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Media Deregulation and Broadcasting Rights: A Case Study of Scottish Football

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Local, national and international forces now shape both the media and sports industries. The Communications Act 2003 introduces a significant element of deregulation to the UK media industry at a time when sports clubs are increasingly reliant on broadcasting revenues for their financial survival. Nonetheless, there has been a failure on the part of the SPL to recognise the importance of this Act. This paper argues that Scottish football cannot ignore changes in the media industry. However, there is a danger that, in focusing on broadcasting deals with media companies, Scottish football may distance itself from the local fans.

Keywords: *Broadcasting, football, globalisation, exclusion.*

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Introduction

It may be, as Giulianotti is quick to point out, "increasingly passé..." to note that "...association football is undeniably the world's premier sport" (1999: xi). It may also be trite to single out developments in media broadcasting as not only a significant driver of globalisation (however it is defined) but also a major contributor to the premier status of

football. Yet football is also inherently local. This aspect of the game is seen in the support of local clubs or in the participation of individuals within community football clubs or in public sector urban parks. The relationship between these global and local aspects of the game, or sport, is becoming increasingly tense, particularly with shifts in the governance of football. As UEFA and FIFA become more powerful and top clubs become global enterprises, governments are increasingly getting involved in policy decisions which inevitably have effects throughout the sport.

What impact does policy change at national, or even international, level have on a sport that has its heritage in local community contests? Moreover what are the *local* cultural and economic consequences of policy change by a government which increasingly places its faith in *global* industry and market forces as a provider of the public interest?

This paper discusses the close relationship between globalisation and football and the centrality of mass media to this association. The process of globalisation is recognised as a “dialectic process” between the global and the local (Giddens, 1990: 67). In drawing upon Boyle and Haynes (2000) and Giulianotti (1999), the nature of this process within football is considered, before noting the potential for further exclusion (given that football already excludes parts of society) of such a process, particularly in light of the impact of global trends on a local context.

In discussing policy change, the paper focuses on the Communications Act 2003. This major deregulation by the current UK government is seen as indicative of their faith in global enterprise. However, the consequences of an ever-increasingly powerful media industry on local football, which in itself is increasingly dependent on income from the sale of media rights, does not appear to have been taken into account by any of the stakeholders. This paper is a preliminary step in readdressing the apparent lack of understanding by those involved of the full ramifications for Scottish football of media deregulation.

The interdependency of media and football is examined with reference to the history of sports broadcasting and the contemporary financial problems within the Scottish Premier League (SPL). Next, the Communications Act 2003 is discussed and the potential implications for the SPL are outlined. It is found that moves towards a global sports broadcasting platform may exclude local fans from fully participating. Without recognising the potential threats that are brought with global changes and increasing reliance on the sale of media rights to global media corporations, the full benefits of the opportunities available to the SPL are unlikely to be fully realised.

Globalisation and Football

Globalisation has been described as:

“the intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa.” (Giddens, 1990: 64).

This paper is an exploration of the potential impact of a specific scenario under globalisation – the impact of national policy change (the Act), in response to international developments (multi-national media corporations), on a local product (the Scottish Premier League). In doing so it is important to note an amendment to the above description of ‘globalisation’; namely that for this peculiar issue to be more fully understood it is important to make explicit at the onset that this process, and subsequent analysis, includes political and economic relations along with Giddens’ “social relations” (1990: 64). What follows is an analysis of this dialectic process (Giddens, 1990); assessing the nature of international, national and local forces in the peculiar case of media deregulation and the Scottish Premier League.

In considering the relationship between local and international forces as symbolic of globalisation, it is notable that such a definition inherently dismisses the one-world view of globalisation as criticised by Giddens (1990) or the 'end of history' conceptualisation of Fukuyama (1989). Indeed, whilst the global consumption of organised events, or spectacles (Debord, 1967), such as the World Cup has led some to purport the rise of a common culture (Bell, 1974), this is countered by the continued success of alternative forms of football such as American Football and Australian Rules. As noted by Giddens (1990), Hebdige (1979) and Robertson (1992) globalisation is a process that often shows a rise of the 'local' in interpretations of 'global' events as evident in the interpretation of global sporting events with reference to individual national heritage and culture (Boyle and Haynes, 2000; Giulianotti, 1999). National variations in the cultural significance and meaning of football are testament to the heritage of the individual state as documented by Giulianotti (1999:9). Thus, the nature of globalisation is perhaps more accurately depicted as McDonaldization (Ritzer, 1998) as a process being led by economic powers from the West with some limited recognition of local interpretations. However, as illustrated by those within the anti-globalisation lobby (for example Klein, 2001), global strategy may, at the very least, be ill-informed of local cultures. It is unclear whether this is merely a transactions costs problem, whether those within chose a geo-centric strategy in order to benefit from greater economies of scale or whether there are more pressing issues in the development of strategy. Undoubtedly, though, this will vary between corporations and is dependent on circumstances. What is important to note is the potential exclusionary aspect of geo-centric strategy.

If mass media is taken as the "Fourth Estate", according to Carlyle's use of the term (1935 [1905]: 349), then a global shift which is insensitive to local interpretations and further excludes members of the local culture from participating must be seen as damaging to the whole society. Moreover given the centrality of sport – and particularly football – to Scottish national identity any increased exclusion from participation may have even greater implications. The nature of sport itself is based upon support and participation so that any significant reduction at the level of the spectator would potentially have a dramatic effect on the sport. This perspective on the issue of exclusion from football is given greater salience within the modern "consumer society" (Bauman, 1998: 36). Bauman's analysis of "the new poor" (1998: 63) suggests that exclusion has evolved so that:

"the poor of today are 'non-consumers' not 'unemployed'; they are defined in the first place through being flawed consumers, since the most crucial of the social duties which they do not fulfil is that of being active and effective buyers of the goods and services the market offers." (Bauman, 1998: 90).

The nature of exclusion within football can therefore be seen both from participation, and increasingly from viewing, football. This dimension of exclusion has been discussed in detail by Le Grand and New (1998), who note that a vast proportion of the population are now effectively excluded from viewing (and some might argue participating), in events of national significance due to the high cost of satellite broadcaster subscription charges. Whilst the significance of 'crown jewel' events does appear to have been taken into consideration at policy-making level, Le Grand and New (1998) argue that this term has been defined too narrowly.

Politics, economics and culture are by no means recent players with a stake in Scottish football. Indeed, global shifts involving all these factors have been a part of the sport since the inception of common rules which in itself had an homogenising impact upon local cultures as popular street football became firstly prohibited in the Highways Act 1835 and then slowly replaced by the new 'modern' game throughout the late 1800s. Whilst these developments have been well documented (for example, Elias and Dunning, 1986; Malcolmson, 1973; Walvin, 1994) what has changed is the extent of interdependence between the actors involved

and the levels of income and capital at stake. This interdependence is best understood as a consequence of the process of globalisation. As Giddens notes, mirroring his earlier “dialectical process” (ibid 1990: 64) definition, “the core meaning of globalization is increasing interdependence” (Giddens, 2002: 70). Despite this, throughout Britain those in positions of authority in football have so far failed to adjust to declining international status and to recognise the implications of this process of globalisation. As a direct consequence British football has been left in a weak position (Giulanotti, 1999). Specifically the charge has been made that the SPL have been protectionist in the past (Boyle and Haynes, 1996) as evident in the failure to respond to the introduction of satellite communications and the subsequent development of BSkyB. As noted by Millar (1999), the isolationist stance of the SPL has become highly problematic and in the light of further global media developments, along with the potential for change brought about by the Communications Act 2003, the status quo has become untenable.

Background to Sports Broadcasting

The BBC first broadcast football in 1938 (Gratton and Taylor, 2001) and it is claimed that, during the 1950s, “the BBC used sport (and football in particular) to encourage ‘...working people to buy or hire televisions’” (Holt, 1989 cited in Gratton and Taylor, 2001: 212). This mirrors the views of Szymanski (2000) and Whannel (1992) on the use of sport by the BBC as a monopoly broadcaster to stimulate demand for television. Since the creation of the ITV network in 1955, the relationship between government and television broadcasting has been one where the private sector could flourish whilst government ensured the provision of public service broadcasting (PSB) as a counter to market failure. However, this perspective fails to highlight that the continued dominance of the BBC in sports broadcasting represented a substantial economic benefit to the corporation. Nonetheless, it has been argued that the BBC’s monopsony power helped to counter the monopoly power of sporting authorities¹ and avoided excessive prices. Even the establishment of ITV did little to alter this, creating a duopsony which was to the benefit of both broadcasters (Le Grand & New, 1998). More recently, the development of satellite and digital technology, coupled with government regulation has encouraged both diversity and plurality in broadcasting.

Sport has found itself in a core position in relation to debates surrounding the implications of globalisation as brands such as Nike, Adidas, and Manchester United compete for a greater market share across the globe in their respective markets. Broadcasting rights associated with football are of particular interest as many football clubs (or businesses) have become heavily dependant upon the large sums of capital associated with the selling of these rights. Concomitantly the global reproduction and consumption of football has undoubtedly had an impact upon the global appeal of sportspeople, sports stars or sports celebrities (Giulanotti, 1999; Boyle and Haynes, 2000) as marketable products (primarily through sponsorship) in their own right (Millar, 1999). For broadcasters, sport has become a key component of broadcasting schedules and obtaining rights to major national leagues has become a significant selling point in attracting new subscribers. News Corporation in particular, has successfully employed a strategy of using ‘local’ sport in order to penetrate new broadcast markets (for example, English Premiership football in the UK, NASCAR in the USA (Andrews, 2003)). The development of more delivery methods has placed greater power in the hands of content providers, such as sports organisations. As non-terrestrial television becomes more popular, and thus more lucrative, the media companies involved will not only have more funds to spend on sports rights, but will have a greater incentive to acquire these rights as a means to attract yet more subscribers.

¹ Sporting events are natural monopolies, with only one winner within the given parameters. The introduction of competition fundamentally alters the product and can dilute its value (as in boxing) (Le Grand & New, 1998).

Terrestrial television channels remain the most popular form of sports media (Mintel, 2003:64) with less than a quarter of those surveyed preferring satellite or cable television. The proportion that prefers satellite or cable television is even lower amongst respondents in socio-economic group E. The divergence in preferred media is even greater regarding internet sports media with 15% in group AB preferring this media compared to only 2% in group E (Mintel, 2003). Potentially, lower socio-economic groups could be excluded from participating in key cultural events at the same level as higher socio-economic groups. This has added significance if we consider that live coverage is rated by all socio-economic groups as the most popular type of sports coverage. What is essential is that all can have equal access to games, particularly where these represent events of national importance, whilst also ensuring the maximum revenue and coverage for clubs. Greater moves towards satellite and other digital forms of communication, such as internet broadcasting, must be qualified by ensuring key fans are not excluded.

Pressures in the Football Industry

Financial pressures have become more evident within football, prompting scrutiny by politicians at both Westminster and Holyrood². The problems facing clubs are summarised by PKF:

“Spiralling player costs. Increased borrowing. Stagnant transfer income. Constraining transfer windows. Uncertainty over future TV revenue. The possibility of insolvency. After a boom in the 1990s, the financial problems facing football clubs could scarcely be starker.” (2002: 2)

Undoubtedly smaller leagues such as the SPL, with their smaller customer base, cannot attract the same level of interest from media companies and thus the television revenues available to them are much smaller. For example, Celtic Football Club earns 8% of its total revenue from television, compared with 26% for a club in the English Premiership and 37% for a club playing in Italy’s Serie A (Boyle, 2000). The ability to generate significant revenues in areas such as merchandising and corporate hospitality means that the Old Firm³ are less reliant on the revenues from televised games. This is not the case for the smaller clubs, for whom broadcasting income represents a significant income with very little cost attached. Table 1 shows a breakdown of turnover for Heart of Midlothian.

Clearly, the change of broadcaster (from BSkyB 1998-2001 to BBC for 2002-04) had a significant impact on revenue. Additionally the broadcasting of live games on terrestrial television was seen as damaging to the gate receipts as suggested by Table 1. Internal disputes may have contributed to a devaluing of the SPL’s product and this, coupled with falling attendances, has had a devastating effect on a number of clubs. The income inequality which exists in Scottish football is well-documented (see, for example, Elliott & Fingland (2003); PriceWaterhouseCoopers (2003)) but even the more successful clubs are not immune from the current financial climate in football. Within the SPL, three clubs are already in administration, and a number of others are “technically insolvent” (PWC, 2003:1). At lower levels of the professional game, poor financial performance has resulted in the demise of Clydebank and Airdrieonians.

² The UK Parliamentary MPs who make up the All Party Football Group conducted an inquiry into football financing, which reported in February 2004. Escalating problems in the SPL prompted a debate in the Scottish Parliament about the future of Scottish football (Denholm, 2004).

³ The ‘Old Firm’ refers to Glasgow Celtic and Glasgow Rangers, the two largest clubs in Scottish football, who dominate the SPL. Non-Old Firm clubs have only won the league nine times in the last fifty years, and not since 1984-85 (SoccerAge.com, 2003). The two clubs have a rivalry rooted in sectarianism.

Table 1: Turnover, Heart of Midlothian Plc

	2001(£000)	2002(£000)	% change
Broadcasting	2143	1178	-45.0%
Match day	4404	3543	-19.6%
Commercial	1378	1330	-3.5%
Other income	22	21	-4.5%

Source: Heart of Midlothian Plc (2003)

The Bosman ruling (1995) was perhaps the most significant event at the supranational level and effectively removed trade barriers in European football, allowing the free movement of out-of-contract players without the imposition of transfer fees. This decision, by the European Commission, introduced a greater element of competition into the player market and made it easier for players to move into other European countries, including Scotland. High wages have, as a result, become an essential bargaining tool for clubs hoping to attract the best players. This trend has been concurrent with the rise in cable, satellite and digital broadcasting, in that bidding wars for exclusive rights to live games have helped boost club finances in the major leagues and subsequently have sustained ever-increasing wage costs. In this instance, there is a single buyer's market (for players) but a multi-tiered seller's market (in that broadcasting revenues available to clubs are subject to wide variations dependent on the league in which a club plays and its position within that league). The end result is that all clubs are subject to spiralling wage costs, but only those who can generate more global interest can reap the benefits of increased income from broadcasting rights. Table 2 demonstrates the variation in broadcast revenues available to the English Premiership and the SPL.

Table 2: Revenues from live televised football

League	Contract Start Date	Broadcaster	Live matches per season	Annual rights fee (£m)	Fee per live match (£m)
English Premiership	1997	BskyB	60	167.5	2.79
	2001	BskyB	66	366.6	5.56
	2004	BskyB	138	341.33	2.47
Scottish Premier League	1998	BskyB	30	11.25	0.375
	2002	BBC	38	9.0	0.24
	2002	Setanta (Pay Per View)	10	0.875	0.0875
	2004	Setanta	38	8.75	0.23

Sources: Broadfoot (1998); Morrow (1999); Halliday (2002); Guardian (2003); BBC (2004).

However, even assuming that the SPL was able to compete with larger leagues (an issue which will not be discussed here) there is a danger that the benefits of this would accrue directly to the top clubs. By adopting such a global outlook the local economic, social and cultural benefits could become secondary concerns.

The aborted efforts of the SPL to launch a television channel demonstrate an awareness of the need for greater exploitation of television. Nevertheless, this was still aimed at the domestic market, which is not large enough to support a major league. Globalisation is something of a double-edged sword for Scottish football. Local sport is a key component of media corporations' strategy in strengthening their global position, and thus the bargaining power of local sports organisations is increased. However, improved access to global markets offers the consumer a much wider choice and threatens the existence of small community clubs.

In England, MPs have recommended greater redistribution of broadcasting revenue not just within the Premier League but from the Premier League to the rest of football (All Party Football Group, 2004). Whilst there is no direct obligation to meet these (and other) recommendations, failure to reform could lead to the creation of a regulator for football. There are no such plans for Scotland, but there have been calls by politicians for improved financial management and greater community involvement in football (Gordon & Williams, 2004).

The Communications Act 2003 – Context and Details

The Act represents a significant shift in regulatory policy towards the communications sector. New Labour has, in effect, continued the Conservative programme of privatization and deregulation (Heffernan, 2001). Media, culture and leisure industries have not been exempt from this as evident in the deregulation of gaming, increasing reliance on National Lottery funding, and Best Value for local government. This is endemic of much greater change within the Labour Party over the past decade, as it embraces the neo-liberalism which has come to characterise the politics of a number of world powers. Further, the principles of market deregulation have been exercised in the media industry across the globe; a number of countries (for example, Sweden, Finland and New Zealand) have already removed all restrictions on media ownership (Economist, 2003).

The new regulator – OFCOM (the Office of Communications) has control over a broad spectrum of activities and the government's expressed aim is to increase competition in the sector to the point where self-regulation becomes feasible (DCMS, 2003). As well as highlighting an ideological shift, this new legislation recognises the changing shape of the communications sector. Indeed, the creation of a single regulator in place of five could be seen as recognition of increasing synergies within the communications industry.

Deregulation has prompted concern over how the public interest is to be protected in the face of increasing media consolidation. As a result, the legislation stipulates that major mergers within broadcasting must pass an as-yet-undefined public interest test. Already, a merger has taken place between the Granada Media Group and Carlton Communications, who now own 12 of the 15 ITV franchises (BBC, 2003). The creation of a merged ITV could arguably place it in a stronger position within the global market, though it remains a very small player in an industry where nine companies dominate what is a global market. Nonetheless, the government believes the merger to be in the best interests of the consumer:

“A stronger ITV will be better able to invest in and provide programming of high quality, including regional programmes. Broadcasting as a whole will benefit.”
(Patricia Hewitt, Trade & Industry Secretary, cited in BBC, 2003).

There are indications that this merger is the first stage in a process that will see ITV taken over by a larger media company. Viacom have expressed an interest in acquiring the network, a move that would no longer be prohibited in light of the removal of restrictions on foreign (that is, non-EEA) ownership of UK broadcasting licences. Removing these restrictions has won the support of a number of media corporations, who argue that lifting such restrictions will not only promote plurality and competition but could lead other nations to repeal similar laws regarding media ownership (for example, Andersen, 2001; Carlton Communications Plc, 2001; News International Plc, 2001).

Restricting ownership of UK media interests to EEA countries does not necessarily protect them from media conglomerates as under the current restrictions, neither Vivendi (French-based) nor Bertelsmann (German-based) are prohibited from owning UK broadcasting licences. As such, certain companies, including News International, feel that regulation is designed to prevent them from owning a broadcasting licence, rather than to protect UK

broadcasting in general (News International, 2001). The introduction of a public interest test could have the effect of limiting any potential increase in the power of BSkyB (Michie and Oughton, 2003) whilst also ensuring that the potential benefits from having a large corporation bidding for broadcasting rights will not be lost.

Trade unions within the broadcasting industry have opposed the removal of ownership restrictions, pointing to the UK cable industry as an example of dominance by US-based companies. It is felt that foreign ownership poses a threat to regional production, and thus to jobs in the broadcasting industry. Certainly, the potential that exists for economies of scale and scope may prove to be an incentive for broadcasters to homogenise their programming to give it broader appeal. This could result in a decline in regional production in favour of centralised programme-making, with an obvious impact on regional employment in this sector. Further, the absence of reciprocal agreements on media ownership leaves UK companies exposed to greater competition in domestic markets but unable to expand into other countries.

The Communications Act 2003 – Implications for the SPL

The government's aim in deregulating the communications' industry is to increase competition in the sector but in practice, deregulation could also result in greater consolidation within the media. There is a danger that, in strengthening media companies, consumers will face price increases as broadcasters seek to exploit exclusive rights to sporting events. The result of this could be the exclusion of local fans from local sporting events such as domestic league football, and thus exclusion from the sense of community engendered by shared participation in such events. To some extent, the government legislates against exclusion by protecting sporting events deemed to be of national public interest. It is argued that such events promote a sense of social cohesion and thus contributes to collective welfare to an extent beyond that of the individual enjoying said event (Le Grand & New, 1998).

Exclusion is a particularly salient issue given that the consumers in this instance are often devoted supporters of a particular club/business. As a result, clubs are subject to highly inelastic demand due to the highly different cultural aspects within each club which acts as a differentiating characteristic. Thus there is a lack of substitute products in the form of a business providing a similar product that fans are likely to consider as a viable alternative to 'their club'. Further, given the importance of football to the cultural identity of most regions of Britain, there is an issue of members of society being excluded from key cultural events such as the FA Cup or Scottish Cup.

However, as noted above, restricting certain sporting events to free-to-air broadcasters can have negative implications for the suppliers of these events. Terrestrial channels are unable to devote the time and resources to sports coverage that could be offered by satellite and digital broadcasters, who can charge according to consumer demand. Thus, from the perspective of the suppliers (in this case, the SPL), deregulation and the prospect of increased competition are welcome. A market which is more responsive to consumer demand, and which can charge on the basis of willingness to pay, will result in higher sums being earned from broadcast rights. This allows greater investment in sport and should improve the quality of the product.

Clearly, a conflict arises, since increased competition may benefit the sport at the expense of the fans. Yet as noted by Michie and Oughton (2003) the sport can not expect to flourish at the expense of the fans. Despite aims to the contrary, deregulation could lead to consolidation within the media industry. Further, there are advantages to agreements between broadcasters and sports providers. The scope for collusion between media companies and football businesses has already been investigated by the MMC (1999). The report concluded that ownership of Manchester United would give BSkyB an unfair advantage in securing the

rights to broadcast English Premiership football, regardless of whether live rights were sold individually or collectively. This advantage would restrict entry into the premium sports television market, given this market's dependence on access to the rights to major sporting events. Ultimately, competition in the pay-tv market would be reduced, to the detriment of the consumer.

Hence there is a trade-off between the needs of the sport and the needs of the fan. Reserving events for free-to-air broadcasts may result in lower revenues for sport, whilst allowing unrestricted competition in bidding could exclude many fans, particularly those in lower socio-economic groups, who have a preference for terrestrial coverage (as noted above). It has been suggested that regulation in sports broadcasting is necessary to ensure fair treatment for the fans, the broadcasters and the sporting bodies (Le Grand & New, 1998). This would prevent excessive monopoly or monopsony power and ensure a fair price paid by broadcasters and consumers. Already, a ruling by the European Commission has forced an end to the exclusivity enjoyed by BSkyB with respect to English Premiership football. As such, BSkyB is now required to re-sell some rights to another broadcaster, and in future, rights will be sold as a number of packages rather than a single product (Milmo, 2004).

Although football is already a global sport, there remains potential for expansion, particularly in Asia and North America (FIFA, 2003). The importance of these markets has already been recognised by top clubs in other leagues, as demonstrated by Real Madrid's links with Asia Sports Development or the development of the FA Premier League Asia Cup. Whilst the top clubs in England, Spain and Italy focus on developing the image of their league, as well as of themselves, the top clubs in Scotland often operate in a manner that could be interpreted as collusive. Potentially beneficial developments such as SPL TV have been blocked in favour of attempting to gain entry to the more profitable English Premiership. It would seem that those involved in Scottish football have failed to recognise the full potential of global branding, and the role that television can have in promoting that brand. However, in promoting the sport globally, it is important not to disengage the local fans. Despite this, a recent decision has granted broadcast rights for four seasons (2004-2008) to Setanta, a pay-per-view channel. Therefore, a significant proportion of the population will be excluded from participation in domestic football, further removing the sport from its community roots, without any increase in the annual revenues available from broadcasting (see Table 2).

Fears of a decline in regional programming in favour of centralised programming fail to recognise that 'local' sport is a key factor in penetrating broadcast markets (Andrews, 2003), as was seen in the broadcasting of English Coca-Cola Cup and the European Cup Winners Cup matches in Scotland by ITV in 1994 (Boyle and Haynes, 1996). That said, the inclusion of Scottish football in ITV's programming could be seen as a preservation of regional content (and consequently regional production and jobs).

The failure of the SPL (or indeed any sporting organisation) to respond to the Media Ownership Consultation process in 2001 seems to demonstrate either a lack of political awareness or a failure to recognise the opportunities available to clubs who reach a wider, international, market and cooperate as a league in the best interests of all parties concerned.

Conclusions

Despite the identification of Asia and North America as potentially lucrative markets for football which have yet to be fully realised, the SFA and the SPL have failed to be proactive in pursuing a share of these markets. As such, the wealth disparity between Scottish football and the top-flight European leagues is likely to widen. This cannot be avoided and as such,

the success of Scottish football is even more dependent on local fans than other leagues in Europe that have a much wider fanbase.

Whilst the clubs seem to recognise the importance of broadcasting revenues to their financial wellbeing, the complete lack of consideration given to the Communications Act seems indicative of myopia where media issues are concerned. The SPL must recognise the extent to which changes in global, national and local markets impact upon them, or risk falling further behind their counterparts in other nations. It must acknowledge and respond to the potentially exclusionary impacts of any moves towards a global media agreement.

The Communications Act 2003 represents a new departure for the UK media industry. As a significant stakeholder in this industry, the SPL must contemplate the potential changes this will bring, along with developing a proactive response with the commitment of all members. Football, and the way it is played, packaged, distributed and consumed will continue to evolve as it has done throughout its history. Thus far, the SPL has *failed* to recognise and respond to changes in the future as well as their counterparts in England. Continued complacency and the lack of a unified strategic approach to the future of the league are untenable. Football will move into a new era – where the influence of media corporations becomes an integral characteristic – with or without the SPL.

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