

Session 1 - Future of the FEI Nations Cup™ Jumping

I – Introduction

The Nations Cup™ Jumping is the oldest equestrian series. It was created in 1909 and came under FEI supervision in 1930. Together with the FEI World Cup™ Jumping, the FEI Nations Cup™ Jumping (FNCJ) is for the FEI, the National Federations (NFs) and stakeholders such as athletes and owners the most important series for several reasons:

- The FNCJ has a long tradition and is the most prestigious team challenge, with national teams around the globe competing for the coveted title;
- The FNCJ is important for the FEI and the NFs for development and promotion of the sport;
- The FNCJ is important for NFs as nations are represented with teams. Furthermore, the NF decides which athletes and horses will represent their country. In addition the NFs select the venue which will organise the qualifier in their respective country and many NFs are actively involved in the organisation;
- The FNCJ is an important tool to prepare and select athletes for important Championships and Games;
- The FNCJ is one of the major reasons for horse owners to invest in the sport.

Everyone agrees that we must do our utmost to preserve the future of the series and that this is a top priority for the FEI. Despite the unanimity on the importance of the series within the community, the FNCJ series has been unable to attract a long-term Title Sponsor. We are however, grateful that since 2013 FEI's Top Partner, Longines, supports the series as its Official Timekeeper and committed to this already for a period of ten years.

The debate on the future of the FNCJ is not new and was already featured and discussed at the first FEI Sports Forum in 2012 which resulted in a review of the format of the series. The main changes were the development of a worldwide qualification system and the introduction of a Final. Thanks to the support of the Saudi Equestrian Fund these changes were successfully implemented under the flag of the Furusiyya FEI Nations Cup.

During the 4 years duration of the Furusiyya FEI Nations Cup the series grew and gained importance and value but until now the FEI has been unable to find an appropriate Title Sponsor to secure the future of the series.

Again we all agree that we need to make the necessary efforts to improve and strengthen the FNCJ and guarantee a sustainable future. In order to facilitate the process, the FEI Bureau decided to continue the FNCJ in 2017 without the support of a Title Sponsor and to provide the necessary financial resources. This is of course not a sustainable model and this is the reason why this year's Sport Forum is so important.

In this memo we have tried to summarise the comments and proposals coming from internal and external evaluations and those received from NFs and stakeholders. This in order to facilitate a debate on how to further improve and strengthen the FNCJ and make it more attractive for a wider audience, (new) media and broadcasting and thereby make the series more interesting for potential commercial partners. This debate will hopefully give us clear guidance on the way forward.

We wish to thank already all the NFs, organisers, athletes, owners and other stakeholders such as the European Equestrian Federation for providing us with their valuable input. The amount of input received proves how important the future of the Nations Cup Jumping series is for all of us. It also illustrates that we all need to work together to find and implement the right solutions.

II - What are the challenges the FNCJ is confronted with ?

Below are comments listed that were noted during different evaluations that took already place mainly with NFs and organisers but also during discussions with specialists in broadcast, media and marketing. We tried to make an evaluation from two different perspectives, sport and marketing but we see that some comments overlap.

From a sports perspective:

- We live in a very competitive world with an increasing number of 5* events that provide a high level of prize money. As at FNCJ the prize money distributed to the teams needs to be shared between the team members, the prize money an individual athlete can actually earn at a FNCJ qualifier is not comparable with other 5* events and can influence the choice of athletes to represent their nation at the FNCJ;
- At the FNCJ qualifiers, there is a NC competition and a Grand Prix. It is not clear to the wider audience which is the most important competition at the event. Some athletes prefer to focus on the Grand Prix as the individual prize money is

more important (i.e. if his team wins the NC the athlete will receive 16K€ and if he wins the GP he receives 66K€);

- The level of the qualifiers that qualify teams for the same Final are of a different level varying from CSIO3* to CSIO5*;
- For a global worldwide series there are some regions that have no qualifying events mainly due to transport and quarantine issues. For these regions the qualification is currently done according to a Nations Cup Team Ranking;
- Besides the CSIOs that are part of the FNCJ there are many other CSIOs that are not part of the series, leading to confusion;
- Some FNCJ qualifiers in one region/division are used by teams of other regions/divisions to train and prepare;
- For many NF's in Division 2 the distances to the qualifying events are too far and too expensive to compete at four events.

From a media and marketing perspective:

- Also from a media and marketing perspective we live in very competitive environment with an increasing number of top sports products available in the market;
- The broadcast environment is changing with audiences turning away from traditional TV and less airtime opportunities for sports;
- Sponsors are looking for new initiatives to engage with potential clients mainly through new digital media and social platforms on top of traditional branding (perimeter boards and jumps) and hospitality opportunities;
- As the FNCJ qualifiers take place at existing events with their own commercial structure, most product categories are already taken by local sponsors and it is extremely difficult for the FEI to find a Title Sponsor and to offer exclusivity in a brand category that is not already covered by the Organising Committee's (OCs);
- In order to be able to provide the OCs with a relevant financial contribution from a sponsor, the sponsorship value of the series must be increased;
- Twenty events in the FNCJ makes the series long, challenging to manage and difficult to explain to a wider audience. Given the number of FNCJ events, it is

difficult to provide the OCs with a relevant financial contribution as the sponsor contribution needs to be distributed over too many events;

- The qualifiers are of a different level varying from CSIO3* to CSIO5*. It is difficult to sell the FNCJ as a top series when it includes also events that are not perceived as being of the highest level;
- The FNCJ has no true global and consistent brand identity. Although the FEI aims to promote the series in a consistent and recognisable manner, most of the qualifiers have their own identity and it is not always clear that they are part of the FNCJ;
- At the same event there is a Nations Cup competition and a Grand Prix. It is not clear what the most important competition at the event is for spectators, media, TV and even athletes;
- Team competitions at CSIO's that are not part of the FNCJ series are also called "Nations Cup" which is confusing as it gives the impression they are also part of the FNCJ series;
- At FNCJ qualifiers, the Title Sponsor of the series is in competition with other sponsors of the event such as the Title Sponsor of the Event, the sponsor of the GP and the presenting sponsor of the qualifier. This is very confusing, limits the visibility and return for a potential FNCJ Title Sponsor and significantly reduces the sponsorship value due to the brand clutter;
- The competition formats of two rounds in one day is too long for television/broadcasting;
- The point system is confusing. Not all competitions at which a nation participates necessarily count. It is very difficult to explain to the public that a nation won the FNCJ competition but that it does not count for qualification for the Final;
- In the year of the FEI World Equestrian Games having a World Jumping Championship for Teams as well as a FNCJ Final is very confusing, as no one understands who is the World Team Jumping Champion.

III - What does success look like ?

The below is a summary of the input received by the FEI Marketing Department, also based on inputs from broadcasters, digital media and sponsorship marketing experts.

Global

A limited number of qualifiers spread around the world leading up to a Final.

Format

An attractive format for TV viewership, digital media and event visitors.

Narrative

A clear and easy to understand story throughout the series which explains how teams can compete, rank and qualify for a Final.

Brand

A consistent and distinctive brand for the series which is not confused with other events, either at the event where the FNCJ competition is held or with other CSIOs that are not part of the series.

Commercial

An exclusive and unique sponsorship value proposition and the opportunity to engage with potential brands in the most relevant product categories.

IV - How can we further improve and strengthen the FNCJ ?

Hereafter we formulate a number of questions to be discussed with the panellists and the participants of the Sports Forum. These questions are based upon the several comments and proposals we received but the discussions will not only be limited to these questions. We hope that they will create a framework for the debate. Again **the main question is of course how can we further improve and strengthen the FNCJ to secure a sustainable future while providing opportunities to find a Title Sponsor?** The FEI wants to look in an open, transparent and unbiased way at the future of the Nations Cup so the questions listed below are based on the input received and do not reflect necessarily the position of the FEI.



Do we believe the concept of qualifiers and a Final is a good concept from a sports and marketing perspective?

- ? Is it possible to reduce the number of qualifiers and increase the financial contribution to them if available?
- ? Should all qualifiers be of a 5* level (based on prize money and ECS)?
- ? Do we need to try to involve the CSIOs that are not part of the series and if so how?
- ? At the qualifiers, is it an option to merge the NC and the GP into the NC competition by merging the prize money and offering prize money for team and individual performance as well as allocate more points for the Longines ranking?
- ? Do we need to review the competition format for the qualifiers? How can we make it more interesting for a wider audience?
- ? What would be the minimum prize money needed in the FNCJ Final?
- ? Should the FNCJ be used as a qualifier to allocate some quota places for the Olympic Games?
- ? During a WEG year, should we integrate the Final of the FNCJ in the WEG as the Jumping Team World Championship?
- ? How can we increase the identity of the FNCJ and make it more consistent at events?
- ? How can we further increase the value for a potential Title Sponsor of the FNCJ?
- ? We understand Europe wants to maintain Division 1 but how can we better integrate the other European NFs (Division 2) in the FNCS?