

TVSportsMarkets

www.sportbusiness.com/tv-sports-markets

Inside this issue

TV ITALY: Vivendi/Telecom Italia joint venture could shake up Italian market	3
FOOTBALL: Uefa close to Facebook deal but struggling in Latin America and Turkey	6
FOOTBALL: BeIN set to launch tenders in Brazil and LatAm for Ligue 1	9
RUGBY UNION: EPCR international rights value likely to fall in new cycle	12
MOTORSPORT: F1 opts for ESPN in the US as it plans OTT launch	15
CRICKET: Cricket Australia suffers decline in Indian subcontinent deal with Sony	17
TV AFRICA: Broadcasters and agencies turn to boxing rights in Africa	19
CRICKET: BPL without international deals due to IMC/DSport dispute	22
FOOTBALL: Eleven recoups some Bundesliga costs from NC Plus sublicensing deal	24
FOOTBALL: Globo to hold exclusive CBF rights following linear agreement	26
FOOTBALL: Bundesliga renews betting deal with Sportradar at small increase	28
TENNIS: IQiyi doubles Australian Open digital rights fee in China	30
US COLLEGE SPORT: Pac-12 increases Chinese value in long-term Alisports deal	32
FOOTBALL: Uefa earns solid increase for its club competitions in the Balkans	34
FOOTBALL: Fifa defies expectations with lucrative ERT World Cup agreement	35
CRICKET: SuperSport to show T20 Challenge as part of original CSA contract	36
Deals round-up	37
Industry news in brief	44

Editorial



Robin Jellis

Editor
+44 20 7265 4139
+44 7846 822175
robin@tvsportsmarkets.com
@robinjellis



Callum McCarthy

Reporter
+44 20 7265 4244
+44 7462 149895
callum@tvsportsmarkets.com
@clmmcrthy



David Cook

Reporter
+44 20 7265 4109
+44 7402 085693
david.cook@tvsportsmarkets.com
@dmacook



Frank Dunne

Chief Sports Writer
+39 051 523 815
+39 349 584 6423
frank@tvsportsmarkets.com
@frankdunnetvsm

Analysts



Gino Di Castri

Analyst
+44 20 7265 4246
+44 7792 662816
gino.dicastro@sportbusiness.com
@gdicastro



David Svenson

Analyst
+44 20 7265 4245
+44 7540 343332
david.svenson@sportbusiness.com
@David2241

Account Management



Paul Santos

Head of Business Development
+44 20 7265 4183
+44 7931 390502
paul.santos@sportbusiness.com
@onesantos



Scott Longhurst

Account Manager
+44 20 7265 4184
+44 7500 904656
scott.longhurst@sportbusiness.com



Patrick Odling

Account Manager
+44 20 7265 4103
+44 7921 140713
patrick.odling@sportbusiness.com
@patrickodling



Max Frew

Account Executive
+44 20 7265 4178
+44 7493 7793374
max.frew@sportbusiness.com

Important Terms and Conditions

All rights in this newsletter are reserved. No part of this newsletter may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of TV Sports Markets. For full terms and conditions of use, please visit: <http://www.sportbusiness.com>.

TV Sports Markets, trading address: 7th Floor, 133 Whitechapel High Street, London, E1 7QA

TV Sports Markets, registered address: 4th Floor, Park House, 116 Park Street, London, W1K 6AF

© TV Sports Markets Ltd 2017

TV ITALY

Vivendi-Telecom-Mediasset axis poses threat to Sky's dominance

By Frank Dunne

Rights-holders are keenly following negotiations between French conglomerate Vivendi and Italian media group Mediasset, which could unblock the impasse over Vivendi's takeover of the Mediasset Premium pay-television platform.

A successful outcome could pave the way for the creation of a powerful new pay-television alliance in Italy between Vivendi (owner of pay-television broadcaster Canal Plus), telco Telecom Italia and Mediasset Premium. Vivendi holds a 28.8-per-cent stake in Mediasset, and a controlling 24-per-cent stake in Telecom Italia.

The dispute between Vivendi and Mediasset began when the former pulled out of an April 2016 deal to buy Mediasset Premium for €760m (\$897m), claiming it had been supplied inaccurate information about the platform's finances by Mediasset.

Mediasset subsequently brought a €3bn damages action against Vivendi. Legal proceedings are due to begin in Milan on December 19, but there were signs this week of a possible settlement.

This would involve Vivendi completing the purchase of Mediasset Premium for between €400m and €1bn, and paying a further €400m in compensation, according to reports.

Vivendi would also reduce its stake in Mediasset, Mediasset Premium's parent company, to less than 10 per cent. Italian competition regulators warned Vivendi in August it would have to reduce its stake in either Telecom Italia or Mediasset to avoid breaching cross-ownership rules.

Vivendi and Telecom Italia have already announced a joint venture pay-television company, Canale Plus, which the two parent organisations say will compete in the sports-rights market. Ownership of the joint venture is split 80:20 between Telecom Italia and Vivendi's Canal Plus.

Some analysts believe the joint venture would not have the penetration to compete with leading pay-television broadcaster Sky Italia for premium sports rights. It is thought likely the joint venture will initially deliver content via the TIM Vision OTT service, which in June had about 600,000 subscribers.

Adding Mediasset Premium's 2m subscribers to the operation would create a strong rival to Rupert Murdoch's Sky Italia, which has about 4.8m subscribers.

Augusto Preta, founder of media research company ITMedia Consulting, said it would make no commercial sense for such a company to compete with Sky for one of the most expensive packages of Serie A rights, which could cost several hundred million euros per season. It would be more logical to bid for a smaller package of rights, or a specific OTT package, should the league make one available.

It may be too soon for Canale Plus to pay the amounts required to land one of the most attractive Serie A packages, but if it wants to build a sustainable subscriber base – with or without Mediaset Premium – it will have to bid aggressively for some premium sport.

In the next three to four months, at least four major sports properties will come to market: domestic rights to the top two football leagues, Serie A and Serie B; Formula One; and MotoGP. Other top football rights, including the 2018 Fifa World Cup and Uefa national team matches (Euro 2020, European Qualifiers and the Nations League), are already on the market.

As Preta put it: “If you want to launch a new pay-television enterprise you have to have top sport. Films and TV series are not enough.”

Growing competition

The emergence of a new pay-television alliance would be the biggest development in the Italian market for years. But there are other factors which suggest rights-holders coming to market this year and next will enjoy greater competition than they have in the last four to five years.

US media company Discovery Communications has been gradually strengthening its Italian rights portfolio with second-tier properties that Sky or sports channel Fox Sports would normally target. The combination of the Eurosport pay-television channel, Eurosport Player OTT service, and free-to-air channel Dmax is an attractive one for rights-holders.

In recent months, Discovery has taken the rights to Italy’s top domestic basketball league, Lega Basket, from Sky, and Euroleague basketball from Fox.

Discovery will pay about €1.5m per season in a three-season deal, from 2017-18 to 2019-20, for exclusive domestic pay-television rights to Lega Basket properties. This is 140 per cent more than Sky paid in its two-season deal covering 2015-16 and 2016-17, worth €620,000 per season (*TV Sports Markets* 21:13).

Discovery is also paying just over €2m per season over four seasons, from 2017-18 to 2020-21, for the Euroleague, more than double the €980,000 per season Fox had paid in a four-season deal, from 2013-14 to 2016-17 (*TV Sports Markets* 21:14).

Local experts believe digital media company Perform has identified Italy as a core target market for the rollout of its OTT platform DAZN, and will become increasingly aggressive. It has bid unsuccessfully for rights to Serie A, Uefa’s Europa League and Lega Basket.

It is expected to bid again for Serie A rights, provided the league creates a package (or packages) that would offer enough exclusivity to drive take-up of the service at a price which reflects the true market value of the rights.

In each of the last two Serie A auctions – a failed auction in June this year and the auction preceding the current rights cycle – the league massively overpriced its OTT packages, offering no exclusivity. It failed to find a buyer on both occasions.

The takeover of the Sportube OTT platform by sports broadcaster Eleven Sports has added another player to the market, albeit one which does not plan to bid for premium rights. Its recent deal to carry three live Serie A matches per week will provide Eleven with valuable data which will shape its future strategy (*TV Sports Markets* 21:17).

World Cup negotiations

The MP & Silva agency, Fifa's sales representative in Italy for the 2018 and 2022 World Cups, is currently in talks with Italian broadcasters about rights to the 2018 tournament. Negotiations have been difficult so far with bids far below the agency's asking price.

In the first round of bidding, Mediaset is thought to have offered about €130m for free-to-air and pay-television rights. This was higher than the total of separate bids for free-to-air rights from public-service broadcaster Rai, and pay-television rights from Sky. Rai and Sky then joined forces and launched a joint bid that was higher than Mediaset's. Mediaset responded with a bid worth about €150m.

MP & Silva has guaranteed Fifa, football's global governing body, €185m for the rights to 2018 and €195m for the rights to 2022 (*TV Sports Markets* 21:11). Because of the structure of the deal, the agency only needs to hit €162m to break-even on 2018. If it brought in that amount, the agency would have to make up the shortfall, paying Fifa the €23m difference. However, it would then be paid 12.5-per-cent commission on the full €185m, or about €23m.

The fresh Mediaset offer is still well below the €162m break-even figure. One option thought to be open to the agency is to carve out certain digital rights and sell these separately, but experts say MP & Silva could still find it challenging to hit its 2018 target. The agency would have to look to break even or make a margin by doing a better deal, in a potentially stronger market, for 2022.

All broadcaster offers are understood to be based on Italy qualifying for the 2018 tournament. Italy finished second in its group, behind Spain, and faces a play-off against Sweden over two legs on November 10 and 13. It is not clear what the next step will be if Italy fails to qualify. Broadcast sources say the value of the competition would be reduced by about 50 per cent.

Rai paid €340m for the 2010 and 2014 World Cups, split €165m for 2010 and €175m for 2014. Italy qualified for both competitions (*TV Sports Markets* 16:22). ◆

FOOTBALL

Latin America and Turkey prove tough work for Uefa and Team

By Callum McCarthy

Tenders for Uefa's club competitions in Latin America and Turkey have failed to produce winners thus far, as bids have fallen below Uefa's expectations.

Champions League and Europa League rights in Latin America, from 2018-19 to 2020-21, were tendered on August 29, with an October 3 deadline for each.

Team Marketing, the sales agency for Uefa's club competitions, is thought to be seeking a strong increase in the region. But weak competition and the looming sale of rights to the Copa Libertadores and Copa Sudamericana club competitions – Conmebol's equivalent to the Uefa competitions – has limited the bidding.

One local expert suggested the tender could be re-run during or after the sale of Libertadores and Sudamericana rights.

Pay-television broadcasters Fox Sports Latin America and ESPN, which have shared the rights to both Uefa competitions for the last two cycles, are thought to have bid jointly for rights in the new cycle.

Fox and ESPN's current deal, from 2015-16 to 2017-18, is worth \$50m (€42.5m) per season. The broadcasters pay an equal share of the fee, sharing first-pick rights on alternating Tuesdays and Wednesdays, and simulcasting the final (*TV Sports Markets* 18:15).

It is double the amount the two paid from 2012-13 to 2014-15, an increase driven by competition from pay-television broadcaster beIN Sports, which was then looking to launch in the region.

The only serious competition Fox and ESPN are expected to face this time is from pay-television operator DirecTV, which carries both channels. DirecTV would have bid to gain leverage over the broadcasters, but did not bid strongly for rights in the current cycle.

Facebook makes its move

While there has been slow progress on a pay-television sale in Latin America, there is better news for Uefa regarding its free-to-air rights. *TV Sports Markets* understands social media platform Facebook will acquire exclusive free-to-air rights to at least the Champions League across Latin America, from 2018-19 to 2020-21.

The deal will mark Facebook's first major sports rights acquisition after almost two years of experimenting with live-streaming sport. Thus far, it has either partnered with broadcasters or struck deals with smaller rights-holders seeking extra exposure for their rights.

It follows Facebook's unsuccessful bid for exclusive Indian Premier League digital rights in the Indian subcontinent, for which it bid \$609.2m over five years, from 2018 to 2022 (*TV Sports Markets* 21:16).

This deal will be markedly cheaper. Local experts say Facebook's deal could be worth between \$5m and \$10m per season, depending on the territories in which it will hold rights.

In the current cycle, Champions League and Europa League free-to-air rights were not sold in Argentina, Chile, Uruguay and Venezuela (barring the Europa League final) to preserve the value of the pay-television rights. Should Facebook acquire rights in these territories – some of Latin America's most lucrative – it would have to pay many times the current value.

Free-to-air Champions League and Europa League rights in Latin America (excluding Brazil) are worth about \$2m per season in the current 2015-16 to 2017-18 cycle, across multiple deals.

Uefa's most lucrative free-to-air deals are with: Mexican commercial broadcaster and pay-television operator Televisa, which acquired Champions League rights only; and Colombian commercial broadcaster RCN, which is one of two free-to-air broadcasters in the region to have acquired both Champions League and Europa League rights.

Experts believe Facebook must have paid a premium to convince Uefa to part with long-term free-to-air partners. While Facebook is widely used in more developed countries, broadband penetration in some Latin American countries is very low in comparison to terrestrial television penetration.

Uefa to wait in Brazil

The muted response to the Champions League and Europa League tenders in Latin America has caused Uefa to delay its tenders in Brazil, where it fears a similar situation could occur.

Tenders for rights to both competitions, from 2018-19 to 2020-21, were due to be released on November 2 with a deadline of December 5. The decision to delay the process until January, with a provisional deadline in February, means the Champions League and Europa League sales process will run at the same time as the IMG agency's Libertadores and Sudamericana sales.

Local experts said Uefa would face a battle to prevent a market correction after pay-television broadcaster Esporte Interativo paid a 180-per-cent increase for exclusive pay-television and digital rights to the Champions League in the current cycle, from 2015-16 to 2017-18. That deal is worth \$45m per season (*TV Sports Markets* 18:21).

Globo holds free-to-air Champions League rights in the current cycle in a deal worth about \$15m per season. ESPN and Esporte Interativo share Europa League rights in the country in the same cycle in deals worth a total of \$8m per season (*TV Sports Markets* 18:22).

Competition in the new cycle is likely to be plentiful, but broadcaster aggression is likely to depend on how, and to whom, Libertadores and Sudamericana rights are sold.

Pay-television broadcaster ESPN is keen to acquire Champions League rights after losing them to Esporte Interativo in the current cycle, and there is likely to be competition from media group Globo for free-to-air and pay-television rights.

Tortuous talks in Turkey

Sources close to talks in Turkey believe the fee for the two Uefa club competitions will not significantly increase in a new cycle. Tenders in Turkey for rights to the Champions League and Europa League were sent out on September 18, with a bid deadline of October 16.

In the new cycle, from 2018-19 to 2020-21, Champions League bidding has gone to a third round. Pay-television broadcaster beIN Sports, pay-television operator D-Smart, the Saran Media agency (which operates pay-television channel S Sport), and telco Türk Telekom all bid in each round. The Europa League tender has concluded, with Uefa currently deciding to whom it will award the rights.

It is thought bidders are looking to keep the value of the rights close to their current value, as Turkey's economic and political turmoil has restricted broadcasters' and agencies' ability to make a profit from subscriptions and sublicensing.

Türk Telekom, which operates pay-television broadcaster Tivibu, currently holds exclusive Champions League and Europa League rights in a deal worth €48m per season, from 2015-16 to 2017-18 (*TV Sports Markets* 18:23). The telco sublicenses free-to-air rights to each competition to public-service broadcaster TRT on an ad-hoc basis.

Sub-Saharan Africa and Canada next

Tenders for Champions League and Europa League rights in sub-Saharan Africa were sent out on October 13, with bids due by November 23. It is thought pay-television broadcaster SuperSport, telco Econet (which owns pay-television operator Kwesé TV and sports broadcaster Kwesé Sports) and pay-television operator StarTimes will bid aggressively for English-language rights. Pay-television operator Canal Plus Afrique is the only realistic destination for Uefa's French-language rights.

English- and Portuguese-language rights in the region to both competitions are held by SuperSport in a deal worth about \$130m per season, from 2015-16 to 2017-18 (*TV Sports Markets* 17:21). Canal Plus Afrique pays about \$10m per season for French-language rights over the same three seasons.

Tenders for the same rights were sent out in Canada on October 10, with a deadline of November 14. Rights to both competitions are currently held jointly by telco Bell and beIN. The two pay \$5m per season for the Champions League and \$800,000 per season for the Europa League, from 2015-16 to 2017-18 (*TV Sports Markets* 19:1). ◆

FOOTBALL

BeIN set to offer Ligue 1 rights to broadcasters in Brazil and LatAm

By Robin Jellis

- BeIN will pay €80m per season for Ligue 1 international rights, from 2018-19 to 2023-24
- It is seeking strong increases from Brazil, Latin America and sub-Saharan Africa
- Brazil currently worth \$1.5m per season; LatAm €4m per season; Africa €12m per season

BeIN Media Group will launch tenders for French Ligue 1 media rights in Brazil and Latin America next week, *TV Sports Markets* understands.

BeIN holds Ligue 1 international rights in a six-season deal, from 2012-13 to 2017-18, worth €32.5m (\$38.2m) per season. It will hold the same rights in the next six-season cycle, from 2018-19 to 2023-24, in a deal worth €80m per season (*TV Sports Markets* 18:11).

In the current cycle, beIN retains rights in territories where it runs its pay-television beIN Sports channels: the Middle East and North Africa, Spain, the US, Canada, Australia, New Zealand and Southeast Asia (Brunei, Cambodia, Hong Kong, Indonesia, Laos, Malaysia, the Philippines, Singapore, and Thailand).

In the rest of the world, it awarded Ligue 1 rights to the MP & Silva and Pitch International agencies. Pitch sold on rights in Brazil and Latin America; MP & Silva in all other territories. Both agencies pay beIN a minimum guarantee and share additional revenue.

BeIN will take the sale of Ligue 1 rights in-house from 2018-19 onward. Doing so will mean the French football league, the Ligue de Football Professionnel, will have more visibility over the contracts struck with international broadcasters. But the league will not be signatory to any agreements.

BeIN is likely to retain rights for use on its beIN Sports pay-television channels around the world, although it is open to selling the rights to other broadcasters should it receive attractive offers.

BeIN plans to sell rights in Brazil, Latin America and sub-Saharan Africa in the coming weeks. It will sell to broadcasters for three or six seasons depending on the strength of the offers it receives. It has identified these three regions as ones in which it can significantly grow the current value of the rights.

Broadcasters are likely to have three or four weeks to respond to the tender in Brazil and Latin America, with deals planned to be finalised in December. A tender in sub-Saharan Africa is likely to follow shortly afterwards, although beIN may agree a direct deal with an interested broadcaster.

BeIN is thought to be confident it can make a profit on its €80m-per-season deal with the league once the value of the rights to its channels is accounted for.

One small factor which may help the rights increase in value from 2018-19 is the addition of the Trophée des Champions, the match between the Ligue 1 champion and the winner of the Coupe de France cup competition. These rights are currently carved out of all Ligue 1 international deals and are sold on a standalone basis.

Broadcasters around the world will be able to acquire from beIN rights to the top-tier Ligue 1, second-tier Ligue 2, the Trophée des Champions and the Coupe de la Ligue cup competition.

Key Ligue 1 growth markets

In Brazil, media group Globo holds Ligue 1 rights in a six-season deal, from 2012-13 to 2017-18, worth about \$1.5m per season (*TV Sports Markets* 16:10).

BeIN believes the rights are now far more valuable in the country following the transfer of Brazilian star Neymar to Paris Saint-Germain. Since the transfer, Globo's Ligue 1 audience figures are said to have risen fivefold. Four other prominent Brazilian players also play for PSG: Thiago Silva, Marquinhos, Lucas Moura and Dani Alves.

In addition, the Brazilian media-rights market has become more competitive since Ligue 1 rights were last sold in the country. US media group Turner has helped Esporte Interativo launch a pay-television channel following its aggressive winning offer for Uefa Champions League and Europa League rights in November 2014 (*TV Sports Markets* 18:21).

In Latin America, sports broadcaster ESPN holds Ligue 1 rights in a four-season deal, from 2014-15 to 2017-18, worth about €4m per season. The deal did not cover the full six-season period of the beIN deal the rights as the league already had an agreement in place with media group Televisa, from 2010-11 to 2013-14, worth \$1.5m per season (*TV Sports Markets* 14:19).

In sub-Saharan Africa, Ligue 1 rights are worth about €12m per season in the current 2015-16 to 2017-18 cycle.

Pay-television operator Canal Plus Afrique pays just over €10m per season for French-language rights, while pay-television broadcaster Fox Sports pays just over \$2m per season for English- and Portuguese-language rights. Fox sublicenses three matches per week to pay-television operator StarTimes for \$1m per season (*TV Sports Markets* 19:16).

Since these deals were agreed, telco Econet has launched its Kwesé TV pay-television platform and its Kwesé Sports broadcaster across the region, and has been bidding aggressively for premium sports rights.

Agencies sniff around Ligue 1

TV Sports Markets understands beIN has been approached by both the IMG and MP & Silva agencies for Ligue 1 rights in certain territories.

IMG is interested in the rights as it could package Ligue 1 with Serie A following last month's three-season international rights deal with the Italian league, from 2018-19 to 2020-21, worth €340m per season (*TV Sports Markets* 21:18).

MP & Silva's interest has been piqued following the loss of Serie A international rights, its flagship rights property, to IMG.

BeIN's secondary markets

If no multi-territory agency deal transpires, beIN is expected to offer Ligue 1 rights to broadcasters in a second tranche of important territories soon after, including Belgium, the UK, Japan and Vietnam.

Rights in Belgium are held by sports broadcaster Eleven Sports in a three-season deal, from 2015-16 to 2017-18, also including Poland. The value of the rights in Belgium is thought to be about €900,000 per season. Rights in Poland are worth about €600,000 per season.

Pay-television broadcaster BT Sport pays about £1m (€1.1m/\$1.3m) per season for Ligue 1 rights in the UK and Ireland over three seasons, from 2015-16 to 2017-18.

Ligue 1 rights in Japan are currently held by OTT service DAZN in a package deal with MP & Silva. DAZN pays about \$20m per season for Germany's Bundesliga, Serie A and Ligue 1 (*TV Sports Markets* 20:15).

Cable television operator SCTV holds Ligue 1 rights in Vietnam from 2015-16 to 2017-18 as part of a package deal also covering the Bundesliga, Serie A, Ligue 1, and English cup competitions the FA Cup and the League Cup. ◆

RUGBY UNION

Value of EPCR international rights likely to fall in new deal

By Robin Jellis

Rugby union experts expect the value of international media rights to Europe's club competitions to decline in any new deal, with a tender covering a new cycle issued this week.

European Professional Club Rugby international rights are currently held by the IMG agency in a four-season deal, from 2014-15 to 2017-18, worth about €5.5m (\$6.5m) per season (*TV Sports Markets* 18:20).

IMG's deal covers rights to the top-tier Champions Cup, second-tier Challenge Cup, and Challenge Cup qualifying. The rights are global excluding the UK, Ireland and France. Rights in Italy were excluded from IMG's deal in the 2014-15 season, but included thereafter.

A tender for the same set of rights in a new four-season cycle, from 2018-19 to 2021-22, was due to be sent out late this week. Rights will be available in Italy for the full four seasons this time. Bids are expected to be due in about three weeks.

IMG is understood to have held talks with EPCR about a renewal in an exclusive negotiating window, but failed to agree terms. It is thought IMG offered EPCR less than it currently pays.

One informed source estimated IMG to be losing between €1.5m and €2m per season on the rights in the current cycle. Several experts spoken to by *TV Sports Markets* this week said this was because European rugby's club competitions had not been adequately promoted or marketed following their formation.

EPCR is the governing body for club rugby union in Europe. It replaced the European Rugby Cup body on April 10, 2014, and the Champions Cup and Challenge Cup competitions replaced the Heineken Cup and Amlin Challenge Cup competitions (*TV Sports Markets* 18:7).

One expert said: "The view of many is that the property has declined in perception, at least since the switch from the Heineken Cup."

Another said: "The brand is too weak. The teams are bigger brand names than the competition they are playing in. It should never be that way round. Previously it had the marketing strength of Heineken investing in the competition. That gave it credibility and status. It no longer has that. There is not the same promotion spend behind it."

According to *Sports Sponsorship Insider*, beer brand Heineken pays between €3.5m and €4m per season from 2014-15 to 2017-18 as a founding partner. In the final season of its deal as title sponsor, in 2013-14, Heineken paid about €10m.

IMG is still expected to participate in the tender for international rights in the new cycle, and is likely to face competition for the rights from the Pitch International agency. Pitch held the rights in a four-season deal, from 2010-11 to 2013-14, worth €1.6m per season.

But there is no chance IMG will again pay the strategic premium it did in acquiring EPCR international rights in June 2014, when it was keen to establish an association with the new organisation.

Uncertainty surrounding the value of the rights in the Middle East and North Africa is another factor that could lead to a decrease in overall international rights value. Pay-television broadcaster beIN Sports, the traditional buyer of rugby union rights in the region, is unlikely to renew EPCR rights in the region as it is focusing on premium rights, especially football (*TV Sports Markets* 21:7).

IMG's EPCR sales

IMG is understood to have agreed deals with broadcasters in all key rugby union territories, but still fell short of the fee it was paying EPCR.

Rights in Italy were sold to pay-television broadcaster Sky Italia in 2015-16 for about €500,000 (*TV Sports Markets* 18:7). Sky renewed for 2016-17, but the rights were sold to US media group Discovery Communications in 2017-18.

Most of the revenue earned by IMG comes from traditional rugby heartlands: Australia, New Zealand, and South Africa. There is also some value in Mena, the US, Latin America, and across Asia.

Pay-television broadcaster Setanta Asia pays IMG \$1.5m per season in a four-season deal, from 2014-15 to 2017-18, for rights across the Asia-Pacific region, excluding Japan and Oceania (*TV Sports Markets* 18:17).

Setanta is thought to have paid a strategic premium to acquire these rights ahead of its sale to Discovery in June 2015. Competition for rugby rights in the region has since cooled as Discovery has also acquired a stake in OTT rugby-focused service Rugby Pass (*TV Sports Markets* 20:5).

Other EPCR deals

EPCR has already sold rights for its next cycle in the UK, Ireland and France, although it has some free-to-air deals to finalise from 2018-19 onward.

Pay-television EPCR rights in the UK and Ireland will be held by pay-television broadcaster BT Sport in a four-season deal, from 2018-19 to 2021-22, worth about £16m (€18m/\$21.1m) per season (*TV Sports Markets* 21:10). BT will show up to 134 matches per season.

A free-to-air deal with UK commercial broadcaster ITV is understood to have been called off following disagreements over timings and picks. ITV had been expected to pay about £2m per season for rights to the first-pick Champions Cup match each week.

TV Sports Markets understands a deal will instead be struck with either commercial broadcaster Channel 4 or rival Channel 5. Any deal is likely to be substantially less valuable than the planned ITV deal.

A free-to-air deal is also being negotiated in Ireland. There is understood to be relatively strong interest from public-service broadcaster RTÉ, commercial broadcaster TV3 and Gaelic-language channel TG4.

The sales processes in the UK and Ireland are being handled by consultant David Kogan.

EPCR rights in France from 2018-19 to 2021-22 will be worth a total of €30.9m per season from deals with public-service broadcaster France Télévisions and beIN Sports. The former will pay €6.2m per season; the latter €24.7m per season. ◆

MOTORSPORT

OTT stipulations lead F1 from NBC to ESPN in key US market

By Robin Jellis

The desire for flexibility around its yet-to-launch OTT service drove Formula One Management to agree a new deal with sports broadcaster ESPN in the US last month.

The two-year deal between FOM, the sport's commercial rights-holder, and ESPN will cover the Formula One championship in 2018 and 2019. ESPN will not pay a fee for the rights.

FOM's previous US deal, with media group NBCUniversal, covered 2017 only and was worth about \$3m (€2.6m). This is the same fee NBC paid in its previous four-year deal, from 2013 to 2016.

FOM's focus in the latest US negotiation was to be able to launch its OTT service into the market without overbearing restrictions placed on it by a broadcast partner.

As such, FOM is understood to have been prepared to earn no rights fee from a linear broadcast deal. The big question is: how much revenue could FOM earn from a subscription OTT model in the US? The service is planned to launch in 2018.

F1's US broadcaster negotiations

FOM is understood to have held long negotiations with incumbent NBC, ESPN, and sports broadcaster Fox Sports. No tender was launched. Discussions focused on: the cost of the F1 OTT service; where it would be available; how it would be distributed; and how it could be bundled with other products.

It is understood negotiations between FOM and NBC were not negatively affected by comments made by Liberty Media chief executive Greg Maffei. At the Morgan Stanley Technology, Media & Telecom Conference in March this year, Maffei described NBC's current \$3m-per-year deal as "a popcorn fart".

US media company Liberty Media completed its purchase of the Formula One series in January.

Shortly before the deal with ESPN was announced on October 4, NBC Sports said in a statement: "Although we take great pride in having grown Formula One's visibility and viewership since we became its exclusive US media rights-holder in 2013, this will be our last season with the series.

"In this case, we chose not to enter into a new agreement in which the rights-holder itself competes with us and our distribution partners. We wish the new owners of F1 well."

In initial talks, NBC is understood to have pushed for: a long-term deal; an expensive F1-branded OTT product; that the OTT product should be available via its own direct-to-consumer offering, NBC Sports Gold; and that any OTT revenues should be shared between the two parties.

Although NBC was willing to compromise on many of these points, the two remaining stumbling blocks to a deal were issues over the price of the F1 OTT service and the way it could be distributed. FOM is yet to announce the cost of the OTT service, although it is expected to be priced highly (*TV Sports Markets* 21:8).

FOM is thought to have chosen to partner with ESPN as it sought to impose fewer restrictions on the launch of its OTT service, and because ESPN is widely recognised in the country as the leading sports broadcaster.

John Papa, ESPN vice president, programming and acquisitions, told *TV Sports Markets* this week ESPN had no qualms about FOM launching its own OTT offering.

“They were upfront from the beginning that they wanted to have an OTT service. We think, collectively, when you take their content plans and what we are planning to do across the ABC and ESPN networks, we feel they can complement each other. Having it on these platforms will only grow Formula One. We were fine with it.” Both ABC and ESPN are owned by media company Disney.

Changes to the calendar?

F1, which is dominated by European races, car manufacturers and drivers, has historically had a small following in the US. The sport still faces major challenges in the country, given most races take place at inconvenient times for the US audience (*TV Sports Markets* 16:19).

One factor that may shift this balance is the likely addition of a second grand prix in the US. A source close to F1 hinted a new US grand prix would be added to the calendar ahead of the next media-rights deal in the country, from 2020 onward. This was one reason FOM sought a short-term broadcast deal.

Papa told *TV Sports Markets* the current schedule with only one US grand prix wasn't a challenge, but that ESPN would welcome the addition of a race in the US, or North America more generally.

ESPN coverage plans

The deal between FOM and ESPN covers all 21 races of the championship each year. The US grand prix will be shown on free-to-air channel ABC. ABC will show three grands prix each year – two live (the US and Mexico grands prix in 2018) and one delayed (the Monaco grand prix in 2018). All other coverage will be on the ESPN or ESPN2 channels.

More than 125 hours of F1 programming, including all practice sessions, qualifying and races, will be shown on ESPN and ABC in 2018. ◆

CRICKET

Sony buys Cricket Australia rights as Indian value plummets

By David Cook

- Sony to pay \$95m for Cricket Australia rights in Indian subcontinent from 2017-18 to 2022-23
- Previous deal, from 2012-13 to 2016-17, with ESPN Star Sports was worth \$155m
- Old deal included all of Asia and Mena; Cricket Australia in talks to sell these in new cycle

Cricket Australia's media rights in the Indian subcontinent have significantly dropped in value in a new long-term deal with Sony Pictures Networks India.

Sony will pay about \$95m (€80m) to Cricket Australia, Australian cricket's governing body, over six seasons from 2017-18 to 2022-23, an average of \$15.8m per season.

The deal includes rights to all home matches played by Australia's men's and women's national teams, as well as the men's and women's Big Bash League Twenty20 competitions.

It is a sharp decrease on the value of the rights in the previous cycle, in which Cricket Australia earned about \$155m over five seasons, from 2012-13 to 2016-17, an average of \$31m per season. The fee was calculated on a per-match basis.

While this was a pan-regional deal covering Asia and the Middle East and North Africa, about 90 per cent of the value is said to have been for the Indian subcontinent. Cricket Australia is yet to sell its rights in Mena and the rest of Asia for the new cycle.

The previous deal was initially agreed with pan-Asian sports broadcaster ESPN Star Sports, and the rights were retained by its successor, Star India, after News Corp bought Disney's 50-per-cent stake in ESS in 2012.

Limited competition from India

The value of Cricket Australia rights in the Indian subcontinent has decreased for three main reasons.

First, Sony faced no competition for the rights as Star had no interest once it secured global rights to the Indian Premier League T20 competition in September (*TV Sports Markets* 21:6).

Star also holds global rights to: International Cricket Council events; and home Indian national team matches and domestic matches, through its deal with the Board of Control for Cricket in India (*TV Sports Markets* 16:7; 18:19).

Second, BCCI rights are set to come on the market within the next year. This means Star and Sony, the two leading sports broadcasters in India, are not prepared to spend large chunks of their budgets on other cricket properties.

Third, Cricket Australia was rushed into agreeing a new deal shortly before its new cycle began by delays in the IPL tender. The deal with Sony was eventually agreed at the end of September, about two months before the start of the 2017-18 Ashes series on November 23.

Sony was keen to buy Cricket Australia rights after losing out on the IPL, but it was not prepared to pay anywhere near the value Cricket Australia targeted.

Cricket Australia had originally hoped to sell its rights in the new cycle for about \$150m over four seasons, an average of \$37.5m per season. One expert said Cricket Australia did well to avoid a greater fall in value. Another said the result should be seen as more of a problem for Test cricket in general than just for Cricket Australia.

A similar decrease in value is expected when the England & Wales Cricket Board sells rights to England national team home matches in the Indian subcontinent for the next cycle. Star held ECB rights for five seasons, from 2012-13 to 2016-17, in a deal worth a total of \$110m (*TV Sports Markets* 16:10).

Value breakdown

In the previous Cricket Australia deal, ESS (and later Star) paid a per-match fee. Of the \$155m total, India's matches in Australia were worth about \$140m.

Fees for Australia vs. India Test and One Day International matches were worth \$6.5m to \$7m each, while T20 matches were worth about \$6m each. T20 was a less popular form of the game when that deal was agreed.

The new deal will cover two Indian tours of Australia. The first will be a four-match Test series between November 2018 and January 2019. The second will consist of seven ODIs and two T20 Internationals between January and February 2020. Two Ashes Test match series between Australia and England also fall during the deal, in the 2017-18 and 2021-22 seasons.

The new deal was agreed directly between Sony and Cricket Australia. The Pitch International agency consulted with Cricket Australia on the valuation of the rights, but played no part in the negotiations with Sony.

In the old deal with ESS, Cricket Australia was advised on the sale of its rights by the IMG agency, as part of a global advisory deal (*TV Sports Markets* 19:11). IMG competed unsuccessfully with Pitch to consult Cricket Australia on the new cycle. ◆

TV AFRICA

African players pivot to boxing rights for low-cost local content

By Callum McCarthy

- Kwesé Sports pays about \$850,000 per year for Kalakoda Promotions rights, 2017 to 2019
- TV Media Sport deal for World Boxing Super Series worth \$300,000 to \$400,000 per year
- SuperSport deal with Golden Gloves worth \$250,000-\$350,000 per year in deal ending in 2020

African broadcasters and agencies are turning to local boxing properties for lower-cost content, with Kwesé Sports, Fox and TV Media Sport all making recent investments in different local ventures.

Sports broadcaster Kwesé Sports has acquired rights to events operated by Kalakoda Promotions in a three-year deal, from 2017 to 2019, worth about \$850,000 (€720,000) per year.

The TV Media Sport agency has added two boxing properties to its portfolio. First, a deal with the MP & Silva agency for platform-neutral rights across sub-Saharan Africa to the World Boxing Super Series, from 2017 to 2019, worth between \$300,000 and \$400,000 per year.

Second, a partnership with the African Boxing Confederation, in which it will act as the exclusive media rights agent for the ABC's new Africa Cup of Nations boxing tournament, from 2018 to 2022. TVMS will earn commission on all sales.

Pay-television broadcaster SuperSport's local boxing content has been provided by South African promotion Golden Gloves since the broadcaster's creation in 1995. Its current deal, thought to expire at the end of 2020, is worth between \$250,000 and \$350,000 per year.

Pay-television broadcaster Fox Sports Africa has been promoting and producing its own boxing events since August. The broadcaster has begun promoting events in Botswana only, but plans to stage events across sub-Saharan Africa in 2018.

The pivot toward boxing – and other pan-African sports properties – represents a shift away from properties with strong appeal in a single market, such as local football leagues. Boxing content is often cheaper as it has lower production costs, and there is a greater opportunity for collaboration with the rights-holder.

Kwesé's Kalakoda deal

Kwesé's deal with Kalakoda covers 12 African boxing events per year (held on the last Friday of each month), as well as an additional Europe vs. Africa event operated by the promotion – the first of which will be held in Manchester, England, on November 10. All events are shown live across Kwesé's free-to-air and pay-television channels.

Kwesé's deal also includes some sponsorship rights, and the ability to sublicense media rights. Kwesé exploits rights in South Africa on digital-terrestrial broadcaster Soweto TV as part of a package deal including NBA rights.

The broadcaster is pleased with the Kalakoda content as the promotion is willing to stage events across sub-Saharan Africa with boxers of different nationalities, giving the events pan-African appeal.

For Kalakoda, the Kwesé deal has enabled the promotion to negotiate better sponsorship deals and source better fighters. Both parties believe the exposure will lead to higher-profile fights, eventually leading to lower-tier world title fights in lower weight classes.

Jeroen Oerlemans, Kwesé Sports chief executive, told *TV Sports Markets*: "Africa is an incredible source for talent in boxing and mixed martial arts, and a lot of these athletes have the opportunity to grow into international-level fighters. They have a lot of travelling fans that follow them and bring an incredible atmosphere to the events."

Kalakoda events complement Kwesé's other combat sports content. The broadcaster has a five-year deal with Matchroom Sports, from summer 2016 to summer 2021, worth about \$750,000 per year. It acquires other international boxing content from the Protocol Sports agency on an ad-hoc basis.

Kwesé also has a deal with mixed martial arts promotion Extreme Fighting Championship, from March 2016 to March 2019, worth ZAR16m (€990,000/\$1.2m) per year (*TV Sports Markets* 21:2).

TV Media Sport turns to boxing

Kwesé financial power and pan-regional free-to-air network has seen TV Media Sport marginalised over the past 12 to 18 months, and the agency is now focusing on boxing to find a new niche in the market.

The agency was once the default choice for major rights-holders seeking widespread free-to-air exposure, having previously sold rights to the Fifa World Cup, Uefa European Championships and the Olympic Games.

TV Media Sport's WBSS deal is its first for platform-neutral rights. The agency is thought to have had preliminary discussions with SuperSport and Kwesé over a potential sale. The semi-finals and finals of the two concurrent tournaments – one for the super-middleweight division, one for the cruiserweight division – will begin in January 2018.

TVMS's partnership with the ABC will focus on free-to-air sales, but the agency is also looking for a pay-television partner. The agency will sell platform-neutral rights to four amateur Africa Cup of Nations events in 2018, 2020, 2022 and 2024.

The event will act as a qualifying tournament for either the International Boxing Association (Aiba) World Championships, or for the Olympic Games, at the ABC's discretion. All other ABC rights are held by the IMG agency as part of its wide-ranging deal with Aiba.

Despite its switch to boxing, TVMS is looking to maintain its relevance as Africa's main free-to-air distribution agency for major sporting events.

Kwesé holds free-to-air rights to the 2018 Fifa World Cup and Uefa Euro 2020, but its free-to-air network – comprising its own channels and partnerships with public-service and commercial broadcasters – covers fewer than 20 countries. It is understood the agency is looking to work alongside Kwesé to assist on sales in other territories.

Other local sports rights

Outside boxing, Kwesé has struck deals for multiple African sports properties, almost all of which are designed to have pan-regional appeal.

Its three-year deal with Africa Netball, from 2017 to 2019, is worth about \$150,000 per year and covers all Africa Netball properties. It is thought this fee includes production costs, and could rise to as much as \$200,000 per year if Kwesé decides to broadcast more of the governing body's tournaments.

The broadcaster complements Africa Netball content with other international netball deals. Its four-year deal with Netball New Zealand covers all women's international test matches, from 2017 to 2020. Kwesé also has a four-year deal for rights to Super Netball, Australia's top women's netball division, from 2017 to 2020.

Kwesé's five-year deal with Rugby Afrique, African rugby union's governing body, is from 2017 to 2021. The deal is worth between \$100,000 and \$200,000 per year, and is focused on broadcasting Rugby Sevens tournaments operated by the governing body.

Kwesé's biggest deal for local sport is with the Nigerian Basketball Federation, covering all men's and women's basketball leagues and tournaments. The five-year deal is worth \$2m per year, from 2017 to 2021 (*TV Sports Markets* 21:8). ◆

CRICKET

BPL international coverage to be limited as DSport and IMC argue

By David Cook

- IMC global rights deal for BPL, from 2017 to 2019, is worth about \$3m per year
- DSport acquired all international rights, from 2017 to 2019, for about \$750,000 per year
- IMC has a separate domestic BPL rights deal with Gazi TV

The Bangladesh Premier League Twenty20 competition begins this Saturday with limited international coverage due to a dispute over who can legally sell the rights.

Indian pay-television broadcaster DSport claims to have purchased the international rights from the Impress Matra Consortium in a three-year deal, from 2017 to 2019, worth about \$750,000 (€637,500) per year. The deal was agreed on September 22. About 40 per cent of the value of the international rights is said to be in India.

IMC, a consortium of conglomerate Impress Group and advertising agency Matra, bought global rights to the competition from the Bangladesh Cricket Board in October 2016. Its three-year deal, from 2017 to 2019, is worth about \$3m per year. It has since sold domestic rights to pay-television broadcaster Gazi TV.

DSport, which planned to show the matches on its own channel in India, has not yet been able to sell the rights in any international markets. According to a source close to DSport, IMC is now claiming it technically did not sell the rights to DSport.

IMC and the BCB had not responded to requests for comment as *TV Sports Markets* went to print.

IMC's argument

DSport holds a document proving IMC signed off on the deal, but IMC is claiming the signatory to the deal was not authorised and that the agreement should be voided.

DSport believes the signatory, Matra managing partner Sanaul Arefeen, was authorised. It claims IMC did not respond to its initial attempts to make contact after the deal was agreed.

When DSport sent a legal notice to IMC on October 8, IMC responded two days later outlining its stance: that it did not believe DSport had been given permission to acquire the rights by any person that had the authority to sign off on the deal.

The case was taken to the Court of First Instance in Dhaka on October 15 by DSport. Both parties are waiting to be given a date for a preliminary hearing.

DSport contacted the BCB on the matter, but the board chose not to get involved in the dispute.

DSport held talks over a possible deal with sports broadcaster Eurosport for rights in the UK, Southeast Asia, Australia and New Zealand. DSport also contacted cricket-focused broadcaster Willow about rights in the US and pay-television broadcaster OSN about rights in the Middle East and North Africa.

A cautionary notice has been sent by DSport advising other broadcasters to not speak to IMC about the rights. *TV Sports Markets* understands IMC has not been in talks with any other parties about BPL international rights in any territories since agreeing its deal with DSport.

What if new deals are agreed?

Should IMC agree deals with broadcasters in territories outside Bangladesh, that broadcaster would still be allowed to show the matches, at least for the time being, as IMC is in possession of the live feed.

Broadcasters are unlikely to strike deals with IMC while the ownership of the rights is in dispute as they could be stripped of the rights if the court finds in favour of DSport.

The BPL purchase was a rarity for DSport as it has so far bought rights solely for India or the Indian subcontinent, and has focused on niche properties outside cricket.

DSport's thinking behind buying the international rights was that it could sell the rights to Eurosport in markets where it is active. Eurosport is owned by US media company Discovery Communications – DSport is a joint venture between Discovery and executive RC Venkatesh.

DSport cannot show the BPL while the dispute is ongoing as it does not hold the live feed. DSport has made no payment to IMC for the rights, before or during the dispute. ◆

FOOTBALL

Eleven and NC Plus partner in Poland with Bundesliga rights

By David Svenson

Eleven Sports last month acquired the remaining package of German Bundesliga rights in Poland, ensuring its control over the league's coverage in the country.

Eleven agreed to pay an additional fee of just under €2m (\$2.4m) per season for the remaining package of rights sold by Bundesliga International, the commercial arm of the Deutsche Fußball Liga. The rights were initially carved out for sale to a Polish free-to-air broadcaster.

Eleven agreed a four-season deal for Bundesliga pay-television rights in March this year, from 2017-18 to 2020-21, worth about €7m per season (*TV Sports Markets* 21:4).

After agreeing its second deal with the Bundesliga, Eleven sublicensed a package of rights to pay-television operator NC Plus. NC Plus is understood to be paying Eleven more than €3m per season for four seasons, from 2017-18 to 2020-21. The operator held discussions with the league about acquiring the free-to-air package before it was awarded to Eleven.

Eleven is carried on NC Plus and had entered discussions with the Bundesliga with a sublicensing deal in mind. But Eleven did not want to share the rights with another pay-television broadcaster if there was also going to be a free-to-air deal.

NC Plus will broadcast two matches out of nine on 30 of the match-weeks, and three matches out of nine on the other four match-weeks. Eleven will retain top picks for all match-weeks. But NC Plus will broadcast each Bayern Munich match during those four weeks where it has access to three matches. Bayern matches are attractive in Poland due to the interest in Polish striker Robert Lewandowski.

On the deal with NC Plus, Eleven Sports executive chairman Marc Watson told *TV Sports Markets*: “There’s growing interest in the Bundesliga in Poland and our agreement ensures that we both get our fair share of great games. NC Plus are an important partner for us and we’re happy to be working together on this property.”

The remaining package of Bundesliga rights included: the Saturday 6.30pm (local time) Bundesliga match; the season-opening Supercup; and relegation play-off matches between teams from the Bundesliga and 2. Bundesliga.

Although there will be no free-to-air coverage of the league in Poland, it is thought Eleven will look to partner with social media platform Facebook to live-stream several matches during 2017-18.

Eleven currently holds rights in Poland to: Spain's LaLiga, Italy's Serie A, the NFL, and Formula One. The broadcaster will look to launch two new channels in the next year, allowing it to show more content and increasing its leverage in carriage deal negotiations.

German Bundesliga rights in Poland were previously held by Eurosport as part of its 22-territory two-season deal from 2015-16 to 2016-17, worth €25m per year in total. The allocation for Poland was between €4m and €5m per season (*TV Sports Markets* 19:16). ◆

FOOTBALL

Globo nets linear national team rights in knockdown CBF deal

By Callum McCarthy

Globo has retained its hold on exclusive rights to Brazilian national team matches, striking a deal well below the Brazilian football federation's target price.

Media group Globo will pay the Confederação Brasileira de Futebol an average of about \$2.1m (€1.8m) per match for a package of exclusive free-to-air and pay-television rights, and non-exclusive digital rights. The deal covers nine World Cup qualifying matches and 28 friendly matches between November 2017 and the 2022 World Cup, and was agreed directly between Globo and the CBF.

The deal is an increase of about 17 per cent on the average \$1.8m per match the CBF has earned from linear rights to Brazilian national team matches since the beginning of 2014. Rights to these matches were sold on an ad-hoc basis to Globo and ranged in value from \$1m for a lower-tier friendly, to \$2.5m for a marquee qualifier against a team like Argentina (*TV Sports Markets* 21:15).

Despite the increase, this is far below the \$3.5m-per-match the CBF had hoped to earn.

Agency Synergy was hired to sell CBF rights in the new cycle. Synergy's plan to sell Package B – non-exclusive digital rights to all 37 matches – before linear rights was designed to extract the maximum possible value from Globo, as the media group feared a possible offer from social media platform Facebook or e-commerce company Amazon (*TV Sports Markets* 21:17).

In late September, Globo acquired Package B for close to \$30m. One local expert said this “killed both the digital and linear markets”, handing control back to Globo. Neither Facebook nor Amazon saw any value in buying non-exclusive digital rights.

Another expert said Globo's ownership of streaming rights scared other free-to-air and pay-television broadcasters away from bidding strongly for linear rights. Globo dominates Brazil's media landscape across several formats, and potential bidders were nervous that even with just digital rights Globo would be the first port of call for many Brazilians to watch these matches.

Before Globo's acquisition of digital rights, sports broadcaster Esporte Interativo and pay-television broadcaster ESPN were expected to bid for linear rights. It is understood neither bid following Globo's acquisition of Package B.

The deal was completed directly with the CBF. Synergy's advisory deal with the federation expired on September 23 because the agency bid for South American Football Confederation (Conmebol) club competition rights. Conmebol excluded companies that had an existing commercial relationship with its constituent football federations from bidding (*TV Sports Markets* 21:17).

2018 Fifa World Cup

Globo completed a sublicensing deal last week for rights to the 2018 Fifa World Cup with commercial broadcaster Rede Bandeirantes. Band will show 32 matches from the tournament free-to-air. Globo will retain non-exclusive rights to these matches.

Globo holds rights in Brazil to four World Cups, from 2018 to 2030. It will pay about \$1.2bn across the duration of the deal, starting with about \$250m for the 2018 edition, with its fee increasing incrementally with each tournament (*TV Sports Markets* 21:2).

Globo has also sublicensed World Cup rights to pay-television broadcaster Fox Sports Brasil. Fox will simulcast all 64 matches from the 2018 tournament. The deal is part of a wider, six-year rights-sharing agreement running from 2013 to 2018.

In this deal, Fox receives non-exclusive pay-television rights to the Copa do Brasil and the 2014 and 2018 World Cups, while Globo receives rights to Copa Libertadores matches owned by Fox. ◆

FOOTBALL

Bundesliga earns small increase from Sportradar betting deal

By Robin Jellis

Germany's Bundesliga has extended its international betting rights deal with Sportradar at a small increase in value, TV Sports Markets understands.

Betting and data services company Sportradar will hold these rights in a four-season deal, from 2017-18 to 2020-21, worth about €16m (\$18.8m) per season. The contract is yet to be finalised.

Sportradar's deal is global, excluding the German-speaking countries of Germany, Austria, Switzerland, Liechtenstein and Luxembourg.

The Sportradar agreement represents an increase of about seven per cent on the value of the league's previous international betting rights deal with the Sportsman Media Group agency. That deal ran for two seasons, 2015-16 and 2016-17, and was worth €15m per season (*TV Sports Markets* 19:5).

In April 2016, Sportradar acquired Sportsman in a deal worth close to €50m. The agreement included all of Sportsman's media-rights content, including Bundesliga betting rights (*TV Sports Markets* 20:7).

The rights in the new cycle were sold by Bundesliga International, a subsidiary of the Deutsche Fußball Liga responsible for its commercial rights. It was known as DFL Sports Enterprises until July.

No tender was issued, although the league is understood to have spoken to other interested parties. The league sold its rights for four seasons so the deal would run concurrently with its broadcast deals across Europe, from 2017-18 to 2020-21.

The last time the league's international betting rights were sold, in March 2015, they increased in value by 400 per cent, from €3m per season in the 2012-13 to 2014-15 cycle to €15m per season.

The increase in value this time has been smaller for three main reasons.

First, the value was already considered high. Second, there has been consolidation in the sector since the rights were last sold, following Sportradar's purchase of Sportsman. Third, interest in the rights from Sportradar's main rivals in the betting rights sphere – the IMG agency and digital media company Perform – is thought to have been relatively weak.

IMG acquired Italian Serie A betting rights last month as part of its international media rights deal. This agreement valued Serie A betting rights from 2018-19 to 2020-21 at €12m per season (*TV Sports Markets* 21:18).

Perform holds rights to the other two major European leagues which sell betting rights: Spain's LaLiga and France's Ligue 1. It pays about €15m per season for LaLiga betting rights and just over €10m per season for Ligue 1 betting rights. Both are three-season deals, from 2015-16 to 2017-18 (*TV Sports Markets* 19:16). The English Premier League does not sell betting rights, and is highly unlikely to change its stance in the near future. ◆

TENNIS

Tennis Australia expands iQiyi deal for Australian Open in China

By David Cook

Streaming platform iQiyi has almost doubled its fee in a renewed deal for Australian Open digital rights in China.

iQiyi will pay about \$2m (€1.7m) per year in a four-year deal, from 2018 to 2021. The deal also includes rights to the Australian Open Series of events prior to the tournament. This includes the Hopman Cup, Brisbane International, Hobart International, Sydney International and World Tennis Challenge. Almost all the value of the deal is in the Australian Open.

In the previous three-year cycle, from 2015 to 2017, iQiyi paid about \$1m per year for Australian Open rights only (*TV Sports Markets* 20:3). Selected rights were shared with state broadcaster CCTV, which held linear rights as well as the right to simulcast its linear broadcast coverage online. Shanghai Media Group also held linear rights, which it distributed to regional broadcasters.

Total media-rights income in China for Tennis Australia, Australian tennis' governing body, was \$1.6m per year. The new iQiyi deal alone is an increase of about 25 per cent on the previous total.

Tennis Australia tendered the digital rights toward the end of the third quarter of last year. iQiyi bought the rights last month after three rounds of bidding. Each round ran for one week. Streaming platforms PPTV and Tencent are also said to have bid for the rights.

Tennis Australia is in talks with CCTV and SMG over renewing their linear deals.

Changes from the old deal

The fee for the digital rights has increased for two main reasons.

First, the new deal includes more events than in the previous cycle. Second, former Chinese player Li Na's success has created greater interest in the event from the Chinese audience. Li Na won the women's singles title in 2014, after the deals for the 2015 to 2017 cycle were agreed. Li Na retired in 2014, but her achievement has had a lasting effect.

The value of the rights is also propped up by the fact the event takes place in a convenient time zone for the Chinese audience, which helped to create competition for the rights.

The rights were sold directly by Tennis Australia. IQiyi will take the world feed provided by Tennis Australia and will be able to show all matches from all courts. IQiyi will also hold digital clip rights.

Securing the Australian Open rights is a significant victory for iQiyi over Tencent, which holds digital rights to the other three grand slams – the French Open, Wimbledon and the US Open.

Acquiring tennis content is a key part of iQiyi's strategy. The Australian Open is its first grand slam, but iQiyi has deals for WTA Tour and ATP World Tour events, for which it pays \$16m to \$17m per year and \$4m per year respectively (*TV Sports Markets* 19:21, 21:13). ◆

US COLLEGE SPORT

Alibaba adds Pac-12 media rights to expand Chinese partnership

By David Cook

US college sports conference the Pac-12 has increased its annual media-rights income in China by about 66 per cent after agreeing a long-term deal with Alisports.

Streaming platform Alisports will pay the Pac-12 about \$1.25m (€1.1m) per season over seven seasons, from 2017-18 to 2023-24.

Negotiations between the two parties began about three months ago and the deal was agreed in principle in mid-September. Alisports will be able to sublicense rights it does not exploit on parent company Alibaba's Youku Tudou streaming platform.

Pac-12 rights in China were previously held by OTT platform LeSports in a three-season deal, from 2014-15 to 2016-17. LeSports paid about \$750,000 per season for the rights but had no interest in renewing its deal as it is now cutting its spending on media rights (*TV Sports Markets* 19:5).

Partnership expansion

Alibaba has an existing relationship with the Pac-12 as a sponsor of the conference's annual men's basketball game in China. Its sponsorship deal was recently renewed for four years, from 2017 to 2020, and is worth about \$1.5m per year, according to *Sports Sponsorship Insider*.

Two other parties bid for the rights and were close to the value of Alisports' offer, but the Pac-12 wanted to pair its media rights with sponsorship of the game held in China.

The Pac-12 sought a long-term deal to allow better planning for its expected growth push in China. A presence in the country is important for the conference's constituent universities, both to attract potential students and encourage academic collaboration.

Content included

The Alisports deal includes rights in China for all Pac-12 events. Coverage of American football, men's basketball, women's volleyball, gymnastics, swimming, lacrosse, track and field and beach volleyball events are exclusive. All other rights, including baseball, golf and wrestling, are non-exclusive.

Alisports will show a minimum of 175 live Pac-12 events per season and a minimum of 100 hours of live programming per season, including shoulder programming. Alisports also holds rights to stream an additional 600 events per season on a non-exclusive basis. The live broadcasts will use the world feed provided by Pac-12 Network and will be shown on Youku Tudou.

In the previous deal, LeSports showed 125 live events per season on an exclusive basis. A large proportion of these were basketball events.

The length of the deal, and the big increase in content, explain the increased fee the Pac-12 will earn from Alisports.

State-broadcaster CCTV holds linear rights to the Pac-12's men's basketball China game, which is scheduled for November 11 this year. CCTV will show the game on its CCTV-5 sports channel. CCTV sublicensed the rights to the game from Alisports. ◆

FOOTBALL

Uefa continues to grow value of club competitions in the Balkans

By David Svenson

Uefa completed the sale of Champions League and Europa League rights in the Balkans this week, increasing its media-rights income from the region by more than 20 per cent.

Football's European governing body will earn about €20m (\$23.6m) per season from deals in Bosnia and Herzegovina, Croatia, Macedonia, Montenegro, Serbia and Slovenia. All deals will run for three seasons, from 2018-19 to 2020-21.

This is up from the €16.5m per season Uefa earns from the region in the current cycle, from 2015-16 to 2017-18. From 2012-13 to 2014-15, rights in the region were worth about €12.5m per year (*TV Sports Markets* 19:7).

All deals have been brokered by the Team Marketing agency, Uefa's sales agent for its club competitions.

The uplift in value in the new cycle has been triggered by increasingly aggressive telcos across the region, which continue to see top-tier sports rights, such as the Champions League, as must-have content. The largest increase for Uefa came in Montenegro, where the value for both club competitions combined increased by about 50 per cent.

In Slovenia, which had seen a significant increase in value between the previous and current cycle, the fee remained flat. In the new cycle, Uefa will have deals with three broadcasters.

Commercial channel Kanal A, owned by media company Pro Plus, will hold rights to the first-pick Champions League match on Tuesdays and Wednesdays. Public-service broadcaster RTV Slovenija has acquired rights for the first-pick Europa League match each match-week. Pay-television broadcaster Sportklub has secured rights to all other matches from both competitions.

Serbia is the most valuable market in the Balkans for the Uefa club competition rights. Champions League rights alone are worth €5m per season in the current cycle.

Uefa and Team Marketing will launch tender processes for Champions League and Europa League media rights in both the Czech Republic and Slovakia next week. ◆

FOOTBALL

Fifa defies market expectations in Greece with World Cup deal

By David Svenson

Fifa has earned a surprisingly strong fee for 2018 Fifa World Cup rights in Greece from ERT after taking back the rights from the Taf Sports agency.

Public-service broadcaster ERT will pay about €10m (\$12m) for exclusive rights to the 2018 tournament. This is about 23 per cent less than the €13m ERT contributed towards the wider European Broadcasting Union deal for the 2014 tournament (*TV Sports Markets* 21:2).

Fifa, football's global governing body, appointed Taf in November 2015 as its exclusive sales representative in Greece for both the 2018 and 2022 tournaments.

The contract gave Fifa final approval over any deal and included a clause allowing the body to take the rights back from the agency if it believed it could earn more revenue from the market.

The final deal appears a good one for Fifa. Earlier this year, several market experts judged the tournament in Greece to be worth between €5m and €6m. In negotiations with broadcasters, Taf came close to agreeing a deal for about €6.5m before Fifa reclaimed the rights.

When Fifa initially took the rights from Taf, it was described as a change of philosophy at Fifa, which wants to become less reliant on third-party agencies. However, it is understood Fifa will still use agencies in certain markets where it requires local expertise (*TV Sports Markets* 21:7).

With the rights back in-house, Fifa opened a tender with bids due on July 19. It was keen to launch the tender at a time when the Greek national team could still qualify for the tournament.

Greece finished second in its group and will contest a two-legged play-off against Croatia.

There was strong competition for the rights from free-to-air broadcasters, with both commercial broadcasters Skai and Antenna TV challenging ERT. It is thought the second-highest bid was about €9m. There was limited interest in the rights from pay-television broadcasters. ♦

CRICKET

SuperSport to show CSA T20 Challenge as part of original deal

By Callum McCarthy

Cricket South Africa has filled the gap created by the postponement of this year's T20 Global League with the T20 Challenge, a decision that will go some way to repairing its relationship with SuperSport.

The T20 Challenge was initially scheduled to be played in April 2018, in addition to the Global League, a new franchise-based T20 competition which was due to take place late this year.

CSA had told pay-television broadcaster SuperSport that the Global League was not part of its existing deal for all domestic cricket and had tried to negotiate a separate agreement for the new tournament. However, SuperSport's refusal led CSA to bring the T20 Challenge forward to fill the six-week gap left by the collapse of the Global League, which has been postponed until 2018-19.

SuperSport holds rights to the T20 Challenge as part of its existing six-season deal with CSA, from 2015-16 to 2020-21, worth about ZAR100m (€6.2m/\$7.3m) per season. This deal covers pay-television rights to all domestic and international cricket matches in the country. That deal was brokered by the IMG agency, which advised CSA on the agreement.

About ZAR20m per season of SuperSport's total fee is allocated to the T20 Challenge. It is understood CSA had been seeking significantly more than this for the Global League's media rights in sub-Saharan Africa from SuperSport, straining relationships between the broadcaster and rights-holder.

The T20 Challenge will enjoy greater prominence in 2017-18, as South African international cricketers scheduled to play in the Global League will now play in the T20 Challenge, significantly boosting its value.

In previous editions of the T20 Challenge, South African internationals were playing for the national team while the competition was being played, with teams comprised mostly of domestic players. The 2017-18 T20 Challenge will run from November 10 to December 16 and be comprised of 33 matches – 24 fewer than planned for the Global League, which was set to run from November 3 to December 16. ♦

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

FOOTBALL

- ◆ International sports broadcaster Eleven Sports enhanced its coverage of the German Bundesliga in Poland and agreed a sublicensing deal with Polish pay-television operator NC Plus (page 24).
- ◆ The IMG agency announced new deals for the A-League, Australian football's top tier. The A-League's international broadcasters for the new season are: pay-television broadcaster beIN Sports in Cambodia, East Timor, Hong Kong, Indonesia, Laos, Malaysia, Spain and Thailand; K-Ball in China; pay-television operator i-Cable in Hong Kong; pay-television broadcaster Neo Sports in India; pay-television operator StarHub in Singapore; pay-television broadcaster BT Sport in the UK and Ireland; pay-television broadcaster Sportdigital in Germany, Austria and Switzerland; OTT platform DAZN in Germany; pay-television broadcaster Arena Sport in the Balkans; free-to-air broadcaster Pasifika TV in the Cook Islands, Niue, Papua New Guinea, Samoa, Tonga and Vanuatu; commercial broadcaster Telekom TV in the Solomon Islands; public-service broadcaster Fiji Broadcasting Corporation in Fiji; sports broadcaster Kwesé Sports in sub-Saharan Africa; and Sport24, which will show coverage on flights and cruise ships.
- ◆ Dutch commercial broadcaster Veronica acquired exclusive rights to the Netherlands' women's national team matches. The deal covers the qualifying campaigns for the 2019 Fifa World Cup and the 2021 Uefa European Championships, as well as home friendlies.
- ◆ Norwegian media company Amedia agreed a five-year deal for rights to the Toppserien, the top division of domestic women's football. The agreement with the Norwegian football association will run from 2018 to 2022 and is worth a total of NOK6.6m (€710,500/\$846,800).
- ◆ US telco Verizon struck a deal with Spanish LaLiga club Barcelona. Verizon's go90 mobile streaming service will work with Barcelona to produce exclusive video content throughout the 2017-18 season.
- ◆ Australian public-service broadcaster SBS acquired rights to the W-League, the top tier of women's club football in the country. SBS Viceland will simulcast up to two W-League matches each week during the 2017-18 season. The Australian women's national team's November friendlies against China will also be broadcast on SBS and SBS Viceland.
- ◆ Chinese state broadcaster CCTV extended its deal with global governing body Fifa. The deal grants CCTV exclusive media rights in China for the 2018 and 2022 World Cups, as well as Fifa's other major international competitions until 2022, including the 2019 women's World Cup.
- ◆ Pay-television broadcaster Fox Sports Latin America agreed five-year deals for exclusive rights to the home matches of Mexican Liga MX teams Tijuana Xoloitzcuintles and Santos Laguna in all competitions. The Tijuana deal will commence from July 2018, while Santos' agreement will start in July 2019. The deal covers Latin America and the US.

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

◆ Media group Globo struck an exclusive deal for rights to Brazil national team matches, from 2017 to the 2022 World Cup (page 26).

◆ US pay-television broadcaster Univision Deportes confirmed it had secured rights to all 18 teams in Liga MX for the 2017-18 season.

◆ German public-service broadcasters ARD and ZDF agreed a deal with European governing body Uefa to show live coverage of the German men's national team matches in the Nations League. The agreement will cover a total of 12 matches, from 2018-19 to 2021-22.

◆ Brazilian sports broadcaster Esporte Interativo agreed a deal with social media platform Facebook for coverage of the Campeonato Brasileiro de Futebol de Aspirantes club competition.

◆ The BBC Wales arm of UK public-service broadcaster the BBC acquired rights to Wales national team friendly matches against France on November 10 and Panama on November 14.

◆ Pay-television broadcaster Sky Deutschland struck a four-season deal for exclusive global rights to the Austrian Bundesliga, from 2018-19 to 2021-22. Sky will also sublicense rights to four live matches per season and weekly highlights to a free-to-air broadcaster.

◆ Indian digital media company Veqta acquired rights to the English League Cup. The exclusive deal covers all quarter-finals, semi-finals and the final during 2017-18.

OTHER SPORTS

◆ **American Football:** NFL team the Chicago Bears extended its deal with local commercial broadcaster Fox 32 by five years, granting the broadcaster rights to team-produced pre-season game broadcasts, and other ancillary content.

◆ **Basketball:** Movistar Plus, the pay-television platform of Spanish telco Telefónica, agreed a multi-season deal for NBA rights. The deal was first reported in *TV Sports Markets* 21:18.

◆ **Basketball:** Euroleague Basketball, which organises continental club competitions in Europe, signed a media partnership with Turkish online sports platform Fanatik.

◆ **Basketball:** The Brazilian Basketball League (LNB) agreed a live-streaming deal with social media platform Twitter. Twitter will live stream 17 games from the top-tier NBB in 2017-18.

◆ **Basketball:** Sportkanalen, the new sports channel launched by Swedish pay-television broadcaster C More, acquired rights to the NBA. Sportkanalen will show live coverage of games every Sunday evening.

◆ **Basketball:** Liga ACB, Spain's top division, agreed a deal with OTT video content platform OZ in Denmark, Norway and Sweden.

◆ **Basketball:** The Chinese Basketball Association agreed a deal with state broadcaster CCTV for 10 seasons, from 2017-18 to 2026-27.

◆ **Basketball:** The CBA agreed a deal with online streaming platforms Tencent and Zhibo for three seasons, from 2017-18 to 2019-20. The deal with

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

Tencent was first reported in *TV Sports Markets* 21:17. The CBA also struck a deal with video-sharing platform Bilibili.

◆ **Bobsleigh/Skeleton:** The International Bobsleigh & Skeleton Federation signed a four-season extension to its media and marketing partnership with the Infront Sports & Media agency, from 2018-19 to 2021-22. Infront will continue to produce all World Cup and World Championship events.

◆ **Bowling:** The CBS Sports division of US network CBS agreed a deal with the United States Bowling Congress until the end of 2019. CBS will show the 2018 US Open as well as the 2018 Professional Women's Bowling Association Tour majors USBC Queens, US women's Open, PWBA Players Championship and PWBA Tour Championship.

◆ **Boxing:** UK free-to-air digital channel FreeSports launched a new series entitled FreeSports Fight Night. The series launched on October 13 with an event at the Ponds Forge Arena in Sheffield.

◆ **Boxing:** German sports broadcaster Sport1 agreed an exclusive three-year deal with the Sauerland Promotion, from 2018 to 2020.

◆ **Boxing:** Multi-territory commercial and pay-television broadcaster Modern Times Group acquired exclusive rights in Denmark to the world heavyweight title clash between Anthony Joshua and Carlos Takam on October 28.

◆ **Cricket:** Mamamia, an Australian women's lifestyle website, struck a deal to show the

women's Big Bash League Twenty20 tournament. Mamamia will show Cricket Australia's live coverage of all 47 matches this year.

◆ **Cricket:** Pay-television broadcaster DSport acquired exclusive rights in India for the 2018 edition of the Pakistan Super League.

◆ **Cricket:** Hotstar, the video streaming platform owned and operated by pay-television broadcaster Star, agreed an exclusive deal to live stream the 2017-18 edition of India's Ranji Trophy club tournament.

◆ **Curling:** The CBC Sports division of Canadian public-service broadcaster CBC agreed a deal with Canada Curling to stream live coverage of the national governing body's 2018 domestic championship events.

◆ **Cycling:** Sports content company Aurora Media Worldwide renewed its host broadcasting contract for the Six Day Series track competition. Aurora will produce international sports broadcaster Eurosport's coverage of events in London, Berlin and Mallorca.

◆ **Esports:** Swiss pay-television channel MySports launched a weekly esports magazine programme, Arena eSports.

◆ **Esports:** The Lagardère Sports agency agreed an exclusive worldwide deal to distribute rights for the new Counter-Strike Blast Pro Series. Lagardère signed the deal with RFRSH Entertainment, the tournament organiser.

◆ **Esports:** Interactive entertainment company Activision Blizzard struck a deal with French production and distribution company Groupe

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

AB. Groupe AB will hold rights in French-speaking Europe to Activision Blizzard's various video game franchises, including Call of Duty, Hearthstone and World of Warcraft.

◆ **Formula E:** Italian pay-television operator Mediaset Premium agreed a three-season deal for the electric car-racing series, from 2017-18 to 2019-20, with the option of extending for a further three seasons to the end of 2022-23.

◆ **Formula E:** Eurosport expanded an agreement for the series to cover 54 markets across Europe, from 2017-18 to 2019-20. Eurosport will show live coverage of all 14 races during the upcoming season on an exclusive basis across Europe, excluding the UK and Italy, where the rights will be non-exclusive. Eurosport will also sell on some rights to free-to-air broadcasters in Austria, Belgium, Czech Republic, France, Germany, Ireland, Israel, Italy, the Netherlands, Spain, Switzerland and the UK.

◆ **Greyhound Racing:** UK racecourse owner and operator Arena Racing Company signed a long-term deal with technology provider Vermantia. Vermantia will distribute ARC's premium content from the UK and Australia.

◆ **Greyhound Racing:** ARC signed a long-term deal with Australian wagering company Tabcorp. Tabcorp will distribute ARC's UK coverage via its Sky Racing service in Australia.

◆ **Greyhound Racing:** ARC extended a partnership with the Bookmakers Afternoon Greyhound Service. Under the agreement, fixtures from 12 greyhound tracks in the UK will be made available to the betting industry.

◆ **Horse Racing:** UK pay-television broadcaster At The Races acquired rights to this year's edition of US event the Breeders' Cup, which takes place on November 3-4. At The Races will show live coverage of each Breeders' Cup World Championships race, including the Breeders' Cup Classic. UK pay-television broadcaster Sky also acquired rights.

◆ **Horse Racing:** UK pay-television broadcaster Racing UK acquired rights to the 2018 Breeders' Cup. Racing UK will show World Championships races live in a special free-to-air broadcast but will not show the Breeders' Cup Classic due to contractual obligations.

◆ **Horse Racing:** Media consultancy HBA Media extended a deal to distribute international rights to the Pegasus World Cup Invitational. The deal covers the 2018 edition of the event, which will be held on January 27 at Gulfstream Park in Hallandale Beach, Florida.

◆ **Horse Racing:** Social media platform Twitter extended its deal with the Victoria Racing Club and Australian commercial broadcaster Seven. Twitter will live stream the 2017 Melbourne Cup on a global basis.

◆ **Ice Hockey:** Pay-television broadcaster NHL Network extended its deal with USA Hockey. NHL Network will hold exclusive rights in the US to several major International Ice Hockey Federation tournaments through to 2021. The deal covers the World Junior Championship, women's World Hockey Championship and the U-18 men's World Championship.

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

- ◆ **Kickboxing:** The Glory kickboxing promotion agreed a media-rights partnership with combat sports-rights distributor Fight Globe to serve as its exclusive distribution agency in Europe and the Commonwealth of Independent States. The deal was reported in *TV Sports Markets* 21:6.
- ◆ **Mixed Martial Arts:** African promotion the Extreme Fighting Championship appointed television content group Inverleigh as its exclusive worldwide rights distribution partner for the next four years.
- ◆ **Olympic Games:** Eurosport signed an advertising and content partnership with Snap Inc, the parent company of social media platform Snapchat, in a move designed to engage younger audiences during next year's winter Olympics in Pyeongchang. Snapchat users across Europe will receive access to Olympic-related content through Snap's Discover platform.
- ◆ **Paralympic Games:** The International Paralympic Committee agreed a pan-European rights deal with the European Broadcasting Union consortium of public-service broadcasters covering the 2018 winter Games and the 2020 summer Games. The deal covers all territories across Europe, excluding the UK and Russia.
- ◆ **Rugby Sevens:** French pay-television broadcaster Canal Plus struck a deal for the men's and women's Sevens Series, the national team competitions organised by rugby union's governing body World Rugby. The two-season deal covers 2017-18 and 2018-19.
- ◆ **Rugby Union:** UK public-service broadcaster the BBC acquired live, non-exclusive rights to the Scottish national team's 2017 autumn Test matches against Australia, New Zealand and Samoa. UK pay-television broadcaster BT Sport will also show live, non-exclusive coverage of the Scottish national team's 2017 autumn Test matches as part of its sponsorship deal with Scottish Rugby.
- ◆ **Rugby Union:** New Zealand Rugby partnered with pay-television broadcaster Sky to live stream a number of national team matches on pay-per-view. The All Blacks' game against the UK Barbarians in London on November 4 will be streamed internationally on AllBlacksTV.com, along with the team's match against France in Lyon on November 14. The deal also includes the Maori All Blacks vs. Canada in Vancouver on November 3, and the Maori All Blacks vs. French Barbarians in Bordeaux on November 10. New Zealand-based fans can purchase the live stream for NZ\$24.99 (€14.80/\$17.49) per All Blacks game and NZ\$14.99 per Maori All Blacks fixture.
- ◆ **Rugby Union:** IMG renewed its exclusive global archive deal with World Rugby to include all major events until the end of 2020. The deal will now cover the women's Rugby World Cup, World Rugby U20 Championship and World Rugby Sevens Series, with more than 2,500 hours of content to be made available via the IMG Replay digital platform.
- ◆ **Sailing:** The following broadcasters acquired rights to the 2017-18 Volvo Ocean Race: Spanish public-service broadcaster TVE; Portuguese public-service broadcaster RTP; Dutch public-service broadcaster NOS; Brazilian public-service broadcaster TV Brasil; French pay-television

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

broadcaster Canal Plus; pay-television broadcaster SuperSport in South Africa; pay-television broadcaster Fox Sports Australia; pay-television broadcaster Sky New Zealand; UK pay-television broadcaster Sky; Japanese pay-television broadcaster J Sports; Turkish basic-tier broadcaster Sport TV; Gaelic-language free-to-air broadcaster TG4; Modern Times Group-owned pay-television broadcaster TV3 and Aftonbladet Sport in Sweden; Chinese streaming platforms Tencent and Sina; social media platform Twitter (global streaming rights), technology company Samsung (digital rights in Asia only), and basic-tier channel Outside TV (digital rights in the US only).

◆ **Sailing:** UK media company 1080 Media TV renewed its production and distribution partnership with the Clipper Round the World Yacht Race until the end of 2019.

◆ **Skiing:** Infront Sports & Media struck an early renewal to its international rights deal with the German Ski Association for World Cup events in the country, from 2021-22 to 2025-26.

◆ **Speedway:** Spring Media, the Stockholm-based agency, struck a deal to distribute media rights to the Elitserien, Sweden's top tier of speedway, on an exclusive basis for the next five years, from 2018 to 2022.

◆ **Tennis:** Tennis Australia extended and expanded its broadcast partnership with Chinese streaming platform iQiyi for the Australian Open grand slam tournament (page 30).

◆ **US College Sport:** The Big Ten Network agreed a distribution partnership with sports

streaming platform specialist FloSports. The four-year agreement covers rights to more than 1,000 non-televised Big Ten events.

◆ **Volleyball:** Sports and betting-related services company Sportradar agreed deals to deliver coverage of the European Volleyball Confederation's (CEV) Champions League in more than 60 territories across Asia and Africa. Sportradar signed a multi-year agreement with Eurosport Asia for exclusive coverage in Australia, as well as the Indian subcontinent, Indonesia, Malaysia, Singapore and South Korea. Sportradar also expanded an existing agreement with Kwesé Sports.

◆ **Volleyball:** The Chinese Volleyball League signed a digital rights partnership with Tencent. Tencent's Live.qq.com service will serve as the official new media live broadcasting platform of the league in a deal that covers 180 games.

◆ **Volleyball:** The Chinese Volleyball League agreed non-exclusive live rights deals with e-commerce company Suning and Sina for 2017-18 only.

◆ **Volleyball:** The Chinese Volleyball League signed a digital rights partnership with the Jinri Toutiao news and information platform. The deal covers short-form video streaming rights to all matches in 2017-18.

◆ **Volleyball:** German sports broadcaster Sport1 acquired rights to the domestic men's Bundesliga. Sport1 will show live coverage of up to seven matches during the 2017-18 regular season on free-to-air television in Germany, Austria and Switzerland.

DEALS ROUND-UP

OCTOBER 12 TO NOVEMBER 1

◆ **Wrestling:** Portuguese pay-television broadcaster Sport TV struck a multi-year deal for WWE rights. Sport TV will show the WWE's flagship *Raw* and *SmackDown* programmes on a weekly basis.

MEDIA RIGHTS NEGOTIATIONS

◆ Football's European governing body Uefa launched tender processes for broadcast rights to its Champions League and Europa League club competitions in Canada (page 6).

◆ Alexander Fayfman, general producer of state-controlled commercial broadcaster Channel One, said no progress had been made on securing a rights deal for the 2018 Fifa World Cup in host nation Russia, adding that the negotiating parties are still seeking a compromise.

◆ LaLiga president Javier Tebas said the organisation which oversees the top two divisions of Spanish club football had delayed talks over its next set of international rights amid the uncertainty caused by Catalonia's proposed split from Spain. Tebas said it is "not the moment" to sell the rights.

◆ Brazilian broadcaster Rede Bandeirantes agreed a sublicensing deal for rights to the 2018 Fifa World Cup (page 26).

◆ Plans by the Premier League's 'big six' to reform the way rights revenue is distributed were shelved, with the league stating it had become clear there is currently no consensus for change. The Premier League cancelled a meeting of shareholders scheduled for October 25.

◆ The English Football League, which operates the three divisions below the Premier League, dismissed suggestions that clubs in the second-tier Championship are unhappy with the EFL's recently-signed rights deal with pay-television broadcaster Sky, amid reports of a breakaway league being formed by dissatisfied teams.

◆ The All England Lawn Tennis Club, organiser of the Wimbledon grand slam tournament, settled its claims against LeTV, operator of Chinese online streaming platform LeSports. LeSports had agreed a three-year deal for Wimbledon rights, from 2016 to 2018. The contract was terminated earlier this year when LeSports missed a scheduled payment for the 2017 tournament. In a statement, AELTC confirmed it has settled its claims against LeTV in respect of unpaid media-rights fees, following the payment of an undisclosed sum.

◆ Uefa launched tender processes for rights to the Champions League and Europa League in Belgium and the Netherlands. Both tenders cover rights for three seasons, from 2018-19 to 2020-21. Deadlines for bids for both tenders have been set at 10am CET on November 27 for the Netherlands and November 29 for Belgium.

INDUSTRY NEWS IN BRIEF

OCTOBER 12 TO NOVEMBER 1

- ◆ The office of the Swiss Attorney General (OAG) confirmed on October 12 that it had opened a criminal proceeding against former Fifa secretary general Jérôme Valcke and Nasser Al-Khelaïfi, chief executive of beIN Media Group, in relation to the award of media rights for the World Cup national team football tournament. “It is suspected that Jérôme Valcke accepted undue advantages from a businessman in the sports rights sector in connection with the award of media rights for certain countries at the Fifa World Cups in 2018, 2022, 2026 and 2030 and from Nasser Al-Khelaïfi in connection with the award of media rights for certain countries at the Fifa World Cups in 2026 and 2030,” the OAG said. BeIN and Valcke denied any wrongdoing. Valcke later insisted he did not “engage” with Al-Khelaïfi. Al-Khelaïfi said he had “nothing to hide” after being questioned by Swiss investigators on October 26.
- ◆ Fox reaffirmed its coverage plans for football’s 2018 Fifa World Cup in the US despite an analyst estimating that the US national team’s failure to qualify for the tournament could cost the network between \$10m (€8.4m) and \$20m. Fox had announced “unprecedented” coverage plans for the 2018 World Cup, comprising 350 hours of programming and a studio based in Moscow’s Red Square. Fox said it remained committed to its coverage.
- ◆ Italian telco Telecom Italia and French conglomerate Vivendi created a joint venture which will compete for sports rights in Italy and will also manage domestic and international production projects (page 3).
- ◆ The Premier League could permit the simultaneous broadcasting of matches in its forthcoming domestic rights tender, which will cover the three seasons from 2019-20 to 2021-22. Premier League executive chairman Richard Scudamore told a Football Supporters’ Federation meeting such a move would initially only cover midweek matches and those on bank holidays.
- ◆ Chinese private equity firm Orient Hontai struck a deal to acquire a majority stake in Imagina, the parent company of Spanish agency Mediapro. Orient Hontai will reportedly acquire 54 per cent of Imagina for \$1bn (€850m). The deal is yet to be approved by the Chinese administration.
- ◆ Spanish LaLiga club Real Madrid struck a strategic partnership with Chinese social media platform Sina Weibo. Sina Weibo will become the official social media platform in China for the club. The two parties will co-operate to deliver daily news, training and match-day videos.
- ◆ Italian Serie A club Juventus launched a new virtual reality mobile application, Juventus VR. The application will give fans access to behind-the-scenes footage and is available via the Oculus Store for Samsung Gear VR and Oculus Rift owners.
- ◆ German media group ProSiebenSat.1 joined forces with US media and entertainment company Discovery Communications to launch a new free-to-access OTT streaming platform in Germany. 7TV brings together nine of the most popular terrestrial television channels in Germany. Viewers can access ProSieben, Sat.1,

INDUSTRY NEWS IN BRIEF

OCTOBER 12 TO NOVEMBER 1

kabel eins, Sixx, ProSieben Maxx, Sat.1 Gold and kabel eins Doku, together with Discovery's free-to-air channels Dmax and TLC.

◆ French web content group Webedia said it would launch an esports television channel. ES1 is due to launch on December 1, subject to clearance from market regulator the CSA.

◆ The Russian Olympic Committee will launch an online streaming channel in December. The channel will be entitled 'Team of Russia'.

◆ The European Court of Justice overturned a merger of Dutch pay-television operators UPC and Ziggo, citing competition in the sports media market as its key concern. The European Commission's approval of the deal had been challenged by fellow pay-television operator KPN, which put forward three main arguments, including the deal's impact on the sports market in the Netherlands.

◆ International sports broadcaster Eleven Sports struck a carriage deal with Belgian satellite platform TéléSat and Flemish satellite operator TV Vlaanderen, which began offering the Eleven Sports 1 and Eleven Sports 2 channels from November 1. The Eleven Sports 3 channel will also be offered online via customers' interactive satellite decoders.

◆ Swedish pay-television broadcaster C More launched its new sports channel, Sportkanalen, on October 14 as part of a new Standard Sport package.

◆ The National Rugby League, the sport's top division in Australia, teamed up with domestic

rights partner, pay-television broadcaster Fox Sports, to launch a direct-to-consumer streaming product for the international market. Watch NRL will launch for the start of the 2018 Premiership season and will also offer the State of Origin Series, Australian men's and women's home international matches, and Super Cup matches. Content will be available outside Australia, New Zealand and the Pacific Territories.

◆ Clare Curran, New Zealand's minister of Broadcasting, Communications and Digital Media, said attempting to shift more sports coverage onto free-to-air television in the country is not a government priority.

◆ Cricket Hong Kong partnered with professional services company Accenture and Cricket Australia to develop new digital media platforms for the revived Hong Kong World Sixes tournament and the Hong Kong T20 Blitz. Accenture and Cricket Australia will deliver the first official CHK mobile app.

◆ Indian pay-television broadcaster DSport took action against the Impress Matra Consortium for allegedly failing to fulfil a deal agreed for international rights to Twenty20 cricket competition the Bangladesh Premier League (page 22).

◆ Pay-television broadcaster Star India will launch the Star Sports 1 Kannada channel on November 16. The channel will serve the state of Karnataka and will replace the broadcaster's Hindi music channel, Channel V. Star is planning further regional sports channels in at least four languages, including Telugu, Malayalam, Bengali and Marathi.

INDUSTRY NEWS IN BRIEF

OCTOBER 12 TO NOVEMBER 1

◆ International sports broadcaster ESPN returned to the Philippines after agreeing a partnership with commercial broadcaster TV5. Under the agreement, TV5's Sports 5 channel will be rebranded as ESPN 5. In addition, ESPN will license more than 2,500 hours of additional programming to TV5 each year.

◆ Kwesé TV launched its sports service in Nigeria. Kwesé TV will be offered as a 'pay-as-you-watch' service, with consumers in the country able to purchase subscription passes for three, seven or 30 days.

◆ Juventus topped the Uefa Champions League prize money table for the 2016-17 season with English Premier League team Leicester City edging winner Real Madrid into third place in the revenues handed out by European football's governing body. The clubs that took part in the 2016-17 Champions League group stage, and the 10 eliminated in the play-offs, shared more than €1.396bn (\$1.663bn) in payments from Uefa. Juventus gained €110.434m from Uefa, €58.826m of which came in market pool payments. Uefa awarded a basic fee of €12.7m to each of the 32 Champions League teams, plus bonuses for results and a share of broadcast rights money known as the market pool.

◆ Broadcast and audiovisual services supplier Euro Media Group and its subsidiary Netco Sports, which specialises in the development of technical and digital solutions for the sport and media industries, acquired On Rewind to improve the group's new OTT offering.

◆ Sports data and technology company Genius Sports agreed a partnership with computer

festival DreamHack, which organises esports events. Genius Sports will distribute video streaming and data from DreamHack's esports events in the regulated betting market globally, as well as helping the organisation protect its competitions from match-fixing.

INDUSTRY MOVES

◆ Sportsfix, a new OTT service for Southeast Asia, appointed Carl Kirchoff as its chief executive.

◆ MP & Silva confirmed that Seamus O'Brien would become the new president and group chief executive of the agency from January 1, with Jochen Lösch stepping aside into a senior consultant role.

◆ ITN Productions appointed Sam Leadsom as head of host broadcasting.

◆ ITN Productions appointed Mark Fulton as executive producer, athletics.