obligations on national associations). Again, the trend will be towards uniformity.

Sports regulators will need to ensure that they are abreast of, and actively engaging with and helping shape, developments - both domestically and internationally. As safeguarding/safe sport continues to rise to the top of the agenda, participants and other stakeholders will expect (and demand) more robust safeguarding policies and regulation – both on paper and (every bit if not more importantly) in practice.



Integrity

Integrity-related rules in sport are crucial to maintain a level playing field and public trust. Those rules might relate to athlete eligibility criteria for particular categories or competitions or may impose restrictions on participants in relation to (for example) conduct that improperly impacts competition results, or the use of prohibited drugs and other conduct that undermines clean sport.



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Anti-doping

Anti-doping efforts are becoming more data-driven and intelligence-led, with anti-doping organisations placing greater emphasis on building capacity, conducting effective investigations and efficient test planning.

What's happened in 2025?

In December 2025, WADA approved the fourth edition of the World Anti-Doping Code (in addition to several International Standards) following a lengthy and detailed review process. Several high profile disciplinary cases have grappled with the core Code requirement to demonstrate proof of source and identify contamination in order obtain a reduced sanction, in particular in relation to contaminated meat and medications.

Key developments and predictions for 2026

Looking ahead to 2026, anti-doping organisations will be focused on rule and policy drafting to give effect to the changes in the 2027 Code and International Standards, ready for enforcement from 1 January 2027. While the 2027 Code will not introduce wholesale change to the legal framework, the amendments provide (among other things) additional flexibility to appropriately sanction inadvertent anti-doping rule violations and to clarify the application of other Code provisions.

Likewise, the iterative improvement of anti-doping systems and processes will continue, from WADA audits of anti-doping organisations to Code compliance proceedings and other measures to ensure harmonisation of anti-doping enforcement efforts.

Anti-doping organisations will continue to align data practices to regulatory and GDPR expectations, with further guidance likely to come from the Court of Justice of the European Union in the NADO Austria case following the Advocate General's opinion in 2025.

On the enforcement side, increased reliance on investigations and intelligence-led testing is likely, as well as the use of demand powers to uncover concealed doping. The Athlete Biological Passport will likely develop and its use will expand across sports and at national level, both as evidence of doping itself and to inform target testing.

What's the impact on sports organisations?

Anti-doping organisations should take careful steps to prepare for the 2027 Code, at policy level, in revising anti-doping rules, and by preparing revised template results management documents. Continued work on privacy notices and the monitoring of data practices will be importance, on top of athlete education and the usual stream of sample collections and results management processes.

Anti-corruption

The regulation and enforcement of anti-corruption issues in sport are increasingly global, multi-stakeholder, and multi-disciplinary matters. Collaboration between sports organisations, law enforcement, and specialists in the monitoring of betting markets and investigations remains very important.

What's happened in 2025?

In the past year, several programmes and partnerships have launched. FIFA and UNODC launched the second edition of the Global Integrity Programme (2025–2027), and the International Partnership Against Corruption in Sport (IPACS) continued its work on procurement integrity, event selection transparency, and governance standards, including template tool production.

Key developments and predictions for 2026

In 2026, the structural trend towards integrity units dealing with multiple integrity concerns is likely to continue. Existing national and international organisations have the pre-existing frameworks, relationships, and operational capabilities to address anti-corruption as well as anti-doping and other matters. Major event operational taskforces and coalitions may also become more common, as utilised successfully at Paris 2024.

Operationally, anti-corruption regulators will develop deeper data-sharing frameworks and MoUs with betting operators and integrity monitoring service providers, including at lower-tier competitions to improve detection where athletes are most vulnerable.

Investigative capacity is likely to improve, given the increasing availability of professional digital forensics, financial tracing tools, and AI-powered software to identify trends. Whistleblowing systems and the use of demand powers are likely to generate further intelligence and evidence for disciplinary cases.

What's the impact on sports organisations?

Regulators and integrity units should continue to build cross-border and multi-disciplinary networks, cement those relationships with information and knowledge sharing, and utilise those networks to learn lessons and work towards operational best practice.

Athlete eligibility

The criteria for eligibility in women's sport has been a hotly debated issue for a decade now. International federations are converging towards eligibility rules based on biological sex, rather than gender identity and hormone suppressant treatments. National federations, especially those in the USA and the UK, are following that direction too.

What's happened in 2025?

In the last twelve months, several international federations have introduced eligibility criteria based on biological sex (XX and XY chromosomes) and begun enforcing the eligibility rules for the women's category by testing athlete cheek swabs for the presence or absence of the SRY gene (which induces male sex determination and development). In addition, the leading candidates for the IOC Presidency all promised to ensure the protection of women's sport, and Kirsty Coventry, the new IOC President, set up the 'Protection of the Female Category working group', which included scientific experts and international federation representatives, to examine how to approach the issue.

Key developments and predictions for 2026

In 2026 national and international federations will continue to grapple with the overarching policy decision regarding the eligibility of transgender athletes to compete in women's sport, seeking to balance inclusion against safety and fairness at the elite and grass-roots levels. Each sport and jurisdiction specific approach will be recorded in policies, rules and regulations.

In part the policy decision may be influenced by political climates and national and international legal decisions. The approach of the US Presidency will have international implications because the USA will host several major events in the coming years. In addition, the UK sports sector is continuing to manage the consequences of the UK Supreme Court decision on sex discrimination. In January 2026, the US Supreme Court will hear two high-profile cases of transgender athlete eligibility in sport, with a decision expected in the late spring or early summer.

Further cases may be heard and determined by the Court of Arbitration for Sport, including the claim brought by Algerian boxer Imane Khelif against World Boxing after it mandated pre-competition genetic testing to demonstrate eligibility for the female category. Such cases will likely scrutinise the scientific bases for the regulations, and procedural fairness in individual cases.

What's the impact on sports organisations?

As international federations move towards SRY testing as a screening mechanism for eligibility, issues may arise in relation to pre-clearance testing availability and logistics, as well as data protection issues, and the application of national legislation on genetic testing.

National and international federations and event organisers should periodically review their policies and regulations in light of scientific and legal developments. If policy positions change, the regulator should document the new policy in clear regulations, develop fair processes and frameworks to enforce the rules, and follow those processes in practice.

Multi-club ownership (MCO)

- Regulatory developments and practical guidance

Investment in sport has surged in recent years, and football has seen a notable **rise** in **MCO structures** across Europe, now involving over 200 UEFA clubs and nearly 400 worldwide, with numbers set to grow.

While MCO structures may be appealing to clubs and investors as they allow for economies of scale, centralised costs, operational synergies, and player development opportunities for clubs within a MCO structure, they raise important regulatory considerations.



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What’s happened in 2025?

The summer of 2025 highlighted the risks of non-compliance, as several clubs were denied access to European competitions for breaching UEFA’s MCO rules. In November 2025, the Court of Arbitration for Sport (**CAS**) published decisions in three significant cases involving breaches of the MCO Rules. We set out below the key points from these awards, which provide critical guidance on UEFA’s enforcement approach, before outlining practical steps clubs should take to navigate the MCO landscape in 2026 and beyond.

Key developments and predictions for 2026

CAS awards: the 2025 MCO trilogy

CAS 2025/A/11604: Crystal Palace FC (CPFC), Nottingham Forest FC (NFFC), and Olympique Lyonnais (OL)

This was the most high-profile of the three CAS awards. Bird & Bird acted for NFFC in this matter.

The procedural history was as follows:

- On 17 May 2025, CPFC automatically qualified for the 2025/26 Europa League by winning The FA Cup. As a result, NFFC fell to be entered into the 2025/26 Conference League (but for CPFC winning The FA Cup, it would have qualified for the Europa League by virtue of its league position).
- On 24 May 2025, OL also qualified for the Europa League. This created a potential MCO issue, as John Textor was the ultimate controlling party of OL whilst also holding a significant ownership interest in CPFC. Both clubs had declared in their respective MCO declarations to UEFA that Mr Textor (via Eagle Football Holdings) had control or decisive influence over them (and other clubs).

- On 11 July 2025, UEFA’s Club Financial Control Body (CFCB) concluded that CPFC and OL did not comply with the MCO Rules as of 1 March 2025 (the relevant assessment date). Consequently, CPFC was admitted to the 2025/26 Conference League, NFFC was admitted to the 2025/26 Europa League, and OL remained in the 2025/26 Europa League.
- On 21 July 2025, CPFC appealed the CFCB’s decision to the CAS.
- On 11 August 2025, following an expedited procedure, the CAS dismissed CPFC’s appeal. The CAS Panel’s decision can be found [here](#).

The key points from this CAS award that are of broader relevance to football clubs and investors are as follows:

- **Actual vs. potential involvement:** When enforcing the MCO Rules, UEFA does not need to establish that an individual had “*actual*” involvement in the management, administration, and/or sporting performance of a club. It is sufficient that the relevant individual can exercise such involvement. The Panel held that requiring UEFA to prove “*actual*” involvement would be extremely difficult to implement in practice.
- **Perception of conflicts vs. actual conflicts:** Part of the underlying rationale of the MCO Rules is to prevent the perception of conflicts of interest, not just actual conflicts of interest. The Panel noted that “*as it was stressed in the ENIC Award [CAS 98/200], the importance of the public perception as to the existence of a conflict of interest potentially affecting the authenticity of results, which is protected by the MCO prohibition. Such public perception is indeed engaged by the simple involvement of a person in a club, irrespective of the level of such involvement.*”
- **Decisive influence:** The concept of “*decisive influence*” is not defined in the MCO Rules, but it was addressed in a UEFA Circular issued in May 2024, which set out four indicators

- providing guidance as to what might constitute “*decisive influence*” (namely, through shareholders’ or members’ rights, financial support, governance, and player transfers).
- **Curing a breach:** There was (as contended for by CPFC) no discretionary practice by the CFCB permitting clubs to “*cure*” any breach of the MCO Rules after the 1 March deadline. CPFC’s competition law complaints in that regard (and against the MCO Rules generally) were dismissed.

The CAS has also published decisions involving **Drogheda** and **FK DAC**. The key points to note from those two cases are as follows:

- **Change of assessment date:** UEFA changed its assessment date from 3 June to 1 March. In Drogheda, the Panel found that this change was properly communicated by UEFA and that clubs knew, or ought to have known, about the change. The Panel in FK DAC reached the same conclusion and ruled that the change was compatible with Swiss and EU law and was implemented in accordance with the procedures established in the UEFA Statutes. As such, the change was not “arbitrary, discriminatory, or grossly disproportionate.”
- **Scope of involvement is very wide:** The Panel in FK DAC reached the same position as the Panel in CPFC regarding the meaning of “be involved,” noting that the words immediately following in the relevant MCO Rule (i.e., “either directly or indirectly, in any capacity whatsoever”) are clear. The Panel held that “there is no need to interpret this clear wording. The draftsperson has deliberately made involvement extremely broad—indirect and in any capacity.”
- **Blind trusts:** FK DAC argued that UEFA had permitted certain clubs to transfer shares into blind trusts after 1 March 2025, provided they had notified UEFA prior to the deadline, and contended that this rendered the 1 March 2025 deadline arbitrary. However, this argument was rejected, primarily because FK DAC failed to produce evidence substantiating this allegation. Moreover, the Panel confirmed that UEFA had not “approved” any blind trust agreements: “The mere fact that certain clubs may have implemented blind trust arrangements, regardless of their form, does not alter the reality that the CFCB has not assessed or approved any such arrangements.” CPFC advanced the same argument, which was also rejected on the same basis.

What’s the impact on sports organisations?

The CAS awards discussed above provide important practical guidance for clubs and investors navigating MCO structures moving forward. We predict that some clubs will continue to fall foul of UEFA’s MCO Rules each year (given the history of such cases, increasing prevalence of such structures, and the perhaps unexpected qualification for the same UEFA competitions by two clubs in the same structure). However, key takeaways for clubs in MCO structures who might qualify for UEFA competitions and wish to avoid difficulty include the following:

1 March is a hard deadline

Notwithstanding prior speculation that UEFA may relax the MCO Rules, in December 2025 UEFA issued a further Circular confirming that 1 March was the strict deadline for compliance. UEFA has insisted that there would be no extension to circumvent the regulations after this date. Accordingly, clubs should not rely on late remedial action to cure breaches or avoid exclusion from UEFA competitions. Late share sales will not retroactively remedy a breach. Clubs – particularly those already in MCO structures – need to take steps to ensure that appropriate restructuring measures can be implemented before 1 March 2026 if there is even a small risk that two clubs in the same MCO structure could end up in the same UEFA competition next season. The CAS cases above demonstrate that ignorance of the MCO Rules (or UEFA Circulars) provide no excuse for non-compliance.

Blind trusts are not a guaranteed solution

In a UEFA Circular dated 14 May 2024, UEFA informed clubs that they would be permitted to use blind trusts (a legal structure under which all decision-making of a club rests solely under the control of a third party/trustee who is bound by fiduciary duty to act in the best interests of the club) after the 2024/25 season's assessment date (3 June 2024), on a temporary basis and under certain conditions. However, the UEFA Circular made clear that this was being permitted *"on an exceptional basis for the 2024/25 UEFA competitions"* and that *"the CFCB First Chamber will not be bound by this alternative when assessing clubs' compliance with the MCO rule for participation in UEFA competitions in subsequent seasons"*. As noted above, both FK DAC and CPFC sought to rely on UEFA's supposed prior approval of blind trusts, but both CAS Panels concluded that UEFA had not approved any blind trusts for the 2025/26 season. The Panel in CPFC noted that this *"was a temporary solution put in place by UEFA for the 2024/25 season only and does not constitute a consistent practice of the CFCB."*

Accordingly, clubs, owners, and investors should exercise caution when utilising blind trusts to address potential compliance issues with the MCO Rules. There is no guarantee they would be approved by UEFA going forward, particularly due to the **questions about the effectiveness of blind trusts** as a means of addressing conflicts of interest (given the ways in which the safeguards can potentially be circumvented).

Furthermore, it is important to note that the structures referred to as 'blind trusts' in the football context would not necessarily share the characteristics of a classic blind trust arrangement. In a traditional blind trust, an individual (for example, a politician) places assets into a trust on terms that permit the trustees to buy and sell trust assets at their discretion without informing the beneficiary. This ensures that the politician holding public office need not declare an interest in certain assets because he or she does not know at any given time what assets are held by the trust.

However, if a shareholder of two football clubs were to place the shares of one club into what is termed a 'blind trust' but under which the trustees lack the power to dispose of those shares, all relevant parties (including the beneficial owner and club personnel) would remain aware at all times that the shareholder is the ultimate owner of the relevant club. Such arrangements may therefore fail to address the underlying concerns regarding conflicts of interest and public perception that the MCO Rules are designed to prevent.

Consistent enforcement is paramount

While excluding clubs from UEFA competitions for failing to comply with the MCO Rules by the March assessment date (months before the season's conclusion) may appear harsh to some, numerous clubs invest considerable effort to ensure compliance by the deadline and UEFA needs a reasonable period during which to assess compliance prior to its competitions commencing to ensure the integrity of its competitions. It would be inequitable for UEFA not to enforce breaches consistently across all clubs. The CAS rejected arguments alleging excessive formalism in UEFA's approach. Clubs in breach of the MCO Rules can and should expect to face significant consequences.

Be mindful of indicators in the UEFA Circular

The threshold for breach of the MCO Rules may be lower than clubs anticipate. Clubs and investors should be mindful of the indicators set out in the May 2024 UEFA Circular (and how they were applied by the Panel in CPFC) and consider how those indicators might apply to their MCO structure. These indicators will serve as a starting point for any assessment of decisive influence.

2025 brought a landmark summer in UEFA's enforcement of its MCO Rules. The three CAS awards discussed above confirm that UEFA and the CAS will rigorously apply the MCO Rules and

that technical compliance by the assessment deadline is non-negotiable. As MCO structures continue to proliferate across European football, so too does the risk of non-compliance. Clubs and investors should therefore adopt a proactive approach, ensuring full compliance well in advance of regulatory deadlines.

Whilst these CAS awards pertain to UEFA's MCO rules in football, it is worth noting that MCO structures and regulations exist in other sports, such as rugby union and Formula 1. The principles established in the decisions – particularly regarding the broad interpretation of 'involvement', the importance of perceived conflicts as opposed to actual conflicts, and the necessity of strict deadline compliance – is instructive for participants in other sports with similar rules. However, the efficacy of the rules remains subject to the regulator's appetite and resources for review, intervention, and monitoring of MCO structures where financial investment in the sport may be a more pressing priority.

What to look out for in *employment law* in 2026

What's happened in 2025?

The global sports sector, an industry reliant on international talent, flexible staffing and seasonal movement, faces a period of regulatory change. In 2025, we saw jurisdictions worldwide tightening immigration controls, enhancing tax compliance obligations, and grappling with workforce transformation driven by technological advancement and evolving ownership models influenced by increasing private equity investment that we expect to see develop into 2026.

Looking closer, 2025 brought some noteworthy legal developments for employers in the sports industry. In the UK, the government introduced measures making recruitment agencies (often used by clubs to source talent and event staff) and end clients jointly and severally liable for any unpaid Pay As You Earn ("PAYE") and Class 1 National Insurance ("NIC") on payments made to workers supplied via umbrella companies. Where no agency is involved, the responsibility falls directly to the end client business. This change, effective from April 2026, will fundamentally alter how sports organisations manage their contingent workforce.

At the same time, changes to UK immigration rules that took effect in July 2025 are set to reshape the landscape, especially with the overhaul of the Skilled Worker visa route, expected to impact many non-playing positions in sport.

All these regulatory developments are unfolding against a backdrop of continued private equity investment in sports franchises, particularly American Private Equity firms acquiring football clubs, and the rapid integration of AI across operational functions, with the sport AI industry already valued at more than \$2.2 billion and expected to soar to \$30 billion a year by 2032.



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Key developments and predictions for 2026

The ‘Americanisation’ of sport and long-term employment contracts

What happens when US private equity-led or backed acquisitions reshape UK football clubs (including Birmingham, Burnley and Ipswich)? In recent years, we’ve seen a distinctly American operating model take hold in UK elite sports, echoing similar shifts across European leagues like La Liga and Serie A. One of the most striking changes is the rise of lengthy player contracts, six, seven, even eight years, which were almost unheard of in UK football, becoming more common in 2025. This mirrors the US approach, especially in baseball, where longer contracts help manage financial and salary cap restrictions. Spain’s La Liga has also experimented with extended contracts, such as Athletic Bilbao’s notable 10-year contract with Nico Williams, but regulatory approaches still vary widely across countries.

The employment law implications are significant: longer-term contracts create complex termination scenarios, necessitating sophisticated contracts with detailed performance clauses and termination rights. We anticipate increased employment disputes over contract terminations as a result.

At the same time, this investment model often triggers significant restructuring within sports organisations, as clubs seek to balance the costs of attracting top talent. We have seen multiple recent high-profile redundancy exercises in the sports sector. For owners, these changes can also offer a faster route to recouping their investment.

Another trend worth watching is the further monetisation of club brands. Owners are exploring new revenue streams, such as partnerships with influencers and social media brands, and hosting brand promotion events. This shift brings more unconventional staffing models into play, including zero-hour contracts, an area where legislative changes are anticipated.

The impact of AI and automation on sports workforce

Recent events like the 2024 Paris Olympics and the 2025 US Open have showcased AI-generated commentary and video highlight packages, offering fans entirely new ways to engage. For instance, the 2024 Olympics introduced ‘Your Daily Olympic Recap on Peacock’, where an AI-generated clone of Al Michaels delivered personalised daily streaming recaps, drawing on 5,000 hours of coverage and creating up to 7 million unique combinations. What other possibilities could this unlock for fan engagement?

AI-generated content is opening up fresh, cost-effective opportunities for sports organisations, especially for non-major sports and smaller teams, allowing clubs to deliver unique fan experiences without needing to expand their workforce. But what does this mean for jobs in the sector? The shift is significant: as AI takes on more content creation and data analysis, traditional roles may be displaced, while the demand for technical skills to manage these systems grows.

For sports businesses, clubs and member bodies, the practical challenge is clear. Robust risk management procedures, covering both redundancy planning and targeted recruitment, will be essential to capitalise on AI’s potential.



Joint and several liability for PAYE and NIC in labour supply chains

In a significant move to tackle tax non-compliance in labour supply chains, the UK government announced plans to introduce joint and several liability for PAYE income tax and NICs, effective from 6 April 2026. The government aims to recover £2.85 billion in unpaid tax between 2025 and 2030, including £75 million in the first year, rising to £895 million once the legislation is fully implemented.

The Income Tax (Earnings and Pensions) Act 2003 will be amended so that recruitment agencies and end clients are both responsible for any PAYE obligations when an umbrella company forms part of a labour supply chain. This measure may impact the approximately 700,000 individuals who work through umbrella companies in the UK, with sports representing a significant proportion given its reliance on seasonal and event-based staffing for match-day operations, hospitality, and temporary support roles.

In contrast with this “gatekeeper” model placing compliance responsibility on agencies and end-clients, other jurisdictions address sports taxation differently, with several European countries, including Spain and Italy, for example imposing withholding tax obligations directly on clubs for player payments.

Skilled worker visa changes in the UK

The Skilled Worker visa route has been overhauled with sponsored roles now required to be at Regulated Qualifications Framework (“RQF”) level 6+ (i.e., graduate level), the Immigration Salary List (“ISL”) being abolished by December 2026, and a new Temporary Shortage List (“TSL”) in effect allowing certain roles to be sponsored, but only temporarily and under stricter conditions.

The general salary threshold for Skilled Worker experienced workers increased from £38,700 to £41,700 (an 8% increase), whilst the threshold for new entrants increased from £30,960 to £33,400. This presents a practical challenge for the sports sector, which relies on a ‘hidden workforce’, from match day staff to those supporting training facilities, tournaments and community programmes. As of Q1 2025, the UK counted around 197,500 sports and fitness workers, many of whom do not meet the new RQF level 6 requirement.

Some roles, such as groundsmen and greenkeepers, are no longer eligible for sponsorship under the new regime. Technical roles in motorsports can still be sponsored under the TSL, but with important caveats: they must meet the higher salary threshold, no dependents allowed, and industry access could be revoked by December 2026. Sports organisations should expect a period of realignment to come whilst they assess their international workforce.

What's the impact on sports organisations?

Sports organisations face a complex compliance landscape that demands swift, strategic action.

Labour supply chain management: With new PAYE and NIC rules coming into force from 6 April 2026, organisations must quickly review where umbrella companies are used, tighten due diligence and clarify who manages these relationships. Steps may include requesting written confirmation that umbrella companies are operating PAYE appropriately for all workers and obtaining corroborating evidence, such as Real Time Information submissions to HMRC, payslips, or payment schedules.

For clubs and governing bodies, this means reviewing and auditing current use of umbrella companies for scouting, medical, coaching, and administrative roles, reassessing overseas recruitment pipelines, especially where payment structures are complex, and considering bringing more roles in-house to retain control over PAYE and NIC obligations. They should also ensure that HR, procurement, finance, and legal functions are aligned and fully apprised of their respective obligations under the new framework, promote organisation-wide awareness of compliance requirements, and train relevant stakeholders.

Immigration compliance: Review and adjust salary benchmarks to ensure salaries align with new thresholds, especially for extension applications or internal promotions, and re-evaluate TSL roles by considering sponsoring affected employees for the maximum permitted term now, in case sponsorship is revoked from 2026. Employers holding sponsor licences should audit every sponsored role linked to stadium operations, events, facilities, and community programmes, and

if a role cannot be redesigned to meet RQF level 6, consider whether it could fall under the TSL and, if so, prepare a robust workforce plan showing local advertising and outreach, training or upskilling steps, and evidence why domestic supply remains insufficient for the role.

Clubs should conduct a comprehensive review of role profiles to identify opportunities to upskill positions to meet the RQF Level 6 requirement, which may involve restructuring job descriptions to incorporate graduate-level responsibilities or combining functions to create more senior positions. It is critical that senior leadership, HR teams, and operational managers are made aware of the potential recruitment challenges arising from these changes, particularly for essential support roles such as groundsmen, greenkeepers, and technical staff, enabling organisations to develop realistic succession planning and allocate sufficient resources for domestic recruitment and training initiatives.

Workforce planning and AI integration: Sports businesses, clubs and member bodies must have robust risk management procedures in place if they are going to capitalise on AI in their operations, with sporting bodies looking to employ AI without proper processes in place at increased risk of misuse of data and regulatory compliance issues. Conduct comprehensive skills audits to identify AI displacement risks and upskilling requirements. Develop transparent consultation frameworks for technology-driven workforce changes and invest in retraining programmes to redeploy affected staff. Ensure AI deployment in recruitment and performance management doesn't create discriminatory outcomes and complies with data protection obligations.

PE investment considerations: For organisations considering PE investment or currently PE-backed, ensure employment contracts reflect the performance-driven expectations of the 'American' operating model whilst maintaining statutory compliance with employment law. The trend towards longer contracts requires careful drafting. Anticipate increased scrutiny of restructuring decisions and ensure robust documentation of business rationale for workforce changes. Consider the cultural shift required to implement 'American-style' performance management within employment law constraints. As for the diversification of brand monetisation, sports employers should consider their staffing models and ensure they are compliant with the latest rules on "gig economy" workers and/or zero hours contract workers. Where sports entities are considering restructuring the business, prior thought should be given to redundancy processes and obligations to consult collectively (in certain cases). Failure to do so properly may result in a protective (monetary) award against it, which is due to be doubled to 180 days' pay per affected employee under the UK Employment Rights Bill.

The convergence of these developments demands a holistic, proactive approach to employment law compliance. Sports organisations that act now to strengthen their governance frameworks, enhance due diligence processes, invest in workforce development, and adapt to the shift in ownership structures will be best positioned to navigate the evolving regulatory landscape whilst maintaining operational effectiveness.

Competition developments in the sport sector

What's happened in 2025?

The intersection of sports governance and competition law has continued to face judicial scrutiny, with competition authorities and courts aiming to balance their role in regulating sport governing bodies' economic activities with the unique social and cultural role sport plays in the UK and across Europe.

The past year has seen significant developments both in EU and UK competition law concerning sports. The Football Governance Act (FGA) received Royal Assent in 2025, establishing the Independent Football Regulator (IFR), following a fan-led review of football governance in the UK. The European Commission (EC) launched dawn raids on ski equipment manufacturing facilities in Austria in October 2025, investigating alleged cartel behaviour under Article 101 TFEU. Meanwhile, the fallout from the Court of Justice of the European Union's (CJEU) 'Sports Trilogy' judgments continues to reverberate, with Advocate General (AG) Emiliou's opinions in *RCC Sports*, *ROGON* and *Tondela* published in May, potentially narrowing the scope of restrictions deemed anticompetitive 'by object'. Private enforcement in this space continues to be active, with new litigation sprouting on the back of the CJEU's judgment in *Superleague*.



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Key developments and predictions for 2026

The IFR

The FGA marks a major shift in English football, introducing a statutory regime, alongside existing self-regulation, and establishing the IFR whose primary mandate is to safeguard the financial resilience and heritage of English football. The Act embeds strong competition law elements, most notably by granting appeal rights to the Competition Appeals Tribunal (CAT), whose open-justice framework is expected to influence how governance disputes are addressed in football.

Since receiving Royal Assent in 2025, the IFR has begun consulting on tougher ownership tests and an enforcement toolkit ahead of full operation in 2026-27. Its licensing regime will require clubs to demonstrate financial soundness and proper governance, with discretionary conditions allowing intervention in debt, liquidity and internal controls. Owners and officers will face enhanced suitability tests, including scrutiny of past financial failures, with forced divestment at the stricter end of the sanctioning powers available for those deemed unfit.

The Act gives the IFR powers not dissimilar to the Competition and Markets Authority, by granting it the ability to impose behavioural and structural remedies through discretionary licence conditions, and the ability to issue significant financial penalties up to a percentage of turnover. This is interesting given the IFR has not been awarded concurrent competition law powers.

At the same time, the Act leaves existing contractual regimes and sporting sanctions with the leagues, creating a parallel system that may give rise to tensions where competition-style enforcement meets collective decision-making by economically interdependent clubs.

Ski raids

The EC has intensified its scrutiny of the winter sports industry, conducting unannounced inspections (dawn raids) at three Austrian ski equipment facilities in October 2025, targeting suspected cartel behaviour.

Commission officials, accompanied by counterparts from the relevant EU national competition authority (notably not including the UK's CMA), executed the dawn raids on the basis of suspected violations of Article 101 TFEU. The investigation centres on whether the companies collaborated to restrict competition or manipulate market conditions through anticompetitive agreements or practices.

While the inspections represent a preliminary step and do not establish guilt or prejudice the investigation's outcomes, the Commission would have secured sufficient evidence to warrant such action. All targeted companies have confirmed that they are fully cooperating with the authorities, though there is no legal deadline for completing these inquiries, with duration depending on the complexity of each case and the extent of party cooperation.

Superleague and beyond

Following the 'Sports Trilogy' of last year (*Superleague*, *International Skating Union and Royal Antwerp*) the next 'trilogy' of competition law cases concerning sport is on the horizon, with Advocate General (AG) Emiliou's opinions in *RCC Sports*, *ROGON* and *Tondela* having been published in May this year. While the CJEU is not required to follow the AG's Opinions (this being underlined following AG Rantos' Opinions in the original Sports Trilogy which were not followed), it would be relatively unsurprising given these Opinions seemingly endorse much of the CJEU's case law in the Sports Trilogy judgments. If AG Emiliou's Opinions are followed, this will be of particular interest to sport governing bodies as he opined that no-poach agreements, fee caps and licensing requirements do not necessarily constitute restrictions of competition *by object*. In particular, it will be interesting to see if the CJEU continues to endorse a narrow view of any 'sporting exception' as they did in *Superleague*, in situations where sport governing body rules affect a parameter of competition (e.g. raising barriers to entry).

In the UK, CAT judges have cited *Superleague* even in cases not concerning sport governing bodies (*Up and Running v Deckers 2024*), indicating EU developments in the sports sector are very likely to continue influencing UK cases.

Apart from the upcoming judgments in *RCC Sports*, *ROGON* and *Tondela*, the fallout from *Superleague* continues to play on, with Real Madrid recently filing damages claim against UEFA for 4.5 billion euros and A22 Sports Management (who supported discussions behind Superleague) also filing antitrust damages claim against UEFA.

What's the impact on sports organisations?

Sports organisations and businesses operating in the sector should prepare for heightened regulatory scrutiny across multiple jurisdictions.

In the UK, football club owners and governing bodies must now strengthen governance, compliance and financial planning while closely monitoring emerging licence conditions and regulatory guidance to navigate an increasingly competition-law informed regulatory landscape.

Businesses in the ski equipment and winter sports sector, indeed in all analogous equipment sectors, particularly those with European supply chains, should carefully review collaboration arrangements with competitors to ensure compliance with Article 101 TFEU and UK competition law. The EC's willingness to conduct dawn raids signals increased enforcement appetite, and UK businesses may face CMA scrutiny given renewed information-sharing mechanisms.

More broadly, sport governing bodies should monitor the upcoming CJEU judgments in *RCC Sports*, *ROGON* and *Tondela*, which may clarify the boundaries of permissible regulation. While the sporting exception has not been relegated altogether, sport governing bodies should carefully assess the content, legal and economic context and objective of rules affecting a parameter of competition – to ensure such rules can be justified as proportionate and necessary for legitimate sporting objectives.

Sport is changing faster than ever. From shifting fan behaviour and fast-moving tech innovation, to increasingly complex regulation, growing athlete rights, and the rise of new investment models - the industry is being reshaped on every front. Whether you're responding to disruptive change or driving it, we understand the realities of the modern sports industry.

For decades, we've helped our clients across sport navigate transformation, manage risk, and unlock new commercial opportunity. With our extensive knowledge of the world of sport, we can help you make sense of what's happening now and prepare for what comes next. We look beyond the issue in front of you to understand the wider forces at play, looking at how they shape your strategy, your risks, and your competitive edge.

Our dedicated Sports team works across a vast range of stakeholders: regulators, clubs, leagues, athletes, sponsors, broadcasters, tech innovators and investors. Coupled with our international reach and full-service capability, we bring together insight from competition, commercial, corporate, data, employment, dispute and other specialists to work with you to solve your challenges from every angle.

Whether you're navigating new governance standards, tackling emerging commercial pressures, or exploring innovative models for growth, we'll help you cut through complexity and find solutions that work in the real world.

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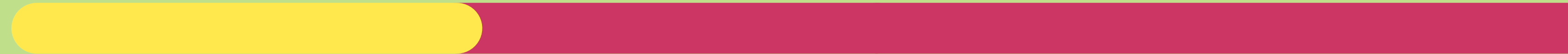
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