

## TV EUROPE

### Threat to Eurosport's EBU rights-buying privileges after takeover

By Kevin McCullagh

Discovery Communications' accelerated acquisition this month of a bigger stake in Eurosport has focused attention on the future of Eurosport's sports rights-buying relationship with the European Broadcasting Union, the public-service broadcaster consortium.

Discovery is increasing its ownership stake in Eurosport to 51 per cent, from 20 per cent, in a deal with French commercial broadcaster TF1, which owns the remainder. The new investment is pending regulatory approval.

The deal raises several questions with major significance for Eurosport, the EBU and the European sports-rights market. Two of the biggest questions are:

1. Should Eurosport be allowed to continue to bid for sports rights as part of the EBU?

2. If not, what would be the impact of breaking the EBU-Eurosport rights-

buying relationship?

US-based Discovery is not an EBU member like TF1. This calls into question Eurosport's continued participation in EBU sports rights bids. Eurosport itself is not a member of the EBU.

Losing its privileged position in the pool of broadcasters which share EBU sports rights would almost certainly force Eurosport to pay more for rights, pushing its cost base up and squeezing profits.

It is understood there have not yet been official talks on the first question between the two parties. There are two broad views on it within the industry. One is that Discovery's investment fundamentally changes the terms of the Eurosport-EBU relationship, possibly to the extent that Eurosport can no longer participate in EBU rights deals.

The second is that having Discovery as  
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## TV INDIA

### Sony Six's January spending spree

By Frank Dunne

In the increasingly competitive Indian pay-television market, Sony Six has begun 2014 on the front foot, snapping up prestigious properties in cricket, football, tennis and rugby.

In three weeks in January, the pay-television channel owned by Multi Screen Media paid close to \$100m (€73.5m) for rights, in the following deals:

- \$90m for the Fifa World Cups of

2014 and 2018

- between \$5m and \$10m for this month's cricket series between New Zealand and India

- about \$1.75m for tennis's Australian Open (see story, page 8), and

- about \$20,000 for Six Nations rugby.

Sony Six, a channel carrying a mix of sport and entertainment, was launched

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## TV EUROPE

# Discovery takeover clouds Eurosport's EBU relationship

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an owner is little different from having TF1 as an owner because both are privately-owned commercial entities, and there is nothing to stop Eurosport continuing to take part in EBU rights bids.

Insiders say the EBU may not take action over the Discovery investment immediately, but may instead wait to see what the new owner's strategy will be.

Eurosport's future within the EBU may hinge on whether Discovery steers the sports broadcaster into competition with the consortium for sports rights. The two have traditionally not been competitors in the rights market. "If they go against the EBU for certain properties, then the agreement is gone," one well-placed source said this week.

Eurosport under Discovery will be more aggressive in the rights market than it has been historically. The acquisition is designed to strengthen Discovery's channel portfolio, giving it leverage in talks with pay-television platforms around the world (*TV Sports Markets* 16:23).

The strategy is similar to that of 21st Century Fox's pay-television broadcaster Fox International Channels. Discovery's accelerated investment in Eurosport – the increase to 51-per-cent ownership was originally due to happen in December 2014 – is viewed as a sign that it needs to move quickly to counteract FIC's rapidly strengthening global sports rights portfolio.

In a signal of the broadcaster's ambition, David Zaslav, Discovery's chief executive, refused to rule out a Eurosport bid for English Premier League domestic rights, one of the world's most expensive sports rights properties, in an interview with UK newspaper *The Guardian* last week.

The EBU is thought to be keeping a close eye on how Discovery exploits the Uefa European Qualifiers rights it acquired in the Nordics last year for an indication of Discovery's strategy (*TV Sports Markets* 17:14). Discovery's

## Eurosport and the EBU – controversial from the start

Eurosport is not a member of the EBU but has been part of EBU sports-rights deals since the pan-European broadcaster was created by the consortium in 1989.

It was designed as a pay-television overflow channel to carry the sports content EBU broadcasters could not fit in their schedules, in the days before digital television. The EBU launched it in partnership with UK-based pay-television operator Sky Television, BSKyB's predecessor.

Eurosport initially acquired rights via a sublicensing agreement with a consortium of 16 EBU members – the Eurosport Consortium. But in 1991 the agreement was struck down by the European Commission, and the broadcaster went off air for a short period. With Sky being one of the EBU's major competitors for sports rights, the commission ruled that the sharing agreement gave Eurosport a privileged position compared to other channels, particularly multi-territory channels.

Eurosport was resurrected the same month after Sky sold its stake in the broadcaster to French commercial broadcaster and EBU member TF1.

Eurosport continued to take part in EBU sports-rights deals, with the relationship overseen by the Eurosport Consortium, and its participation governed by rolling output deals.

For at least some EBU members, Eurosport became an irritation over time. With the advent of digital television, European public-service broadcasters were able to launch more channels, and could now fit in their schedules the sport that Eurosport was created to carry.

But Eurosport's role in supporting EBU rights acquisitions has also grown. Originally it acquired rights only by sublicensing them from EBU members, for a fee which was split between the members. Today, Eurosport directly contributes to the initial rights fee in many EBU deals.

basic-tier channel business SBS Nordic outbid local EBU members to secure the rights. Eurosport's Nordic channels are among SBS's options for exploiting the 546 live matches it acquired.

Rival multi-territory sports broadcasters such as FIC and Al Jazeera's beIN Sports, as well as commercial broadcasters excluded from the EBU because they do not meet its membership criteria, are also likely to be watching closely how the EBU-Eurosport relationship evolves. Any suggestion that Discovery was buying itself a competitive advantage in the market could lead to a challenge in the European courts. Eurosport's sharing in EBU sports rights was briefly halted by the European Commission in the 1990s (see panel).

### Break-up consequences

There would be downsides for both Eurosport and the EBU in severing their sports rights partnership, but Eurosport looks like it has the most to lose.

Eurosport would lose what is considered relatively low-cost access to large amounts of sports content. The broadcaster is currently involved in most major EBU

sports rights deals bar those for major international football tournaments.

Eurosport does not get the rights at knock-down prices – the EBU makes sure what it pays is benchmarked against market values. But, as one industry insider put it, "you can't compare the situation to having to go out and bid without the EBU behind them."

Eurosport would be forced to bid for pan-European rights without the financial muscle and attractive free-to-air platforms of the major EBU broadcasters to help convince rights-holders. It may even have to bid against EBU broadcasters.

The EBU is often considered by rights-holders as a strong alternative to agencies. Bidding separately, Eurosport would come into competition with major agencies for pan-European deals.

Eurosport would of course be able to buy pan-European rights from agencies. However, agencies increasingly look for market-by-market deals in the continent, which doesn't suit Eurosport's multi-territory channel feeds.

Eurosport is far from completely reliant on the EBU for sports content. Some of its most important properties, such as the

French Open and US Open tennis grand slams, are acquired outside the EBU. The broadcaster even fully owns and runs some sports events itself, such as the World Touring Car Championship, via its Eurosport Events division.

There would also be downsides for the EBU in a break-up with Eurosport, not least in losing Eurosport's financial contribution that has helped secure vital rights deals. Eurosport cash helped the EBU land the 2010 and 2012 Olympics rights after a first-round bid without the pay-television broadcaster floundered. Eurosport has been a major guarantor

of other EBU sports rights deals, contributing a large proportion of the cost of the rights in some cases. The guarantors are the EBU broadcasters that take part in a deal – not all of its 74 active members do so in each case.

Eurosport's ability to offer rights-holders many hours of coverage and exposure in 54 markets has also been useful for the EBU in securing some rights properties.

But some within the EBU are understood to believe that dropping Eurosport could actually strengthen the consortium's hand in at least some rights negotiations.

The consortium is increasingly selling

on rights in territories where its members don't use them. This is more difficult if Eurosport is involved in the deal, as it will have pay-television rights in all the territories. Some argue the EBU could be more aggressive with rights fee offers if it was able to sell fully exclusive rights in markets in which it wasn't using them.

Another question for Discovery, the EBU and Eurosport is how Eurosport's existing EBU deals might be affected by any change in the relationship. Discovery will almost certainly have looked at this during its due diligence ahead of investing in the sports broadcaster. ■

## FOOTBALL

# Channel operators heat up market for Belgian league

By Robin Jellis

The Belgian Pro League, which will next week vote on a strategy for selling its media rights in the coming cycle, has an opportunity to ensure the financial security of its clubs for over a decade.

The league, the top division of football in Belgium, currently has two strong long-term offers on the table: (1) a proposal to form a joint venture with pay-television operator Telenet; and (2) an offer from the MP & Silva agency to act as an adviser.

Alternatively, the league could take its traditional approach of holding an auction for a short-term deal for its rights which is open to all parties.

In the current three-year cycle, from 2011-12 to 2013-14, the league earns €55.2m (\$75m) per year from live rights deals with Telenet and rival pay-television broadcaster Belgacom. Telenet has the top two packages of live rights on an exclusive basis and shares a third package of live rights with Belgacom.

The league looks certain to earn more in its next deal, as operators like 21st Century Fox's Fox International Channels look to enter a rights market which has been dominated for years by the two telcos.

## Joint venture

Telenet is proposing a joint venture with the league for 12 years, from 2014-15 to 2025-26, which is reported to be worth €900m, or €75m per year.

The league and Telenet would establish a channel which would be distributed on all platforms on a non-exclusive basis. The business model would be similar to that of Eredivisie Live, the league channel operated by the Dutch football league.

Flanders-based Telenet and Walloon pay-television operator BeTV, owned by telco Voo, believe that exclusive football rights are too expensive for their businesses. It is thought that Telenet struggles to break even on its current deal.

If accepted, the joint venture business model would involve a switch away from exclusivity premium deals to wholesale distribution deals, with the fee being covered by the volume of distribution agreements. This seems extremely bullish as it would require the joint venture to make €20m more per year than the league makes in its current domestic deals for exclusive rights.

A company will be set up to agree deals on behalf of the joint venture. Telenet would have a stake in the company. It would seek as many distribution deals as possible. Potential carriers include: Belgacom; Voo; telco Numericable; digital operator Snow; telco Mobistar; mobile service Stievie; Flemish satellite operator TV Vlaanderen; and satellite platform Télésat.

Non-exclusive distribution would

mean consumers would not need to switch operators to watch all matches, and that access to the Pro League could be available at a lower price.

## Defensive

The Telenet offer is widely seen as a defensive move which could deter or at least delay FIC from entering the Belgian market. FIC's entry into the neighbouring Netherlands, where it took a 51-per-cent stake in Eredivisie Live in August 2012, took the market by surprise (*TV Sports Markets* 16:15).

This time, the market knows FIC is coming. In October, FIC acquired the rights to the German Bundesliga in 80 territories from the 2015-16 season, including Belgium. Last year, Pro League president Ludwig Sneyers said that FIC was a potential bidder for the league's domestic rights.

Under the joint-venture plan, a tender would be held for highlights rights. These are currently held by Flanders-based commercial broadcaster VMMA and Wallonia-based public-service broadcaster RTBF, who sublicensed them from Telenet. The deals are worth about €5.2m per year and €2.8m per year respectively.

The Belgian Competition Authority would need to approve the joint venture. One informed source said that as long as the joint venture offered the channel on terms which were "fair, reasonable and non-discriminatory," and tendered highlights rights, it could not be deemed to limit competition.

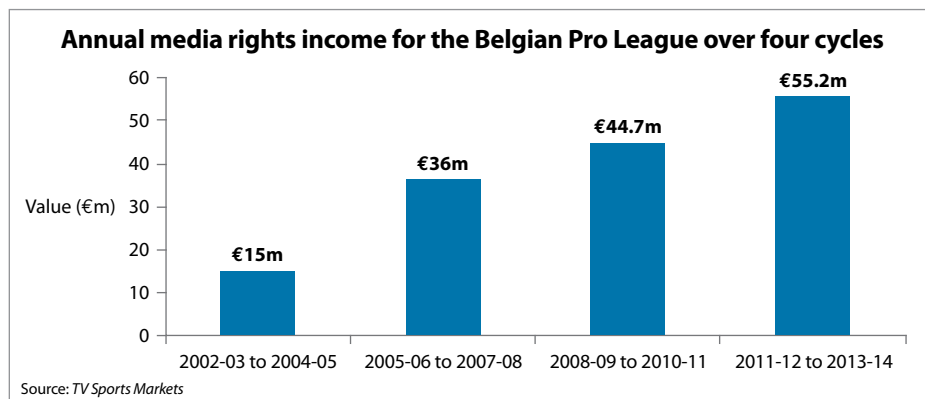
## Adviser

The league is also seriously considering a rival offer from MP & Silva to act as an adviser on broadcast deals, covering domestic and international rights.

The proposal is thought to be for a 12-year period with a guarantee of about €55m per season. This is the amount the league currently earns from domestic rights. The agency is targeting a further €15m per season from international rights, but without guaranteeing the amount. Rights outside Belgium are sold by the IMG Media agency in the current three-year cycle.

MP & Silva has said that its model would be similar to that adopted by the Infront Sports & Media agency in its deal with Italy's Serie A. Infront earns only on income brought in above an agreed target and has to pay the league the difference should it not reach that target.

The agency has almost certainly been drawn to the market by the prospect of increased competition. It would look to draw FIC and, at a later date, pay-television



broadcaster beIN Sports, with which it has close ties, into the bidding.

However, it is understood that should Telenet's joint venture proposal be rejected it would not participate in a tender for exclusive rights due to the difficulty it has in breaking even on the rights at the moment.

MP & Silva last month recruited Pierre Maes as an adviser. Maes, the former head of sports-rights acquisitions for pay-television operator Canal Plus in the Benelux countries, had previously worked as an adviser for Telenet.

## Auction

The third option the league has is to sell its rights in its traditional method, by issuing a tender. It has done this successfully, securing increases each cycle for over a decade (see table).

If the league sold the rights directly it would face the same market dynamics that MP & Silva would face. However, it would not have to pay commission on any income brought in, which would mean more money for the clubs. ■

## FORMULA ONE

# Mediapro ahead by a nose after discounted deals

By Robin Jellis

Spanish agency Mediapro is thought to be making a small profit on the rights to the Formula One championship in Spain following deals agreed last week.

The agency agreed a deal with commercial broadcaster Antena 3 worth about €30m (\$40.8m) per year for non-exclusive rights. It also sold rights to Catalan public-service broadcaster TV3 for about €3.5m per year. Both deals cover the 2014 and 2015 seasons.

Mediapro acquired the rights to the F1 championship from Formula One Management, the commercial rights-holder for the motor racing series, in a two-year deal from 2014 to 2015 (*TV Sports Markets* 17:15). The deal is thought to be worth between €32m and €33m per year. This is down slightly from the €35m

per year Mediapro paid from 2009 to 2013.

The short-term agreement means FOM could agree a more lucrative deal in two years if the Spanish market has improved.

With broadcasters paying between 20 and 30 per cent less than last time, Mediapro's profit margin has been reduced considerably.

In the previous five-year cycle, from 2009 to 2013, the rights were worth between €42m and €48m per year. Commercial broadcaster La Sexta paid between €35m and €40m per year, TV3 paid €5m per year, and Canal Nou, a regional broadcaster in Valencia, paid between €2m and €3m per year.

Antena 3, owned by Spanish media group Atresmedia, picked up the F1 rights in 2012 for the remaining two seasons after merging with La Sexta. Canal Nou's deal also ended two years early due to cuts made by its owner, RTVV, as it was losing money. It was closed in November last year.

The value of the rights in the new deals has fallen due to the economic crisis in Spain which has negatively affected the advertising market.

There was also not much competition

for the rights. Commercial broadcaster Telecinco, owned by Mediaset, is thought to have been interested but did not bid. Telco Telefónica is also understood to have been interested in the rights for its IPTV platform Movistar TV, but it is unclear whether or not it bid.

Antena 3 was keen to retain its rights due to the high audience figures it generated. It had an average of 3.7m viewers per race in 2013, an audience share of 35.6 per cent.

It was also important to hold on to the rights due to rival Telecinco's coverage of MotoGP, which is just as popular as F1, one local expert said. Telecinco pays €30m per year in the three seasons from 2012 to 2014 for its MotoGP rights.

Despite the decrease Antena 3 has secured, it is thought unlikely that it will be able to refinance its investment from advertising revenue.

The 2014 F1 season begins with the Australian Grand Prix in Melbourne on March 16. The Barcelona Grand Prix, which will take place on May 11, must be shown free-to-air according to Spanish listed-events legislation. ■



## TV INDIA

## Sony Six's rights blitz gives the channel a powerful platform

Continued from page 1 ►

just over a year ago. Local experts say it has quickly established itself as a powerful rival to 21st Century Fox's sports pay-television operation Star TV and is a major threat to the Ten Sports and Neo Sports pay-television channels.

Sony Six was keen to play down the rivalry this week, however, as well as the idea that its emergence would lead to rights inflation.

Prasana Krishnan, head of business at Sony Six, told *TV Sports Markets*: "We are not looking to get into bidding wars at this time. We are still in our first year and Star has been there for a long time. There are not too many big opportunities coming up for this market in the coming months so I think things will settle down. I don't think we will go beyond certain levels [of rights fee]. We are quite bottom-line focused."

He said that Sony was developing its own niche and was rarely in head-to-head competition with Star. In football, for example, Star was concentrating on the top European leagues – England's Premier League, Spain's La Liga and Italy's Serie A – whereas Sony was focusing on international football (see box).

### World Cup

Sony's World Cup deal looks a good one. On a tournament-by-tournament basis, this represents only a small increase on the \$42m that ESPN Star Sports paid for the 2010 World Cup.

Informed sources say that Star either did not bid for the package or put in a low bid, due to clashes with its top cricket events this summer, which would account for the relatively low uplift.

Krishnan declined to comment on the value of the contract beyond saying that Sony was "happy" with the deal. "This gives us the predictability we wanted as the home of international football for the next five years. We were very clear that we

## Krishnan: We are the home of international football

Last week's Fifa World Cup deal was the final piece in the jigsaw which has enabled sport and entertainment channel Sony Six to position itself unequivocally as the international football channel in India.

Last year, the broadcaster acquired the exclusive rights in the Indian sub-continent to Euro 2016 and also picked up the European Qualifiers rights package from 2014-15 to 2017-18.

Prasana Krishnan, head of business at Sony Six, told *TV Sports Markets* this week: "We are positioning ourselves as the home of international football and all of our acquisitions, be it the World Cup or the qualifier matches, fit with this strategy. Our position is simple and clear: any time someone is playing football in their national strip, it is going to be on Six."

The deals have given the broadcaster volume and high quality football across the schedule. "The biggest events in football will be on Six and we will have something every year," Krishnan said. "We have the World Cup in 2014, the Euros in 2016, the U17s in 2017, the Confederations Cup in 2017, and the World Cup in 2018. And in between we have all the qualifier matches."

Krishnan said that investing in national team football was not a big gamble, despite football's relatively marginal status in the region. He said that the ratings for top matches

compared well to ratings for cricket.

"Events like the Euros and the World Cup, which only happen once every four years, have traditionally managed to draw audiences beyond the core football following in this country. For the 2010 World Cup and Euro 2012, the numbers were fairly significant. The ratings for a World Cup match are not very different from the ratings we get for a cricket match, excluding India. After a cricket tour involving India, the second highest ratings would be for the World Cup."

Local sources say that broadcaster interest in the Fifa package was low because of the seven-and-a-half-hour time difference between Brazil and India. Krishnan said that concern about the problem had been overplayed.

He said that of the 64 matches, 24 would be played at 9.30pm Indian time, which was "as good a time slot as we could possibly get." Another 10 matches will be played at 12.30am, which Sony did not see as a major issue. "Only about a third of the matches will be played at 3.30am, so while it is not ideal it is not as bad as people are making out."

This also had to be balanced against the fact that the 2018 tournament in Russia, with a time difference of just two hours, was "ideal" for an Indian broadcaster.

[www. For the full interview with Prasana Krishnan visit our website.](#) ■

wanted it," he said.

The Fifa package also includes the 2017 U-17 World Cup which will be staged in India – the first time a major Fifa tournament has been staged there. Krishnan said that the youth tournament would have "a positive impact on the level of interest in football ahead of the 2018 World Cup."

### New Zealand series

Picking up the rights to this month's Indian cricket tour of New Zealand – in a deal with the Pitch International agency – was an unexpected bonus for the channel.

Sony had held the rights to New Zealand

cricket from 2008-09 to 2012-13 in a deal worth about \$30m. It lost them when Neo Sports paid \$60m for the Asian rights to New Zealand cricket for seven years, from 2014 to 2020. Sony and Star are both thought to have bid less than \$40m.

However, the Neo deal fell through late last year, and with India's visit to New Zealand approaching the agency was forced to do a one-off deal. Sources say that the agency had originally been asking for \$10m but Sony is thought to have paid less than this.

The current 30-day tour, from January 19 to February 18, includes five One Day Internationals and two Test matches.

It is unclear why the Neo deal collapsed, with some local sources claiming that there was a dispute over rights payments and others that the issue was around New Zealand Cricket delivering the events promised in the contract.

In April 2012, Pitch acquired the global media and marketing rights, outside New Zealand, to New Zealand cricket from the national cricket board in an eight-year deal, from 2012-13 to 2019-20.

### Variety

Rugby and tennis are not big sports in India but Krishnan said that the Australian Open and Six Nations deals gave the broadcaster “a nice balance and mix around its four or

five core sports” of cricket, football, NBA basketball and fight sports (see panel).

“What we have been trying to do on Six is focus on four or five areas and then offer a variety of interesting sport around that.” He said that rather than trying to show “any and all kinds of cricket,” Sony was trying to go “more down the developmental route.” It could do this safe in the knowledge that in the Indian Premier League it had one of cricket’s crown jewels.

“Six Nations is never going to be a big driver, but there are people in India interested in it. There are large expatriate communities, for example,” Krishnan said. “And the Australian Open gives us the first grand slam of the year.” ■

### Sony Six rights portfolio

- Indian Premier League cricket
- Fifa World Cup 2014 and 2018
- Euro 2016
- European Qualifiers 2014-2018 football
- Conmebol qualifiers for 2014 World Cup
- Scottish Premiership football
- Australian Open tennis
- NBA basketball
- Total Non-Stop Action wrestling
- Ultimate Fighting Championship
- Glory World Series kickboxing
- Indian Open Super Series/India Open Grand Prix Gold badminton
- Golf Premier League

## RUGBY UNION

# Top 14 deal: a case study in the use of market power

By Robin Jellis

The negotiations for the domestic rights to French rugby’s Top 14 league were, for many observers, a case study in market power: how to use it, when to use it, and the high cost of getting it wrong.

It began with pay-television broadcaster Canal Plus using its market power to obtain what it viewed as a good deal for the rights. It ended with the league using its market power to induce Canal Plus into paying an additional €40m (\$54.4m) per season, an increase of 124 per cent, for the same rights.

The turnaround hinges on a break clause in the contract between the broadcaster and the league, the Ligue Nationale de Rugby, and raises the question of why Canal Plus agreed to it. With the benefit of hindsight, agreeing to the clause looks like a very costly mistake.

Earlier this month, the league and Canal Plus signed a deal for five seasons, from 2014-15 to 2018-19, worth €71m per season. The deal was effectively an early renegotiation of the five-year deal, from 2011-12 to 2015-16, in which the broadcaster was paying €31.7m per season.

Some local rights experts said this week

that Canal Plus was originally underpaying for the rights and was now overpaying. Others said that given current levels of competition, when benchmarked against other properties, such as English football’s Premier League, Canal Plus was now paying a fair market rate.

When the last cycle of rights was negotiated, Canal Plus faced no competition in the French pay-television market. Although rival platform Orange Sport did not close until June 2012, Orange had long been signalling its intention to withdraw from the pay-television market and focus on its core telecoms activities.

Canal Plus initially offered €18.5m per year, a 30-per-cent decrease on the average of €26.25m it had paid from 2007-08 to 2010-11, incensing the league. The two parties eventually agreed the €31.7m-per-year deal. However, the league asked for a clause allowing it to renegotiate after three years and Canal Plus agreed.

Insiders say that, despite having the whip hand in the negotiations, the broadcaster would have agreed to the clause because it was nothing new or unusual. The league had always preferred to do long deals, for four or five years, and has always included a break clause, typically one year before the end of the contract. At the time, Canal Plus could not have foreseen that pay-television operator Al Jazeera would soon launch a pay-television service in France, with an apparently limitless budget for sports rights.

When Al Jazeera launched its beIN Sports channels, the tables turned and the league now had the whip hand. Canal Plus offered to increase its fee to between €65m and €66m per year but the league rejected the offer and activated the cancellation clause, ending the contract two seasons early. This meant it could tender the rights, pitching Canal Plus and beIN Sports against one another.

Fear of beIN Sports pushed Canal Plus up to €71m, which the league accepted. This meant an early end to the tender process, and infuriated beIN Sports. The broadcaster’s director general Yousef Al-Obaidly said that the rights should have been sold in a fair and transparent procedure and that the broadcaster would consider a complaint to the French competition authorities.

Canal Plus and the league declined to comment this week.

### Defensive move

Though the price may be high, the deal was a vital defensive move, local experts said this week. Since beIN Sports’s arrival in France, Canal Plus has lost several sports properties to its rival. BeIN Sports shares rights to Ligue 1 and Champions League football with Canal Plus, and has taken Wimbledon tennis and most ATP events, as well as NBA and Euroleague basketball from it.

Canal Plus’s strategy is now focused on retaining its core properties. The Top 14 is a good subscription driver for pay-

television and is the second most important domestic property behind Ligue 1.

“Canal Plus don’t want to take any risks with their top properties like Ligue 1, the Top 14 and the Premier League,” one source said. “For a long time they had good properties for a good price, but they are having to re-evaluate their strategy.”

Of Canal Plus’s 5m subscribers, 500,000 are thought to be big rugby fans. Renewing its deal will at least prevent these subscribers switching to beIN Sports, which has about 1.5m subscribers.

Canal Plus will pay €70m in the first and second seasons, €71m in the third, and €72m in the last two seasons.

### Good for the league

The deal is a good one for the league. It has more than doubled the value of its rights. The previous deal, initially from 2011-12 to 2015-16, was agreed at a time when Canal Plus faced little competition.

Canal Plus also offers greater exposure than beIN Sports would have. Club sponsors may have been aggrieved had the Top 14 moved to a platform with one third of the viewers.

### Rights

Canal Plus has the rights in all territories in which it operates. It has channels in sub-Saharan Africa, the Caribbean, the South Pacific, the Indian Ocean and Vietnam. It will show at least three games live every match day on its Canal Plus or Canal Plus Sport channels, with all other games available live on its Rugby Plus channel.

It will also work with the league to distribute Top 14 rights in all other countries outside France. One rugby expert estimated these rights to be worth about €2m per year in the current contract, and that this could increase to between €2.5m and €3m per year. The UK, South Africa, Australia and New Zealand are the most valuable markets for the league outside France.

The deal includes exclusive rights to the play-offs and the semi-finals, as well as non-exclusive coverage of the Top 14 final which must be shown free-to-air in accordance with French listed events legislation.

The Top 14 final is currently shown by public-service broadcaster France

### Timeline of Top 14 deal

**January 2011:** Canal Plus offers only €18.5m per year for Top 14 rights; the offer is rejected by the league

**May 2011:** Canal Plus agrees to pay an average of €31.7m per year but with a break clause after two seasons

**January 2012:** Al Jazeera arrives in France and buys rights to Ligue 1

**December 2013:** The league rejects an offer from Canal Plus to increase its fee and activates its break clause, putting the rights out to tender

**January 13 2014:** The league suspends the tender following the threat of legal action from Canal Plus

**January 14 2014:** The league signs a €355m deal with Canal Plus over five years

Télévisions in a three-year deal, from 2011-12 to 2013-14, worth about €650,000 per year. It is thought to be keen to renew its rights, but due to budgetary restrictions is unlikely to be able to pay a higher fee. Commercial broadcasters TF1 and M6 are not thought to be interested. ■

## OLYMPIC GAMES

# Russian time zone freezes rights fees in US and Canada

By Frank Dunne

The International Olympic Committee is set to earn less in media-rights income from the 2014 winter Olympic Games in Sochi than it did from the 2010 winter Games in Vancouver.

The most recent figure available for the global media rights for Sochi is \$1.26bn (€926.5m). This was published by the IOC prior to its deals last week in Africa and a handful of small territories where it was finalising deals late this week. The final figure will be higher but will not surpass the \$1.28bn the IOC earned for Vancouver. At best, the value will be flat.

It will be the first time that the value of the winter Games has gone backwards since 1992 and has everything to do

with the time zone.

In each case, the drop was due to broadcasters in the US and Canada having paid high premiums for the previous Games taking place in Canada. North America has always accounted for the majority of the media-rights value of the Olympic Games.

Timo Lumme, managing director of television and marketing at the IOC, told *TV Sports Markets* this week: “The global Olympic broadcast revenue from Sochi is comparable to Vancouver, rather than a significant increase as we saw for example from Torino 2006 to Vancouver 2010.”

He said that there were “a number of factors” affecting the figures, but by far the most important was location.

“Vancouver was an appealing time zone in two major broadcast territories (the host country and the United States) and this was reflected in the rights fees paid in those territories.”

He pointed out that in many other territories there had been an increase in rights fees for Sochi and that there would

be an increase over the whole 2014-2016 cycle. For the last cycle, covering the 2010 and 2012 Games, the IOC earned \$3.9bn.

### ‘Angry, suspicious, poorer’

The last time a winter Olympics failed to match its predecessor in rights values was the 1992 Games in Albertville, France. The IOC brought in about \$292m compared to the \$325m it had earned for Calgary, Canada, in 1988 – a fall of about 11 per cent. The drop was a market correction after US networks ABC, NBC and CBS got sucked into a frantic bidding war for the rights to Calgary.

The negotiation pushed ABC to pay \$309m, a 238-per-cent increase on the \$91.5m it had paid for the rights to the 1984 winter Games in Sarajevo, in the former Yugoslavia. ABC lost \$65m on the Games in Calgary.

Former IOC commercial director Michael Payne wrote in 2005 that the outcome, and the way the negotiations were handled, left US broadcasters “angry, suspicious and poorer.”



## Africa deals

Among the last deals to be finalised ahead of Sochi were the two the IOC signed last week in sub-Saharan Africa.

It renewed its deal for pay-television rights with SuperSport. For the free-to-air television rights in the region, the Octagon agency, the incumbent rights-holder, lost out to the Infront Sports & Media agency. The deal also includes radio, internet and mobile rights.

Infront will sell the rights with the collaboration of Paris-based rights agency TV Media Sport, which has a track record of selling football and athletics rights on the continent.

Local television executives estimate that the value of the contract is in the low millions of dollars.

The appointment of Infront came as something of a surprise, as Octagon was considered by local experts, and by the IOC, to have done a good job in an extremely difficult market.

Octagon's strategy was to charge low rights fees and top up revenues by selling advertising and broadcast sponsorship on a centralised broadcast feed (*TV Sports Markets* 16:3). It asked for rights fees from \$30,000 for the smallest territories up to \$300,000 for larger territories, such as Nigeria.

The IOC did not publish an invitation to tender for the new cycle but held direct talks with a small number of agencies. Infront is said to have been chosen for a combination of its track record in rights distribution, its financial offer and coverage commitments.

Infront will produce a tailored feed for African audiences and has pledged to increase the exposure of Olympic sports through year-round programming. The agency also acquired rights to the Youth Olympic Games in Nanjing, China, this summer as part of the deal.

One agency executive said that the Olympics in Africa were a tough sell. He said that there was strong interest in athletics in East African countries such as Kenya and Ethiopia where the sport was strong, and for the summer Games generally in South Africa, but that free-to-air broadcasters were reluctant to commit to showing significant coverage. Interest was virtually nil for the winter Games.

Some free-to-air broadcasters in the region also have a reputation for unreliability in terms of paying agreed rights fees. "You can deliver the sponsors, sell the airtime and hand them everything on a plate, and you still might not get the coverage you agreed," the agency executive said.

Another expert said that nobody would know the market value of the rights, nor the difficulties involved in selling them, better than Octagon. The fact that Octagon did not fight tooth and nail to hang on to the rights, he said, pointed to the agency having either lost money or made very little profit on its deal. ■

## TENNIS

# Australian Open leaps in hot Asian pay-TV markets

By Kevin McCullagh

The Australian Open tennis grand slam has generated a rights fee increase of at least 350 per cent in two major deals covering most of Asia, driven by strong competition between pay-television operators.

Fox International Channels Asia is paying about \$5m (€3.7m) per year for the rights in 20 territories in East Asia. Sony Six is paying about \$1.75m per year for the rights in the Indian subcontinent. Both buyers are pay-television broadcasters. Both deals cover the five years from 2015 to 2019.

The combined value of about \$6.75m per year compares to the \$1.5m per year generated in a single deal covering the same territories in the seven years from 2008 to 2014. Pay-television broadcaster ESPN Star Sports was the previous rights-holder.

The rights are sold by the IMG Media agency, on behalf of rights-holder Tennis Australia. IMG has a multi-year, commission-based deal to sell the media rights in most territories outside Australia.

IMG tendered the rights across Asia, excluding China and Japan, and is understood to have received strong interest from a mixture of multi- and single-territory broadcasters. The sales process took place during mid- to

late-2013 – the opening round of bids took place during the Wimbledon tennis championships last June and July.

The two Asian pay-television arms of Rupert Murdoch's 21st Century Fox, FIC Asia and Star India, were major forces in the bidding. Star bid unsuccessfully against Sony Six in the Indian subcontinent.

FIC Asia and Star were the previous rights-holders. They inherited the rights when the ESPN Star Sports brand was dissolved after Murdoch took full control of the company in 2012 by buying out ESPN's 50-per-cent stake.

FIC Asia is understood to have seen off interest in the rights from Al Jazeera-owned pay-television sports broadcaster beIN Sports. FIC Asia and beIN Sports are the most ambitious multi-territory players in East Asia. They have been building their platforms in the last year, adding content and launching channels in new territories, and are expected to be major rivals in the rights market.

Single-territory operators are also understood to have provided strong competition for FIC Asia. One well-placed source said the timing of the sale was good, as it coincided with channel carriage renewal talks between FIC and several single-territory pay-television platforms. Some platforms are understood to have tried to win the Australian Open rights in order to weaken FIC's portfolio and its position in the carriage talks. In the end, FIC Asia's offer was strong enough to dissuade IMG from going market by market.

FIC Asia is understood to have bid separately from its Indian subcontinent sister broadcaster Star.

## Competitive India

Sony Six is understood to have faced competition for the Indian subcontinent rights from pay-television broadcasters Neo Sports and Ten Sports, as well as Star. The four players are making the region an increasingly competitive sports rights market (see separate story, page 1).

Indian industry insiders say tennis grand slams are popular in the country, helped by Indian players' success in the men's mixed doubles in recent years.

The Australian Open generates strong interest across Asia – it is marketed as "the Grand Slam of Asia-Pacific." ■



## SPORTS CLIPS: News from TVSM Daily from January 16 to January 29

### MEDIA RIGHTS 1

## American football, Aussie rules, baseball, boxing, cricket and more

- **American Football:** Regional US broadcaster NBC Bay Area, operated by the NBCUniversal media company, will show at least 400 hours of non-game programming per year dedicated to the San Francisco 49ers as part of a 10-year agreement with the NFL franchise, from 2014-15 to 2023-24.
- **Aussie Rules:** Digital free-to-air channel Sommet Sports and pay-television broadcaster Sky New Zealand acquired rights in the country for the Australian Football League covering three years, from 2014 to 2016. Sommet will show at least five matches live per week plus the finals series and the grand final, with the remaining games broadcast on a delayed basis. Sky will show one match per week and one finals game per week on a delayed basis plus live coverage of the grand final and Anzac Day matches. Sommet and Sky will show weekly highlights and NAB Challenge pre-season games.
- **Baseball:** The MP & Silva agency will distribute the global media rights for the Chinese Professional Baseball League, the top division in Chinese Taipei, for six years, from 2014 to 2019. The agreement covers all regular-season games, the All-Star series, Taiwan series and Winter League. The agency will produce the coverage.
- **Boxing:** The IMG Media agency will distribute live rights for Wladimir Klitschko's fights until the end of the heavyweight's career. The global deal excludes Germany, Austria, Switzerland and the Ukraine. IMG Media will market the complete archive of fights dating back to 2004 featuring Wladimir and his brother Vitali. IMG Media struck the deal with Klitschko Management Group, which represents the brothers.
- **Bowling:** The Octapixx Live agency was awarded global rights for events operated by the Professional Bowlers Association, the main sanctioning body for ten-pin bowling in the US. The multi-year deal covers new and archived coverage of events such as the World Series of Bowling, Geico Summer Swing and PBA League.
- **Cricket:** Indian pay-television broadcaster Star India acquired online and mobile rights in a sublicensing deal with Times Internet, the digital division of the Times of India media group, for the 2014 Indian Premier League Twenty20 competition. Star India and Times Internet will both offer video-on-demand and live coverage, with Star India selling advertising across both companies' platforms.
- **Football:** Pay-television broadcaster Elta TV acquired rights in Chinese Taipei for all 64 games during the 2014 World Cup in a deal with Fifa, the sport's global governing body. Elta sublicensed digital rights to telecommunications company ChungHwa Telecom.
- **Football:** State-owned broadcaster S Media extended rights deals in Myanmar for the Uefa Champions League and Europa League for three seasons, from 2015-16 to 2017-18. S Media will show all Champions League matches and eight Europa League matches live per kick-off slot plus highlights of both tournaments across seven S Media Skynet Sports channels and free-to-air channel MNTV. The rights include coverage of the Super Cup match in 2015, 2016, 2017 and 2018. The deal was brokered by the Team Marketing agency.
- **Football:** US pay-television broadcaster One World Sports will distribute programming from the Milan Channel, the official television channel of Italian Serie A club AC Milan, for two-and-a-half years, until the end of the 2015-16 season. The deal includes delayed coverage of Milan's weekend matches on Tuesday nights. Highlights and other content will be available on the Watch One World Sports mobile application.

### SINCE LAST TIME

- David Stern, the commissioner of the NBA basketball league, said that he was in "no doubt" that English Premier League football matches would soon be available to watch on UK television at 3pm on Saturday afternoons.
- Portugal's media regulator, the ERC, refused to accept a proposed deal for telecommunications company Portugal Telecom to acquire a 25-per-cent stake in Portuguese pay-television broadcaster Sport TV. ERC told Portugal Telecom and the Zon Multimedia and Sportinveste media companies, Sport TV's other shareholders, to amend "non-competition clauses" in the arrangement.
- Austrian commercial broadcaster Puls 4 complained to KommAustria, the country's media regulator, about public-service broadcaster ORF's acquisition of rights for the Uefa Champions League football tournament over three years, from 2015-16 to 2017-18. Puls 4, which was outbid by ORF, said that the public-service broadcaster paid excessively for the rights.
- BBC sports rights executives David Murray and Robert Foster left the UK public-service broadcaster to found a sports rights consultancy, Fozmuz. Murray, formerly the BBC's head of sports rights, told *TV Sports Markets* that the new agency saw an opportunity to service an increasing number of broadcasters, rights-holders, federations and other companies looking for sports rights advice. Fozmuz will seek to do so at lower cost than some of its rivals, due to its small team and low overheads, he said. The agency has a deal with the BBC under which Murray and Foster will continue to advise on sports rights acquisitions.

### MEDIA INTERNATIONAL

- Media company 21st Century Fox increased its stake in US regional pay-television sports broadcaster Yes Network from 49 per cent to 80 per cent.
- NBC Olympics, a division of the NBCUniversal US media company, agreed a deal with Facebook for the social media website to carry 2014 winter Olympic Games video content.

**SPORTS CLIPS:** News from TVSM Daily from January 16 to January 29**MEDIA RIGHTS 2****Golf, hockey, mixed martial arts, motocross, Formula One and V8 Supercars**

- **Golf:** Australian commercial broadcaster Seven acquired rights for the US Masters in a multi-year deal with the Augusta National Golf Club, which hosts the tournament. The deal includes television, online, IPTV, mobile and broadband rights.
- **Golf:** SendtoNews agreed a multi-year deal to show highlights of events sanctioned by the US PGA Tour on the digital sports video agency's network of local news websites in the US.
- **Hockey:** Star India acquired global rights, excluding Argentina, for events operated by the FIH, the sport's global governing body, in an eight-year deal, from 2015 to 2022. Star India will produce the coverage.
- **Mixed Martial Arts:** The Abu Dhabi Media Company pay-television and free-to-air broadcaster acquired rights in the Middle East and North Africa for the Ultimate Fighting Championship. The deal will run for three years, from 2014 to 2016, and includes live coverage, highlights and magazine programmes on free-to-air, pay-television, online, mobile and IPTV platforms.
- **Mixed Martial Arts:** Asian pay-television channel Kix acquired rights for events operated by promoter Bamma.
- The deal covers Brunei, Hong Kong, Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam.
- **Mixed Martial Arts:** Malaysian free-to-air broadcaster TV9 acquired rights for the One Fighting Championship series until at least the end of 2014.
- **Motorcycling:** Pan-regional sports broadcaster Eurosport acquired rights for the Motocross World Championship and Motocross of Nations. The three-year deal with the events' promoter Youthstream will run from 2014 to 2016. The agreement, including live coverage and highlights, covers 54 European countries and 16 Asia-Pacific countries.
- **Motorcycling:** German sports broadcaster Sport1 renewed a deal for live and delayed coverage of the Motocross World Championship and Motocross of Nations for two years, from 2014 to 2015.
- **Motorsport:** Spanish commercial broadcaster Antena 3 and Catalan public-service broadcaster TV3 agreed extensions to rights deals for the Formula One world championship. The deals with the Mediapro agency will run for two years, from 2014 to 2015, and include television and mobile rights (page 4).
- **Motorsport:** The Setanta Sports Eurasia division of pay-television sports broadcaster Setanta Sports agreed a two-year Formula One rights deal, from 2014 to 2015. The agreement with Formula One Management, the commercial rights-holder for the the championship, covers Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan, Turkmenistan and Uzbekistan.
- **Motorsport:** Sport 24, the live sports channel produced and distributed by the IMG Media agency exclusively for the in-flight and in-ship markets, acquired Formula One rights from FOM. Sport 24 will show live coverage of races, qualifying and practice sessions for three years, from 2014 to 2016.
- **Motorsport:** The IMG Media agency renewed a global rights deal, excluding Australia and New Zealand, for the V8 Supercars championship for three years, from 2014 to 2016. The rights include live coverage of 38 races across television and in-flight platforms. IMG Media will sublicense on rights for live coverage of qualifiers, highlights and a season review.

- US Major League Baseball franchise the Los Angeles Dodgers said that its new regional pay-television sports channel, SportsNet LA, will launch on February 25 as part of a 25-year local rights deal, from 2014 to 2038, with US broadcaster Time Warner Cable.
- The Fox International Channels Latin America broadcast subsidiary of media company 21st Century Fox launched pay-television channel Fox Sports 2 in Brazil.
- Filipino commercial broadcaster ABS-CBN replaced free-to-air youth lifestyle channel Studio 23 with a new sports channel, ABS-CBN Sports+Action Channel.
- Uefa, football's European governing body, launched sales processes for rights in Italy, Spain and Greece to European national team qualifiers for Euro 2016 and the Fifa 2018 World Cup. Bids for the rights over four years, from 2014-15 to 2017-18, must be submitted to the CAA Eleven agency by February 20 in Spain and February 21 in Italy and Greece.
- Public-service broadcaster France Télévisions is unlikely to acquire rights for the 2014 Fifa World Cup and is more likely to seek a deal for Euro 2016, according to director of sport Daniel Bilalian.

**ALSO SINCE LAST TIME**

- SNTV, a joint venture between the Associated Press news agency and IMG Media agency, agreed a three-year deal, from 2014 to 2016, with Eurosport to supply digital and television content for the pan-regional broadcaster's international channels and digital platforms.
- Internet video technology provider NeuLion agreed a deal with Microsoft to provide live sports content through the computer company's Xbox One games console.

**MEDIA RIGHTS NEGOTIATIONS**

- Pay-television broadcaster ESPN and the Fox and CBS networks submitted bids for rights to Thursday night NFL American football games during the 2014-15 season. The NBC network is also expected to bid.

**SPORTS CLIPS:** News from TVSM Daily from January 16 to January 29**MEDIA RIGHTS 3****Olympic Games, rugby union, swimming and Australian Open tennis**

- **Olympic Games:** Pay-television sports broadcaster SuperSport acquired rights in South Africa and sub-Saharan Africa for the 2014 winter Games and 2016 summer Games. The deal with the International Olympic Committee covers pay-television satellite, online and mobile platforms (page 7).
- **Olympic Games:** International Media Content, the owner of pay-television broadcaster SportsMax, acquired exclusive English-language pay-television and free-to-air broadcast rights in the Caribbean for the 2014 winter Games. The deal, excluding online and mobile rights, covers Anguilla, Antigua-Barbuda, the Bahamas, Barbados, Belize, Bermuda, the British Virgin Islands, Cayman Islands, Cuba, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago and the Turks and Caicos Islands. SportsMax will sell on rights to free-to-air broadcasters.
- **Olympic Games:** Sports5, the sports arm of commercial broadcaster TV5, acquired rights in the Philippines for the 2014 winter Games, 2016 summer Olympics and the 2014 summer youth Games in a deal with the Dentsu agency.
- **Olympic Games:** The IMG Media agency's Sport 24 channel acquired exclusive rights for the 2014 winter Games for the in-flight and in-ship markets.
- **Rugby Union:** Indian pay-television channel Sony Six acquired exclusive rights for the 2014 Six Nations (page 1).
- **Swimming:** US sports broadcaster Universal Sports Network acquired exclusive television and online rights for events operated by Fina, the sport's global governing body. The eight-year deal, from 2014 to 2021, covers four World Championships, three World Swimming Championships (25m), three Diving World Cups and two Synchronised Swimming World Cups.
- **Tennis:** The Fox International Channels Asia broadcast subsidiary of media company 21st Century Fox acquired television, online, mobile and IPTV rights for the Australian Open across 20 Asian territories. The multi-year agreement with Tennis Australia covers Brunei, Cambodia, East Timor, Guam, Hong Kong, Indonesia, Laos, Macau, Malaysia, Micronesia, Mongolia, Myanmar, Papua New Guinea, the Philippines, Singapore, South Korea, North Korea, Taiwan, Thailand and Vietnam (page 8).




**Sportel**  
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## **TV Sports Markets announces line-up for SPORTEL conference programme in Shanghai**

*TV Sports Markets* will present two high-level panel discussions on March 4 at the *SPORTEL Asia 2014* event in Shanghai.

“Building a Successful Sports Brand in Asia,” will feature Shingo Shibuya of Dentsu, Michael Wandell of NBA China and Jörg Daubitzer of DFL Sports Enterprises.

“The Future for Sports Channels in Asia,” will feature Peter Hutton of MP & Silva, Lee Choong Khay of Astro and Rohit D’Silva of Fox International Channels.

Both panels will be moderated by Frank Dunne, Editor of *TV Sports Markets*.

The panels are part of a comprehensive agreement with *SPORTEL* to deliver compelling conference content during *SPORTEL Asia 2014* and *SPORTEL Monaco 2014*.

# SPORTS CLIPS: News from TVSM Daily from January 16 to January 29

## MEDIA RIGHTS 4

### Tennis: ATP World Tour, Davis and Fed Cups, International Premier League

- **Tennis:** Pay-television broadcaster OTE acquired exclusive rights in Greece for events on the ATP World Tour men's circuit, including the World Tour Finals. The three-year deal, from 2014 to 2016, covers all top-tier Masters 1000 events plus 11 events from the 500 series and 16 events from the 250 series. The deal was brokered by the IMG Media agency.
- **Tennis:** Spanish public-service broadcaster TVE extended a rights deal for the men's Davis Cup and women's Fed Cup for three years, from 2014 to 2016, in an agreement with the International Tennis Federation. The rights cover all Spain national team matches.
- **Tennis:** British Eurosport, the UK division of pan-regional broadcaster Eurosport, acquired rights for the Davis Cup, Fed Cup and mixed team Hopman Cup for three years, from 2014 to 2016, in a deal with the ITF.
- **Tennis:** UK public-service broadcaster the BBC acquired rights for all Great Britain national team matches during the World Group elite stage of the Davis Cup in a three-year deal with the ITF, from 2014 to 2016.
- **Tennis:** The MP & Silva agency acquired global rights for the 2014 International Premier Tennis League tournament.

- Football's English Premier League extended a deal to allow digital sports media company Perform to have global responsibility for advertising sales on the league's official website for three years, from 2014 to 2016.
- Perform announced a partnership with the North American Soccer League to stream live and on-demand coverage of the league's matches through the NASL.com website.
- United Soccer Leagues Pro agreed a deal with YouTube to allow the video-sharing website to show live coverage of every game from the US football competition.
- The Nigeria Football Federation appointed production company HotSports to produce non-match content surrounding its national team in a three-year deal, from 2014 to 2016.
- The CSM Sport & Entertainment division of marketing agency Chime Communications established a new company, Sportseen, and agreed a partnership with the Pitch International agency to sell advertising and sponsorship surrounding major televised sporting events through the venture.
- UK pay-television broadcaster At The Races launched in-house streaming division Sport Mediastream and will seek sports-rights outside of horse racing for the service.
- Hong Kong pay-television provider Now TV will launch Now688, a dedicated horse racing channel, on February 2.
- Turf TV, the channel for betting shops in the UK and Ireland, struck a deal for its coverage of US racing to be shown in UK bookmaker William Hill's betting shops.

## INDUSTRY MOVES

- Ross Hair resigned as managing director of pay-television broadcaster ESPN's operations in Europe, the Middle East and Africa. Charly Classen was promoted to vice-president and general manager of ESPN EMEA.
- Huw Bevan was named as the head of the Sunset+Vine production company's new office in Singapore.
- The IMG Productions division of the IMG agency appointed Nick Moody as the head of Premier League Productions, which produces and distributes the English Premier League's international programming.
- US pay-television broadcaster One World Sports appointed Randy Brown as executive vice-president of distribution.

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