

MEDIA RIGHTS TENDER 2020.

Frankfurt, 3 March 2020.



CORNERSTONES OF THE MEDIA RIGHTS TENDER 2020



- **Subject:** Media exploitation rights (audiovisual, audio, digital out of home)
- **Matches:** 617 matches per season of Bundesliga, Bundesliga 2, relegation, Supercup
- **Licence period:** Four seasons 2021/2022 until 2024/2025
- **Territory:** Germany, Austria, Switzerland, Lichtenstein, Luxembourg & South Tyrol
- **Rights packages:** 7 live rights packages and 7 highlight rights packages (audiovisual)
- **Process:** Open, transparent and non-discriminating tender
- **Basis:** Commitments of the DFL from antitrust proceedings pursuant to § 32b GWB¹

FOCUS AREAS



**Promotion
of digital
innovations
and highest
presentation quality**

**Strengthening
of pay live with
concurrent upgrade
of comprehensive
free to air coverage**

**Preservation
of proven regular
match schedule, but
without Monday
night matches**

WHAT'S NEW: „PAY“



- 1.** Expansion of licenced territory beyond Germany to Austria, Switzerland, Lichtenstein, Luxembourg and South Tyrol.
- 2.** The highest-quality serial production in Germany: 176 matches in 4K. Top matches with 26 cameras. Frequent use of innovative technologies, e.g. of Aerial Camera Systems, drones and corner flag cameras.
- 3.** Additional digital and mobile usage rights for pay live: In-match video and audio clips. Pay clips on demand after final whistle.
- 4.** Inclusion of extensive club marketing rights as part of the live rights packages.

WHAT'S NEW: „FREE“



- 1.** Three additional free to air matches:
Relegation Bundesliga and season opening match Bundesliga 2.
- 2.** Rights holders can make available all highlight shows
after Monday 0.00h on demand.
- 3.** Up to 3 „Free-Clip“ providers can make available single clips
after Monday 0.00h on demand.
- 4.** Tendering of a „Digital out of Home“ package (DOOH) with exploitation
rights for digital advertising screens.

WHAT'S NEW: DIGITAL OUT OF HOME



- DFL tenders a Digital out of Home rights package for the first time
- There are >100.000 digital advertising screens in Germany.
- Besides ads, these screens show content such as sports.
- The market is growing. DOOH reaches >50M contacts per day.
- The share of digital advertising screens will rise to ~50% until 2025.

WHAT'S NEW: CHANGES OF THE MATCH SCHEDULE



BUNDESLIGA

10 „recovery matches“ are played Sunday 19.30

instead of 5x Sunday 13.30 and 5x Monday 20.30



BUNDESLIGA

Bundesliga 2 top match is played Saturday 20.30

instead of Monday 20.30



BUNDESLIGA



BUNDESLIGA

Bundesliga kick off Sunday 18.00 is moved to 17.30

Bundesliga 2 kick off Saturday 13.00 is moved to 13.30



BUNDESLIGA



BUNDESLIGA

Match day 33 is played as a regular match day

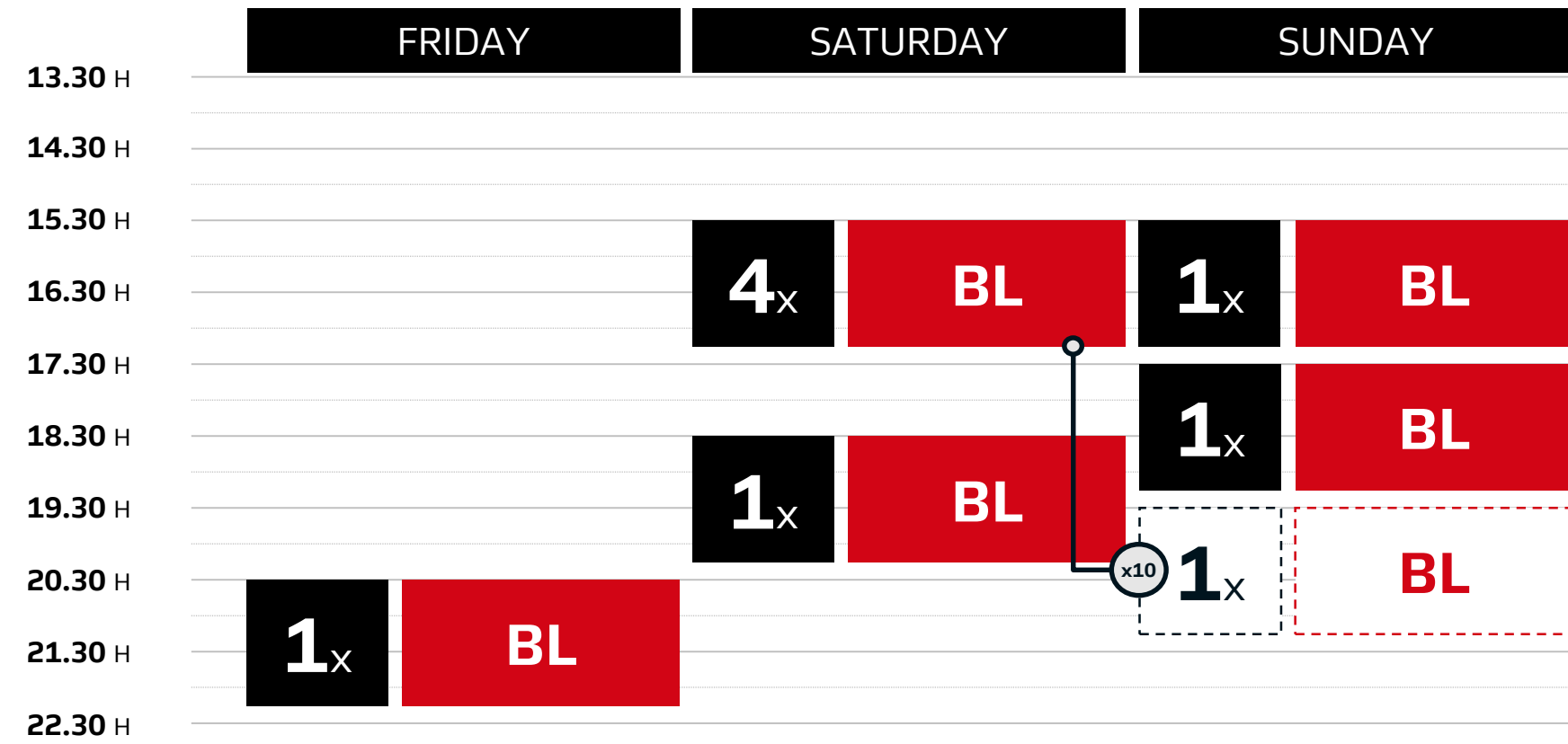
with normal kick off times

BUNDESLIGA: REGULAR MATCH SCHEDULE



	FRIDAY	SATURDAY	SUNDAY
13.30 H			
14.30 H			
15.30 H			
16.30 H		5 _x	1 _x
17.30 H			
18.30 H		1 _x	1 _x
19.30 H			
20.30 H			
21.30 H	1 _x		
22.30 H			

BUNDESLIGA: 10 „RECOVERY MATCHES“ PER SEASON



BUNDESLIGA 2: REGULAR MATCH SCHEDULE



	FRIDAY	SATURDAY	SUNDAY
13.30 H			
14.30 H		3 _x	3 _x
15.30 H			
16.30 H			
17.30 H			
18.30 H	2 _x	2 _x	
19.30 H			
20.30 H		1 _x	1 _x
21.30 H			
22.30 H			

BUNDESLIGA: LIVE RIGHTS PACKAGES



Package

Package	A	B	C	D	E
	Saturday 15.30 Conference Tue. & Wed. 20.30 Conference	Saturday 15.30 Tue. & Wed. 18.30 20.30 Relegation BL	Saturday 18.30 Supercup	Sunday 15.30 17.30 19.30 ¹ Friday 20.30	Free Live BL MD 1/17/18 BL 2 MD 1 Relegation BL & BL 2 Supercup

Matches

166

170

33

106

9²

Conferences

35

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Pay



Free

BUNDESLIGA 2: LIVE RIGHTS PACKAGES



Package



BL 2

Fri. | Sat. 13.30 |
Sun.

Relegation
BL 2



Saturday

20.30

Matches

275

33

Conferences

98

—





Pay



Pay and/or Free

HIGHLIGHT RIGHTS PACKAGES



Package	H	I	J	K	L	M	N
Broadcast Window	Fri 22.30 – 24.00 Sun 18.45 – 21.15	Sat 18.30 – 20.15	Sat 21.45 – 24.00	Sun 6.00 – 15.00	Sun 21.15 – 24.00	HL Clips after final whistle	HL Clips Mon 0.00
Bundesliga	—	Fri+Sat ¹	Fri+Sat	Fri+Sat	Fri-Sun	Fri-Sun	Fri-Sun
Bundesliga 2	Fri+Sun	Sat ²	Sat	Fri+Sat	—	Fri-Sun	Fri-Sun
	 Pay	 Free					

Up to 3x

FURTHER RIGHTS PACKAGES



Audio

Broadcast

Audio exploitation rights for UKW with the opportunity of a national program hookup.

Netcast

Audio exploitation rights for Web/Mobile.

DOOH

Digital out of Home

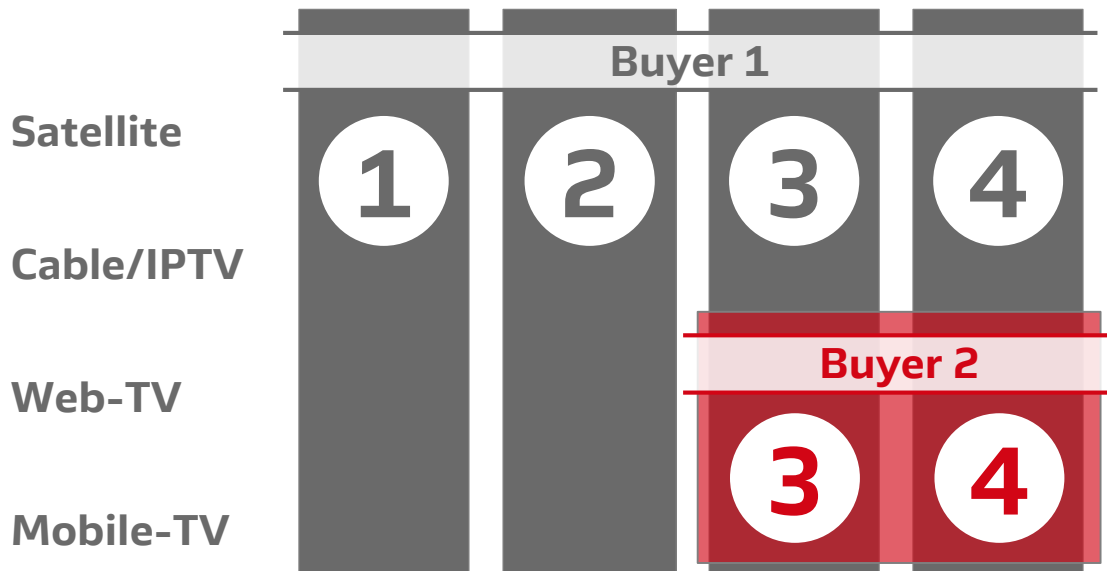
Exploitation right to show audiovisual content over digital advertising and information screens.

THE „NO EXCLUSIVE OWNER RULE“



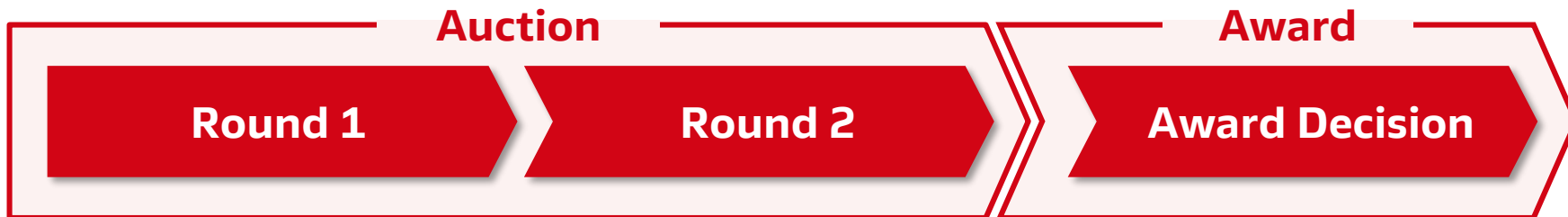
If a **single buyer** acquires all 4 Bundesliga live rights packages...

...the rights packages tendered on third and fourth place during the auction are awarded **co-exclusively** over the distribution paths Web and Mobile-TV to a **another buyer**¹



1. The order of the four rights packages is yet to be determined.

AUCTION PROCESS

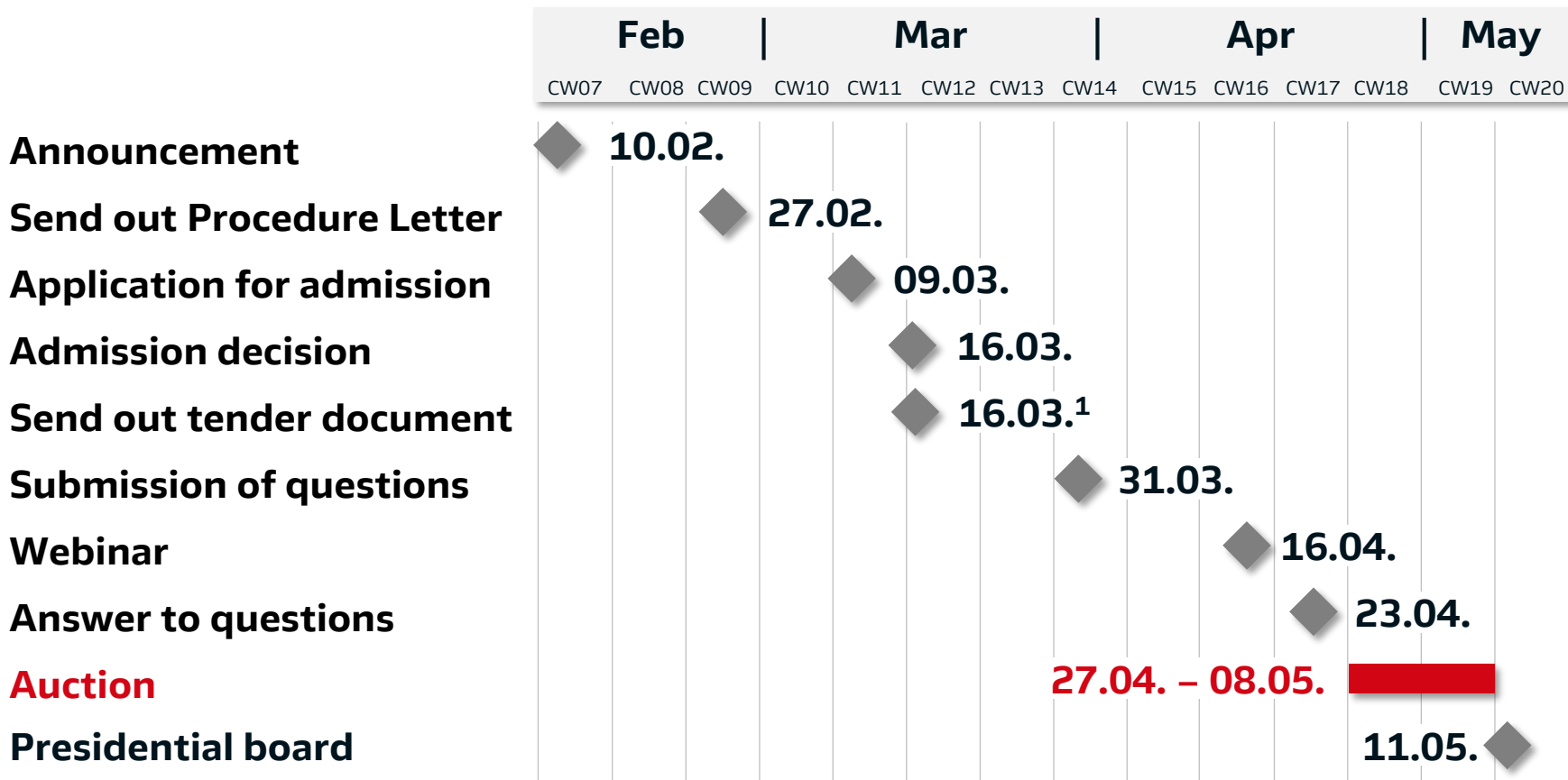


AUCTION RULES: EXAMPLES



Constellation	Example		Result	
	VP/RP	Offers	Round 1	Round 2
Several offers above VP/RP and second highest offer is more than 20% lower	100	150 110	Award	Award
Exactly one offer above VP/RP and second highest offer is more than 20% lower	100	110 80	Award	Award
Several offers above VP/RP and second highest offer is less than or exactly 20% lower	100	150 120	No award	DFL decision
Exactly one offer above VP/RP and second highest offer is less than or exactly 20% lower	100	110 95	No award	Award
No offer above VP/RP	100	90 80	No award	DFL decision ¹

TIMELINE



Remark: Timeline subject to final approval of tender modalities through federal cartel authorities 1. Earliest date

CONCLUSION



The DFL markets one of the world's most valuable sports rights portfolios – and the most valuable in Germany

The rights allow for a modern and user-oriented media offering. They reflect technological developments and trends in media consumption

The DFL focuses on digital innovations and highest presentation quality of all matches based on an almost unchanged match schedule



MEDIA RIGHTS TENDER **2020.**