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Demand–Access Alignment for a Follower League: A Market Prioritisation Framework for Liga Portugal's Internationalisation

Gilbert Nicolas von Holtzapfel (66115)

Work project carried out under the supervision of:

Ines Caetano

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Abstract

European football leagues outside the top tier face pressure to internationalise, yet limited resources require disciplined market choices. This thesis develops a Demand–Access–Playbooks framework to prioritise foreign markets for Liga Portugal and translate screening results into an actionable strategy. Using eight literature-grounded indicators, an index-based Demand–Access matrix ranks countries and flags constraints. Benchmarking LaLiga and evidence yields three modular playbook dimensions: demand localisation, access/platform configuration, and digital engagement. Results identify France and Brazil as core priorities, with Spain and Canada as growth markets. A two-season roadmap and KPI set operationalise low-risk pilots ahead of 2028 rights centralisation.

Keywords

Liga Portugal, Internationalisation Strategy, Follower football leagues, Market prioritisation, Demand–Access matrix, Sports media rights, Digital distribution and OTT

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1. Introduction

1.1 Background: internationalisation of European football leagues

European professional football increasingly operates within a global sports-entertainment economy, where international media rights shape the commercial opportunity set for leagues beyond their domestic markets (Ludvigsen 2020). Digitalisation intensifies this dynamic by reshaping monetisation and distribution, creating a cross-media environment in which attention is split between traditional and digital channels (Zheng and Mason 2022). Clubs and leagues, therefore, follow differentiated international orientations through digital strategies, including multilingual and market-specific communication designed to attract and retain foreign audiences (Fleischmann and Fleischmann 2019). However, for follower leagues, benchmarking cannot be treated as a straightforward transfer of best practice, because performance models and policy choices are grounded in specific institutional and cultural contexts that limit direct comparability and transferability (Böhlke and Robinson 2009).

1.2 Liga Portugal and motivation for this study

Liga Portugal is a valuable setting for studying the internationalisation challenge faced by follower leagues (i.e., competitions outside the European top tier). Although it operates below the European top tier, it has exportable assets that can matter in specific markets, including recognisable clubs, strong player-development narratives, and Lusophone and diaspora links. However, demand is valuable only if it can be translated into legal and regular consumption. In practice, distribution arrangements, scheduling fit, and rights protection determine whether interest translates into sustained viewership and revenue. This thesis is undertaken in a transition period in which Liga Portugal's strategic room for action is constrained by international rights governance. A semi-structured online meeting with Liga Portugal's Internationalisation Coordinator was used to contextualise organisational constraints and inform the strategic emphasis of Chapters 6–7; it did not affect indicator construction, scoring, or market rankings (Appendix E). The meeting further indicated that meaningful centralisation of international rights governance is expected only from 2028 onwards, which frames 2025/26–2026/27 as a preparatory pilot phase rather than a full international rollout (Appendix E).

1.3 Research question and objectives

The guiding research question is: **How can Liga Portugal identify and prioritise international markets and what strategies can it adopt to position itself successfully in these markets?** To address it, this thesis pursues four objectives: (1) Develop a literature-grounded Demand–Access–Playbooks framework, (2) Build a transparent indicator-based Demand–Access matrix, (3) Combine the matrix shortlist with qualitative benchmarking, and (4) Translate findings into market-specific recommendations.

The contribution is a market-selection and strategy framework for follower leagues that combines demand signals, access constraints, and playbook logic, rather than treating market screening and strategic planning as separate steps.

2. Literature Review

2.1 Pillar 1 – Demand for Liga Portugal abroad

For a league to expand internationally, there must be underlying fan demand in overseas markets. Pillar 1 reviews four demand-side constructs: digital attention**,** diaspora and cultural ties**,** affordability, and player links. These are drawn from literature on sports fandom and migration. Each construct is reviewed and linked to its operationalisation as an indicator.

2.1.1 Digital attention and online demand

International expansion increasingly begins with digital attention, as sports fans access and engage with sports content on smartphones and social media as part of their wider consumption journey (Chan-Olmsted and Xiao 2019). Since online search activity captures what audiences are paying attention to, researchers use Google Trends as a proxy for public interest and to compare leagues across countries and over time (Noury and Barrio 2021; Mutz 2024).

Evidence from the Saudi Pro League shows how quickly search attention can spike following major events, while also underlining that visibility is necessary but not sufficient. Attention may reflect curiosity, but it does not automatically translate into sustained viewership or revenues (Mutz 2024). For this reason, this study uses a Google Trends index as a digital attention metric (P1-1) to assess latent interest in Liga Portugal across markets (see 4.3.1.1).

2.1.2 Diaspora and cultural proximity

Cultural and diaspora ties shape which foreign leagues audiences are more likely to follow. Cultural proximity suggests that audiences often gravitate toward media that feel culturally and linguistically familiar (Straubhaar 1991). In transnational football, the perceived value-fit between a club and the supporter's own background is discussed as one mechanism shaping overseas brand choice (Bodet et al. 2020). Similar studies have shown that non-domestic identification is anchored in ancestry and parental influence, and can be reinforced through new media practices that facilitate community building (Burton, Bradish, and Dempsey 2019). Nevertheless, diaspora effects can shift, research on British-born Asian fans shows that younger generations may express affiliation with the host nation, indicating potential generational shifts (Burdsey 2006). Thus, diaspora hubs create promising, but not automatic or permanent, possibilities of demand. In this study, diaspora-based demand is approximated by the number of Portuguese-born residents per 100,000 inhabitants in each country (P1-2), used as a measure of cultural proximity and potential fan base. (see 4.3.1.2)

2.1.3 Affordability of access (PPP-adjusted)

Even when fans are interested, they need both the desire and the ability to pay for content. In online sports streaming, willingness to pay is higher when the service delivers satisfaction and enjoyment. (Sun and Zhang 2021). A similar study in European football shows that willingness to pay varies with perceived match quality and interest, as well as access conditions (Macedo, Ferreira Dias, and Mourão 2023). At the same time, sport affordability is identified as the relationship between the cost of consumption and local income, highlighting that rising subscription costs can decrease accessibility (Sangkwon Lee and Chi-Ok Oh 2016). Research on sports OTT users also identifies subscription fees and pricing-plan design as constraints on continued use (Choi, An, and Park 2025). Leagues want to increase revenue, but high prices can push even loyal fans away. Because of this, this thesis treats affordability as a key demand factor and measures it using a PPP-adjusted price-to-income ratio (P1-3), which provides a simple, comparable way to assess affordability across markets (see 4.3.1.3).

2.1.4 Player links and star narratives

Star players and familiar athletes provide narrative links that can draw foreign audiences to a league. Superstar characteristics and star talent have also been shown to increase identification and television audience demand, whereas competitive balance or game uncertainty tend to have a smaller effect (Hoegele, Schmidt, and Torgler 2014; Buraimo and Simmons 2015). In English football, locally trained players are often seen as symbols of the community. However, evidence from English supporters shows that having local players is less important to them than financial stability and winning trophies. This suggests that identity based on players does not always lead to stronger attachment (Bullough, Edmondson, and Mills 2024). Still, leveraging player storylines is a well-recognised tactic to engage international fans. Accordingly, the "player link" indicator (P1-4) in the matrix tracks each country's players in Liga Portugal, as a concrete yet simplified measure of personal ties that could attract viewers (see 4.3.1.4).

2.2 Pillar 2 – Access & Feasibility

Latent demand alone is not enough if fans cannot access the matches. Pillar 2 examines four factors that enable or constrain viewership. Digital access, carriage, watchability and anti-piracy enforcement. Each of these is discussed below and corresponds to an indicator in the feasibility analysis.

2.2.1 Digital access, smartphones and OTT platforms

Digital access is a crucial precondition for converting interest into viewership. Live-sport distribution has increasingly shifted towards OTT, where content is delivered through streaming services across multiple screens, increasing the dependence on connectivity and suitable devices for access (Hutchins, Li, and Rowe 2019). Concurrently, Global statistics show that about two-thirds of people worldwide use the internet, while those without mostly come from low-income and rural areas (International Telecommunication Union 2024). Therefore, national indicators such as account ownership, mobile phone use, and Internet access are used to provide a general sense of how prepared people are to view Liga Portugal in the matrix (see 4.3.2.1).

2.2.2 Carriage and distribution

Even if the digital basics are in place, fans can only watch Liga Portugal when matches are available on the platforms they use. In many European markets, football has progressively shifted from free-to-air to Pay-TV packages built around national-championship rights. These rights are often split across multiple providers, meaning consumers may need more than one subscription to access the full domestic championship (Cabrera Blázquez et al. 2016). At the same time, digitalisation has expanded the range of distribution routes and encouraged multi-platform viewing (Zheng and Mason 2022). In this thesis, the “distribution” indicator (P2-2) therefore distinguishes between markets with broad national carriage on major platforms, limited carriage on minor outlets, and no structured carriage at all (see 4.3.2.2).

2.2.3 Watchability and scheduling

A further feasibility condition is whether matches are scheduled at times when potential viewers can watch them live. A study from the NFL shows that games score significantly higher on TV ratings when they fall in prime-time slots rather than at less convenient times (Tainsky 2010). Applied to European football, a study from the U.S shows that ratings for

Bundesliga drop when matches overlap with broadcast of the Premier League and LaLiga, indicating strong substitution between competing leagues (Nalbantis, Pawlowski, and Schreyer 2023). In other words, even a substantial interest in Liga Portugal could be undermined if potential markets cannot realise kick-off times. This study, therefore, includes a "Watchability" indicator (P2-3) that assesses how often Liga Portugal fixtures fall into each country's prime viewing windows (see 4.3.2.3).

2.2.4 Piracy and live enforcement

Sports piracy and the strength of enforcement shape how much of a market a league can really reach. Unauthorised live streaming can divert audiences away from legal broadcasts and weaken the commercial value of exclusive rights (Kariyawasam and Tsai 2017). In Europe, courts have introduced dynamic and live blocking injunctions that allow rights holders and internet providers to update blocks during live events rather than relying only on static website lists (Frosio and Bulayenko 2021). Empirical work on large blocking campaigns in the United Kingdom shows that shutting down many piracy sites at once reduces visits to those sites and increases use of paid legal services, whereas blocking a single site displaced users to other piracy channels (Danaher et al. 2020). Similar actions in Brazil and India yield modest but statistically significant rises in visits to legal movie/TV sites (Danaher et al. 2023). Accordingly, this thesis uses an "Anti-Piracy" indicator (P2-4) that scores each country's legal tools, live-blocking capacity and practical enforcement as a proxy for how well Liga Portugal's content would be protected (see 4.3.2.4).

2.3 Pillar 3 – Benchmarking & Playbooks

Benchmarking is a common tool in sport management. Still, it should be treated as structured learning rather than a transfer of "best practice", because strategies remain contingent on resources and institutional context (Böhlke and Robinson 2009). In this thesis, Pillar 3 therefore adds a qualitative layer to the Demand–Access matrix by benchmarking LaLiga as the primary reference case and extracting a small set of actionable playbook dimensions rather than creating additional indicators. The LaLiga benchmark is grounded in the Harvard case, which depicts LaLiga`s transformation towards a global entertainment brand, including its delegate network, multilingual digital ecosystem, OTT positioning and an emphasis on content protection (Greyser, Cortsen, and Fernández 2023). These insights are complemented by research on how European top clubs make use of multilingual social media and differentiated international orientations to reach satellite supporters (Fleischmann and Fleischmann 2019). Furthermore, evidence showing how OTT distribution reshapes rights markets by enabling multi-device access while also increasing fragmentation and piracy risk complements the pillar (Hutchins, Li, and Rowe 2019). The resulting playbooks structure the interpretation of country profiles in Chapter 6 and inform market-specific strategies and the implementation roadmap in Chapter 7.

2.4 Literature gap

Most academic work on league internationalisation focuses on Europe's major competitions. Case studies of the Premier League and LaLiga show how rising media-rights values, cross-border broadcasting, and digital brand building have supported global growth (Ludvigsen 2020; Greyser, Cortsen, and Fernández 2023). However, this literature offers limited guidance for follower leagues with lower brand power and constrained resources. In particular, demand drivers and access constraints are usually analysed separately rather than as complementary conditions that jointly determine whether international viewing can materialise. In the Liga Portugal context, the league's Strategic Plan 2023–2027 frames internationalisation as a priority and explicitly points to markets with historical and cultural ties to Portugal, including the Portuguese diaspora, as well as the importance of centralising broadcasting rights as a structural lever (Liga Portugal and EY Portugal 2023). Yet they do not translate these themes into a transparent method that compares markets on both demand and feasibility, or into concrete playbooks for execution. This thesis addresses that gap by proposing a Demand–

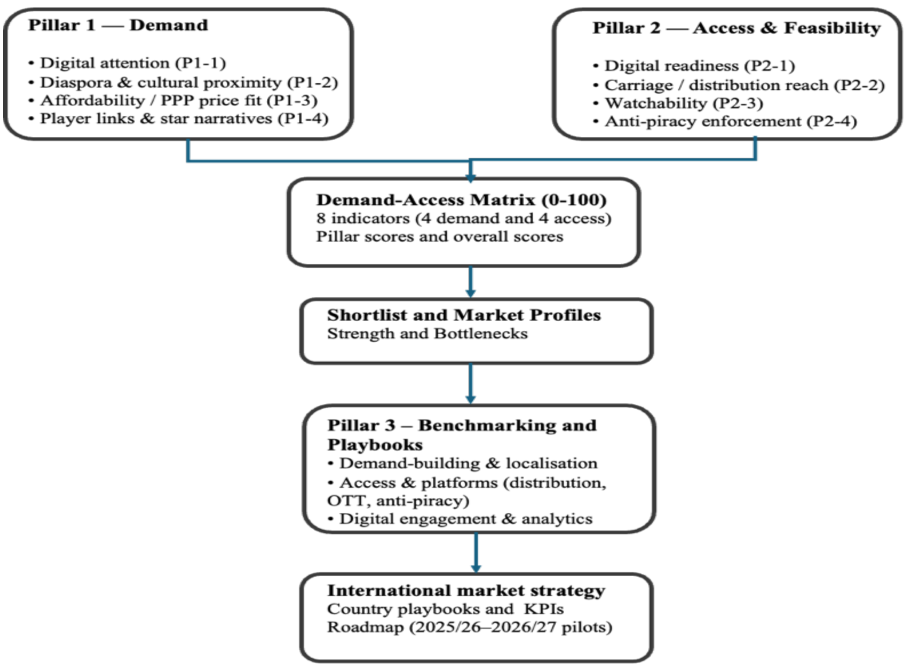
Access Playbooks framework for follower leagues that integrates demand and access as joint conditions and connects market prioritisation to market-specific playbooks and a pilot-phase roadmap.

3. Theoretical Framework

3.1 Pillar-based conceptual model of internationalisation

Figure 1 summarises the framework linking the literature review to the empirical analysis. Pillar 1 (Demand) and Pillar 2 (Access and Feasibility) are each operationalised through four literature-grounded indicators. The eight indicators are normalised to a 0–100 scale and combined in a Demand–Access matrix that produces pillar scores, an overall score and market profiles based on strengths and bottlenecks. Pillar 3 (Benchmarking and Playbooks) then translates these profiles into action by synthesising practices from reference leagues into three playbook dimensions: (1) Demand - Building and Localisation, (2) Access and platforms and (3) Digital engagement and analytics. Thus, the matrix and playbook structure the proposed international market strategy for Liga Portugal.

3.2 Figure 1 – Demand–Access–Playbooks model



4.0 Methodology

4.1 Research design and case selection: Demand–Access matrix

This thesis used a scoring matrix to prioritise international markets for Liga Portugal. The analysis followed two pillars: Demand and Access & Feasibility, each measured through four indicators. A multi-indicator matrix was used because internationalisation reflects multiple mechanisms, including latent interest, diaspora ties, affordability, distribution access, schedule fit and piracy risk. Each indicator was linked to a single construct in the conceptual model, so country scores mapped to concrete levers for action. The matrix was applied to eight purposively selected countries: Brazil, Angola, Mozambique, Cabo Verde, France, Spain, the USA and Canada. Selection followed three criteria: (1) Lusophone or historical ties and sizable Portuguese communities, (2) existing or plausibly attainable distribution and (3) variation in purchasing power and media-market maturity. Large European markets such as the United Kingdom or Germany were excluded because Liga Portugal's footprint was limited, and the eight-country set already provided sufficient variation for the study's scope. A complementary benchmarking exercise using public documents and industry reports extracted recurring "playbook" elements applied in Chapters 6 and 7.

4.2 Table 1: Indicator overview

Indicator	Construct	Transformation & normalisation	Interpretation	Appendix reference
P1-1 Trends_Basket	Latent interest/search intent	Weighted Google Trends basket for league + Big-3 clubs, min–max scaled to 0–100 across eight countries.	0–100, higher = more ongoing attention to league and main clubs.	A1, D1
P1-2 Diaspora_ per100k	Strength of Portuguese community ties	Portuguese-born residents per 100,000 population, min–max scaled to 0–100.	0–100, higher = denser Portuguese community and stronger social ties.	A2, D1
P1-3 PPP_PriceFit	Affordability of the target monthly price	Convert PPP GDP per capita to monthly PPP, compute price/PPP burden ratio, map to 0–100 affordability index.	0–100, higher = price is a small share of purchasing power (easier to monetise)	A3, D1
P1-4 PlayerLink	Narrative link via players from that country	Combine total minutes and number of players in Liga Portugal (with a Big-3 bonus) and scale to 0–100.	0–100, higher = stronger and more visible presence of local players.	A4, D1
P2-1 DigitalAccess	Readiness to access OTT / pay-tv	Weighted average of adults with financial account, mobile phone and recent internet use, 0–100 index.	0–100, higher = better basic conditions to watch and pay for Liga Portugal.	A5, D1, D2 Panel A (imputed)
P2-2 Carriage/ Distributor	Strength and reach of legal Liga Portugal distribution	Rubric-based score (0/25/50/75/100) based on presence on major/niche TV or OTT platforms and coverage depth.	Higher values = more complete and mainstream Liga Portugal offer in local TV/OTT ecosystem	A6, D2 Panel B

P2-3 Watchability	Time-zone fit With local Prime-time	Share of fixtures falling into local weekend and weekday prime-time; weighted share scaled to 0–100.	0–100, higher = more matches fall in realistic local viewing windows.	A7, D1
P2-4 Anti-Piracy	Strength of live Anti-Piracy enforcement	Rubric-based 0–100 index combining tools, in-event blocking speed and cooperation with intermediaries.	0–100, higher = stronger ability to protect legal streams and convert demand into paid viewing	A8, D2 Panel C

4.3 Indicator construction

The eight indicators translated the constructs discussed in Sections 2.2 and 2.3 into measurable variables. This section describes data sources, transformations, and any imputations or judgment calls. Detailed inputs and years were summarised in Appendix D (Table D1), while imputed values and rubric-based coding were documented in Appendix D (Table D2). Country scores were reported in Appendix A (Tables A1–A8)

4.3.1 Demand indicators (Pillar 1)

4.3.1.1 P1-1 Trends_Basket – latent interest and search attention

P1-1 operationalised digital attention (Section 2.1.1) using Google Trends as a proxy for latent interest in Liga Portugal and its three largest clubs. For each country, 12-month Google Trends indices (0–100 within each query-country series) were collected for "Liga Portugal," "Benfica," "FC Porto," and "Sporting CP" and combined as: *Trends_Basket = 0.40·Liga Portugal + 0.20·Benfica + 0.20·FC Porto + 0.20·Sporting CP*. The basket was then min–max scaled across the eight markets to produce a 0–100 indicator (Appendix A, Table A1).

4.3.1.2 P1-2 Diaspora per 100k – Portuguese-born community density

P1-2 captured diaspora density (Section 2.1.2) using Portuguese-born residents per 100,000 inhabitants. UN DESA International Migrant Stock (2024) and World Bank population data were used to compute *Diaspora density = (Portuguese-born residents / total population) × 100,000***.** Values were min–max scaled to a 0–100 index (Appendix A, Table A2).

4.3.1.3 P1-3 PPP PriceFit – affordability of a monthly subscription

P1-3 approximated affordability (Section 2.1.3) by comparing a common subscription price to PPP-adjusted income. GDP per capita (PPP) from the World Bank WDI was converted to a monthly value (PPP_month). A price anchor of €29.99 / month was expressed as a burden ratio: $r_i = price / PPP\_month_i$ Affordability was mapped to a 0–100 score using: $PPP\_PriceFit_i = 100 / (1 + r_i / 0.01)$, so that a burden of 1% corresponded to a score of 50 (Appendix A, Table A3).

4.3.1.4 P1-4 PlayerLink – player-driven narrative links

P1-4 operationalised player-linked narratives (Section 2.1.4) using the presence of players from each country in Liga Portugal. Using FBref (Primeira Liga 2024/25), the indicator combined (1) total minutes, (2) number of players with minutes > 0 and (3) minutes at Benfica, FC Porto and Sporting. Minutes and player counts were min-max scaled and combined as: $BaseScore = (0.70 \cdot Minutes\_0to100 + 0.30 \cdot Players\_0to100)$. If any minutes occurred at a Big-3 club, a +5-visibility adjustment was applied (capped at 100) (Appendix A, Table A4).

4.3.2 Access & Feasibility indicators (Pillar 2)

4.3.2.1 P2-1 DigitalAccess – digital prerequisites for viewing

P2-1 summarised readiness to access and pay for OTT/Pay-TV. Three measures from the World Bank Global Findex were combined: adults with an account (HasAccount), adults with a mobile phone (Phone), and adults who used the internet recently (Internet). The index was computed as: $P2\text{-}1\ DigitalAccess = 0.40 \cdot HasAccount\_\% + 0.30 \cdot Phone\_\% + 0.30 \cdot Internet\_\%$. Where recent values were missing (Angola, Cabo Verde), peer-group medians were imputed and flagged in Appendix D (Table D2). Scores for Pillar 2 were entered directly as a 0–100 index (Appendix A, Table A5).

4.3.2.2 P2-2 Carriage – legal distribution availability

P2-2 translated distribution feasibility (Section 2.2.2) into a five-level rubric based on the main legal outlet(s) and the depth of coverage. Scores were assigned as follows: *0 = no legal carriage, 25 = limited coverage, 50 = some coverage on a niche channel or OTT service with limited reach, 75 = regular coverage on at least one major pay-TV or mainstream OTT* *platform, 100 = comprehensive multi-match coverage on a major platform.* Scores were used without further scaling. Appendix A (Table A6) summarised outlets and scores, and Appendix D (Table D2, Panel B) documented sources and justification notes.

4.3.2.3 P2-3 Watchability – schedule fit with local prime time

P2-3 measured the share of fixtures falling into local prime-time windows (Section 2.2.3). Kick-off times for Matchdays 10–19 of the 2024/25 season were converted to local time using fixed time zone offsets. Each match was coded as weekend prime time (Sat–Sun 18:00–22:30), weekday prime time (Mon–Fri 19:00–22:00) or off-prime. The indicator used a weighted share: $Primetime\_share\_weighted = 0.60 \cdot Weekend\_Share + 0.40 \cdot Weekday\_Share$. The indicator is then $Watchability = 100 \times Primetime\_share\_weighted$, yielding a 0–100 score (Appendix A, Table A7).

4.3.2.4 P2-4 Anti-Piracy – strength of live enforcement

P2-4 captured the strength of live Anti-Piracy enforcement (Section 2.2.4) using three rubric-coded subdimensions: availability of dynamic/live blocking tools, speed/routine of in-event blocking and organised cooperation with intermediaries. Each dimension was coded 0/50/100 and aggregated as: $Anti\text{-}Piracy = 0.40 \cdot Tools\_dynamic + 0.40 \cdot Speed\_event + 0.20 \cdot Intermediary\_coop$. Country scores were reported in Appendix A (Table A8), and evidence sources were documented in Appendix D (Table D2, Panel C).

4.4 Data sources, imputation and Source Log

The matrix was built on secondary data and desk research. Demand indicators drew on Google Trends (P1-1), UN DESA International Migrant Stock and World Bank population data (P1-2), World Bank PPP GDP per capita (P1-3), and FBref player statistics (P1-4). Access indicators combined World Bank Global Findex data (P2-1), rights and platform listings for legal carriage (P2-2), the Liga Portugal fixture list with time-zone conversions (P2-3) and legal/regulatory documents supported by industry reports on site-blocking and enforcement practice (P2-4). Data sources, years and transformations are summarised in Appendix D (Table D1). Imputation was restricted to P2-1, where missing inputs for Angola and Cabo Verde were replaced using peer-group medians (Appendix D, Table D2, Panel A). Rubric-based coding for P2-2 and P2-4 was documented in the Source Log with evidence summaries and justification notes (Appendix D, Table D2, Panels B–C). Bibliographic entries are provided in the References for the main datasets and recurring reports, country-level web sources used to support rubric-based coding are documented in Appendix D. A brief semi-structured meeting with Liga Portugal's Internationalisation Coordinator (3 December 2025) was used to contextualise organisational constraints and inform Chapter 7, it did not affect indicator values, scores, or rankings (Appendix E).

4.5 Composite scores and prioritisation logic

All eight indicators were expressed on a 0–100 scale. For each country, Pillar 1 (Demand) was computed as the average of P1-1 to P1-4, and Pillar 2 (Access & Feasibility) as the average of P2-1 to P2-4. The overall market score was: $\text{Overall}_i = 0.5 \cdot \text{Pillar1}_i + 0.5 \cdot \text{Pillar2}_i$, which served as the main ranking metric. As a feasibility diagnostic, a feasibility flag was defined as 1 if any Pillar 2 indicator (P2-1 to P2-4) was below 30, indicating at least one material access constraint that could limit conversion even when demand was present. Robustness checks were conducted by (i) recomputing the analysis using z-scores and (ii) testing alternative pillar weights (60/40 and 40/60 between Demand and Access). Results were reported in Section 5.3 and Appendix B (Tables B2–B3).

4.6 Limitations of the approach

The scoring matrix is a decision-support tool based on secondary data across eight purposively selected markets. Some inputs come from different years. DigitalAccess required limited imputation, and Carriage/Anti-Piracy depend on rubric coding based on documented rights availability and enforcement practice. Watchability uses Matchdays 10-19 as a proxy for scheduling. Despite transparent documentation and robustness checks, measurement error and researcher judgment remain

5 Results: Demand–Access matrix

5.1 Indicator scores by country

Appendix A (Table A9) reports the eight indicator scores (0–100) for each country: four demand indicators (Trends_Basket, Diaspora_per100k, PPP_PriceFit, PlayerLink) and four access indicators (DigitalAccess, Carriage, Watchability, Anti-Piracy). Demand differs sharply by construct: search attention is highest in Mozambique, Angola and Cabo Verde but very low in Brazil and the USA; diaspora density is concentrated in France (with smaller clusters in Canada, Cabo Verde and Spain), affordability favours the USA, Canada, France and Spain and is most constrained in Mozambique; and PlayerLink is dominated by Brazil, with Spain a distant second. On the access side, DigitalAccess is strongest in the USA, Spain, France and Canada and weakest in Cabo Verde and Mozambique. Carriage is generally strong, but weaker in the USA and especially in Spain. Watchability is low across all markets, weakest in the USA and Canada. Anti-Piracy is strongest in France, Spain and Canada, moderate in Brazil, the USA and Angola, and absent in Mozambique and Cabo Verde.

5.2 Pillar 1 and 2, overall results, and shortlist

Table 5.2 summarises the pillar scores and overall index. Pillar 1 (Demand) and Pillar 2 (Access & Feasibility) are calculated as simple averages of their four indicators, and the Overall score is the mean of both pillars. A feasibility constraint flag identifies markets where at least one Pillar 2 indicator falls below 30, signalling a binding access limitation. France ranks first overall (63,49), combining the strongest Demand score (52,08) with the highest Access score (74,90). Brazil (50,12), Canada (51,01) and Spain (49,64) form the next cluster. All three show comparatively strong feasibility (Pillar 2 above 62 for Brazil, Canada and Spain), while differences on the demand side drive their overall ordering. Angola (40,75) and Cabo Verde

(36,56) sit in the middle of the ranking, each combining moderate demand with materially weaker feasibility, while Mozambique (32,73) and the USA (36,26) score lowest overall due to weak demand and/or binding feasibility constraints. Based on the overall ranking, the strategy chapters define a primary shortlist of France, Brazil, Canada and Spain, while treating Angola, Cabo Verde, Mozambique and the USA as a secondary group where at least one feasibility constraint is likely to limit conversion even when demand signals exist.

Table 5.2. Pillar scores, overall score, and feasibility constraints (P2 < 30) by country

	Brazil	USA	Angola	Spain	Mozambique	France	Cabo Verde	Canada
Pillar 1 – Demand	36,22	20,61	26,32	36,45	26,58	52,08	33,91	34,66
Pillar 2 – Access & Feasibility (	64,02	51,90	55,17	62,82	38,88	74,90	39,21	64,85
Overall score	50,12	36,26	40,75	49,64	32,73	63,49	36,56	49.76
Feasibility Constraints (P2 indicators <30)	P2-3	P2-3	P2-3	P2-2, P2-3	P2-4	P2-3	P2-4 and P2-3	P2-3
Overall rank (1 = best)	2	7	5	4	8	1	6	3

5.3 Robustness checks (z-scores, parameter changes)

Appendix B indicates two robustness tests. First, Table B2 recalculates the index after standardising all eight indicators as z-scores (mean 0, SD 1) while keeping equal weights. The country ranking is unchanged under this alternative scaling, indicating that the ordering is not an artefact of the original normalisation. Second, Table B3 tests alternative pillar weights (60/40 and 40/60 between demand and access). France and Brazil remain the top two markets in all specifications. Canada and Spain continue to occupy the next positions (swapping third and fourth). Overall, the shortlist of France, Brazil, Canada and Spain is stable under plausible parameter changes.

6. Pillar 3 Findings: Benchmarking & Playbooks

The previous chapter used the Demand–Access matrix to rank eight candidate markets and identify a primary shortlist of France, Brazil, Canada and Spain. Pillar 3 adds a qualitative layer by benchmarking LaLiga and a small set of comparable leagues and media actors to understand how they build demand, structure access, and use digital tools in foreign markets. The goal is not to produce extra scores, but to extract a few playbook dimensions that can be combined with the matrix to design country strategies.

6.1 Reference leagues and documents analysed

Pillar 3 uses a focused group of benchmarks. The primary reference is LaLiga, based on the Harvard Business School working paper describing its shift from domestic organiser to a global entertainment brand, including its delegate network, multi-language digital ecosystem, LaLigaSportsTV and content-protection capabilities (Greyser, Cortsen, and Fernández 2023). Fleischmann and Fleischmann (2019) analyse how Premier League, Bundesliga and LaLiga clubs use multi-language social media to reach “satellite supporters”, while Hutchins, Li and Rowe (2019) discuss how OTT platforms reshape rights markets and piracy pressures.

6.2 Benchmark results: key playbook elements

The first playbook dimension concerns how leagues build and localise demand abroad. LaLiga’s Global Network places delegates in high-potential markets to manage relations with broadcasters, sponsors and local stakeholders. These are supported by international activations such as academies and grassroots initiatives (Greyser, Cortsen, and Fernández 2023). At the same time, leagues and clubs localise language and content. Fleischmann and Fleischmann (2019) show that internationally oriented organisations are more likely to operate multilingual channels to engage foreign audiences. For Liga Portugal, these benchmarks suggest that demand-building in priority markets should combine diaspora narratives, player linkages and targeted local-language content rather than generic league branding.

The second dimension relates to how leagues make their product available and monetizable. OTT development enables multi-device access and direct subscriber relationships, but also fragments coverage and intensifies piracy risks (Hutchins, Li, and Rowe 2019). In LaLiga’s case, international distribution is scaled through a large partner network, supported by direct distribution via LaLigaSportsTV and a dedicated Anti-Piracy capability. For Liga Portugal, this points to a mix of strong local broadcast or OTT partners, clear positioning within existing packages and credible but pragmatic Anti-Piracy measures, rather than reliance on a single platform or purely legalistic enforcement.

The third dimension focuses on digital fan engagement and basic analytics. Social media and club apps help European clubs maintain relationships with supporters and are seen as central tools for internationalisation (Fleischmann and Fleischmann 2019). LaLiga's digital setup combines a central team with local delegates to segment audiences, monitor trends and produce multi-language content across markets. At the same time, apps and interactive formats extend contact beyond live matches (Greyser, Cortsen, and Fernández 2023). For Liga Portugal, the benchmarks imply three pragmatic moves: build a focused multi-language content stack for priority markets, systematically highlight players and stories from those countries and use simple analytics on time zones and devices to adapt posting times and formats.

6.3 Mapping playbooks to shortlist markets

The playbook dimensions interpret the Demand–Access results without re-ranking countries. France, with the highest overall score, strong demand and access conditions, is a consolidation case. The priority is to maintain high-quality carriage, add light localisation and target diaspora hubs through tailored digital content. Spain shows some demand and weak carriage, so a leaner playbook is appropriate, focused on Spanish-language content, fan-community alliances and selective viewing events while exploring distribution improvements.

Brazil and Canada are growth opportunities. Brazil scores very highly on PlayerLink and reasonably on DigitalAccess, but lower on PPP-based affordability and search attention. This underlines a player- and narrative-driven approach, complemented by viewing events in key cities and flexible pricing. Canada combines good diaspora and access scores with limited player links and low Watchability. This points to diaspora-oriented communication, multi-language content and cooperation with Portuguese community media, while player links grow more slowly. The secondary group mixes potential and structural barriers. Angola, Cabo Verde and Mozambique benefit from strong carriage and, in some cases, high search attention. However, they face limitations in DigitalAccess, Affordability and Anti-Piracy enforcement. They suit a developmental strategy that leverages existing broadcasters and low-cost federation or community initiatives. The United States has excellent PPP_PriceFit and DigitalAccess, but low demand and weak schedule fit, creating a long-term option in which only small-scale digital experiments in diaspora hubs are pursued. These profiles bridge the quantitative matrix, the country playbooks, and the implementation roadmap in the strategy chapter.

7 Strategy for Liga Portugal

7.1 Strategic principles derived from the matrix and benchmarking

Building on the Demand–Access matrix in Chapter 5 and the benchmarking analysis in Chapter 6, three principles guide Liga Portugal's internationalisation strategy. Figure C1 in Appendix C plots the eight countries by their composite Demand and Access scores, and Table C1 assigns each a portfolio role and priority level. The benchmarking in Chapter 6 defines three playbook dimensions (demand/localisation, access/platform configuration, and digital engagement). Chapter 7 turns these into strategic principles that guide prioritisation and sequencing. Appendix Table C2 then applies the same three dimensions as market-level levers**.**

The first principle is "portfolio selectivity". The matrix shows that France, Brazil, Canada and Spain consistently outperform the remaining four markets on the combined Pillar-1 and Pillar-2 scores. Liga Portugal should therefore treat markets as a portfolio, allocating attention and budget to the primary countries and approaching the others with lighter, experimental strategies. Table C1 reflects this hierarchy by classifying France and Brazil as Priority 1, Spain and Canada as Priority 2, and Angola, Mozambique, Cabo Verde, and the United States as Priority 3.

The second principle is “access first, monetisation second”. Pillar 2 underlines that demand has little value if matches are hard to watch, poorly scheduled or widely pirated. Benchmark evidence suggests that leading leagues treat distribution architecture and content protection as core levers, alongside selective direct-to-consumer options where appropriate (Greyser, Cortsen, and Fernández 2023; Hutchins, Li, and Rowe 2019). For Liga Portugal, this implies securing at least one credible legal viewing option, minimum replay availability and basic enforcement in each target country before expecting meaningful subscription or sponsorship revenues. These access implications are summarised by markets in Table C2 and operationalised in the roadmap actions in Table C3. Larger investments are constrained until international media rights become fully centralised from 2028 onwards. (Appendix E)

The third principle is “diaspora-and player-led demand building”. The demand indicators highlight Portuguese-born populations and PlayerLink as natural entry points. Research on “satellite supporters” supports a localisation logic in which multilingual, market-facing digital communication is used to engage non-domestic audiences (Fleischmann and Fleischmann 2019). Early initiatives should therefore prioritise diaspora networks and player narratives in the pilot markets, before attempting to reach broader mainstream segments. Table C2 embeds this logic in the demand and localisation levers, and several KPIs in Table C4 track diaspora- and player-based activation. Together, these three principles provide the conceptual bridge between the quantitative matrix and the country playbooks in Section 7.2 and the implementation roadmap in Section 7.3.

7.2 Country-specific playbooks

This section applies the playbook dimensions to the markets prioritised for near-term implementation. France, Brazil, and Spain are discussed in detail because they offer the strongest strategic fit and feasible pilot actions for 2025/26-2026/27. Canada remains part of the portfolio as a Priority 2 market but is summarised more briefly in Appendix, C together with the secondary countries (Tables C1–C2).

7.2.1 France

France is the strongest overall market, combining dense Portuguese diaspora communities, favourable affordability and very good access conditions. Demand is present but not yet fully converted into consistent viewership, so France should be treated as a core consolidation market. On the demand side, Liga Portugal should focus on diaspora hubs through targeted storytelling around Portuguese clubs and relevant French-speaking players, complemented by occasional viewing events or community activations. On the access side, the priority is to secure or maintain carriage with one or two premium sports broadcasters or OTT platforms that offer clear visibility in their football packages, rather than fragmented coverage. Digital engagement should rely on a bilingual content stack, geo-targeted to France and timed to French prime time, with campaigns around big matches and Portuguese public holidays. The main risk is over-reliance on a single distributor in a saturated football market.

7.2.2 Brazil

Brazil scores very highly on player connections and reasonably on digital readiness, but less on affordability and current brand-level attention. It is best approached as a growth market where player narratives and pricing are central. Demand-building should position Liga Portugal as a “Brazilian talent league”, with regular Brazilian Portuguese content on current players, historic alumni and coaching staff, distributed via Liga channels and selected Brazilian outlets. On the access side, Liga Portugal should aim for a clear “home” on a recognised Pay-Tv or OTT service while remaining flexible on pricing through bundled offers and, if necessary, ad-supported or freemium options in early years. Digital engagement should focus on short-form video and highlights optimised for Brazilian platforms and usage patterns, complemented by occasional viewing events or online meet-and-greets with Brazilian players when feasible. Budget constraints and intense competition from other European leagues limit the physical footprint, and Anti-Piracy enforcement will depend heavily on partners, so early efforts should be framed as low-cost pilots that test positioning and willingness to pay.

7.2.3 Spain

Spain is a medium-high opportunity market with good affordability and digital readiness, but only modest demand for Liga Portugal as a stand-alone product. It is a neighbour growth market that becomes attractive once clearer positioning and basic distribution improvements are in place, so the playbook emphasises selective growth. On the demand side, Liga Portugal can build on familiarity with Portuguese clubs, major derbies and cross-border fan interest. This can be done using Spanish-language content that presents the league as complementary to LaLiga and highlights Portuguese talent with Spanish connections. On the access side, the priority is not to renegotiate rights immediately, but to work with current distributors to give Liga Portugal a clearer “home” in existing packages. For instance, through more prominent placement in football menus or a small highlights window on digital or free-to-air platforms. The Internationalisation Coordinator noted that Liga Portugal is working with LaLiga on internationalisation-related topics, including coordination on Anti-Piracy and distribution issues, which may reduce coordination costs and support learning in Spain (Appendix E). Spain should thus be treated as a medium-term monetisation option supported by low-cost demand and access pilots.

7.3 Implementation roadmap for 2025/26–2026/27 and KPIs

The country playbooks must be translated into an implementation plan that fits Liga Portugal’s exploratory stage and limited resources. Rather than a single intensive launch, a two-season stage is adopted: 2025/26 as a preparation and pilot-design season, and 2026/27 as a first implementation season in a small number of priority markets. This reflects both the absence of centralised international rights and the need to test what is feasible with a small team and undefined budget (Appendix E). Table C3 summarises the roadmap and links each action to one strategic dimension, the main markets and a responsible functional role.

7.3.1 Season 2025/26 – preparation and pilot design

Liga Portugal should establish light governance and define a small set of low-risk pilots. A project lead and cross-functional working group should coordinate initiatives and set up an initial international dashboard using the KPIs in Table C4. In parallel, the team should map diaspora hubs and priority partners, and hold exploratory discussions with at least one broadcaster or OTT platform in each target market to clarify rights cycles and packaging options, without attempting major renegotiations before 2028. Digital and Content should launch dedicated local-language streams for France and Brazil. At the same time, Activations/CSR designs a low-cost viewing-event concept and Legal/Rights defines basic anti-piracy cooperation clauses where feasible.

7.3.2 Season 2026/27 – pilot execution and early consolidation

In 2026/27, the emphasis shifts from design to execution and learning. Target outcomes include diaspora events in at least two markets, visible follower growth on local-language channels, at least one evaluated sponsor-activation pilot, and first steps in distribution positioning. The international working group reviews progress periodically, using simple assessments to decide whether to adapt, discontinue or scale each pilot. By the end of the season, Liga Portugal should have a small portfolio of tested initiatives and an updated set of country playbooks that can inform more ambitious scaling once league-level media rights are centralised from 2028 onwards.

7.3.3 Key performance indicators and resourcing

Table C4 defines a compact KPI set that links back to the Demand–Access framework by tracking demand signals, access and protection outcomes, and the international share of commercial income. The international dashboard, created in 2025/26, should regularly report these indicators and serve as the main tool for assessing whether the recommended strategies are beginning to shift conditions in the targeted markets. The roadmap assumes a light but dedicated resource commitment: one internationalisation project lead working with the General Manager and designated contact persons across Rights & Distribution, Legal/IP, Digital/social media, Content/Design, Data & Analytics, and Activations/CSR. Because there is currently no internationalisation budget, the actions in Table C3 are conceived as low-cost pilots that can later be scaled up or down once Liga defines the investment envelope.

8 Discussion and implications

8.1 Theoretical implications for league internationalisation research

This thesis contributes to league internationalisation research by proposing a Demand–Access Playbooks framework that links indicator-based market screening with modular strategic responses. Prior work on the Premier League and LaLiga provides rich narratives of international expansion but offers limited guidance for follower leagues that must prioritise markets under tight constraints. By operationalising Demand and Access through eight indicators, the matrix clarifies how audience potential and media feasibility jointly shape the opportunity set for a follower European league.

The findings suggest that demand and access are mutually reinforcing rather than separable stages. France and Brazil illustrate that diaspora or player links translate into more sustainable audiences only when distribution and rights protection are sufficiently robust. Conversely, the United States shows that purchasing power and digital infrastructure do not create an attractive opportunity when latent interest and watchability are weak. Internationalisation should therefore be analysed as a joint function of audience potential and the institutional media environment, rather than as a predominantly demand-driven process.

8.2 Managerial implications for Liga Portugal and similar leagues

For Liga Portugal, the central managerial implication is to treat internationalisation as a portfolio decision rather than opportunistic deal-making. The matrix indicates that France and Brazil provide the strongest near-term foundations, with Spain and Canada functioning as selective growth and learning markets. Concentrating management attention, pilot budgets, and staff time on these markets is more likely to generate measurable learning than dispersing limited resources across many territories. Second, managers should follow an "access-first, monetisation-second" logic. Each priority market needs a clearly identifiable legal viewing option, workable replay availability, and basic anti-piracy cooperation. Without these access conditions, audience building is difficult to sustain and commercial upside remains limited.

Third, execution should rely on pragmatic pilots that leverage diaspora and player narratives. In France and Canada, Lusophone communities offer the most direct pathway to activation. In Brazil, the concentration of Brazilian players supports a "talent league" positioning reinforced through local-language storytelling and selective activations. In this set-up, the matrix and playbooks operate as a decision-support system that sequences experiments and prepares more ambitious moves once international rights governance becomes more centralised from 2028 onwards.

8.3 Limitations and avenues for future research

This study has several limitations. The Demand–Access matrix is based on data from eight countries and is cross-sectional. Several indicators rely on secondary sources and proxies (e.g., Google Trends for attention, PPP-adjusted income for affordability, and player counts/minutes for player links). While transparent and replicable, these measures are subject to measurement error and cannot fully capture local fan cultures or media-system complexity. In addition, key modelling choices, such as min–max scaling, equal weighting within pillars, and rubric-based coding for carriage and anti-piracy, reflect informed author judgement. The findings are also context-specific. The analysis focuses on one follower European league in a strategic cycle where international rights are expected to be centralised only from 2028. This constrains how quickly access and packaging recommendations can be implemented, meaning the 2025/26–2026/27 proposals are primarily preparatory pilots rather than full repositioning moves. Organisationally, the roadmap assumes a lean league-level set-up: the head of internationalisation projects working with the General Manager and designated departmental contacts, without a fixed budget (Appendix E). The playbooks should therefore be read as a directional template for low-cost experiments, not a fully costed plan. Future research could apply the framework across more markets and leagues, integrate fan-level data on diaspora, pricing, and player narratives, and use longitudinal designs to link matrix scores to audience and commercial outcomes.

8.4 Concluding remarks

This thesis addressed how a follower European league, such as Liga Portugal, can prioritise and approach foreign markets in a structured and implementable way. It developed a three-pillar framework combining a Demand–Access matrix with qualitative playbooks and applied it to eight candidate countries. The results indicate that France and Brazil form the strongest near-term foundations, with Spain and Canada offering selective growth and learning potential. More broadly, the analysis shows that distribution conditions and anti-piracy capabilities are as decisive as latent football interest, and that diaspora communities and player narratives offer realistic entry points for early demand-building. The strategy chapter translated these insights into market playbooks and a two-season roadmap aligned with Liga Portugal's resource profile and rights constraints. Despite limitations, the thesis shows how follower leagues can use transparent tools to make data-driven choices and design actionable initiatives rather than global ambitions.

9. Appendix

Appendix A – Indicator construction tables

Table A1 – Construction of P1-1 Trends_Basket (latent interest / search intent)

Country	Liga Portugal	Benfica	FC Porto	Sporting CP	Basket Index	P1-1score (0–100)	Rank
Brazil	43,11	11,30	5,53	16,25	23,86	0,00	8
USA	42,92	16,36	7,79	19,32	25,86	8,70	7
Angola	46,47	37,42	41,51	38,13	42,00	79,10	2
Spain	49,04	10,51	13,00	24,32	29,18	23,20	6
Mozambique	46,77	44,85	49,98	45,62	46,80	100,00	1
France	42,91	29,26	35,79	9,73	32,12	36,00	4
Cabo Verde	41,81	51,49	43,43	28,06	41,32	76,10	3
Canada	46,43	24,83	15,68	25,60	31,79	34,60	5

Note: Indices are weekly-average Google Trends web-search values (0–100) for “Liga Portugal”, “Benfica”, “FC Porto” and “Sporting CP” in each country over the past 12 months (12/2024–11/2025). The weighted basket applies weights of 0.40 to “Liga Portugal” and 0.20 to each Big-3 club. P1-1 Trends_Basket is obtained by min–max scaling the basket across the eight countries so that the lowest basket becomes 0 and the highest 100; Rank = 1–8, where 1 denotes the country with the highest P1-1 score.

Table A2 – Construction of P1-2 Diaspora_per100k (Portuguese-born residents per 100,000)

Country	Diaspora Stock	Total Population	Diaspora_per100k	P1-2 Diaspora_per100kper 100k (0–100)	Rank
Brazil	146697,00	211998573,00	69,20	6,60	5
USA	141889,00	340110988,00	41,72	3,30	6
Angola	5454,00	37885849,00	14,40	0,10	7
Spain	93840,00	48807137,00	192,27	21,20	4
Mozambique	4741,00	34631766,00	13,69	0,00	8
France	585896,00	68516699,00	855,11	100,00	1
Cabo Verde	1281,00	524877,00	244,06	27,40	3
Canada	120690,00	41288599,00	292,31	33,10	2

Note: “Portuguese-born residents” reports the stock of residents in each country whose country of birth is Portugal in 2024 (mid-year), from UN DESA International Migrant Stock 2024 – Destination & Origin tables. “Population” is the total resident population in the same year from World Bank World Development Indicators (SP.POP.TOTL). “Per 100,000 residents” is calculated as (Portuguese-born / population) × 100,000. P1-2 Diaspora_per100k is obtained by min–max scaling these densities across the eight countries to a 0–100 range (lowest density = 0; highest = 100); Rank = 1–8, where 1 indicates the highest diaspora density.

Table A3 – Construction of P1-3 PPP_PriceFit (PPP-based affordability of a €29.99 price)

Country	PPP per capita (intl $/year)	PPP_month (intl $/month)	Price Anchor (€/month)	Burden Ratio r = price/PPP_month	P1-4 PPP_Price Fit (1-100)	Rank
Brazil	22333,41	1861,12	29,99	0,016	38,29	5
USA	85809,90	7150,83	29,99	0,004	70,45	1
Angola	8347,95	695,66	29,99	0,043	18,83	7
Spain	56926,24	4743,85	29,99	0,006	61,27	4
Mozambique	1699,71	141,64	29,99	0,212	4,51	8
France	61321,69	5110,14	29,99	0,006	63,02	3
Cabo Verde	11261,77	938,48	29,99	0,032	23,83	6
Canada	65463,10	5455,26	29,99	0,005	64,53	2

Note: PPP per capita is taken from the World Bank World Development Indicators (NY.GDP.PCAP.PP.CD) and converted to a monthly PPP value. The price anchor is set at €29.99 for all markets. The burden ratio r is defined as price / PPP_month. P1-3 PPP_PriceFit then maps r into a 0–100 affordability index using Score = 100 / (1 + r / 0.01), where a lower burden ratio yields a higher affordability score.

Table A4 – Construction of P1-4 PlayerLink (minutes, players and Big-3 visibility bump)

Country	**Total minutes in LP**	**Number of Players**	**Minutes at Big-3 clubs**	**Minutes_0–100**	**Players_0–100**	**Big3_bump**	**P1-4 Player Link (0–100)**	**Rank**
Brazil	123476	108	5802	100	100	5	100	1
USA	512	2	0	0	0,00	0	0	8
Angola	8286	12	0	6,32	9,43	0	7,26	5
Spain	42830	41	7926	34,41	36,79	5	40,13	2
Mozambique	3661	2	0	2,56	0,00	0	1,79	7
France	10367	15	0	8,01	12,26	0	9,29	3
Cabo Verde	12087	8	0	9,41	5,66	0	8,29	4
Canada	2508	3	1918	1,62	0,94	5	6,42	6

Note: Total minutes and player counts are calculated from FBref's 2024/25 Primeira Liga player statistics (fields: Player, Nation, Squad, Min). "Total minutes in LP" (Min_25_all) sums minutes for all players from each country; "Number of players" (Players_25_count) counts unique players with Min > 0; and "Minutes at Big-3 clubs" (Big3_25) sums minutes at Benfica, FC Porto and Sporting. Minutes_0–100 and Players_0–100 are min–max normalised across the eight countries. P1-4 PlayerLink is computed as MIN(100; 0.70·Minutes_0–100 + 0.30·Players_0–100 + Big3_bump), where Big3_bump = +5 if Big3_25 > 0 and 0 otherwise.

Table A5 – Construction of P2-1 DigitalAccess (payment, device and connectivity prerequisites)

Country	**HasAccount_%**	**Phone_%**	**Internet_%**	**Imputed ?**	**P2-1 DigitalAccess**	**Rank**
Brazil	86	92	88	No	88,4	5
USA	97	98	98	No	97,6	1
Angola	68	85,5	46,5	Yes	66,8	6
Spain	98	97	97	No	97,4	2
Mozambique	54	62	27	No	48,3	8
France	99	91	96	No	95,7	3
Cabo Verde	39	80	43	Yes	52,5	7
Canada	98	89	95	No	94,4	4

Note: HasAccount_%, Phone_% and Internet_% are taken from the latest World Bank Global Findex wave for each country (adults 15+). Where no recent data are available (Angola, Cabo Verde), I impute medians from a small peer group with similar income and connectivity profiles and flag these cases in the Source Log. P2-1 DigitalAccess is computed as 0.40·HasAccount_% + 0.30·Phone_% + 0.30·Internet_%, yielding a 0–100 index of digital readiness for accessing Liga Portugal via OTT or pay-TV services.

Table A6 – Construction of P2-2 Carriage (legal distribution of Liga Portugal)

Country	Main distributor	Platform Type	Coverage Summary	P2-2 Carriage score (0–100)	Rank
Brazil	ESPN (Disney+ Premium) + RTP Int'l	Pay-TV sports network & OTT	Several Liga Portugal matches per round on a major sports channel and its OTT service; good presence but not full-season coverage and behind a pay subscription	75	2
USA	GolTV (via FuboTV, Fanatiz) + RTP Int'l/BTV	Niche pay-TV channel via OTT & diaspora channels	Regular carriage on a minor channel with limited reach, mainly inside OTT bundles; no mainstream US sports network involved	50	3
Angola	Sport TV África (on ZAP) + BTV + RTP África	Pay-TV & diaspora channels	ZAP's Sport TV África offers an all-matches package (plus Benfica TV and RTP África), giving comprehensive but subscription-only coverage.	75	1
Spain	No dedicated broadcaster(only RTP Int'l)	foreign free-to-air channel	Only an occasional match of the week on Portuguese RTPi; no Spanish TV or OTT platform carries the league, so footprint is minimal.	25	4
Mozambique	Sport TV África (ZAP) + BTV + RTP África	Pay-TV & diaspora channels	Same Sport TV África package as Angola, with all matches available via pay-TV and diaspora channels; comprehensive but behind a paywall.	75	1
France	beIN Sports France + Free + RTP Int'l/BTV	Pay-TV sports network & ISP platform	beIN Sports shows all matches of the Big-3 clubs live and on demand, ensuring strong visibility on a major paid sports platform, complemented by diaspora channels.	75	2
Cabo Verde	Sport TV África (ZAP) + BTV + RTP África	Pay-TV & diaspora channels	Identical ZAP Sport TV África package to Angola and Mozambique; full match coverage but limited to paying subscribers.	75	1
Canada	fuboTV Canada + GolTV Play + RTP Int'l/BTV	Mainstream OTT & diaspora channels	National OTT provider fuboTV and GolTV's own platform carry Liga Portugal matches; good digital coverage, though no traditional TV broadcast.	75	2

Note: P2-2 Carriage is a rubric-based 0–100 score capturing whether, and how prominently, Liga Portugal is distributed in each market. In this sample, scores take the values 25 (very limited coverage, e.g. single weekly match), 50 (some coverage on a niche or lower-reach platform) and 75 (strong coverage on at least one major pay-TV/OTT platform). Platform types and coverage descriptions are based on broadcaster websites, ZAP channel lists and LiveSoccerTV rights overviews for the 2024/25 season; detailed sources and justification are provided in Appendix D2.

Table A7 – Construction of P2-3 Watchability (prime-time share of fixtures)

Country	TZ_Offset_ hours	Fixtures _ total	Weekend _ PT	Weekday _ PT	Weekend _ Share	Weekday _ Share	Primetime _ share_ weighted	P2-3 Watchability (0–100)	Rank
Brazil	-3	90	19	0	0,21	0,00	0,13	12,67	4
USA	-5	90	0	0	0,00	0,00	0,00	0,00	5
Angola	1	90	40	5	0,44	0,06	0,29	28,89	3
Spain	1	90	40	5	0,44	0,06	0,29	28,89	3
Mozambique	2	90	45	5	0,50	0,06	0,32	32,22	1
France	1	90	40	5	0,44	0,06	0,29	28,89	3
Cabo Verde	-1	90	40	6	0,44	0,07	0,29	29,33	2
Canada	-5	90	0	0	0,00	0,00	0,00	0,00	5

Note. P2-3 Watchability measures how often Liga Portugal fixtures fall into convenient local viewing windows. The table reports, for each country, the number of Liga Portugal matches in Matchdays 10–19 of the 2024/25 season, converted from Portugal time to local time using a fixed time-zone offset. Weekend prime time is defined as 18:00–22:30 on Saturdays and Sundays, weekday prime time as 19:00–22:00 Monday–Friday. Weekend_Share and Weekday_Share are the shares of fixtures in these windows; the weighted share is computed as 0.60·Weekend_Share + 0.40·Weekday_Share, and P2-3 Watchability = 100 × Primetime_share_weighted (0–100 scale, higher = more games in local prime time).

Table A8 – Construction of P2-4 Anti-Piracy (live enforcement against illegal streaming)

Country	Tools_dynamic (0/50/100)	Speed_event (0/50/100)	Intermediary_coop (0/50/100)	P2-4 Anti-Piracy score (0–100)	Rank
Brazil	100	50	100	80	3
USA	50	50	100	60	4
Angola	50	50	50	50	5
Spain	100	100	100	100	1
Mozambique	0	0	0	0	6
France	100	100	100	100	1
Cabo Verde	0	0	0	0	6
Canada	100	100	50	90	2

Note: For each country, Tools_dynamic indicates the availability of dynamic and live site-blocking orders for sports streaming (0 = none, 50 = limited or static, 100 = full dynamic/live blocking). Speed_event codes how quickly such measures can be applied during live events (0 = post-event only, 50 = some in-event blocking, 100 = systematic in-event updating). Intermediary_coop captures structured cooperation with ISPs and other intermediaries (0 = none, 50 = partial/ad-hoc, 100 = formal MoUs or industry codes). The indicator is calculated as
P2-4Anti-Piracy=0.4·Tools_dynamic+0.4·Speed_event+0.2·Intermediary_coop",
yielding a 0–100 index of enforcement strength that feeds into Pillar 2. Rank orders countries from strongest (1) to weakest (6) enforcement. Detailed sources and coding justifications are provided in Appendix D2.

Table A9 – Overview of indicator scores by country (0–100)

	Brazil	USA	Angola	Spain	Mozambique	France	Cabo Verde	Canada
P1-1Trends_Basket	0,00	8,70	79,10	23,20	100	36	76,10	34,60
P1-2Diaspora_per100k	6,60	3,30	0,10	21,20	0	100	27,40	33,10
P1-3PPP_PriceFit	38,29	70,45	18,83	61,27	4,51	63,02	23,83	64,53
P1-4PlayerLink	100,00	0,00	7,26	40,13	1,79	9,29	8,29	6,42
P2-1DigitalAccess	88,40	97,60	66,80	97,40	48,30	95,70	52,50	94,40
P2-2Carriage	75	50	75	25	75	75	75	75
P2-3Watchability	12,67	0,00	28,89	28,89	32,22	28,89	29,33	0
P2-4 Anti-Piracy	80	60	50	100	0	100	0	90

Notes: All indicators are scaled to **0–100** where **higher values indicate more favourable conditions** for Liga Portugal's internationalisation (higher demand or easier access/feasibility). Scores are reported with **two decimals** (rounding). **P2-2 (Carriage)** and **P2-4 (Anti-Piracy)** are **rubric-based** indicators (discrete steps) and therefore take a limited set of values; all other indicators are continuous transformations. Full data sources, transformations, and any imputations are documented in **Appendix D (Tables D1–D2)**, with country-level construction tables in **Appendix A (Tables A1–A8)**.

Appendix B – Robustness and dispersion

Table B1 – Dispersion of indicator scores across countries

Indicator	Min	Max	Range	StdDev
P1-1 Trends_Basket	0,00	100,00	100,00	36,18
P1-2 Diaspora_per100k	0,00	100,00	100,00	33,29
P1-3 PPP_PriceFit	4,51	70,45	65,94	25,09
P1-4 PlayerLink	0,00	100,00	100,00	34,05
P2-1 DigitalAccess	48,30	97,60	49,30	20,95
P2-2 Carriage	25,00	75,00	50,00	18,60
P2-3 Watchability	0,00	32,22	32,22	13,77
P2-4 Anti-Piracy	0,00	100,00	100,00	41,06

Notes: All indicators are scaled to **0–100** where **higher values indicate more favourable conditions** for Liga Portugal's internationalisation (higher demand or easier access/feasibility). Scores are reported with **two decimals** (rounding). **P2-2 (Carriage)** and **P2-4 (Anti-Piracy)** are **rubric-based** indicators (discrete steps) and therefore take a limited set of values; all other indicators are continuous transformations. Full data sources, transformations, and any imputations are documented in **Appendix D (Tables D1–D2)**, with country-level construction tables in **Appendix A (Tables A1–A8)**.

Table B2 – Baseline vs z-score specification

	Brazil	USA	Angola	Spain	Mozambique	France	Cabo Verde	Canada
Baseline overall score (0–100)	50,12	36,26	40,75	49,64	32,73	63,49	36,56	49,76
Baseline rank	2	7	5	4	8	1	6	3
Z-score overall (standardised)	0,15	-0,33	-0,11	0,11	-0,36	0,67	-0,22	0,11
Z-score rank	2	7	5	3	8	1	6	3
Rank difference	0	0	1	1	0	0	0	0

Notes: The **baseline** overall score is computed from the eight **0–100 indicators** using equal weights within each pillar and equal pillar weights (as specified in Section 4.5). In the **z-score specification**, each indicator is first standardised **across the eight countries** (mean = 0; standard deviation = 1) before aggregation using the same weighting structure. Reported z-score overall values are rounded; small differences between markets can therefore produce **minor rank changes or ties** (e.g., Spain/Canada are very close), without affecting the shortlist-level conclusion.

Table B3 – Robustness of overall ranking to alternative Demand–Access pillar weights (60/40 and 40/60)

Country	Overall (50/50)	Rank (50/50)	Overall (60/40)	Rank (60/40)	Overall (40/60)	Rank (40/60)
France	63,49	1	61,21	1	65,77	1
Brazil	50,12	2	47,34	2	52,90	2
Canada	49,76	3	46,74	4	52,78	3
Spain	49,64	4	47,00	3	52,27	4
Angola	40,75	5	37,86	5	43,63	5
Cabo Verde	36,56	6	36,03	6	37,09	7
USA	36,26	7	33,13	7	39,39	6
Mozambique	32,73	8	31,50	8	33,96	8

Notes: Scores are on a 0–100 scale. Rank 1 = highest overall priority. Pillar weights are 50/50 in the baseline, and 60/40 or 40/60 in the robustness specifications.

Appendix C - Strategy tables and visuals

Table C1 Market portfolio roles and priorities for the eight target countries.

Country	Portfolio Role	Priority Level	Short Rationale
France	Core anchor market	1	Highest Demand & Access; strong diaspora; good PPP and enforcement.
Brazil	Core growth market	1	Very strong player link & football culture; language proximity; access improvable.
Spain	Growth market- neighbour	2	Good PPP & DigitalAccess; modest Demand & Carriage in a crowded LaLiga market.
Canada	Growth – experimental / WC-driven	2	High PPP & DigitalAccess; Portuguese diaspora; weak PlayerLink & Watchability.
Angola	Developmental – Lusophone	3	Strong Carriage & Watchability; low PPP; mid DigitalAccess; weak Anti-Piracy.
Cabo Verde	Developmental – micro-market	3	High search interest; small size; moderate diaspora; constrained PPP & access.
Mozambique	Developmental – high interest, low means	3	Very high interest & Carriage; very low PPP & DigitalAccess; weak Anti-Piracy.
USA	Experimental digital option	3	Excellent PPP & DigitalAccess; very low Demand, PlayerLink, Watchability.

Note: France and Brazil are treated as core markets (Priority 1), with France as the anchor given its highest composite score and Brazil as a core growth market due to its linguistic and player-link advantages. Spain and Canada are primary growth or experimental markets (Priority 2). Angola, Cabo Verde, Mozambique and the USA are developmental or long-term options (Priority 3). Priority level: 1 = core focus; 2 = primary growth / learning markets; 3 = secondary / developmental or long-term options.

Table C2. Summary of main strategic levers by market.

Country	Key demand & localisation lever	Key access / platform lever	Key digital &Protection Lever
France	Activate Portuguese diaspora in key hubs through French-friendly storytelling around Liga Portugal clubs and relevant French-speaking players, complemented by occasional community viewing events.	Secure or maintain a clear "home" on 1–2 premium sports broadcasters or OTT platforms, with strong visibility inside football packages (avoid fragmented carriage).	Run a geo-targeted PT–FR bilingual content stream timed to French prime time; rely on partner-led content protection where available (e.g., notice-and-takedown and live-blocking cooperation).
Brazil	Position Liga Portugal as a "Brazilian talent league" through player-led storytelling (current players, alumni, coaches), supported by selective activations in key cities when feasible.	Establish a clear OTT/TV "home" with flexible pricing (bundles/discounts; pilot ad-supported or freemium options if needed).	Prioritise BR-Portuguese short-form highlights and platform-native formats, supported by selective influencer tie-ins; use partner-based monitoring and basic Anti-Piracy clauses in contracts.
Canada	Focus on Portuguese/Lusophone communities and World-Cup interest; treat Canada as an experimental / learning market.	Include Liga Portugal in an existing Euro-football OTT bundle with strong on-demand / replay options; avoid large fixed-fee commitments.	Geo-targeted PT–EN content; use analytics to learn from diaspora engagement keep basic Anti-Piracy clauses in partner contracts
Spain	Use Spanish-language storytelling that leverages cross-border familiarity and rivalry narratives, highlighting Portuguese talent with Spanish connections.	Create a clearer "home" within existing packages through low-friction steps (e.g., more prominent placement in menus and/or a limited sublicensed or highlights window on secondary channels/digital platforms)	Maintain Spanish-language content focused on emerging talent; apply low-intensity protection via existing Spanish/EU tools and partner cooperation
Angola	Support existing fandom through league/federation-run community and youth initiatives rather than direct club deals.	Maintain current Sport TV Africa/ZAP carriage at affordable prices.	Simple PT content; informal cooperation with operators on obvious pirate channels.
Cabo Verde	Highlight Cape Verdean players and diaspora stories via small federation-linked academies, clinics and community events.	Ensure reliable carriage and, where possible, free-to-air highlights in a small market,	PT content via community media; minimal Anti-Piracy beyond local partner practice
Mozambique	Focus on Big-3 matches and historic Portugal–Mozambique links, using occasional federation-level camps and youth events.	Keep low-priced/sponsored carriage given very low PPP.	Low-bandwidth content; soft Anti-Piracy emphasis on value of legal access.
USA	Concentrate on Portuguese/Brazilian diaspora and niche Euro-football fans	Use a niche OTT aggregator or small DTC service tailored to diaspora.	EN/PT recaps timed to US; rely mainly on partners' Anti-Piracy systems

Note: *PT = Portuguese, FR = French, EN = English, BR-PT = Brazilian Portuguese, OTT = over-the-top streaming. Source: author's own elaboration based on Demand–Access matrix results (Chapter 5) and benchmarking analysis (Chapter 6)*

Table C3. Two-season implementation roadmap for priority markets (2025/26–2026/27)

#	Action Item	Market(s)	Dimension	Timeline	Responsible Unit
1	Appoint an internationalisation project lead and small cross-functional working group (rights, media, digital, data).	All	Cross-cutting (governance)	Season 25/26	General Manager; Internationalisation project lead
2	Build an "international dashboard" with baseline values for key indicators per country	All	Data & KPIs	Season 25/26	Data & Analytics; Internationalisation project lead
3	Map and prioritise main diaspora hubs and community partners (associations, consulates, clubs, media) in France, Brazil, Canada and USA	France, Brazil, Canada, USA	Demand & localisation	Season 25/26	Internationalisation project lead; CSR / Community & Clubs
4	Launch or adapt dedicated local-language content streams for France and Brazil with a basic posting calendar	France, Brazil	Digital engagement	Season 25/26	Digital & Social Media; Content / Design
5	Hold exploratory meetings with at least one key broadcaster or OTT platform in each priority market to understand rights cycles, packaging options and future scenarios, without attempting major renegotiation before 2028**.**	France, Brazil, Canada, Spain	Access & platforms	Season 25/26	Rights & Distribution; General Manager
6	Design a low-cost diaspora viewing-event concept (e.g. Paris, Toronto) and secure partner venues and potential sponsors, without yet scaling up	France, Canada	Demand & localisation	Season 25/26	Internationalisation project lead; Marketing & Activations
7	Agree basic Anti-Piracy cooperation clauses with existing or potential partners in France and Spain (information sharing, notice-and-takedown, live-blocking options)	France, Spain	Access & platforms	Season 25/26	Legal / IP; Rights & Distribution
8	Execute first diaspora viewing events and document participation, partner feedback and media coverage.	France, Canada	Demand & localisation	Season 26/27	Internationalisation project lead; Marketing & Activations
9	Run 6–8-week pilots of enhanced local-language digital content in France, Brazil, Canada and Spain (higher posting frequency, player-led stories, geo-targeting) and monitor engagement	France, Brazil, Canada, Spain	Digital Engagement	Season 26/27	Digital & Social Media; Content / Design
10	Negotiate at least one concrete step-up in distribution (e.g. clearer positioning in a French package, a first sublicensed package in Spain, or improved bundle in Canada)	France, Brazil, Canada, Spain	Access & platforms	Season 26/27	Rights & Distribution; General Manager
11	Explore one low-friction DTC/OTT option for international fans (limited games or highlights, simple registration, modest pricing), prioritising Brazil or a small multi-market pilot, as a preparation for the 2028 centralised rights cycle.	Brazil (+ multi-market)	Access & digital	Season 26/27	Rights & Distribution; Digital & Product
12	Review pilot results and KPI trends; update country playbooks and targets and prepare a plan for scaling successful initiatives in the next season/rights cycle	All	Cross-cutting (evaluation)	Season 26/27	Internationalisation project lead; cross-functional working group (Rights, Digital, Data, CSR)

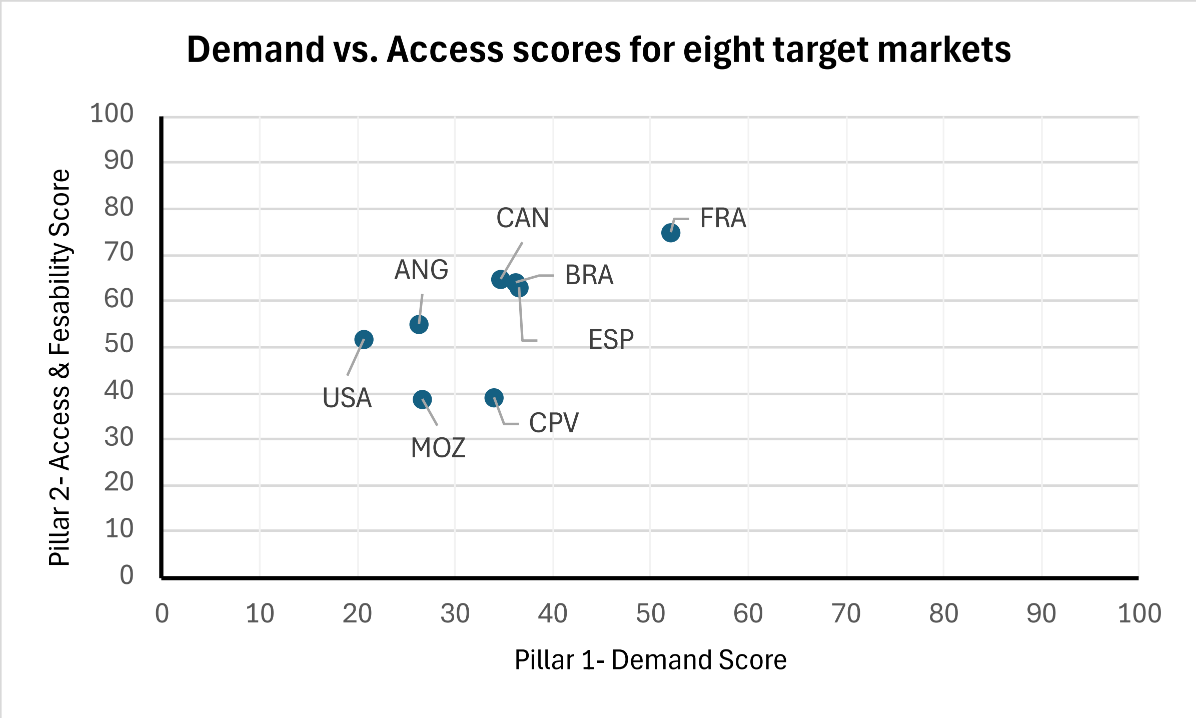
Note: Dimension indicates the main strategic focus addressed by each action (Demand & localisation; Access & platforms; Digital engagement; Cross-cutting).

Table C4. Medium-term KPIs for priority markets (linked to Demand–Access indicators)

#	KPI (what is tracked)	Linked indicator(s)	Priority markets	Baseline reference	18-24 month target	Data source / frequency
1	Google Trends index for "Liga Portugal" (and Big-3 clubs)	P1-1 Trends_Basket	France, Brazil, Canada, Spain	Values in Ch.5, Table 5.1	+25–50% vs 2024 baseline in France & Brazil, clear upward trend in Canada & Spain	Google Trends; quarterly
2	Number of active partnerships with Portuguese/Lusophone diaspora organisations (clubs, associations, festivals, media)	P1-2 Diaspora_per100k (activation proxy)	France, Canada USA, (Brazil)	0–1 informal links	≥3 active partners in France and Canada, 1–2 in USA/Brazil	Internal partner log,quarterly
3	Frequency of player-/coach-story content linked to each market (features, interviews, social campaigns)	P1-4 PlayerLink	France, Brazil, Canada, Spain	Ad hoc, unsystematic	At least 1 targeted player-/coach story per month per priority market	Content calendar / social analytics, monthly
4	Followers and engagement on local-language digital channels (FR–PT, BR-PT, PT–EN)	P1-1 Trends_Basket; P2-1 DigitalAccess	France, Brazil, Canada, Spain	Current social stats	Doubling of follower base on new/targeted channels, engagement rate ≥3–5% per post	Platform analytics; monthly
5	Existence of at least one clear legal live or full-match replay option in each market	P2-2 Carriage; P2-1 DigitalAccess	France, Brazil, Canada, Spain	Fragmented / limited in some markets	One clearly identifiable "home" platform per priority market	Rights/contracts overview; annually
6	Average number of Liga Portugal matches (live or full replays) available per matchday	P2-2 Carriage; P2-3 Watchability	France, Brazil, Canada, Spain	Current carriage mapping	France: ≥2–3 matches per round, Brazil/Canada/Spain: ≥1–2 matches or full replays per round	Partner reports / EPG checks, half-yearly
7	Number of formal Anti-Piracy cooperation measures with partners (clauses, MoUs, joint monitoring initiatives)	P2-4 Anti-Piracy – Intermediary_coop	France, Brazil, Spain	Limited / implicit	At least 1 formal clause or cooperation agreement in France and Spain, pilot clause in Brazil	Contract review, annually
8	International share of commercial income (media + sponsorship attributed to foreign markets	Overall Demand–Access outcome	France, Brazil, Canada, Spain	Current share (if available)	Gradual increase in international revenue share, at minimum covering additional activation costs in core markets	Finance / commercial reports, annually

Note: These KPIs are expected to evolve beyond the initial two-season implementation roadmap in Table C3 (2025/26–2026/27). Baselines are drawn from the current Demand–Access matrix (Chapter 5) and internal Liga Portugal data. Where precise values are not yet available, the **2025/26 actions** in Table C3 include setting up the initial international dashboard.

Figure C1. Positioning of the eight target markets on the Demand–Access matrix



Appendix D

D1 – Data sources, years and imputation by indicator

Indicator	Primary Data Source(s)	Year(s) /period	Key Raw variables	Key transformation 0–100 index	Imputation/author judgement	Table
P1-1 Trends_ Basket	Google Trends (web search indices) for "Liga Portugal" and Big 3 Clubs by Country	12/2024–11/2025	Weekly average 0–100 indices for league and Big-3 clubs	Weighted basket (0.40 Liga, 0.20 each Big-3); then min–max scale basket across 8 markets to 0–100	No imputation; weights reflect higher strategic importance of league brand	A1
P1-2 Diaspora _per100k	UN DESA International Migrant Stock (Destination & Origin tables); World Bank WDI (total population)	2024	Portuguese-born residents by destination country; total resident population	Diaspora per 100,000 = (Portuguese-born / population) × 100,000; then min–max scale densities across 8 markets to 0–100	No imputation.	A2
P1-3 PPP_PriceFit	World Bank WDI GDP per capita, PPP (constant international $)	2025	GDP per capita (PPP)	PPP_month = PPP per capita / 12; burden ratio r = price / PPP_month (price = €29.99); index = 100 / (1 + r / 0.01)	No missing PPP data for the 8 countries. Formula and anchor price are author choices reflecting a typical OTT price point.	A3
P1-4 PlayerLink	FBref player statistics for 2024/25 Primeira Liga season (Min, Nation, Squad)	2024/25 season	Total minutes by nationality; number of players by nationality; minutes at Big-3 clubs	For each country: min–max scale Minutes and Players across 8 markets to 0–100; P1-4 = MIN(100; 0.70·Minutes + 0.30·Players + Big3_bump), where Big3_bump = +5 if any minutes at Benfica, Porto or Sporting	Fully author-designed weighting scheme; Big3 bump emphasises visibility through minutes and Big-3 exposure	A4
P2-1 DigitalAccess	World Bank Global Findex (adults 15+); World Bank WDI and regional statistics for imputation	2025	% adults with account at financial institution/mobile-money; % adults with mobile phone; % adults using internet in last 3 months	P2-1 = 0.40·HasAccount_% + 0.30·Phone_% + 0.30·Internet_% (all already 0–100)	Angola & Cabo Verde: account and internet % imputed from median of income/region peer group; flagged in Source Log	A5
P2-2 Carriage –	Broadcaster and distributor websites; channel line-ups; OTT platform listings; rights overviews (e.g. LiveSoccerTV, WorldSoccerTalk, ZAP))	2022-2025	Main distributor(s) per country; platform type (pay-TV, OTT, diaspora channel, FTA); qualitative coverage	Apply rubric-based score: 0 = no carriage; 25 = very limited coverage; 50 = some coverage on niche / low-reach platform; 75 = strong coverage on at least one major pay-TV/OTT outlet; 100 = comprehensive, regular multi-match coverage	Fully judgement-based scoring, supported by source log in Table D2.	A6
P2-3 Watchability	Liga Portugal 2024/25 fixture list (Matchdays 10–19); time-zone offsets by country	2024/25 season, Matchdays 10–19	Kick-off times in Portugal; time-zone offset to local time; counts of fixtures by day and time window	Convert all fixtures to local time; classify into weekend prime time (Sat–Sun 18:00–22:30) and weekday prime time (Mon–Fri 19:00–22:00); compute Weekend_share and Weekday_share; Watchability index P2-3 = 100 × (0.60·Weekend_share + 0.40·Weekday_share)	No imputation; all eight markets use same fixture sample and time-window definition; prime-time definition is author judgement	A7
P2-4 Anti-Piracy	National legislation and case law on site-blocking; regulator and court documents; industry	2020–2025 (latest available informati	Existence and scope of dynamic/live blocking tools; evidence on in-event blocking speed; evidence on structured	For each country code three sub-dimensions on a 0/50/100 rubric: Tools_dynamic, Speed_event,	Scores rely on author coding of legal and industry evidence; where evidence is	A8

	reports on live-blocking actions; ISP codes of conduct and cooperation	on by country)	ISP / intermediary cooperation	Intermediary_coop. Compute P2-4 = 0.40·Tools_dynamic + 0.40·Speed_event + 0.20·Intermediary_coop,	partial, mid-category (50) is chosen. Detailed coding notes and sources in Table D2.	

Notes: This table summarises the **primary datasets, periods, and transformations** used for each indicator. Unless stated otherwise, min–max scaling is performed **within the eight-country sample** used in the matrix. **Full bibliographic references and source URLs are listed in the Excel Source Log** (supplementary workbook).

Table D2. Source log, imputation and judgement notes by indicator
Panel A – P2-1 DigitalAccess (imputed values)

Country	Field	Source Status	Imputed Value	Imputation Approach	Primary source(s)	Note
Angola	HasAccount_%	Missing in Findex	68%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution
Angola	Phone_%	Missing in Findex	85,5%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution
Angola	Internet_%	Missing in Findex	46,5%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution
Cabo Verde	HasAccount_%	Missing in Findex	39%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution
Cabo Verde	Phone_%	Missing in Findex	80%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution
Cabo Verde	Internet_%	Missing in Findex	43%	Median of peer group (Sub-Saharan Africa, lower-middle income) with similar connectivity profile; see Methodology 4.4	World Bank Global Findex 2025,Table B1	Flagged as imputed; interpret P2-1 for this country with caution

Notes: Imputed values were used only where recent Global Findex inputs were unavailable and were set to **peer-group medians** as described in Section 4.4. Imputed entries are **explicitly flagged** to support cautious interpretation. **Full source references are provided in the Excel Source Log.**

Panel B – P2-2 Carriage (distribution rubric by country)

Country	Main Distributor(s)	P2-2 Carriage Score	Evidence summary	Primary source(s)	Note
Brazil	ESPN (Disney+ Premium) + RTP Int'l	75	ESPN / Disney+ premium package shows several Liga Portugal matches each round; cross-checked with LiveSoccerTV schedules.	Live Soccer TV	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
USA	GolTV (via FuboTV, Fanatiz) + RTP Int'l/BTV	50	GolTV listed as LP rights holder; schedules show regular matches on a niche channel available mainly via OTT bundles	World Soccer Talk	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
Angola	Sport TV África (on ZAP) + BTV + RTP África	75	ZAP's Sport TV África package advertises all Liga Portugal matches (incl. Benfica TV), giving full but pay-TV-only coverage	Wikipedia	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
Spain	*No dedicated broadcaster*(only RTP Int'l)	25	LiveSoccerTV lists only a weekly match on RTPi; no Spanish pay-TV/OTT operator carries the league	Live Soccer TV	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
Mozambique	Sport TV África (ZAP) + BTV + RTP África	75	Same ZAP Sport TV África package as Angola; full LP coverage but entirely behind a subscription paywall	Wikipedia	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
France	beIN Sports France + Free + RTP Int'l/BTV	75	beIN Sports France shows all Big-3 matches live and on demand; complemented by RTPi/BTV for diaspora.	Live Soccer TV	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
Cabo verde	Sport TV África (ZAP) + BTV + RTP África	75	ZAP's Sport TV África package marketed in Cabo Verde with full Liga Portugal coverage on pay-TV	Wikipedia	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).
Canada	fuboTV Canada + GolTV Play + RTP Int'l/BTV	75	fuboTV Canada and GolTV Play list Liga Portugal among their rights; LiveSoccerTV confirms regular streaming coverage only.	Live Soccer TV/wikipedia	0–100 rubric (0 = none, 25 = very limited, 50 = some on niche platform, 75 = strong on major platform, 100 = comprehensive multi-match coverage).

Notes: Carriage scores follow a **pre-defined 0–100 rubric** based on the presence and reach of legal distribution outlets. Evidence is summarised per country; **platform listings and verification links are archived in the Excel Source Log**(supplementary workbook)

Panel C – P2-4 Anti-Piracy (coding of enforcement)

Country	Tools_dynamic	Speed_event	Intermediary_coop	P2-4 Anti-Piracy score	Evidence summary	Primary legal/industry sources
Brazil	100	50	100	80	Recent court decisions and industry reports show dynamic live-blocking injunctions for sports streaming and formal ISP cooperation.	Set, Minha Operadora, Tecmundo
USA	50	50	100	60	Legal analysis and A.C.E./ITIF reports describe strong DMCA enforcement and court-ordered blocking, but mainly on a case-by-case basis	United States Senate, United States Attorneys Office, ITIF, Alliance for Creativity and Entertainment, Richmond Journal of Law and Technology
Angola	50	50	50	50	Telecom regulator and ISP documents indicate some blocking tools and occasional cooperation, but limited detail on live sports	Correiokianda
Spain	100	100	100	100	Government and LaLiga sources document systematic dynamic site blocking for football, with fast in-event updates and ISP agreements	ITIF, IRIS Merlin; LALIGA; Piracy Monitor
Mozambique	0	0	0	0	No specific evidence of structured live-blocking tools or ISP cooperation could be identified.	no reliable source found
France	100	100	100	100	ARCOM reports describe dynamic blocking orders for live sport and formal cooperation frameworks with major ISPs	ARCOM;Piracy Monitor
Cabo verde	0	0	0	0	No specific evidence of structured live-blocking tools or ISP cooperation could be identified.	no reliable source found
Canada	100	100	50	90	Canadian legal commentary and ISP statements describe dynamic site-blocking orders for piracy and some industry-wide cooperation	Smart & Biggar, Deeth Williams Wall, Canadian Lawyers Magazine, Torys, Cassels

Notes: Anti-piracy scores are **rubric-coded** from legal/regulatory and industry evidence on live blocking tools, in-event speed, and cooperation with intermediaries (see Section 4.3.2.4). Where **no reliable public evidence** could be identified, countries are coded conservatively. **Full references and evidence excerpts are documented in the Excel Source Log**.

Appendix E
Summary of a semi-structured meeting with Liga Portugal

1) **Meeting Information**
    - Date: 3.12.2025
    - Format: online
    - Participant: Internationalisation Coordinator, Liga Portugal
2) **Purpose**
   Used to contextualise constraints and inform the roadmap/strategic emphasis. Insights informed Chapter 7 but did not affect indicator construction, scoring, or country rankings.
3) **Key Insights**
   A) Resourcing and Operating Model
    - Internationalisation is currently led by a single coordinator working directly with the General Manager, with additional ad-hoc support drawn

from other internal departments when needed (i.e., no dedicated internationalisation department/team).

B) Budget Constraints

- No dedicated internationalisation budget was specified; the initiative is described as a new project, so investment levels are not pre-committed and cannot be stated as fixed amounts.

C) Timing and Staging

- The current season is framed primarily as an exploration / preparation period rather than a full execution season; recommendations should therefore focus on what can be prepared now and implemented from next season onward (two-stage approach).
- The representative indicated that meaningful centralisation of international rights governance is expected only from 2028; until then, near-term recommendations should focus on actions feasible under the current rights set-up and a pilot-style implementation window

D) Market-prioritisation

- Canada was discussed as an interesting medium/long-term option (e.g., in view of the World Cup), but Spain was described as more readily monetisable in the nearer term.

E) Examples of realistic near-term initiatives

- Given limited resources, emphasis was placed on low-cost, feasibility-led actions (e.g., improving distribution visibility where rights exist, prioritising a small number of target markets, and testing partnerships/activations that can be executed by a lean team).

F) Collaboration with LaLiga (internationalisation and content protection)

- The Internationalisation Coordinator stated that Liga Portugal is working with LaLiga on internationalisation-related topics, including distribution/market development discussions and Anti-Piracy/content-protection coordination.
- The Coordinator described this cooperation as ongoing and practical in nature (i.e., exchange of experience and coordination where useful), rather than as a finalised, standalone strategic programme.

4) Data Handling/ Transcription note

- With the participant's consent, the meeting was audio-recorded and transcribed using an AI transcription tool (turboscribe.ai). This appendix provides a condensed summary of the points most relevant to the thesis. The full transcript is retained by the author for verification but is not included in the appendix. The transcript was reviewed and condensed manually to produce this summary.

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