

TVSPORTS MARKETS

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PREMIER LEAGUE

Africa continues good start but picture less clear in Singapore

By Kevin McCullagh and Dan Horlock

The English Premier League has secured a rights fee increase of just over 20 per cent in sub-Saharan Africa, a market which has been problematic for the league in past cycles.

Pan-regional pay-television sports broadcaster SuperSport is understood to be paying just over \$113 million (€87 million) per season over three seasons, from 2013-14 to 2015-16. The rights in the region generated \$95 million per season in the current cycle, from 2010-11 to 2012-13. The deal covers pay-television rights for all matches in South Africa, Nigeria, and the rest of sub-Saharan Africa. The league will sell free-to-air rights in the region later.

The deal continued a good start to the Premier League's round of international rights sales for the new cycle. Africa was the second region after the Nordics in which the league has sold rights for the new period. The Nordic deals are understood to have also delivered an increase, with some media reporting that

revenue in the region is up 30 per cent compared to the current cycle, in which it earns about €40 million per season.

The league this week also agreed a new deal in Singapore, where it sold non-exclusive pay-television rights to pay-television operator SingTel. The fee is understood to be less than the \$80 million per season which SingTel pays in its current deal but the league appears to have avoided the disaster that some had predicted, in what has become a very tough market (*TV Sports Markets* 16:17). As one source put it, "doing a deal this early in the right sales process suggests a positive outcome. The league could have waited but didn't."

The overall picture for the market will not become clear until rival pay-television operator StarHub decides whether it too wants to acquire non-exclusive rights and how much it is prepared to pay. Cross-carriage regulation, introduced by the government to cool rights prices after the

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TV EUROPE

Crisis forcing rights re-think

By Frank Dunne and Dan Horlock

The speed at which the economic recession is deepening in the 'PIGS' countries of southern Europe – Portugal, Italy, Greece and Spain – is turning the continent into a two-speed sports-rights market, with values holding or increasing in the north but stagnating or falling in the south.

The impact of the crisis is being felt mostly keenly in free-to-air television, where public funding is being squeezed

and advertising income is dropping. Public-service broadcasters such as Italy's Rai, Spain's TVE, Greece's ERT and Portugal's RTP have been dropping some rights properties and bidding much lower than before, if at all, for others.

One leading sports rights-holder said this week that it currently viewed Spain and Italy – two of Europe's biggest television markets – as "disastrous."

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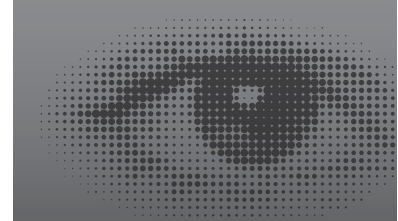
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FASTRACK

BT Vision brings UK market back to life

Sports-rights fees in the UK are on the way up again as emerging pay-television broadcaster BT Vision scrambles for content for its new sports channels. Big increases have been paid this month in deals for cricket and international league football.

Strong bidding by BT pushed rival pay-television operator BSkyB to pay a 213-per-cent increase to hold on to the rights for Australian cricket. Sky will pay about £50 million (€62.5 million/\$80.6 million) for the four years from 2012-13 to 2015-16. It paid £16 million in the previous four-year deal, which ended this year. The deal covers rights for national team matches and domestic competitions played in Australia.

Sky won the deal after several rounds of bidding. BT's interest in the rights was driven by the popularity of the Ashes Test cricket series between the England and Australia national teams.

Sky also outbid BT to renew its rights deal with Cricket South Africa, the governing body of cricket in South Africa. Sky will pay £24 million over eight years, or £3 million per year, in the period 2012-13 to 2019-20. It paid £3 million per year in the previous deal, which covered the four years from 2008-09 to 2011-12.

The deal covers rights for national team matches and domestic competitions played in South Africa. It doesn't include content as compelling for the UK market as the Ashes, and consequently the bidding was not as strong.

Sky is understood to have been preparing to drive down the cost of the rights to both Australian and South African cricket. It considered them over-priced, with the value having been driven up by competition from Setanta Sports, the last pay-television broadcaster to seriously challenge it in

the UK rights market.

The IMG Media agency brokered both deals, on behalf of governing bodies Cricket Australia and Cricket South Africa respectively. Each governing body's rights were sold in a separate sales process.

BT paid between £3 million and £3.5 million per year for rights for Italian Serie A football, an increase of at least 200 per cent on the £1 million sports broadcaster ESPN is paying in a one-season deal for 2012-13. BT agreed a deal for at least two seasons, 2013-14 and 2014-15, with the MP & Silva agency covering rights for four football leagues: the Italian Serie A, the French Ligue 1, US Major League Soccer and the Brazilian Campeonato Série A. The deal is understood to be worth a total of just under £5 million per year. The Ligue 1 rights are understood to account for about £1 million per season, and the rights for MLS and the Brazilian league to account for the balance. ■

Taylor to join Team and CAA Eleven

David Taylor, the chief executive of Uefa Events, Uefa's commercial arm, is set to take up a post on the boards of the CAA Eleven and Team Marketing agencies. The move is part of European football's governing body's strategy of bringing the sale of commercial rights to national team games into line with the sale of the rights to its club competition.

The switch follows the appointment of CAA Eleven this month as Uefa's sales agency for the commercial rights to the matches of its 53 member federations (*TV Sports Markets* 16:17). CAA Eleven will sell the media rights to the European Championship and World Cup qualifier matches of Uefa's 53 member federations and all unsold commercial rights for Euro 2016. Team sells the rights to the Champions League and the Europa League.

Taylor's contract with Uefa Events expires in December and with so much

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of the division's commercial work being passed over to CAA Eleven, Uefa felt that the role had become redundant. Uefa will not appoint a new chief executive to Uefa Events. Marketing director Guy-Laurent Epstein and operations director Martin Kallen will now report directly to Gianni Infantino, Uefa's general secretary.

Uefa's control over the two agencies will be strengthened by the appointment of two of its executive committee members to their boards. Michael van Praag, president of the Dutch football federation, will sit on the board of Team, while Marios Lefkaritis, honorary president of the Cypriot federation, will join CAA Eleven.

The appointments reflect the different activities of the two agencies. Van Praag is very much a 'club man,' having been chairman of Eredivisie club Ajax in the 1990s. Lefkaritis is an 'association man,' having worked for the Cypriot federation since 1985. He has been a Uefa exco member since 2002 and is currently treasurer.

One senior football insider said that while the Taylor switch was "an elegant solution" for Uefa in the circumstances, the appointment of the two board members was puzzling. "It is remarkable that Uefa has assumed a formal position in both companies, as the single client, but without equity in the companies. I do not see a practical benefit of these positions. Uefa can exercise control and supervision in many other ways. It will also discourage any other company from thinking about business opportunities with Uefa."

Uefa was still in talks with CAA Eleven this week about which Uefa Events staff will leave to join the agency. Between 20 and 30 Uefa members of staff are likely to be affected by handing so much of the division's business over to CAA Eleven, between those changing company, those moving internally within Uefa and those being made redundant. ■

PREMIER LEAGUE

Africa provides increase as league plays it safe

Continued from page 1 ►

last round of Premier League deals, and StarHub's apparent withdrawal from the sports-rights market led many to predict a massive drop in income for the league. Sources close to the deal say that this has not been the case. One local expert said, however, that if SingTel's fee was anywhere close to what it paid last time, or if the league ended up earning more money overall by doing two non-exclusive deals, the outcome would make

the government "look stupid."

No tender

In what appears to confirm a shift away from the league's traditional policy of giving every bidder an equal shot at the rights, the deals in Africa and Singapore were done without a formal tender.

There are two possible reasons why the league did not tender the rights in Africa. First, SuperSport is a reliable long-term partner of the league and has in each of the last two cycles bailed it out when deals with other partners have gone sour. Pay-television operator GTV dropped its pan-regional rights midway through the 2007-08 to 2009-10 cycle after going bankrupt. In the last cycle, the pay-television operator that acquired the rights in Nigeria, HiTV, had to drop them before the first season after being unable

to meet rights fee instalments. In both instances, SuperSport stepped in to buy the dropped rights and paid the Premier League the equivalent of what the original buyer had promised.

The second possible explanation is a lack of credible alternative buyers. The one company thought likely to challenge SuperSport was Chinese pay-television operator StarTimes. The company bid for the rights last time and is understood to have been eager to bid for the rights for the new cycle.

StarTimes is regarded within the industry as relatively young and inexperienced in sports broadcasting. Given the history of African broadcasters collapsing under the weight of the rights fee commitment required for the Premier League, the league may have decided that it was not yet a serious contender. ■

TV EUROPE

Crisis hitting state channels' sports hopes

Continued from page 1 ►

Another said: "If we can get any money at all out of Greece it is a bonus."

A senior executive at a major sports rights agency said that many free-to-air broadcasters, both public service and commercial, had been slow to understand the impact of a crisis which has its roots in the financial meltdown of 2008.

"Many are only now acknowledging that there has been a serious structural impact and that they can't keep paying higher rights prices," he said. "When you cut the head off a chicken it carries on running around for a while but eventually runs out of energy. That's where many free-to-air broadcasters are now – there's finally a realisation that there have to be deep cuts."

It is not just second- or third-tier rights which are being affected. Major events like the Olympic Games, the Fifa World Cup, and the Uefa European Championship, which have traditionally

been shown by public-service broadcasters, are also likely to be affected. Investments in flagship sports properties are also being questioned.

TVE this week lost out on the rights to Euroleague basketball (see separate story), while the Spanish national football team's World Cup qualifier against Belarus tonight was at risk of not being televised as *TV Sports Markets* went to press because no free-to-air broadcaster was prepared to pay the €1.5 million (\$1.95 million) rights fee (see Sports Clips). In Italy, Rai is entering tough talks with RCS Sport to renew the rights to cycling's Giro d'Italia, hoping to reduce its fees, according to media reports (see separate story). In Greece, the domestic basketball league was forced to accept a big cut in its rights fees from ERT.

Few economists are predicting any improvement. The Spanish government will reduce TVE's budget from €1 billion to €941.6 million for 2013. ERT faces a 25-per-cent cut in its government financing in 2013, from about €300 million per year to about €225 million per year, as the government diverts resources to a state energy company. RTP's board has submitted a plan to the government to reduce an already heavily cut annual budget by a further €55 million to €180 million. Rai,

which is funded half by licence fee and half through advertising, lost €129 million in the first six months of the year, including a €72-million drop in advertising income year on year.

All four of the broadcasters are members of the European Broadcasting Union, the consortium of public-service broadcasters. Their predicament would appear to point to a weakening of the EBU's overall bargaining position in the rights market. But this is not so, an executive at one EBU broadcaster argued. "TVE and Rai have been a bit off the pace for the last few years in terms of EBU bids so there's no radical change there and ERT has never been particularly active in EBU bids," he said.

TVE and Rai struggling

Spain's TVE is the broadcaster which has been making the most swingeing cuts in sports-rights spending and hasn't finished yet. TVE president, Leopoldo Gonzalez-Echenique, said this week that the broadcaster would offer less for the rights to the Spanish national team home and friendly football matches in the next contract. TVE's current five-year deal, worth a reported €43 million per year, expires at the end of 2012.

TVE tried, and failed, to share the rights and costs of the 2012 Olympic

Games with rival commercial broadcasters. The broadcaster spent €60 million on the 2010 and 2012 Olympic Games as part of the original European Broadcasting Union deal, of which around 95 per cent was for the 2012 Games.

The broadcaster is understood to have asked Uefa, unsuccessfully, for a discount on its Champions League deal. In February 2011, it outbid rival commercial broadcasters for the rights, paying €30 million per season, from 2012-13 to 2014-15.

The broadcaster chose not to renew its deal for the tennis French Open when the rights were offered on a market-by-market basis this year. It had been paying €4.6 million per year for the rights as part of an EBU deal. This followed the pattern of last year's athletics World Championships in Daegu, Korea. TVE refused to increase a very low offer made early in the sales process when the property switched from the EBU to the

open market. The broadcaster also recently pulled out of the EBU's unsuccessful bid for the Union Cycliste Internationale rights from 2013 to 2016 (*TV Sports Markets* 16:17).

TVE also lost the rights to motorcycling's MotoGP world championship, one of the key sports-rights properties in Spain. Commercial broadcaster Telecinco paid about €30 million per season in a three-year deal, from 2012 to 2014. TVE had previously paid about €20 million per season.

In one deal which was renewed this year, the fee was cut. TVE signed a three-year deal, from 2012-13 to 2015-16, for the domestic basketball league, the ACB, paying about €2.5 million per year in rights fees and advertising – 50 per cent less than in the previous deal.

Italian state broadcaster Rai recently pulled out of two big EBU football bids, the consortium's successful €315 million bid for the World Cups of 2018 and 2022

and its unsuccessful bid for the rights to Uefa's newly-centralised European Qualifiers package. It is expected to push for a big discount on the €350 million it paid for the 2010 and 2014 World Cups, which some independent experts believe to have been a massive overpayment.

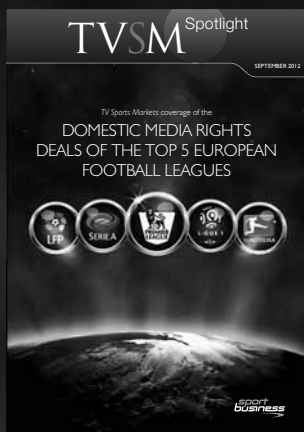
The broadcaster was also excluded from the EBU's successful €614 million bid for the Olympic Games of 2010 and 2012, because it refused to meet the International Olympic Committee's valuation of the Italian rights.

The state broadcaster also gave up its traditional position as the first free-to-air broadcaster to show highlights of Sunday Serie A football matches. Sky Italia's free-to-air channel Cielo acquired the rights for a mere €3.2 million per season.

More damagingly, the broadcaster this year lost the live rights to Formula One motor racing to Sky from next season, with Sky paying around 35 per cent more than the €40 million per season that Rai had been paying. ■

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BASKETBALL

TVE loses out, ERT holds on, as talks go to tip-off

By Frank Dunne

Basketball's Euroleague is thought to have been forced to accept a significant reduction in rights fee in Spain for the matches of Real Madrid when the digital-terrestrial channel Marca TV replaced state broadcaster TVE in a last-minute deal this week. The season tipped off yesterday.

Spain is by far the league's most important market and the TVE deal had been the most valuable of the four which it holds in the country. In the four-year cycle which has just ended, from 2008-09 to 2011-12, TVE paid €2 million (\$2.6 million) per year to show the live matches of Real Madrid on either its La 2 or Teledeporte channel. The crisis-hit broadcaster made a much lower offer for the next three seasons which was rejected by the Euroleague. The league will also be losing viewers with the new deal. Marca has an average audience share of about one per cent. The channel is owned by Unidad Editorial, a joint venture between the Mediapro agency and Veo Televisión.

The league had continued to negotiate with the state broadcaster but also had three rival offers: the bid from Marca TV; one from Mediaset, which owns the Telecinco and Cuatro channels; and one from Grupo Planeta, which owns the Antena 3 and La Sexta channels.

The league has so far agreed two three-year regional deals in Spain and was expected to conclude a third late this week, each at a slightly lower value than in the previous cycle.

It has renewed with regional public-service broadcaster TV3 in Catalunya, for Barcelona Regal matches. In Andalusia, it replaced regional public-service broadcaster Canal Sur with Marca TV, for the matches of Unicaja Malaga. It is close to finalising a deal with Basque regional public-service broadcaster ETB for the matches of Caja Laboral Vitoria. The previous regional deals, from 2008-09 to 2011-12, are each thought to have been

worth about €1.25 million per season.

Other deals

The league also agreed deals in Israel and Italy. The deal in Israel with commercial broadcaster Channel 10 is thought to be worth between €2 million and €3 million per season, a high value for a market with only one competing team in Maccabi Electra Tel Aviv. The new deal is for one season with an option for a further two. In the first year, the rights fee is slightly lower than last season but if the option is taken up, the fee will be higher in years two and three than it was last year. Channel 10 will show all of the games involving Maccabi during the 2012-13 season, up to 31 games over the season, depending on how far the team progresses.

The new three-year deal in Italy with digital sports channel Sportitalia has a minimum guarantee and a series of bonus payments according to how far Italian teams progress. The total fee last season, the last year of the previous three-year deal, was just below €1 million.

The new deal has a similar structure but there are higher bonus payments plus new bonus payments linked to audience shares. With two of the three competing Italian clubs, Montepashì Siena and EA7 Emporio Armani Milan, considered highly competitive, the league expects the new deal to be more lucrative. The broadcaster will show about 100 live games plus news footage across three channels: Sportitalia, Sportitalia 2 and Sportitalia 24.

The deal looks like a good one for the league considering the lack of competition for live rights. Pay-television broadcaster Sky Italia, which had shown the Euroleague for nine years before dropping it in the last cycle, told the league that it was interested in the new game scheduled for Friday night from this season but that it had no budget, either for rights or for production. The broadcaster is focusing investments on properties which drive subscriptions.

Greek security

The impact of the current economic crisis on the league would almost certainly have been greater had it not signed a six-year deal in Greece with the Asset Ogilvy agency before the worst of crisis was felt in the country. However, it has twice had to

accept a downward renegotiation with the agency, as broadcasters struggled with the level of the fees.

Asset first agreed a four-year deal, from 2010-11 to 2013-14, worth €5 million per season. In October 2010, the league accepted a reduction in the fee to €4.3 million per season, and agreed to extend the deal by two years, to the end of the 2015-16 season. The fee is understood to have been renegotiated downwards at least once since then, in line with a reduced fee from state broadcaster ERT and pay-television broadcaster Nova, the two broadcasters which share coverage.

A source close to the league said: "The broadcasters are making sacrifices to keep the Euroleague contract. So the league has been happy to sit down with them and Asset and find a mutually satisfactory solution, with a small discount for the broadcasters."

Greek league takes less

The top Greek basketball league, the A1 League, will be about 25 per cent worse off this season, under last-minute deals agreed this week with state broadcaster ERT which enabled the championship to get under way, having been postponed since the beginning of the month due to the lack of a deal.

The clubs will earn about €3.6 million (\$4.7 million) this season, compared to the €4.5 million they earned last season.

ERT agreed two separate one-season deals. The first, for the two top clubs, Olympiakos and Panathinaikos, is worth about €2 million. It was agreed with the Asset Ogilvy agency, which held the two clubs' rights in the second year of a two-year deal. The second, with the other 12 league clubs, was for €1.3 million in cash, plus airtime worth about €300,000.

ERT faced no competition because the only matches of real interest in the league are those between the two top teams. When either side plays one of the other 12 teams, the result is usually a victory by a wide margin. As one local industry expert put it, "you can't even compare it to the Spanish football league, where two clubs dominate completely," he said. "At least there you have the two best players in the world, in [Lionel] Messi and [Cristiano] Ronaldo. In Greece, we don't have that." ■

TV DENMARK

MTG bid for Danish dominance under scrutiny

By Kevin McCullagh

The success of a major play by pan-Nordic television operator Modern Times Group to strengthen its position in the Danish sports-rights market lies this week in the hands of the local competition authority.

MTG has agreed a deal to buy the 50 per cent of pay-television sports broadcaster TV2 Sport that it does not currently own. TV2 Sport, which has the strongest sports-rights portfolio in the market, is currently owned 50:50 by MTG and state-owned basic-tier pay-television broadcaster TV2.

TV2 has accepted MTG's offer, and the transaction is now pending approval by the Konkurrencestyrelsen, the Danish competition authority. The process is expected to take three to six months. A conditional approval for the bid is thought the most likely result of the approval process. The extent of the conditions would play a big role in determining the future shape of the Danish television market.

The deal would increase MTG's strength in the market by giving it more control over TV2 Sport's rights, brand, personnel, infrastructure and revenues. Although MTG and TV2 each owns 50 per cent of the broadcaster at present, conditions laid down by the competition authority when TV2 Sport was formed in 2007 mean that they have limited control over it.

The conditions included that TV2 Sport be run as a separate business, with no TV2 or MTG members on its board, and with its own staff and facilities. TV2 Sport, MTG and TV2 were also not allowed to bid jointly for sports rights.

Depending on the amount of control the competition authority allows MTG to take, the media group could potentially:

- strengthen its other channels, which include basic-tier channels TV3, TV3+ and TV3 Puls, by sharing TV2 Sport's rights with them;
- increase profits by getting rid of

duplicated resources across TV2 Sport and its existing Danish channels, such as production facilities;

- leverage up the value of its channel distribution agreements with Danish pay-television platforms by selling TV2 Sport to them alongside its existing channels.

The top rights in TV2 Sport's portfolio are football from the Danish domestic league in 2012-13 to 2014-15, the English Premier League from 2010-11 to 2012-13, and the Uefa Champions League in 2012-13 to 2014-15. TV2 Sport also has rights for NFL American football, Danish domestic handball competitions, and NHL and Danish domestic ice hockey.

MTG's main challengers in Denmark are basic-tier broadcaster SBS, pan-Nordic media group Bonnier, and TV2. SBS's channels have been gaining audience share at MTG's expense over the last couple of years. Their growth was helped by its acquisition of live English Premier League rights in the 2010-11 to 2012-13 cycle.

Bonnier has launched two new channels strongly reliant on sport in Denmark since 2009 in order to try to crack a market in which it has traditionally been weak. It has not yet been successful, partly because it has lacked sports content as strong as that on TV2 Sport, and the channels are understood to be loss-making.

Financial problems at TV2 mean that it is not as strong a competitor in the sports rights market as it was around the time TV2 Sport was launched.

TV2 backs out

TV2 is understood to have initiated the takeover. The state-owned broadcaster, whose management has changed since TV2 Sport was founded, was unsatisfied with its lack of control over TV2 Sport and saw little strategic value in its stake in the channel.

TV2 and MTG had set up TV2 Sport in 2007 in order to preserve their strong positions in the Danish market. They felt threatened at the time by several pan-Nordic companies which were considering entering the Danish broadcasting market. These companies included Bonnier, Norwegian telecommunications company Telenor, and Norwegian media group Schibsted.

The move appears to have worked, as interest from Telenor and Schibsted has subsided, and Bonnier has struggled to build a strong business in the country.

When TV2 made the first offer for MTG's 50-per-cent stake, MTG responded with a much higher offer for TV2's stake, which was accepted. The deal includes cash plus rights for the European Handball Championships in 2016 and 2018. MTG acquired these rights on a pan-Scandinavia basis in September, surprising TV2, which had been the long-term rights-holder in Denmark (*TV Sports Markets* 16:9). ■

TV ROMANIA

Champions League drop sign of shrinking market

By Kevin McCullagh

The value of Champions League rights in Romania has dropped by nearly 60 per cent in the 2012-13 to 2014-15 cycle, a reflection of the radical change in a market that was buoyant until the last couple of years.

European football's governing body will earn between €7 million (\$9 million) and €7.5 million per season in the new cycle, compared to €17.3 million per season in the previous cycle, 2009-10 to 2011-12.

Uefa this week agreed a deal with public-service broadcaster TVR worth between €1 million and €1.5 million per season for free-to-air coverage of the second-choice match each Tuesday. The rest of the rights were sold to pay-television operators RCS-RDS and Romtelecom in a joint deal in April worth €6 million per season.

TVR previously paid €12.3 million per season for two live matches per week, and Romtelecom paid €5 million per season for live rights for the remaining matches.

In another sign of the difficulties in the market, Uefa has been forced to execute a bank guarantee covering public-service broadcaster TVR's deal for Champions League rights in the previous cycle. TVR, which is facing massive government-

enforced budget cuts after years of overspending, still owed €9 million in rights fees from the previous deal.

Market correction

The rights-fee drop represents a market correction. The value increased by 325 per cent the last time the rights were sold, in 2008. It was a time of intense competition in a rapidly growing pay-television market, in which nine broadcasters were vying for sports rights.

The pay-television market has since consolidated. Boom and Telesport, two of the broadcasters which had competed for top rights such as the Champions League, went bust in 2010 and 2011 respectively.

The two other big factors in the fee drop were the creation of a strategic alliance between RCS-RDS and Romtelecom – the market's leading pay-television operators – and the financial troubles at TVR.

RCS-RDS, which operates the Digi Sport-branded channels, and Romtelecom, which operates the Dolce Sport channel, have started to bid jointly for sport. Uefa has been the first major rights-holder on the receiving end of such bids, with the two broadcasters first acquiring the Champions League rights jointly, then agreeing a joint deal for the Europa League last month. Uefa is understood to have also taken a cut in the value of its Europa League rights.

TVR, previously the strongest free-to-air sports broadcaster, has hit a wall financially in the last six months. Overspending and the effect of the European economic crisis have led the Romanian government to force upon it a massive restructure. Budget cuts are set to bring job losses for about 900 of the broadcaster's 2,300 staff.

TVR is understood to have been the only broadcaster to present what Uefa deemed an acceptable offer for the free-to-air Champions League rights. The appetite of other broadcasters for the rights was curbed by disappointing performances by Romanian teams in the last three-year cycle, the impact of the economic crisis on the advertising market and the popularity of cheaper programming genres, such as reality TV shows. ■

CYCLING

Rai has second chance to be part of new RCS vision

By Frank Dunne

Italian public-service broadcaster Rai and RCS Sport, the organiser and commercial rights-holder for the Giro d'Italia stage race, have begun what are understood to be complex and difficult talks about a renewal of Rai's domestic rights deal.

The value of the rights is understood to be an issue, with Rai reported to be looking for a reduction in rights fees. A bigger stumbling block, however, may be RCS's desire to improve production standards and secure greater levels of exposure.

The Giro is one of Rai's flagship sports properties and the broadcaster feels that it does a good job of broadcasting the race. Rai's commercial arm, Rai Trade, also felt that it did a good job of distributing the global rights to the Giro but RCS Sport unceremoniously replaced it earlier this year with the IMG Media agency, in an eight-year deal from 2013 to 2020 (*TV Sports Markets* 16:12).

One insider said this week: "RCS is setting out a new vision for the Giro, which involves higher production standards. The question is not so much whether Rai wants to pay more or less but whether it wants to be a part of that vision."

For RCS, Rai is very much the partner of choice for the domestic coverage. However, the company's perspective is a global one and it is not prepared, insiders say, to compromise on its plans to expand coverage internationally by having a television product which falls short of its ambitions.

Well-placed sources say that over the last few years RCS has had some concerns about the level of coverage, in particular the amount of coverage which is pushed onto Rai's digital sports channels from the main free-to-air channels. It also believes that the television production has not kept pace with technological developments.

"It does not require a complete overhaul," one source said. "The fundamentals are in place. But there are

ways of improving the viewer experience so that viewers feel closer, they can see and hear the event better, and there are some technical issues about the compression and distribution of the signal which need to be addressed."

In its existing four-year deal, from 2009-12, Rai is thought to pay about €7 million (\$9.1 million) per season in rights fees, split roughly evenly between domestic and international rights, and a further €3 million per season in production costs. One option for RCS would be to carve the host production rights out of the deal and sell Rai Italian broadcast rights only, outsourcing the production to a third party. ■

FOOTBALL SPAIN

Free-to-air rights fee falls by 75% in line with audiences

By Dan Horlock

The value of the free-to-air live rights to the Spanish Liga fell by around 75 per cent in the deal with Marca TV signed earlier this month.

The digital-terrestrial channel, which is owned by the joint venture Unidad Editorial and managed by the Mediapro agency, acquired the exclusive rights to one live free-to-air Liga match per week for three years, from 2012-13 to 2014-15, in a deal understood to be worth €32 million (\$41 million) to €35 million per season. Marca acquired the rights from Mediapro, which sells domestic and international rights for the league.

The deal represents a drop of about 75 per cent from the €130 million per season in the previous three-year deal cycle, from 2009-10 to 2011-12. Commercial broadcaster La Sexta is understood to have paid about €100 million per season for non-exclusive rights to the match. Regional broadcasters TV3 in Catalunya, Canal Nou in Valencia, Telemadrid in Madrid and IB3 in the Balearic Islands also acquired non-exclusive rights for the match for a combined fee of about

€30 million per season.

Mediapro had originally agreed a deal for the next cycle with La Sexta, formerly owned by the Mediapro agency, thought to be worth between €38 million and €42 million per season. La Sexta showed the weekly free-to-air game until the sixth round of fixtures. Marca began its coverage on October 1. Marca took over the Liga rights after the government gave its approval for the sale of La Sexta to the Grupo Planeta publishing group. Grupo Planeta was not interested in holding onto the Liga rights and there were no other bidders.

The value of the rights has fallen because Real Madrid and Barcelona games will not be shown free-to-air in the new cycle. Last season, there were 15 free-to-air matches featuring the teams, including one *Clásico* match between the two.

The value has also been hit by the move of the match from its primetime Saturday slot to a less attractive slot on Friday or Monday night. The poor health of the Spanish advertising market also affected the rights value.

The difference in the value of the rights fees agreed with La Sexta and then with Marca – as much as 24 per cent – is due to the audience share of the two channels. La Sexta has an average audience share of about eight per cent. Marca has an average audience share of about one per cent.

In the first free-to-air game of the season, between Real Zaragoza and Real Valladolid, on Monday August 20 at 11pm Central European Time, La Sexta had an audience of 887,000 and a 7.5-per-cent share. Last season, the channel regularly had audiences of over four million and shares of 25-per-cent for the free-to-air game.

The first free-to-air match to be shown on Marca was between Getafe and Mallorca on Monday October 1 at 9.30pm. It had an audience of 619,000 and drew a share of three per cent. Its second match on Friday October 5 at 9.30pm between Celta Vigo and Sevilla had an audience of 922,000 and drew a share of 5.6 per cent.

Coverage of the Liga significantly enhances Marca's audience share,

allowing the broadcaster to increase its advertising rates in what is a very difficult market.

Although the matches on Marca are likely to find a smaller audience than on La Sexta, local media experts said that this would not necessarily translate into an increase in pay-television subscriptions.

Grupo Planeta now controls eight digital-terrestrial channels and accounts for about 42 per cent of the television advertising market. ■

FOOTBALL INDIA

IMG-Reliance gets stung in new I-League deal

By Dan Horlock

The IMG-Reliance joint venture signed its first multi-year pay-television broadcast deal in India for the top-tier domestic league, the I-League, but at a significant reduction from the previous one-season deal.

Indian pay-television channel Ten Sports, owned by pay-television operator Zee, acquired live and delayed rights to up to 75 games from the I-League in a three-season deal until the end of 2014-15, worth about \$400,000 (€310,000) per season. As part of the deal, Ten will also show live coverage of two seasons of the Federation Cup, the domestic cup competition, from 2013-14 to 2014-15. The I-League and cup are run by IMG-Reliance through a long-term agreement with India's football federation, the All India Football Federation.

Ten had a one-year deal last season. The rights fee is thought to have dropped significantly due to a lack of competition. One informed source said the broadcaster paid \$1 million for the rights to the 2011-12 season.

Under the new deal, the joint venture will have to absorb production costs of about \$3 million per season. Last season, Ten covered the production costs as part of its rights agreement.

The Ten deal was signed two days

before the start of the season on October 4. The I-League season runs from October to May. The joint venture had been trying to negotiate a deal since at least February, with production costs the main sticking point (*TV Sports Markets* 16:3).

IMG, Ten Sports and the federation all declined to comment on the deal this week.

Last month, the federation agreed a deal with public-service broadcaster Doordarshan for free-to-air rights to the 2012-13 Federation Cup. The federation wanted to gain exposure for the competition. There was no rights fee involved. "Commercially, Indian football is a poor proposition. There is no advertising revenue against it," one expert said. Last season, Doordarshan showed the semi-finals and final of the cup.

The joint venture is still to sell its local language broadcast rights in the different regions of India. Last season, it is understood to have agreed a one-season deal worth between \$1 million and \$2 million with Bengali satellite channel NTV. Bengal is the region in India where football is most popular. Some experts expect the value of the rights to fall in line with the pay-television deal. IMG-Reliance is still in negotiations with regional broadcasters.

IMG-Reliance has an agreement with the federation, paying a minimum of Rs6.55 billion (€96 million/\$125 million) over 15 years, from 2010-11 to 2024-25, for the commercial rights for Indian football, including the I-League and national team (*TV Sports Markets* 14:23). Unlocking the potential of the world's most popular sport in the world's second most-populous market appears to be proving more difficult than expected in a country where football remains a niche sport, at best, and the domestic game is of a relatively poor standard.

IMG-Reliance's deal in India had two main strategies. First, to improve the world ranking of the Indian national team, ranked 142 in December 2010. The team is now ranked 168. Second, to overhaul and re-launch the I-League. Rights fees for the league appear to have dipped from last season and the joint venture has yet to sell title sponsorship of the league. ■

SPORTS CLIPS: News highlights from September 27 to October 10

TV RIGHTS 1

Football: Premier League, I-League, national teams and more

- **Football:** Uefa, football's European governing body, appointed newly-created company CAA Eleven as its global sales agent for the European Qualifiers package of media rights. The rights cover the World Cup and European Championship qualifier matches of Uefa's 53 member federations for four years, 2014-15 to 2017-18. The deal also includes the unsold media and marketing rights for the Euro 2016 competition.
- **Football:** Indian pay-television broadcaster Ten Sports acquired rights for domestic competitions the I-League and the Federation Cup (page 8).
- **Football:** Vietnamese public-service broadcaster VTV acquired rights for the 2012 Asean Football Federation Cup in a deal reported to be worth just under \$1m (€775,000). The rights were sold by the Dentsu Alpha agency, the distributor of the tournament's rights on behalf of the federation, which organises tournaments for the South East Asian nations.
- **Football:** The Hong Kong Football Association appointed the MP & Silva agency to distribute the cross-platform media rights in foreign territories for national team matches. The length of the deal was not disclosed. The rights include Hong Kong's qualifying matches for the 2015 Asian Cup.
- **Football:** Singapore telco SingTel agreed a deal with the English Premier League for non-exclusive rights for all matches for three seasons, from 2013-14 to 2015-16 (page 1).
- **Football:** Sub-Saharan Africa pay-television broadcaster SuperSport renewed its rights for the English Premier League for three seasons, from 2013-14 to 2015-16 (page 1).
- **Football:** Norwegian basic-tier broadcaster TVNorge acquired rights for Uefa Europa League games from pay-television broadcaster C More Entertainment. TVNorge acquired rights for up to 14 matches per season over three years, 2012-13 to 2014-15. It will show the games on its basic-tier pay-television channel Max.
- **Football:** Pan-Nordic basic-tier broadcaster SBS sublicensed the rights in Sweden for the national team's 2014 World Cup qualifier away to Germany on October 16 from Swedish commercial and pay-television broadcaster TV4.
- **Football:** Italian pay-television broadcaster Mediaset Premium acquired rights for the Australian A-League, following former Juventus and Italy player Alessandro del Piero's move to Sydney FC. The deal will run until at least the end of the 2012-13 season.

SINCE LAST TIME

- The Competition Commission of India, the country's competition watchdog, approved media conglomerate News Corporation's buy-out of Disney-owned sports broadcaster ESPN's 50-per-cent stake in pan-Asian sports broadcaster ESPN Star Sports. The regulator ruled that the deal, in which News Corp will increase its stake in the broadcaster from 50 per cent to 100 per cent, would not have an adverse effect on competition due to the existing number of sports broadcasters in India.
- Broadcasters around the world were forced to find replacement programming for the first two rounds of the 2012-13 season of North American ice hockey league the NHL, after the matches were cancelled due to a player wage dispute. Further rounds could yet be cancelled as the league and the players remain in talks to resolve the dispute.
- The iPlayer internet catch-up service from the BBC attracted record numbers of users during the London 2012 Olympic Games, which was broadcast by the UK public service-broadcaster. A record 51 million requests from 11 million users were generated during the week beginning July 30. In August, 22 million requests were received from mobiles and 17 million from tablet devices, both monthly records. The service had 196 million programme requests in total during August.
- French pay-television broadcaster Canal Plus will show Uefa Champions League games on a delayed basis on its free-to-air general entertainment channel Direct 8 from the next round of games on October 23-24. The arrangement will run until the end of this season. Direct 8 is also expected to show the Champions League final live. The amount of free-to-air coverage the tournament would receive in France in the current cycle, 2012-13 to 2014-15, had previously been unclear. In previous cycles at least one match per week has been shown free-to-air, but Uefa sold the rights in the current cycle to Canal Plus, which is primarily a pay-television broadcaster, and Al Jazeera, which is exclusively a pay-television broadcaster.

TV INTERNATIONAL

- The final day of the 2012 Ryder Cup golf tournament on September 30 attracted the event's highest US viewing figures for 13 years. The NBC network's live coverage scored a 4.1 overnight rating – representing the percentage of homes with a television set in the top 56 US markets that were tuned in to the coverage – and a nine-per-cent audience share. In the UK, pay-television broadcaster BSkyB's coverage of the tournament drew a peak of 2.24 million viewers. Coverage also generated record figures for Sky's internet and mobile service Sky Go, with 700,000 viewers following the live action on the service.
- Eurovision, the television producer operated by the European Broadcasting Union, and Russian state broadcaster VGTRK, agreed a deal with the International Association of Athletics

SPORTS CLIPS: News highlights from September 27 to October 10**TV RIGHTS 2****Basketball, boxing, golf, handball, motorsport and more**

- **Baseball:** Major League Baseball agreed new eight-year deals, from 2014 to 2021, with US network Fox and cable-television broadcaster Turner Broadcasting System. The renewals are worth a combined \$6.8bn (€5.3bn), or \$850m per year. Fox retained rights for the All-Star Game and the season-ending World Series. Coverage of the regular season and play-offs will be shared across Fox Sports, Turner and league-operated pay-television channel MLB Network.
- **Basketball:** The Euroleague agreed deals with: Italian sports broadcaster Sportitalia, for 2012-13 to 2014-15; Spanish digital-terrestrial channel Marca TV, for 2012-13; and Israeli commercial broadcaster Channel 10, for 2012-13 (page 5).
- **Basketball:** Brazilian media group Globo's pay-television channel Sportv acquired rights to the Liga Sudamericana, the pan-South American club competition organised by Fiba, basketball's world governing body.
- **Basketball:** The Spanish ACB Liga agreed deals for the 2012-13 season in India, with media company Sony Entertainment Television, and in sub-Saharan Africa, with the MCS TV Group.
- **Basketball:** State-owned sports broadcaster the Bahrain Sport Channel acquired live rights for national team competition the GCC Basketball Championship, which took place on September 30 to October 6 in Bahrain.
- **Boxing:** US pay-per-view platform Integrated Sports Media acquired the rights for the super middleweight IBF world title bout between Carl Froch and Yusaf Mack on November 17, in a deal with the Matchroom Sports agency. The fight and its undercard will be made available on a ppv basis for \$29.95 (€23.27) via cable and satellite platforms including DirecTV and the Dish Network.
- **Golf:** Australian network Seven acquired rights for the 2012 Australian Open. Seven will broadcast 20 hours of live coverage across the four days of the tournament, from December 6-9. The deal was brokered by the World Sport Group agency on behalf of tournament organiser the PGA of Australia.
- **Handball:** The European Handball Federation announced several new deals and deal renewals for the men's and women's Champions Leagues, beginning in the 2012-13 season. Al Jazeera-owned pay-television broadcaster beIN Sport acquired live rights in France, the US and Canada for the men's and women's competitions in a deal with the MP & Silva agency. Sub-Saharan Africa pay-television broadcaster SuperSport acquired rights for the men's competition from the Sportsman Media Group agency. The federation's marketing arm, EHF Marketing, sold live rights for the men's competition to UK pay-television broadcaster Premier Sports, Slovenian pay-television broadcaster Sportklub, FYR Macedonian public-service broadcaster MRT and state-owned Belarusian broadcaster ONT.
Deals were extended with pay-television broadcaster Setanta in Ireland and Africa, public-service broadcaster RTS 2 and pay-television broadcaster Arena Sport in Serbia, Croatian public-service broadcaster Hrvatska Radiotelevizija, Russian media group NTV and online streaming company Start TV. The durations of the deals were not disclosed.
- **Horse Racing:** State-owned media company Dubai Media Incorporated struck a four-year deal, from 2013 to 2016, with English racecourse Ascot and the Racecourse Media Group. The Dubai Sports and Dubai Racing channels, which are available on free-to-air, satellite and cable-television platforms across the Middle East, will show coverage of flat racing events from Ascot and the 30 racecourses whose media rights are sold by RMG.
- **Ice Hockey:** The Russian Kontinental Hockey League agreed a deal for the 2012-13 season with sports broadcaster ESPN in North America and the UK. Matches will be streamed on the ESPN3 online platform.
- **Motorsport:** The Sportsman Media Group agency and media company the Red Bull Media House were jointly appointed to promote the World Rally Championship from the start of 2013. Under the deal with the Fédération Internationale de l'Automobile, the international motorsport federation, the two companies will be responsible for producing and distributing media coverage of the series, and other marketing and organisational activities. The length of the deal was not disclosed.
- **Motorsport:** Eurosport Events, a division of pan-European broadcaster Eurosport, renewed its promoter deal with the Fédération Internationale de l'Automobile, the international motorsport federation, for the World Touring Car Championship for five years, 2013 to 2017. The deal includes global media rights, which will either be exploited by Eurosport's television channels or distributed to other broadcasters.
- **Motorsport:** The IMG agency was appointed as global promoter of the Fédération Internationale de l'Automobile Rallycross Championship, with responsibilities including distribution of global media rights, under a 10-year deal from 2013 to 2022.
- **Netball:** National governing body Netball South Africa agreed a five-year rights deal, from 2013 to 2017, with sub-Saharan Africa pay-television broadcaster SuperSport. The broadcaster will show live coverage of senior national team matches and the new Netball Premier League, plus regional championships, club championships, the Fast Net series, the Netball Mania festival, and national school and university championships.

SPORTS CLIPS: News highlights from September 27 to October 10

TV RIGHTS 3

Olympics, tennis, US college sport, volleyball and more

- **Olympic Games:** Danish public-service broadcasters DR and TV2 acquired rights for the 2014 winter Olympics and the 2016 summer Olympics. The deals include free-to-air television, pay-television, internet and mobile rights. The rights were sold on behalf of the International Olympic Committee by the Sportfive agency.
- **Tennis:** Asian pay-television broadcaster Ten Sports extended a deal for live coverage of the US Open for four years, 2013 to 2016. The deal, with the United States Tennis Association, covers cross-platform rights in India, Pakistan, Afghanistan, the Maldives, Nepal, Sri Lanka, Bhutan and Bangladesh.
- **Tennis:** International sports broadcaster Eurosport acquired media rights and became the host broadcaster of the annual ATP Power Horse Cup in Düsseldorf, Germany. Under the three-year deal, from 2013 to 2015, Eurosport will provide live coverage of the tournament on its television channels and digital platforms across 59 European countries. The deal was agreed with the tournament's organisers.
- **University Sport:** International sports broadcaster Eurosport agreed a deal with the Fédération Internationale du Sport Universitaire, the International University Sports Federation, to show the 2013 summer and winter Universiade events in 17 countries in the Asia-Pacific region. The agreement extends a deal agreed last month for the rights in Europe.
- **US College Sport:** The Atlantic 10 conference agreed a nine-year deal, from 2012-13 to 2020-21, with the NBCUniversal media group, and eight-year agreements, from 2013-14 to 2020-21, with the CBS network and pay-television sports broadcaster ESPN. The deals include live coverage of men's and women's basketball. Cable-television channel the NBC Sports Network will show six games during the 2012-13 season and 28 regular-season games per season thereafter. ESPN will show up to 30 games per year. The CBS Sports Network cable-television channel will show up to 54 games per year.
- **US College Sport:** The Fox Sports Networks division of US network Fox reached a multi-year deal with the Big West conference, starting with the 2012-13 season. The rights, which will be exploited on the Prime Ticket, FS West and FS San Diego regional cable-television broadcasters, include men's and women's basketball, football and athletics. In November, Fox Sports Networks will launch a free video-streaming platform to cover up to 800 live events from the conference per year.
- **US College Sport:** US sports broadcaster Fox Sports agreed a multi-year rights deal to show Baylor University's sports events. The agreement, which includes digital rights, comprises one American football game per year, men's and women's basketball, baseball, softball, football, volleyball and Olympic sports. The length of the deal, which will start in the 2013-14 academic year, was not disclosed.
- **Volleyball:** Japanese commercial broadcaster Fuji TV acquired rights for the Confédération Européenne de Volleyball, the European volleyball federation, women's Champions League. The deal, which was agreed with the Sportsman Media Group, will run until at least the end of the 2012-13 season. Fuji TV will provide live coverage of at least one game per round.
- **World Games:** The Ufa Sports agency will distribute the global media rights for the next two editions of the World Games, the multi-sport event for sports not included in the Olympics. The five-year agreement, from 2013 to 2017, with the International World Games Association, covers the 2013 World Games in Cali, Colombia, and the 2017 World Games in Wroclaw, Poland. Ufa will also market all other commercial and sponsorship rights for the event.

Federations to host broadcast the 2013 World Athletics Championships in Moscow.

- Pan-Asian sports broadcaster ESPN Star Sports launched a football pay-television channel called Fox Football Channel in Malaysia. The channel, which is being carried by telecommunications company Telekom Malaysia's IPTV service HyppTV, will feature more than 500 live matches per year from the top leagues in Spain, Argentina, the Netherlands and Russia. The channel will also show programming produced by the official channels of English Premier League clubs Manchester City and Chelsea.
- Pan-Asian sports broadcaster the Outdoor Channel agreed a partnership with production company Spontaneous Combustion Productions. The companies will develop programming focused on outdoor adventure races from Asia, especially China. The Outdoor Channel will also show the Ordos Adventure Challenge and Wulong Mountain Quest adventure races, with coverage produced by Spontaneous.
- Entertainment company Bigballs Films is launching a football channel, Copa90, on the YouTube video-sharing platform. The channel is aimed at European football fans, with content in the English, French, Spanish, Italian, German, Russian and Polish languages. Content will include football clips, studio discussions driven by user comments, and feature programmes.

TV RIGHTS NEGOTIATIONS

- About 80 of Britain's national sports governing bodies have been approached to pool their commercial and media rights into the British Sports Marketing Bureau, an independent company that will market the rights centrally. The rights may be exploited on a

SPORTS CLIPS: News highlights from September 27 to October 10

new UK television channel dedicated to Olympic sports. The company was created by Sir Keith Mills, the former deputy chairman of the London Organising Committee of the 2012 Olympic Games.

- Free-to-air commercial broadcasters TF1 and M6, as well as pay-television broadcasters Canal Plus and beIN Sport, are in the running to acquire Formula One motor-racing rights in France. The broadcasters each submitted a bid for the three seasons from 2013 to 2015. Canal Plus is reported by French newspaper *L'Équipe* to have bid €30m (\$39m) per season. BeIN Sport, which is owned by Qatari broadcaster Al Jazeera, is reportedly in a weak position in the bidding due to a possible scheduling clash with its French Ligue 1 football coverage.
- A mixture of free-to-air and pay-television coverage of Formula One is expected in the Netherlands for the cycle beginning in 2013, according to newspaper *De Telegraaf*. Current rights-holder RTL, the free-to-air commercial broadcaster, is reported to be unwilling to renew its exclusive live rights for the series. Formula One Management, the series rights-holder, is in talks with pay-television broadcaster Sport1 about acquiring live rights.
- The Botswana Football Association cancelled a three-year domestic rights deal, from 2011-12 to 2013-14, with television production company RP Productions. The *Botswana Gazette* newspaper said that the agreement, covering the country's top club division, the Botswana Premier League, had been curtailed because RP Productions had not paid any of the BWP4.2m (€420,000/\$550,000) per season rights fees due under the deal.
- Mahfoud Kerbadj, the president of the Algerian Ligue de Football Professionnel, which runs the country's top football league, said domestic rights fee income for the top Ligue 1 division was expected to "double or even treble" in the next rights cycle, as talks over a renewal with state broadcaster ENTV got underway. ENTV paid Dinar210m (€2.03m/\$2.65m) last season. A deal is not yet in place for 2012-13, which started in September. A new rights fee distribution model – giving a larger share of the income to clubs that finish higher in the table and are shown more often on television – is being considered by the league.

ALSO SINCE LAST TIME

- The responsibility for organising the Superbike World Championship was transferred from the Infront Sports & Media agency to Dorna Sports, the commercial rights-holder of fellow motorcycling championship MotoGP, by private equity firm Bridgepoint, the parent company of Infront and Dorna. Infront was appointed as marketing partner and global adviser to both championships, which will be managed by Dorna as separate events. Infront said that the restructure would have no impact on the sale of the two championships' media rights until the end of the 2013 season, at least. Italy's *Gazzetta dello Sport* reported this week that Paolo Flammini, the head of the Infront Motor Sports division whose family has controlled Superbikes for 25 years, was considering a legal challenge to the move.
- Digital media company Perform agreed a deal to provide its ePlayer sports video-on-demand service to more than 100 of the Gannett media company's digital media platforms in the US, including USA Today Sports Media Group's portfolio of local news websites. Perform and USA Today Sports Media Group will also produce original collegiate sports programming for a USA Today-branded channel on the ePlayer service.
- Mexican commercial broadcaster TV Azteca stopped broadcasting the home matches of top-tier Mexican football club Pachuca. The move came after businessman Carlos Slim, who runs rival telco América Móvil, acquired a 30-per-cent stake in Grupo Pachuca, which owns Pachuca and fellow first division club León. Slim has sold León's media rights to pay-television and internet broadcasters, but not TV Azteca. TV Azteca has a deal for Pachuca's media rights until next season.

INDUSTRY MOVES

- Alfonso Medina was appointed as the new head of media rights at the English Football League, which represents the three divisions below the top-tier Premier League. Medina joined the league from production company Endemol. ■ It emerged that Rik Dovey, the former deputy managing director of Sky Sports at UK pay-television broadcaster BSkyB, left the broadcaster in July.

EDITORIAL

Editor Frank Dunne
 Digital News Editor Kevin McCullagh
 Reporter Dan Horlock
 Telephone +44 (0) 20 7954 3506
 Fax +44 (0) 20 7954 3511
 Email editorial@tvsportsmarkets.com

DESIGN & PRODUCTION

Designer Kyle Young
 Production Assistant Carianne Whitworth
 Email carianne@tvsportsmarkets.com

SALES & COMMERCIAL

Telephone +44 (0) 20 7954 3483
 Fax +44 (0) 20 7954 3511
 Email sales@tvsportsmarkets.com

Paul Santos Head of Sales & Commercial
 Email paul.santos@tvsportsmarkets.com

TV Sports Markets

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For more information, contact Paul Santos by email on paul.santos@tvsportsmarkets.com