

CLUB ADVISORY PLATFORM



London, 17 October 2019

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Translation Channels



Kelly Cates Your Host

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Club Advisory Platform **OPENING**



Richard Masters
Premier League Interim Chief Executive

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Lars-Christer Olsson
President of the European Leagues

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SPEECH - UEFA



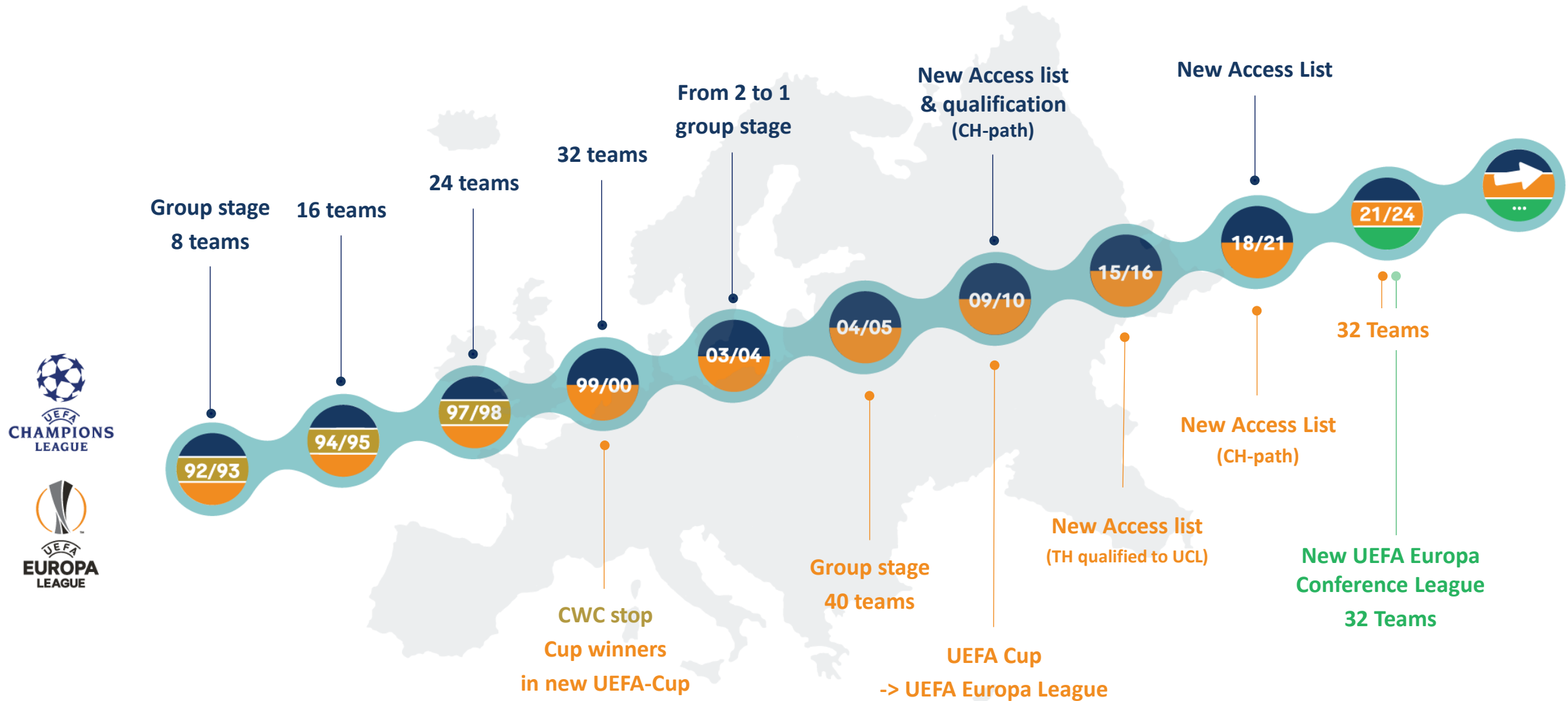
Giorgio Marchetti - Deputy General Secretary



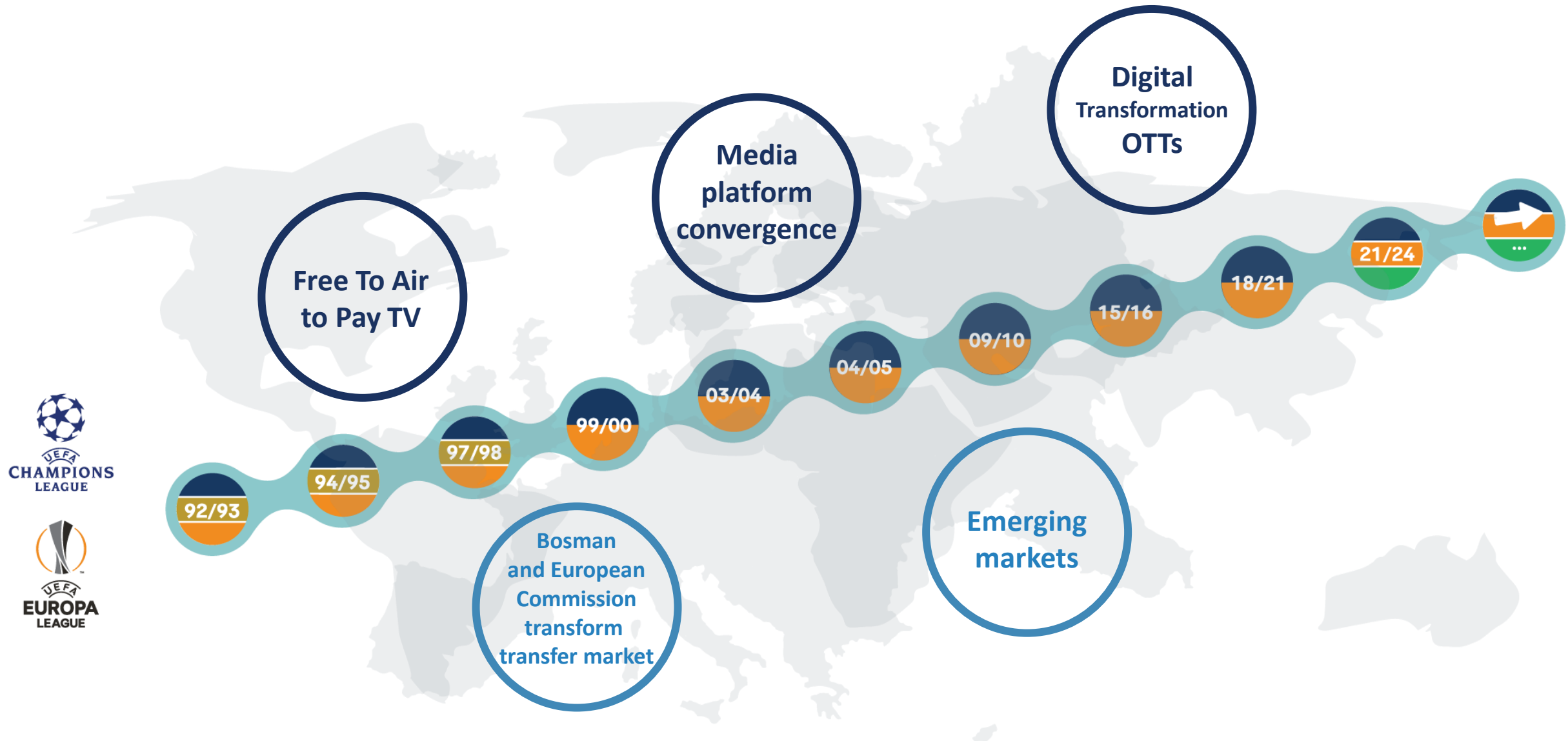
UEFA CLUB COMPETITIONS

Horizon 2024

European competitions evolve



And the environment changes

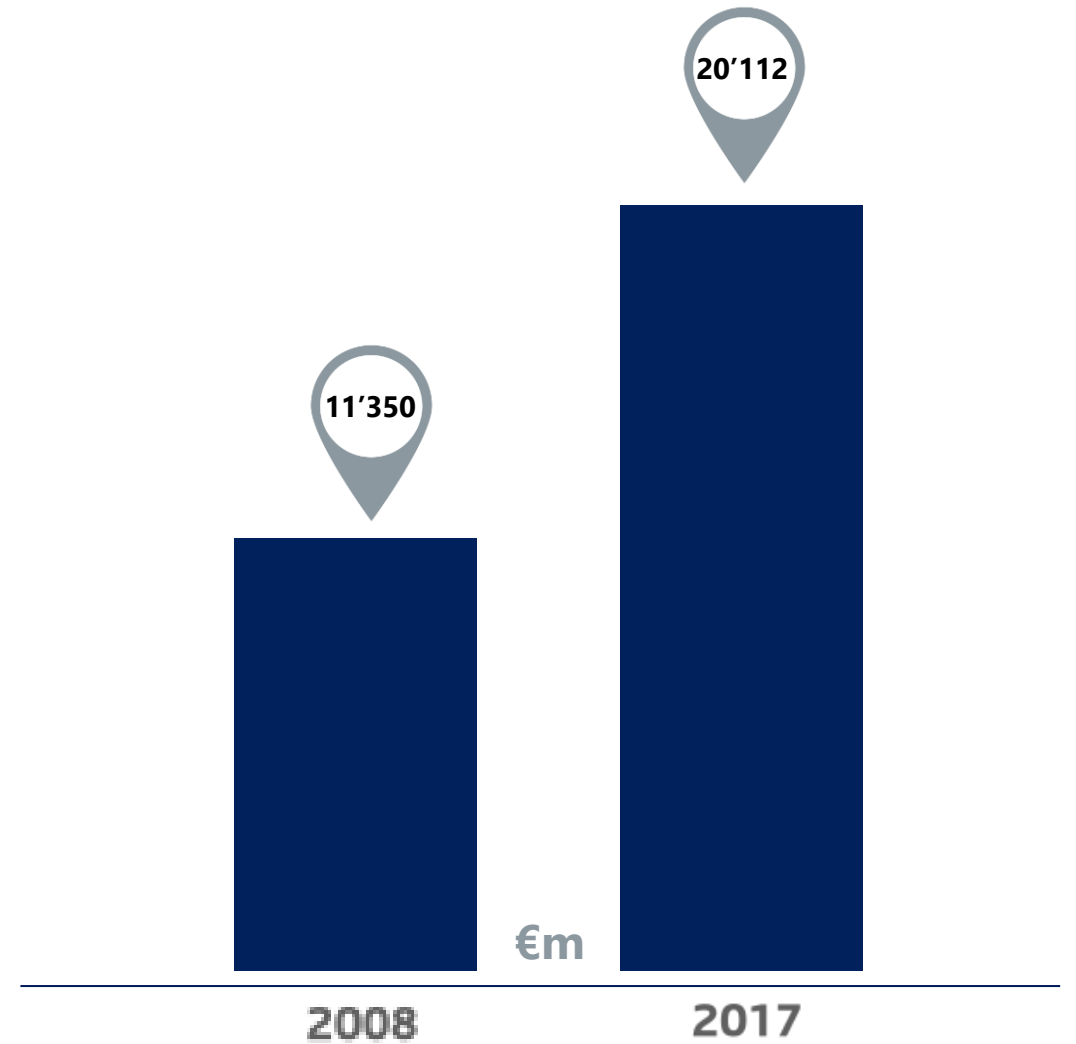




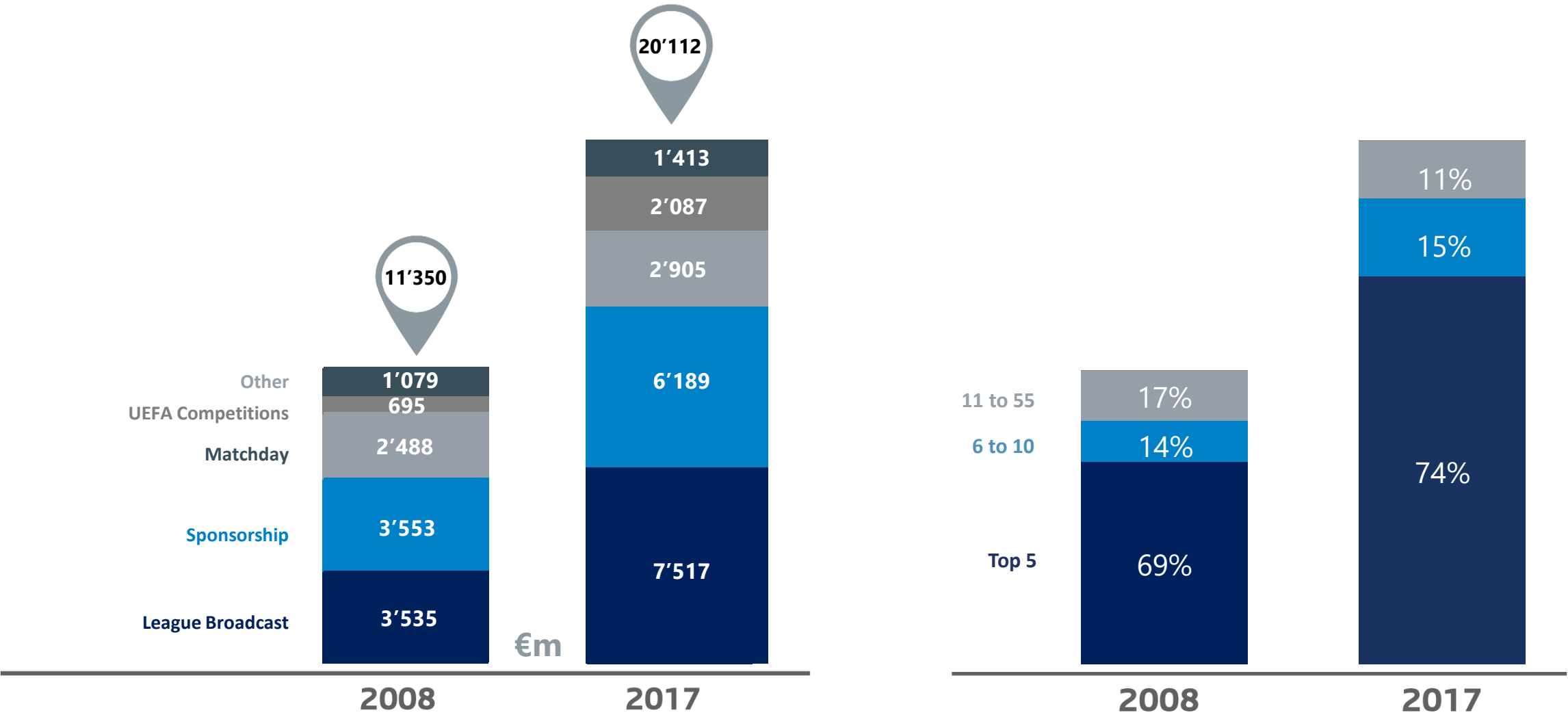
The evolution of football economy

10 difficult years for Europe but European football has grown steadily

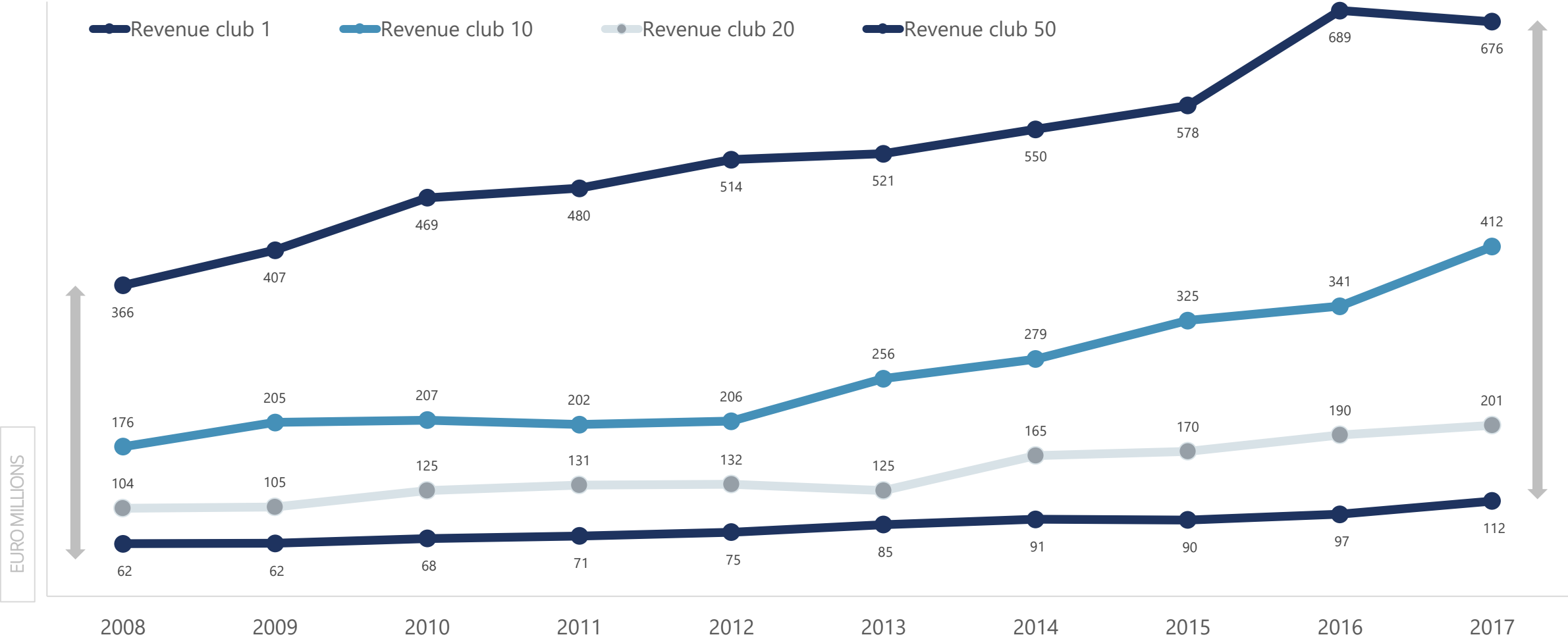
Total Club revenue in Europe



Source and destination of club revenue



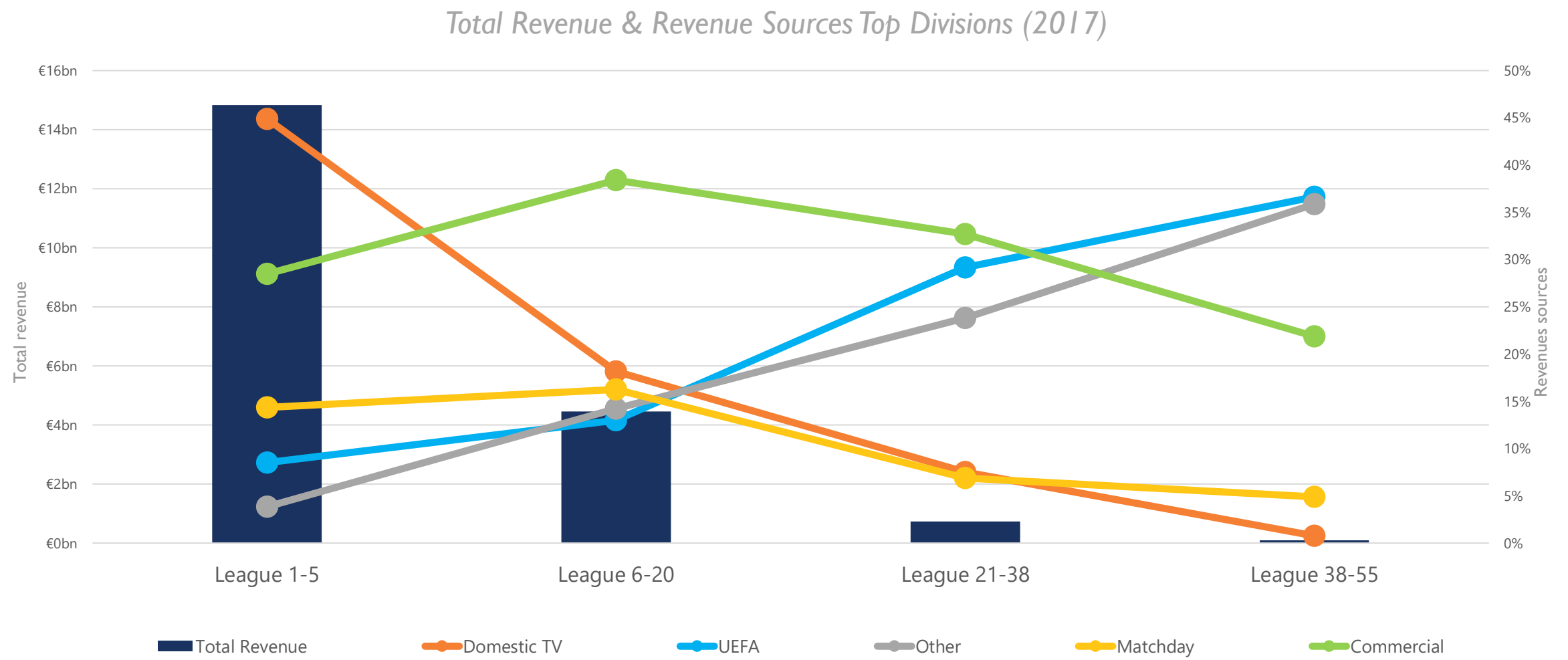
Wealth gaps between clubs growing at top



Wealth gaps between clubs



Clubs revenue break-down



Key drivers of change

01



Lucrative domestic broadcast deals

02



Increased exposure maximizing commercial rights

03



Globalisation and evolution in technology opening new opportunities

04



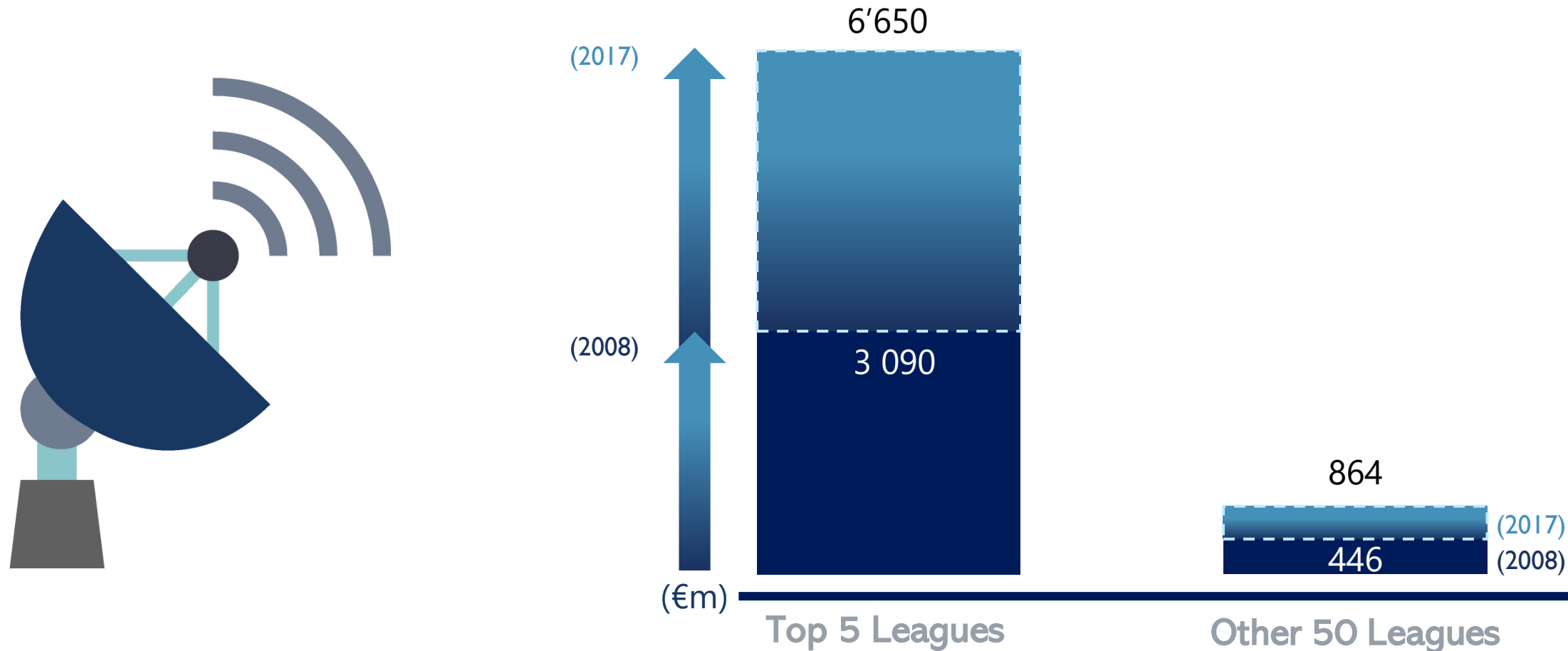
Post Bosman changes to the player transfer system altering traditional transfer economy

05



UEFA competition revenues growth

Growth in domestic broadcast deals



Key drivers of change

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Lucrative domestic broadcast deals

02



Increased exposure maximizing commercial rights

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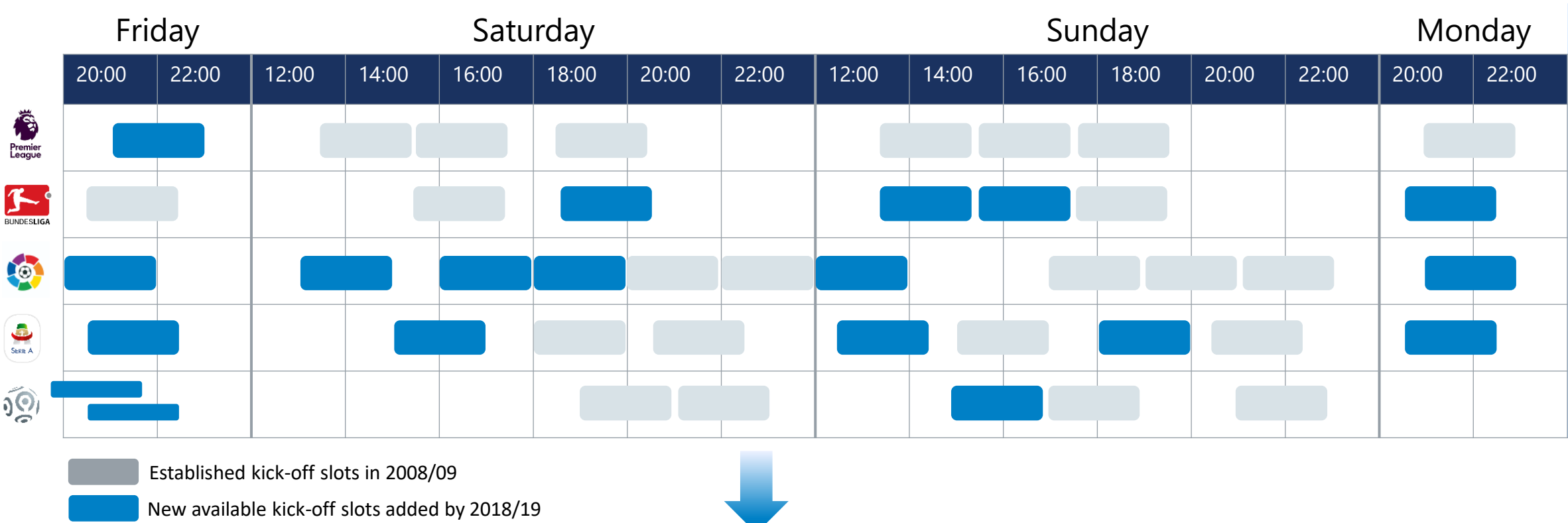
Post Bosman changes to the player transfer system altering traditional transfer economy

05



UEFA competition revenues growth

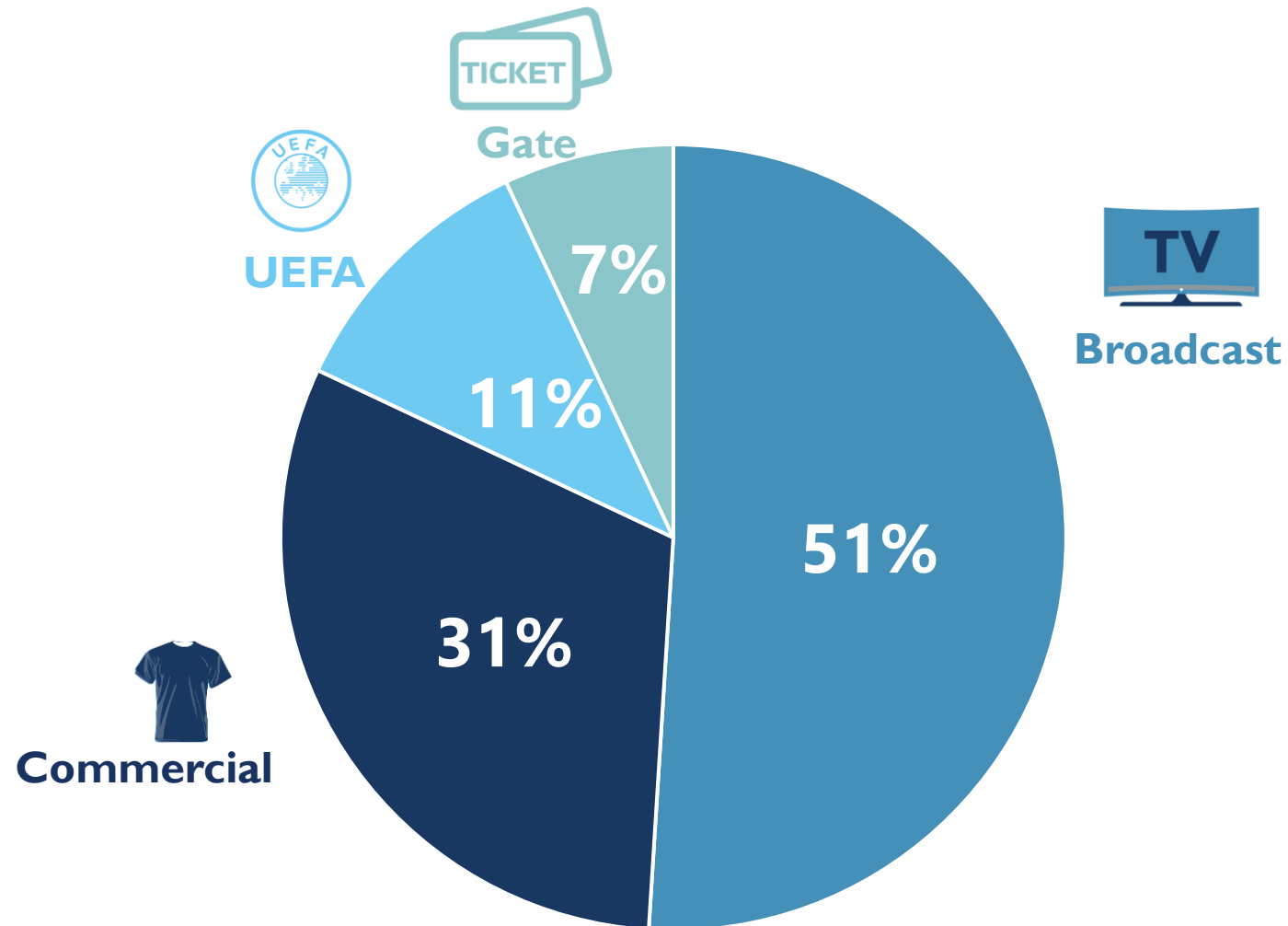
Increasing exposure



2008/09 Kick-off slots: 23

2018/19 Kick-off slots: 42

Revenue growth type for Top 5 Leagues (2008-2017)



Key drivers of change

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Post Bosman changes to the player transfer system altering traditional transfer economy

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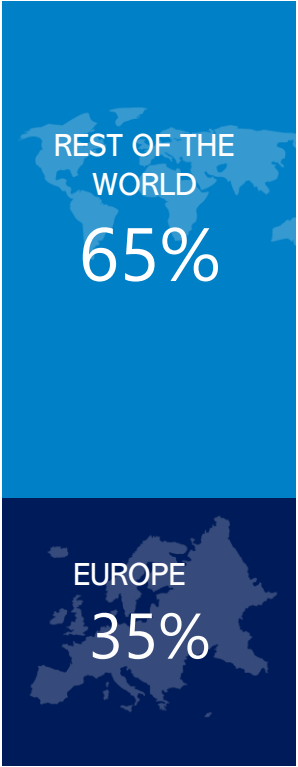


UEFA competition revenues growth

Domestic competitions international broadcast revenues



Revenue
(2017)



Source



Destination

Based on UEFA proprietary data and third party market specialists

Non-top 5 spend in non-domestic broadcast rights (m€)



2009/10

2017/18

UCL / UEL

210

373

+78%

Top 5 Leagues

100

427

+327%

Key drivers of change

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Post Bosman changes to the player transfer system altering traditional transfer economy

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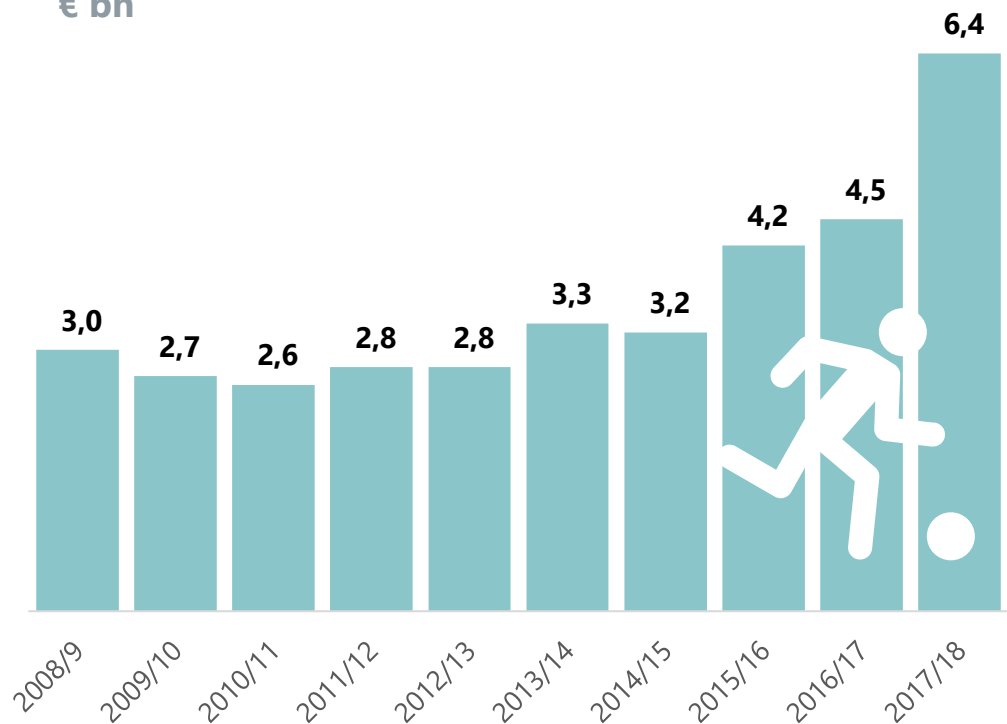


UEFA competition revenues growth

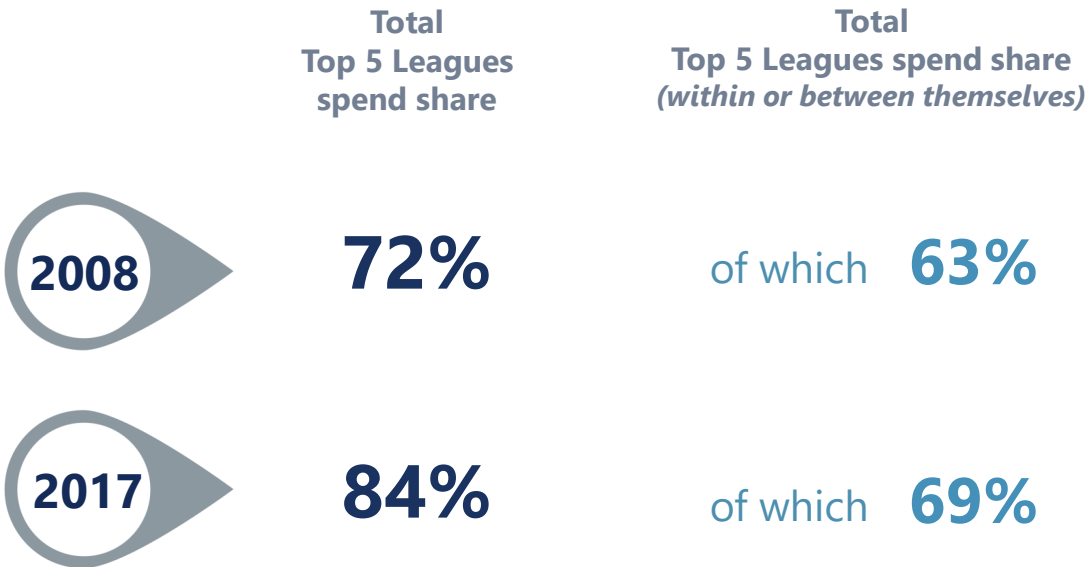
European transfer income

European top division club transfer spend
2008/09 – 2017/18

€ bn



Evolution in share of European transfer spending
(all divisions)



Top 250 most valuable players

*According to transfer market values (Transfermarkt)



Transfer value as of start of each season



Non-domestic players in top 5 leagues



2008/09

43%

2017/18

52%

**From other European
Countries**

17%

22%

Key drivers of change

01



Lucrative domestic broadcast deals

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Increased exposure maximizing commercial rights

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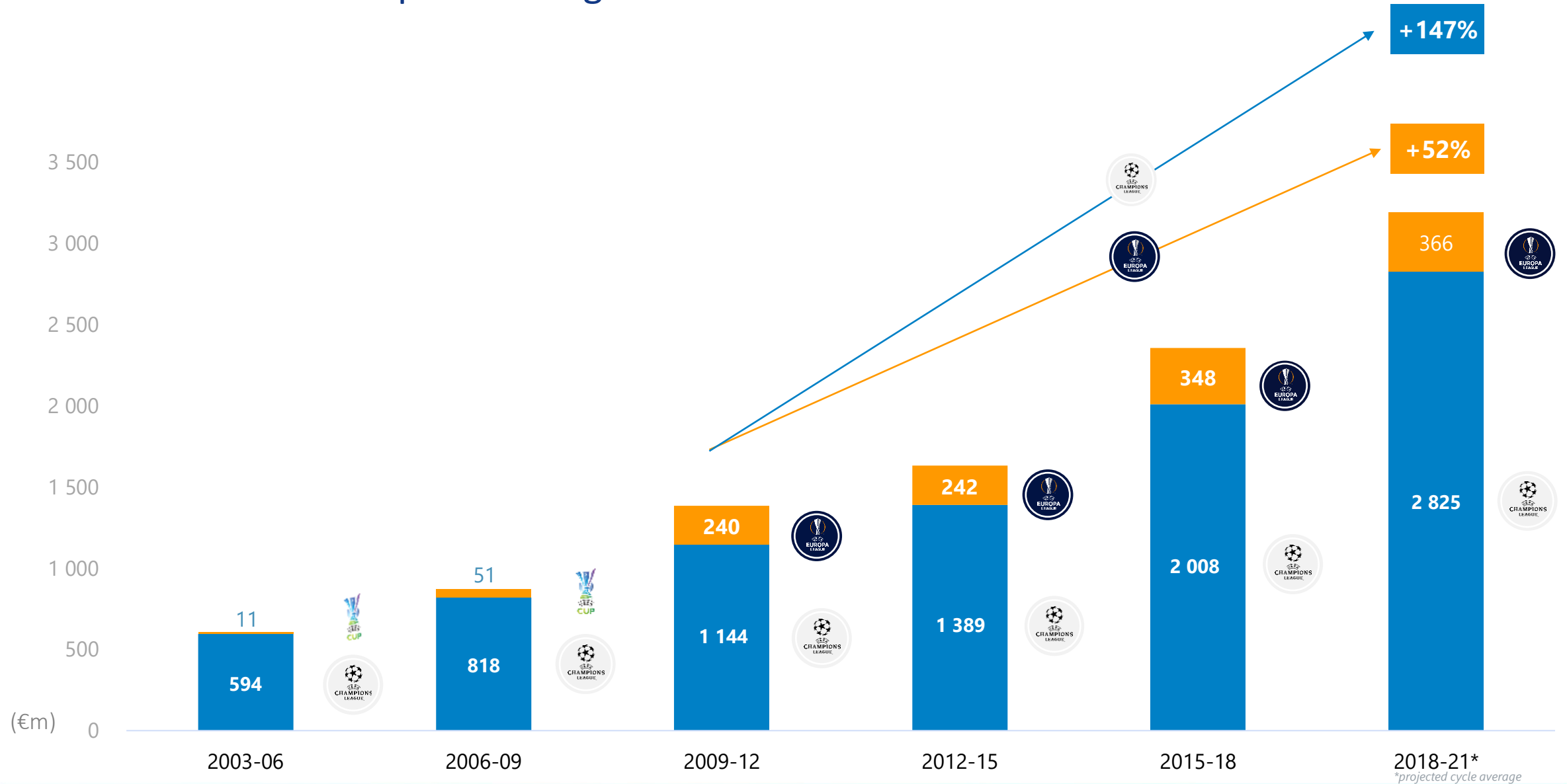
Post Bosman changes to the player transfer system altering traditional transfer economy

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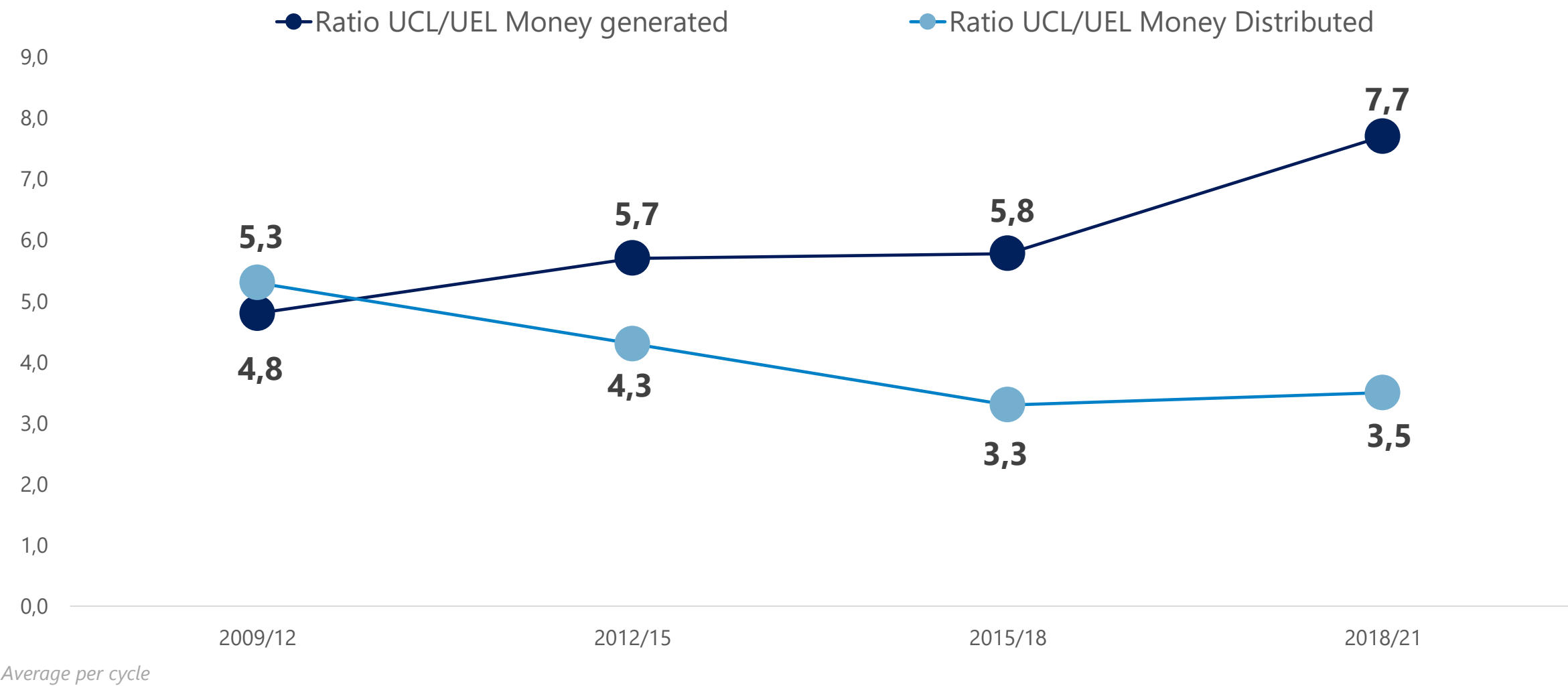


UEFA competition revenues growth

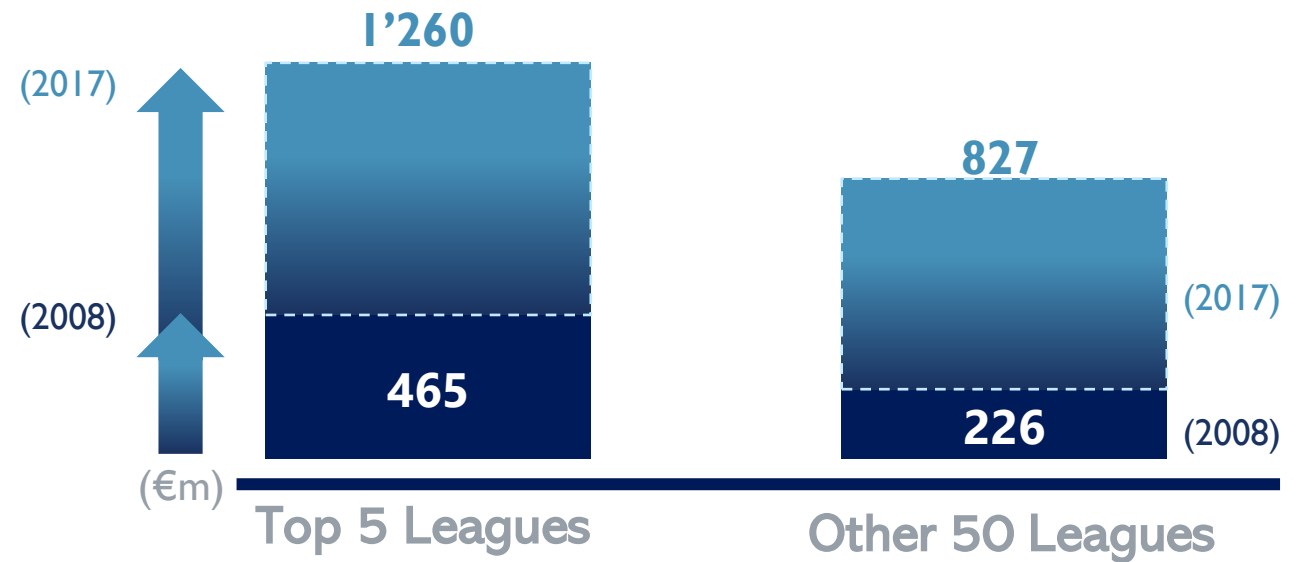
Evolution of UEFA competitions rights revenue



Evolution of UCL and UEL revenues and distribution



UCL / UEL Distribution and Solidarity

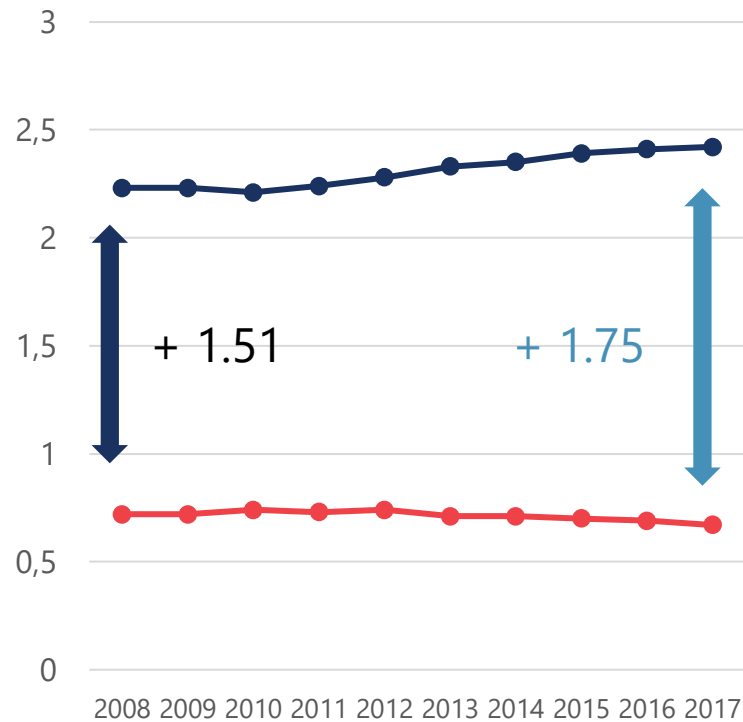




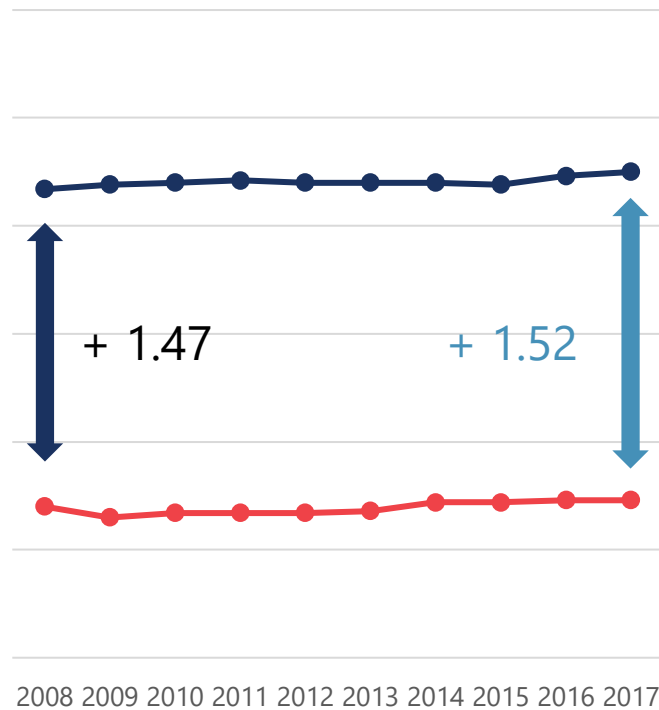
The impact on football competitions

Competitive balance - Domestic leagues

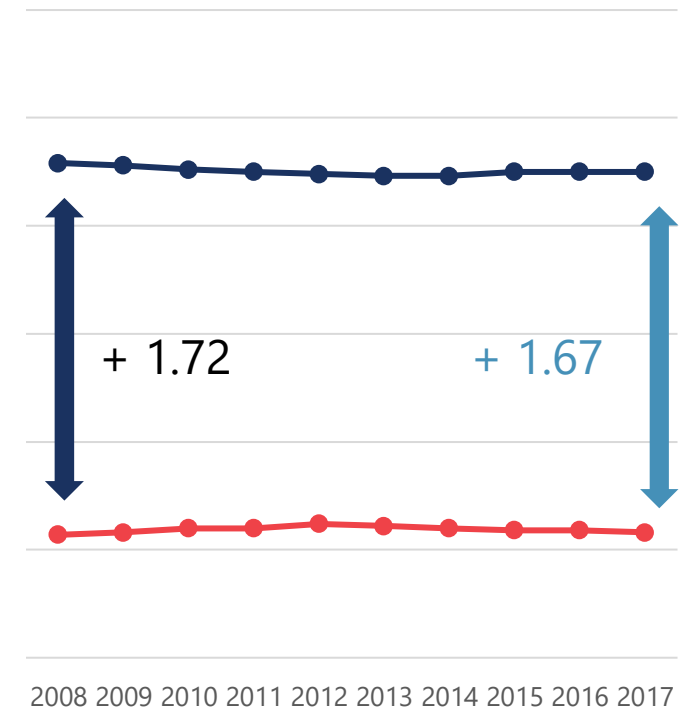
Top 5 Leagues



Leagues 6 - 15



Leagues 16 - 55



—●— Champions average points per game —●— Bottom club average points per game

Competitive balance – UEFA Champions League



Evolution of competitive balance in the Champions League (2003-2018)

Figure 4: % of group matches with at least a three goal difference, Champions League (2003-2018)

2003-2006	16.9%	
2007-2010	18.5%	
2011-2014	20.6%	
2015-2018	22.9%	

Figure 3: average goal difference for group stage matches, Champions League (2003-2018)

2003-2006	1.39	
2007-2010	1.47	
2011-2014	1.59	
2015-2018	1.64	

Figure 1: points per match and goal difference of teams at the top of the group, Champions League (2003-2018)

	points per match		average goal difference	
2003-2006	2.11		+6.38	
2007-2010	2.21		+6.72	
2011-2014	2.22		+8.63	
2015-2018	2.26		+8.91	

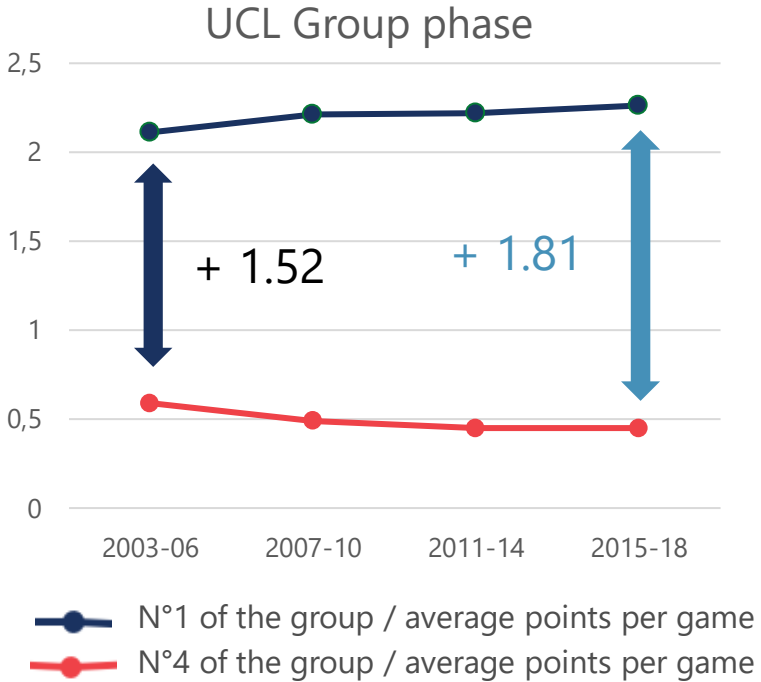
Figure 2: points per match and goal difference of teams at the bottom of the group, Champions League (2003-2018)

	points per match		average goal difference	
2003-2006	0.59		-6.72	
2007-2010	0.49		-7.50	
2011-2014	0.45		-9.44	
2015-2018	0.45		-9.06	

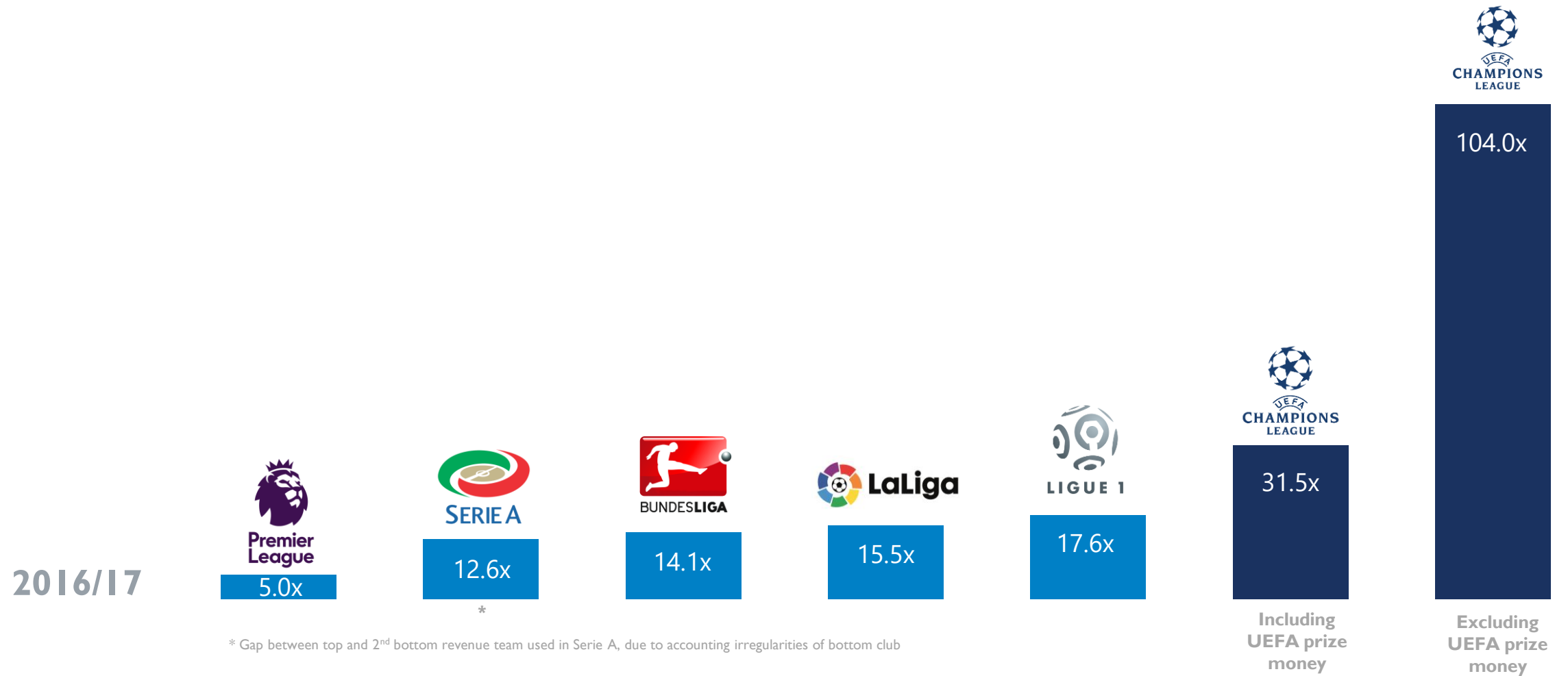
Figure 6: % of matches where the clear favourite wins, Champions League (2004-2018)

	Home		Away		Total	
2004-2008	76.1%		62.5%		74.9%	
2009-2013	76.1%		69.6%		74.6%	
2014-2018	81.4%		74.6%		79.5%	

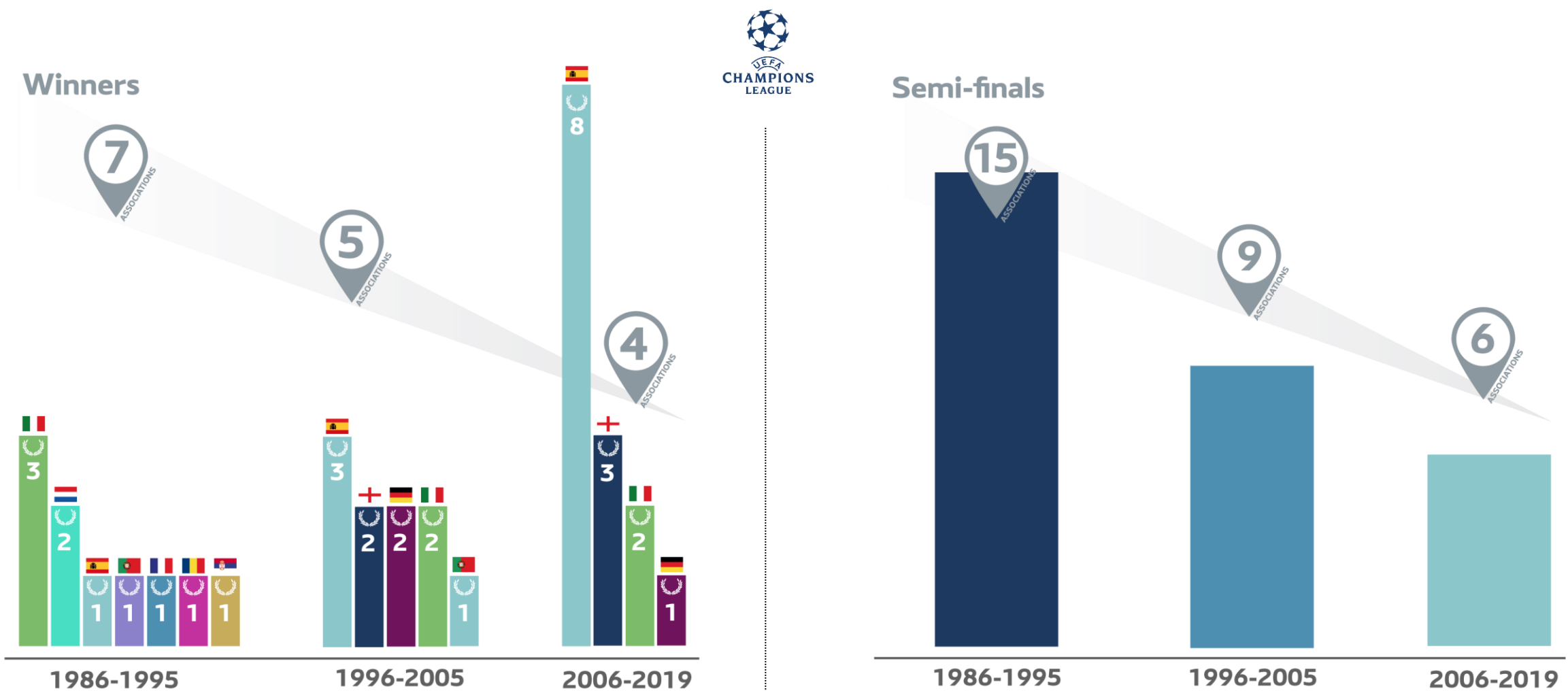
CIES Football Observatory Monthly Report N°42 – February 2019



Disparity in annual revenues of top and bottom revenue clubs

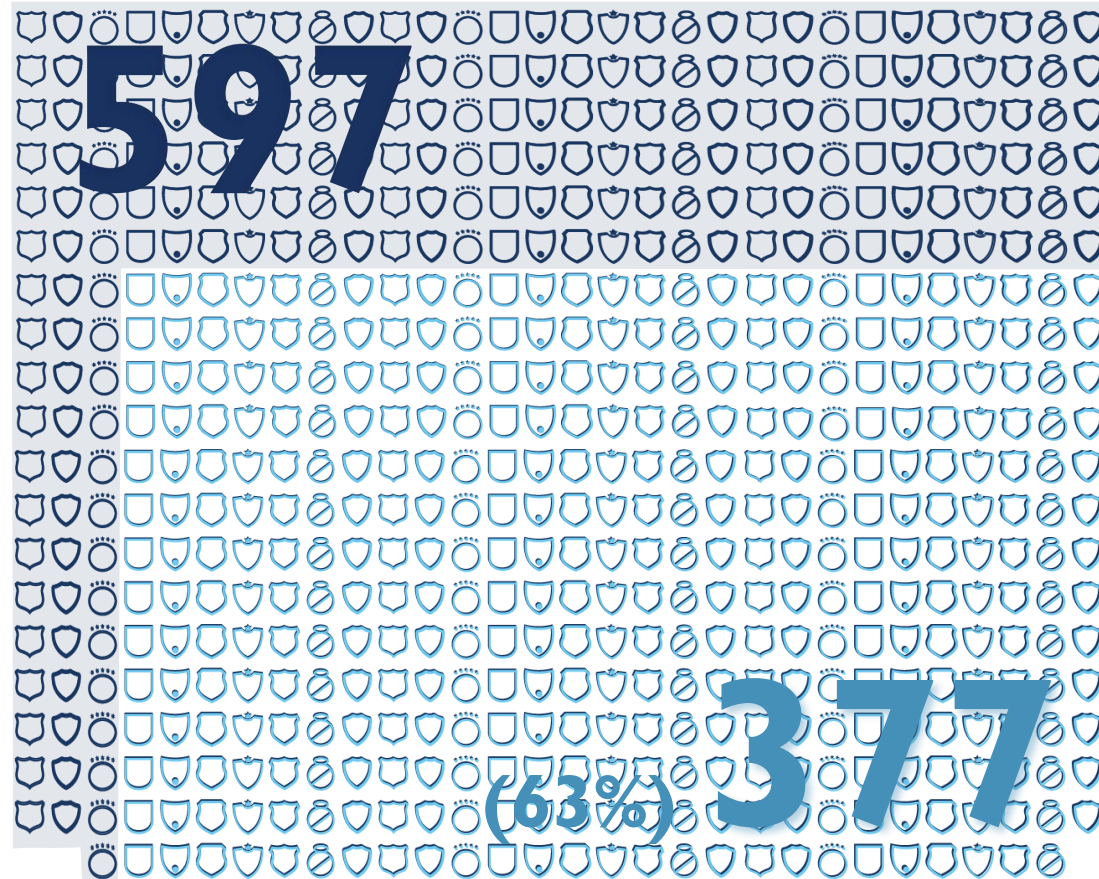


Countries' success rate in UCL



Clubs in qualification since 2009/10

**Clubs have started in
UCL & UEL...**



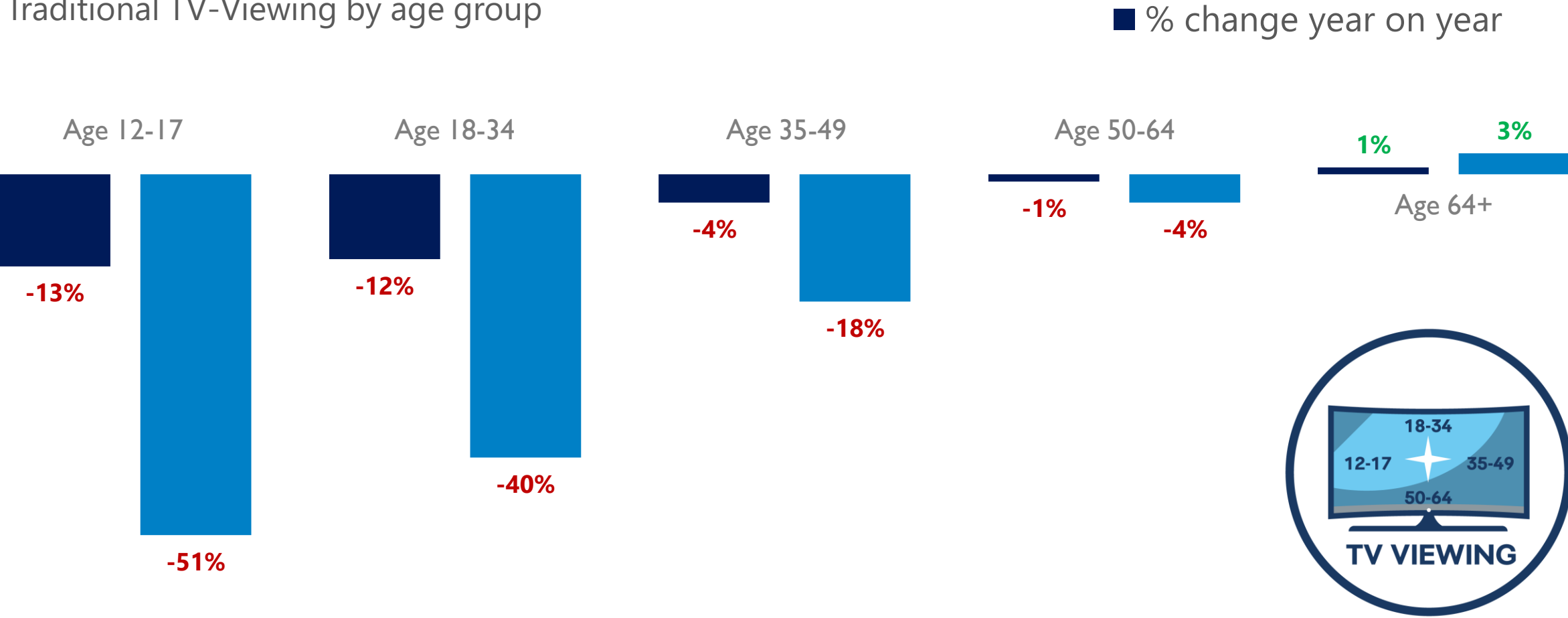
**... have not
played a group stage**



Business environment: the new challenge

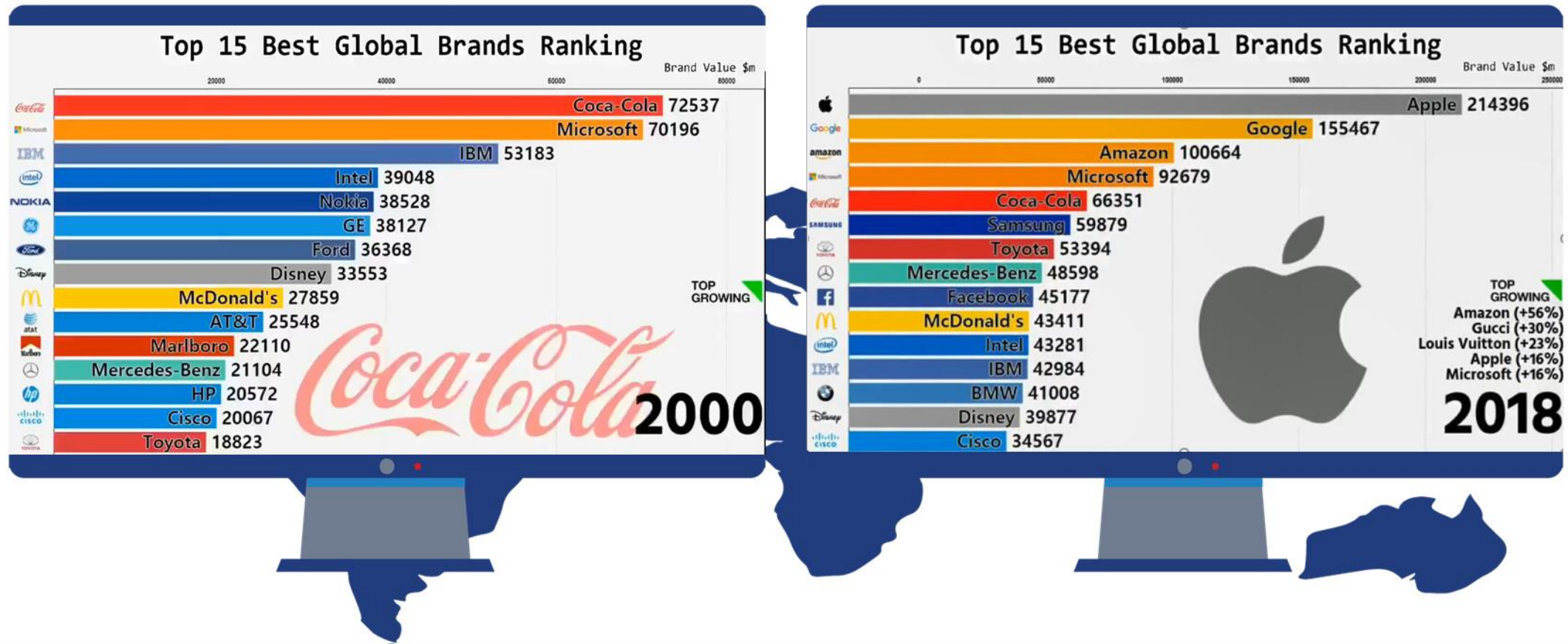
Dramatic shift in younger audiences

Traditional TV-Viewing by age group



Source: Nielsen, marketingcharts.com

Market place in rapid transformation



A changing media landscape





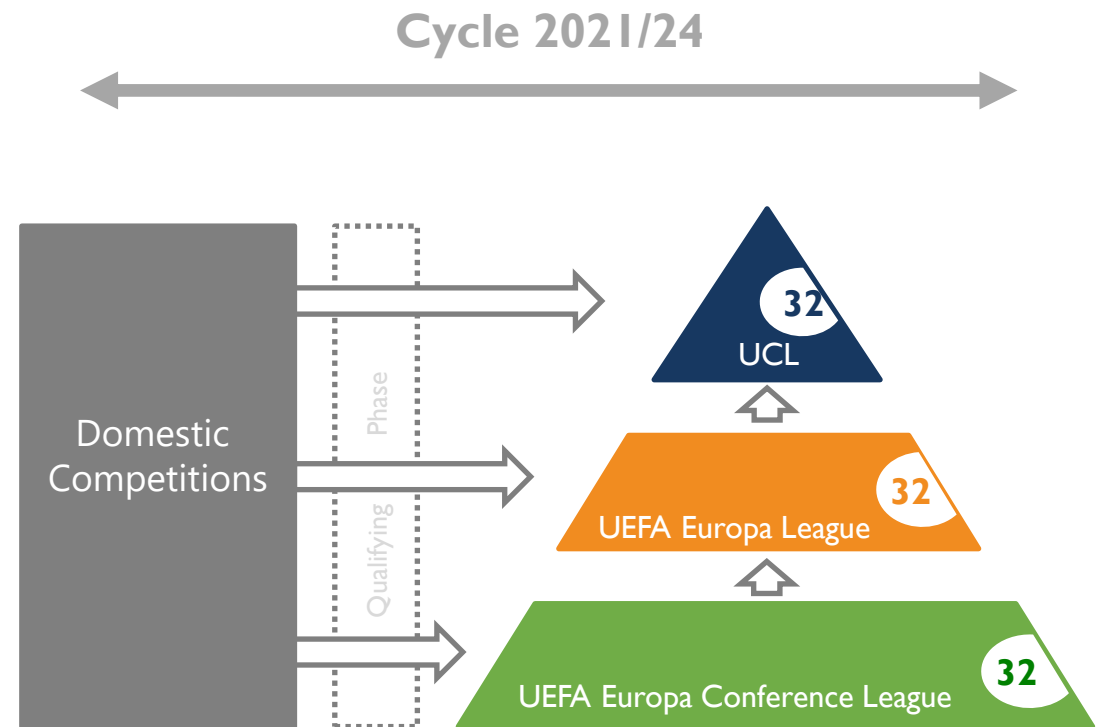
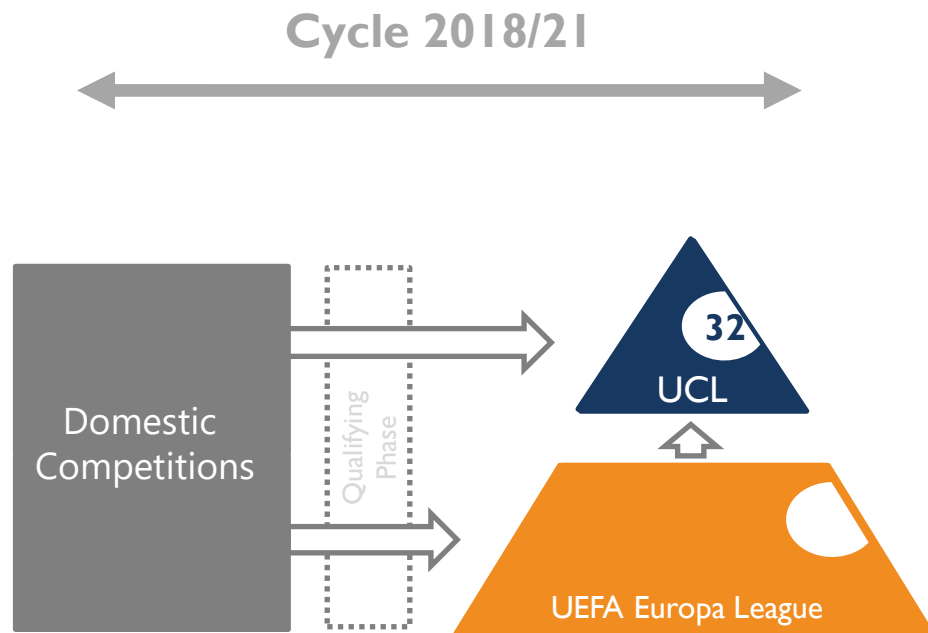
The challenge for European football

The challenge for European football

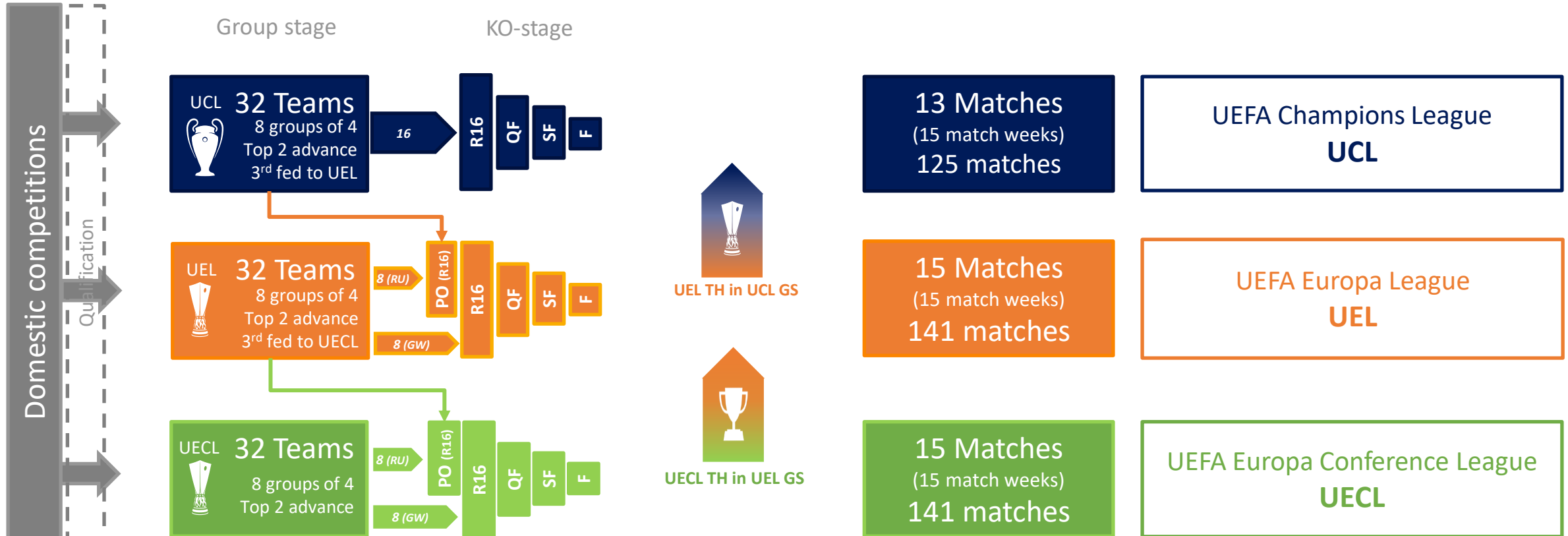
The challenge for UEFA competitions



From 2018/21 to 2021/24



The next cycle (2021/24)



Access list 2021-24 – Facts & figures

26

Associations entering
the UEL or UECL qualification
phase later than today

+77

Matches in a centralised
phase

11

Associations entering
the qualifying phase
later than today

34
+8

Countries represented
in a UEFA club competition
group phase (minimum)

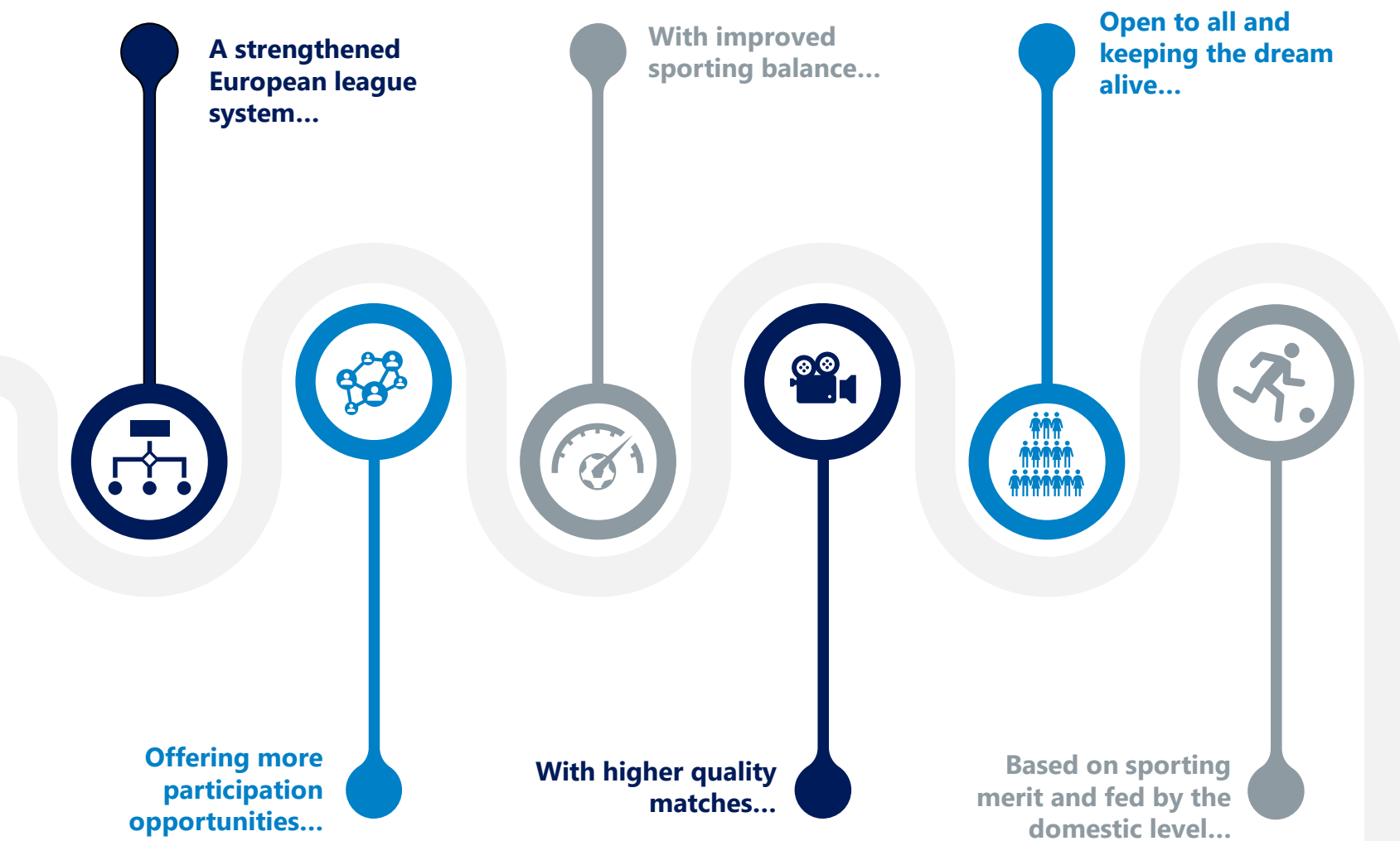
+16

Additional places in a
UEFA group phase

14
+2

Associations with a guaranteed
place in a group phase

...2024 HORIZON



**No Magic
Formula**

Stakeholders

...2024

HORIZON

Thinking

Feedback





UEFA CLUB COMPETITIONS

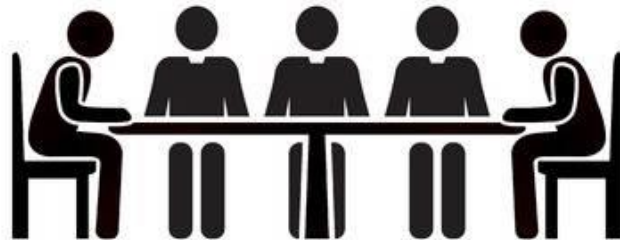
Horizon 2024

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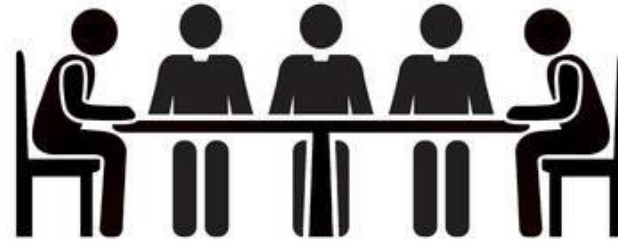


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Club Advisory Platform **THE CLUBS' VIEWS**



THE CLUBS' VIEWS



Synergies between domestic and European club competitions

Panel discussion moderated by



Jacco Swart
Managing Director at European Leagues

Club Advisory Platform

THE CLUBS' VIEWS – SYNERGIES BETWEEN DOMESTIC AND EUROPEAN CLUB COMPETITIONS



Appearances in UCL GS: 8
Last time: 2015/16

Appearances in UEL GS: 9
Last time: 2019/20

Alexander Staehelin *FC Basel (SUI)*

- Joined FC Basel as Head of Strategy & Development in July 2019.
- Worked with Manchester City FC/ City Football Group (2014-19)
- Graduated from Bentley University in Boston with a BSc in Quantitative Economics
- Background in marketing & corporate strategy



Appearances in UCL GS: 1
Last time: 2015/16

Appearances in UEL GS: 3
Last time: 2019/20

Patrick Lips *KAA Gent (BEL)*

- Commercial and Communication Director
- Former journalist before joining the club back in 1991



Appearances in UCL GS: 1
Last time: 2005/06

Appearances in UEL GS: 4
Last time: 2012/13

Stefano Campoccia *Udinese Calcio (ITA)*

- Vice-President at Udinese
- Board Member of Serie A
- Lawyer



Appearances in UCL GS: 0

Appearances in UEL GS: 1
Last time: 2016/17

Jan Lehmann *1. FSV Mainz 05 (GER)*

- Executive Board Member for commercial Affairs
- Former Managing Director for Nielsen Sports in Germany
- Former Director of Strategic Marketing & Product Management for the DFL Bundesliga
- Former corporate consultant & project manager at McKinsey

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Coffee Break



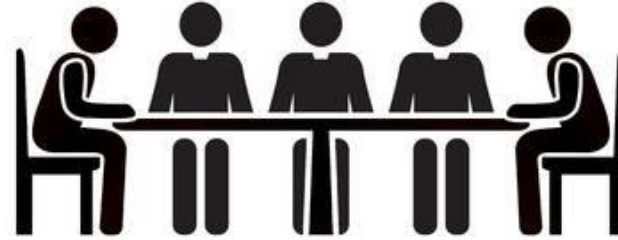
Please return by 15:15

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Kelly Cates Your Host



Financial sustainability of European club football

Panel discussion moderated by



Claus Thomsen
CEO of Danish League
Vice-President at European Leagues

Club Advisory Platform

THE CLUBS' VIEWS – FINANCIAL SUSTAINABILITY OF EUROPEAN CLUB FOOTBALL



Appearances in UCL GS: 0

Appearances in UEL GS: 0

Aleksandrs Usovš FK RFS (LAT)

- Sporting Director at FK RFS since 2015
- Ex-Player Latvian Football Youth National Teams U15-U20 (2000-2005)
- Master Degree in Strategy and Organization (University Rotterdam)
- UEFA Certificate in Football Management (2018)



Appearances in UCL GS: 11

Last time: 2005/06

Appearances in UEL GS: 10

Last time: 2007/08

Ivar Koteng Rosenborg BK (NOR)

- President at Rosenborg BK since 2012
- Entrepreneur and owner of Koteng Holding AS
- Core business about developing and owning Real Estate



Appearances in UCL GS: 6

Last time: *current season*

Appearances in UEL GS: 5

Last time: 2014/15

Marc Inгла Lille OSC (FRA)

- Vice-President and Chief Executive Officer at Lille
- Former Vice-President of FC Barcelona (from 2003 to 2008)
- Industrial Engineer Degree
- Active investor in the venture capital, internet start-up's



Appearances in UCL GS: 1

Last time: 2005/06

Appearances in UEL GS: 3

Last time: 2018/19

Federico Martinez Real Betis (ESP)

- Corporate General Manager since May 2014
- Developed his professional career in multinationals where his activities have always been linked to engineering in areas such as Energy, Environment and IT
- Graduate in Senior Business Management

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Club Advisory Platform **THE CLUBS' VIEWS – TAKE AWAY**



- **Domestic competition is most important for clubs**
- **Concern about the growing gap in competitive balance**
- **UCC Competition is open and must be based on domestic competition**
- **Giant killer factor and keep the dream alive**
- **The whole football ecosystem need a fairer financial distribution – even for the new competition**

Club Advisory Platform **THE CLUBS' VIEWS – TAKE AWAY**



- **European football must be based on organic growth and must benefit to all**
- **Sustainability for all clubs in Europe, not just a few**
- **Solidarity is a key principle and is very important for the development of the medium and small clubs**
- **All stakeholders must be actively involved in the process**
-

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THE CLUBS' VIEWS – TAKE AWAY

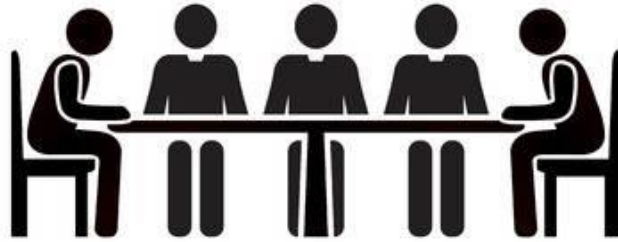


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Club Advisory Platform **THE PLAYERS' VIEWS**



Discussion with FIFPro

Moderated by



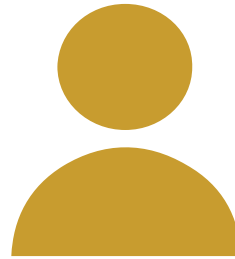
Alberto Colombo
Deputy General Secretary at European Leagues

Club Advisory Platform

THE PLAYERS' VIEWS – DISCUSSION WITH FIFPRO



THE PFA



Bobby Barnes

President FIFPro
Division Europe

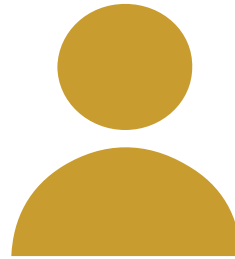
Deputy Chief
Executive at PFA

Club Advisory Platform

THE PLAYERS' VIEWS – DISCUSSION WITH FIFPRO



THE PFA



Bobby Barnes

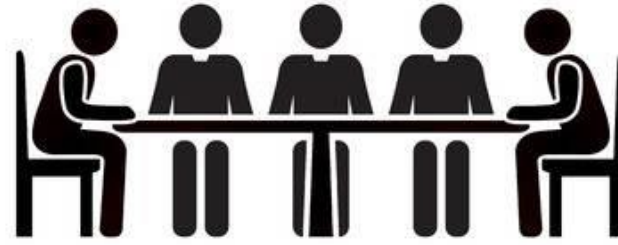
President FIFPro
Division Europe

Deputy Chief
Executive at PFA

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Discussion with Football Fans' representatives

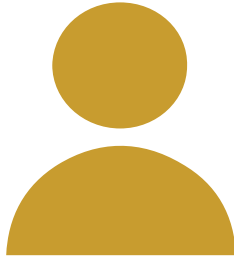
Moderated by



Alberto Colombo
Deputy General Secretary at European Leagues

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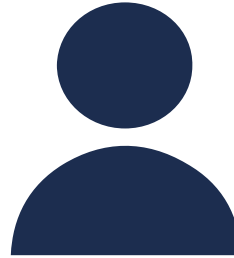
THE FANS' VIEWS – DISCUSSION WITH FOOTBALL FANS' REPRESENTATIVES



Antonia Hagemann

*Supporters Direct
Europe*

CEO



Ronan Evain

*Football Supporters
Europe (FSE)*

CEO



Kevin Miles

*Football Supporters'
Association*

CEO

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KEYNOTE SPEECH



Frank Lampard, OBE - Head Coach Chelsea FC

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Club Advisory Platform **CLOSING**



Lars-Christer Olsson
President of the European Leagues

Club Advisory Platform **CLOSING**



201 Clubs from **34** different countries

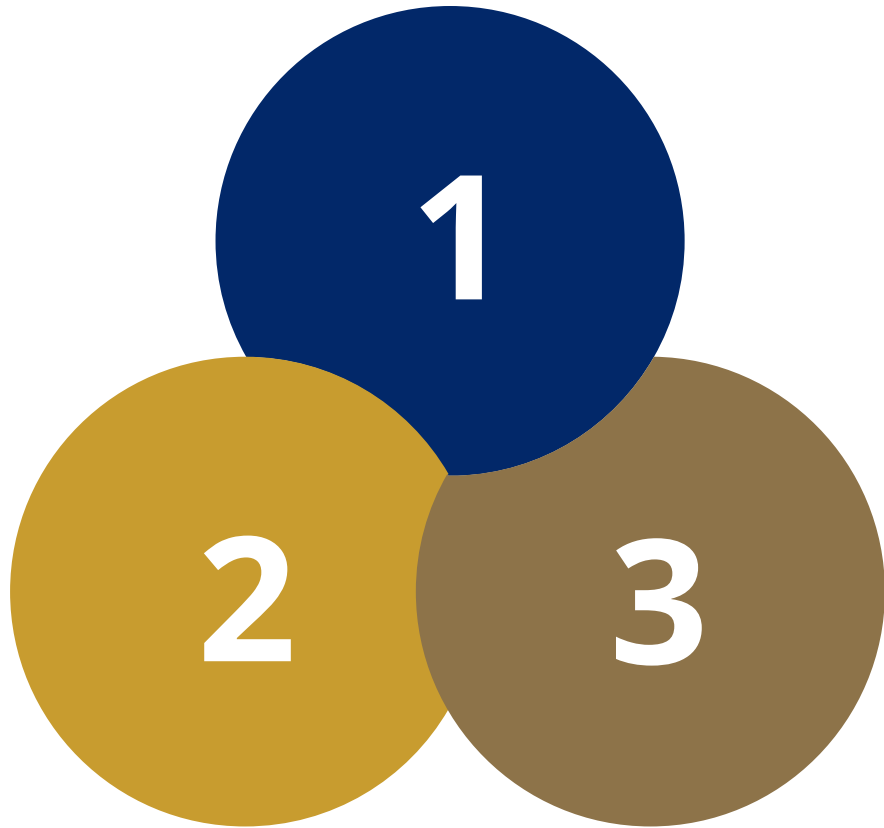


39 Leagues



Over **320** Participants

THE FUTURE OF EUROPEAN CLUB COMPETITION



1

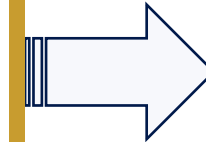
**Protect Domestic
Leagues**

2

**Increase
Participation**

3

**Fairer
Financial Distribution**



PROPOSALS

EUROPEAN CLUB COMPETITIONS INTERLINKED FACTORS



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Thank you

Club Advisory Platform **USEFUL INFORMATION**

- For those of you staying at the **Hilton Paddington hotel**, a coach is available at **17.45hrs** that can take you back to your hotel to freshen up before dinner – our team on the Welcome Desk can direct you.
- **Coaches** have been arranged from both the **Royal Lancaster London** and from the **Hilton Paddington** this evening to take you to Kensington Palace. Please meet in the lobby of your hotel at **18.45hrs**.
- For security reasons, please remember **to bring your badge** and the **invitation** to **Kensington Palace** with you. Please avoid bringing luggage where possible.

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