



**OL GROUPE**

## SFAF strategy presentation 2008/09

Wednesday, 28 October 2009



OL GROUPE

# Contents



Football performance



Financial results



News and outlook



OL GROUPE

# FOOTBALL PERFORMANCE



OL GROUPE

## Football performance

OL is one of the major European clubs

Domestic championship performance (from 1999 to 2009)

Performance equivalent  
to Manchester United



11 top-three finishes  
7 times champions

Manchester United



11 top-three finishes  
7 times champions

Bayern



10 top-three finishes  
7 times champions

Real Madrid



9 top-three finishes  
4 times champions

Inter Milan



7 top-three finishes  
4 times champions

Barcelona



7 top-three finishes  
3 times champions

Liverpool



5 top-three finishes  
No championships



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## Football performance

OL has performed well domestically and in Europe

Number of points obtained in European cup play over last 10 years

**1. Lyon 159**

2. Bordeaux 103

3. Marseille 91

Lyon is the largest contributor to France's UEFA index



Number of trophies won in last 10 years

**1. Lyon 15**

2. Bordeaux 5

3. Nantes 4

4. Monaco 3

5. Paris 3

6. Auxerre 2

MARSEILLE 0



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## OL continuous Europe presence

Only four clubs have qualified for the Champions League 10 consecutive times



Olympique Lyonnais – Arsenal – Real Madrid – Man Utd

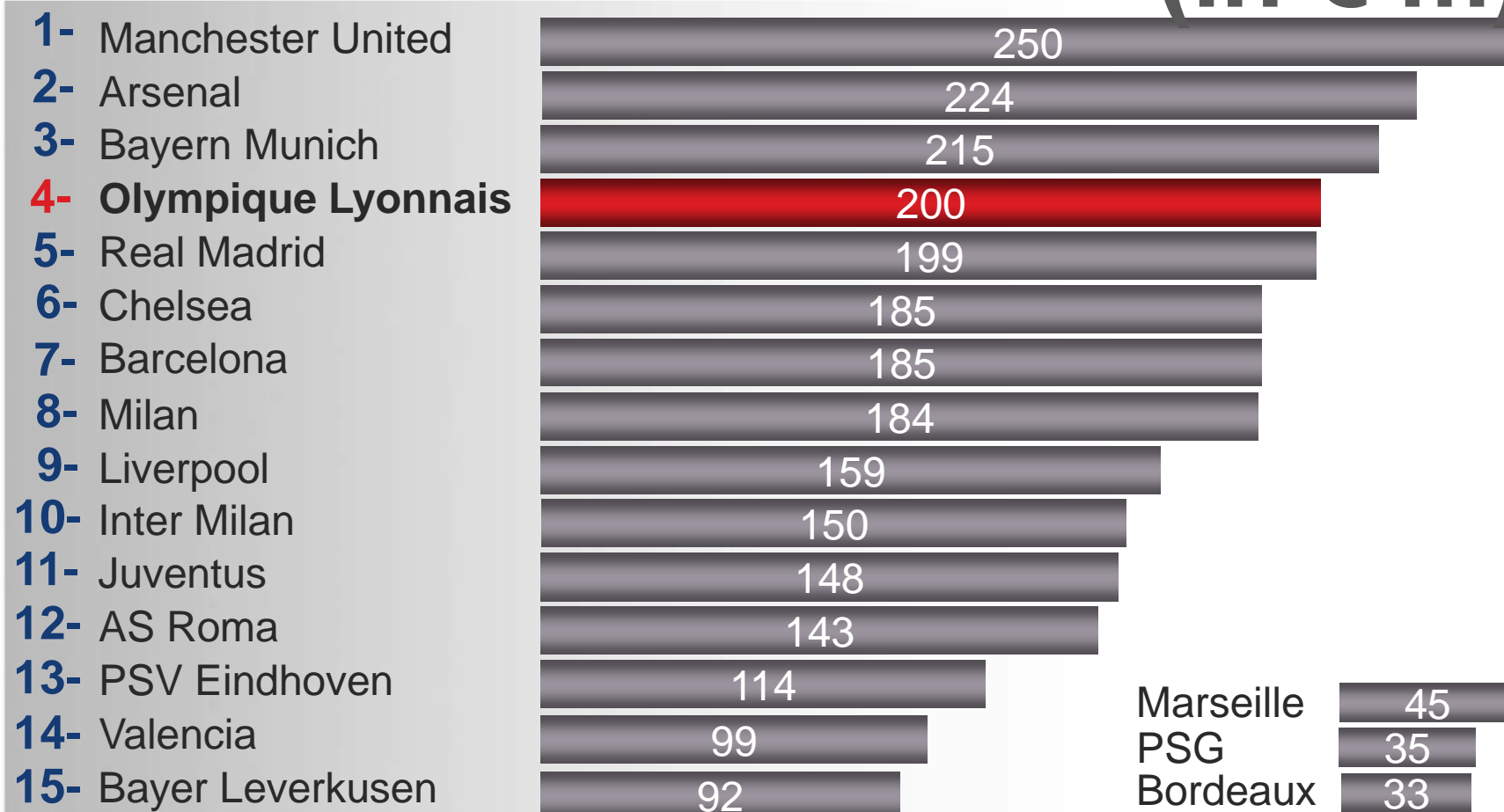




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Champions League marketing revenue since 2000/01, date of OL's first qualification

(in € m)





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## Football performance

European ranking (UEFA index)

**10th place**



### At 30/06/09

MARSEILLE	39th
LILLE	40th
PARIS	42nd
BORDEAUX	49th





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## Football performance

### French Ligue 1

3rd place

11th consecutive time in the top three

### Champions League

#### ▶ Round of 16

against Barcelona  
who went on to win the  
European championship

### French cup competitions

▶ Coupe de France round of 16  
(Lille)

▶ Coupe de la Ligue round of 16  
(Metz)

### Women's team

▶ 3rd consecutive French Ligue 1 title



▶ Challenge de France semi-finalists  
(Montpellier)

▶ European Cup semi-finalists  
(Duisburg)

### Amateur (CFA) team

▶ French League title  
of professional reserve teams



### Young players teams

▶ 2008/09 "Best Young Team"  
Challenge for the 8th time





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# FINANCIAL RESULTS at 30 June 2009



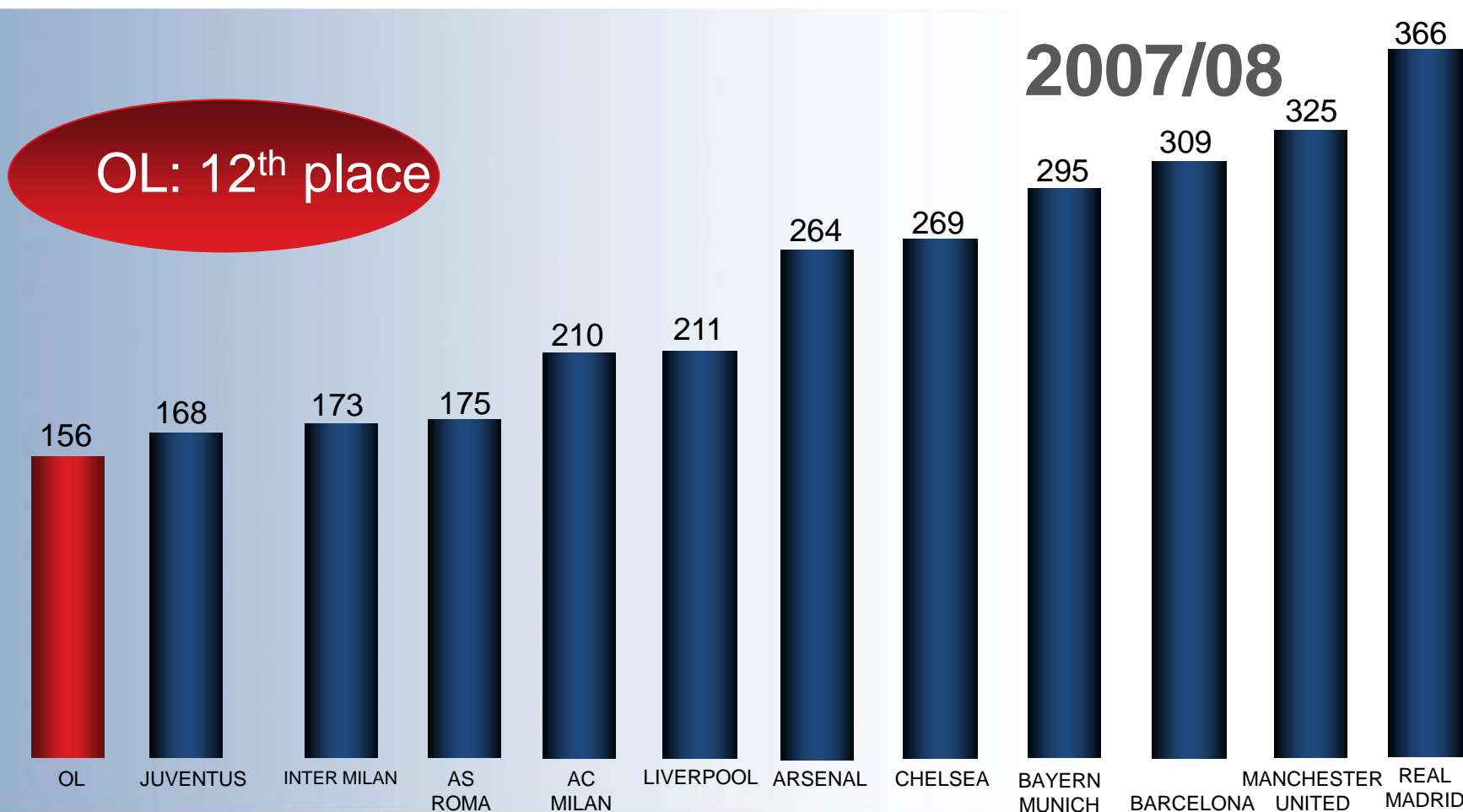
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## Financial results

Ranking of European clubs by revenues  
Revenues excl. player trading

**In €m**

**2007/08**




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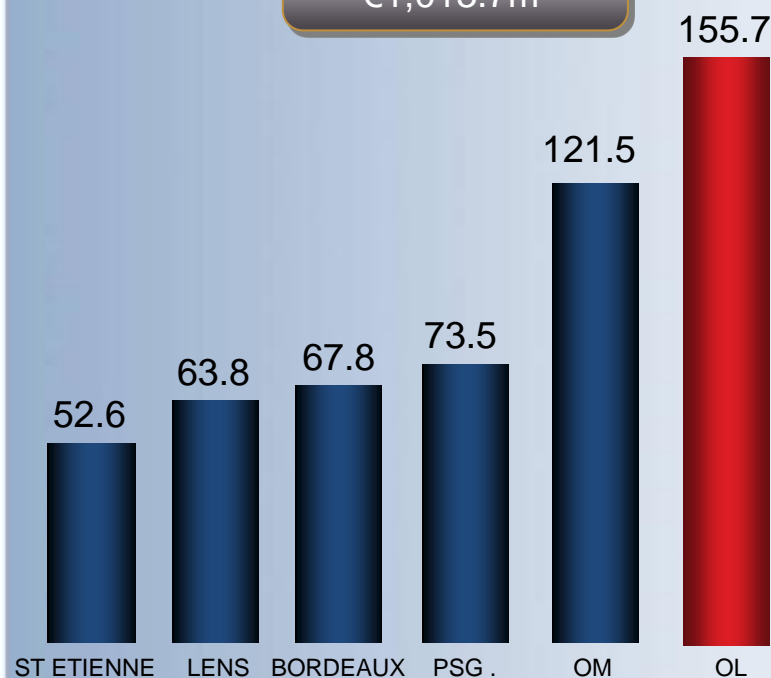
# Financial results

OL's dominant position in French football (2007/08)

**In €m**

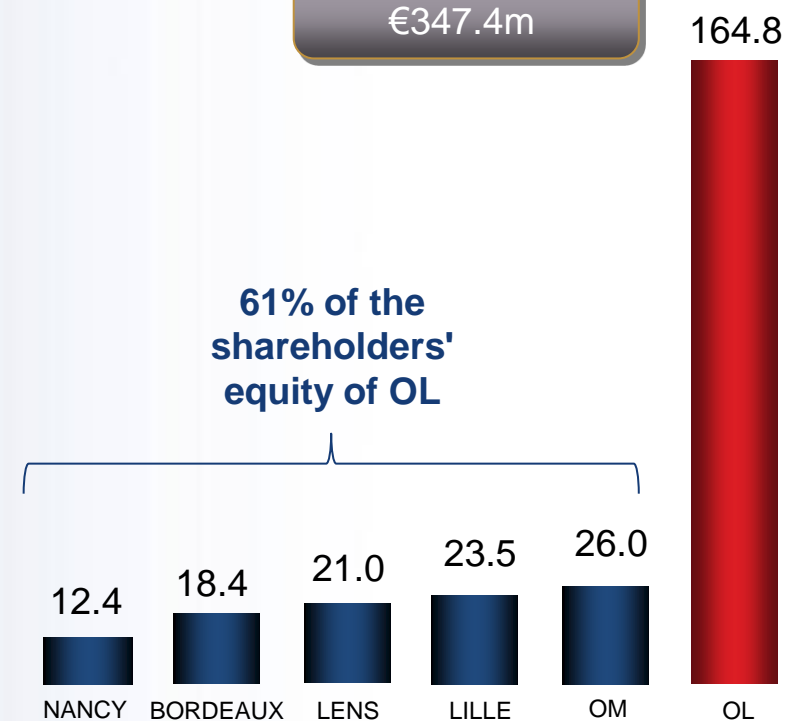
**Revenue from businesses, excl. player trading**

**TOTAL LIGUE 1**  
€1,013.7m



**Equity**

**TOTAL LIGUE 1**  
€347.4m



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## Financial results

OL revenue from businesses over 5 yrs.

**In €m**

	2004/05	2005/06	2006/07	2007/08	2008/09	Total 5 years
Excl. player trading	91.8	127.7	140.6	155.7	139.6	655.4
Player trading	24.8	38.4	73.5	55.9	52.4	245.0
<b>Total</b>	<b>116.6</b>	<b>166.1</b>	<b>214.1</b>	<b>211.6</b>	<b>192.0</b>	<b>900.4</b>

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## Revenue from businesses

**Total revenue  
from businesses 2008/09 - 9.3% / N-1**

**(in € m)**

	30.06.08	30.06.09	% change
1. Ticketing	21.8	22.4	3.0%
2. Partnerships – advert.	20.4	21.3	4.0%
3. Media rights	75.0	68.1	-9.2%
4. Brand-related revenue	38.5	27.8	-27.7%
<b>Total, excl. player trading</b>	<b>155.7</b>	<b>139.6</b>	<b>-10.3%</b>
5. Player trading	55.9	52.4	-6.3%
<b>Grand total</b>	<b>211.6</b>	<b>192.0</b>	<b>-9.3%</b>





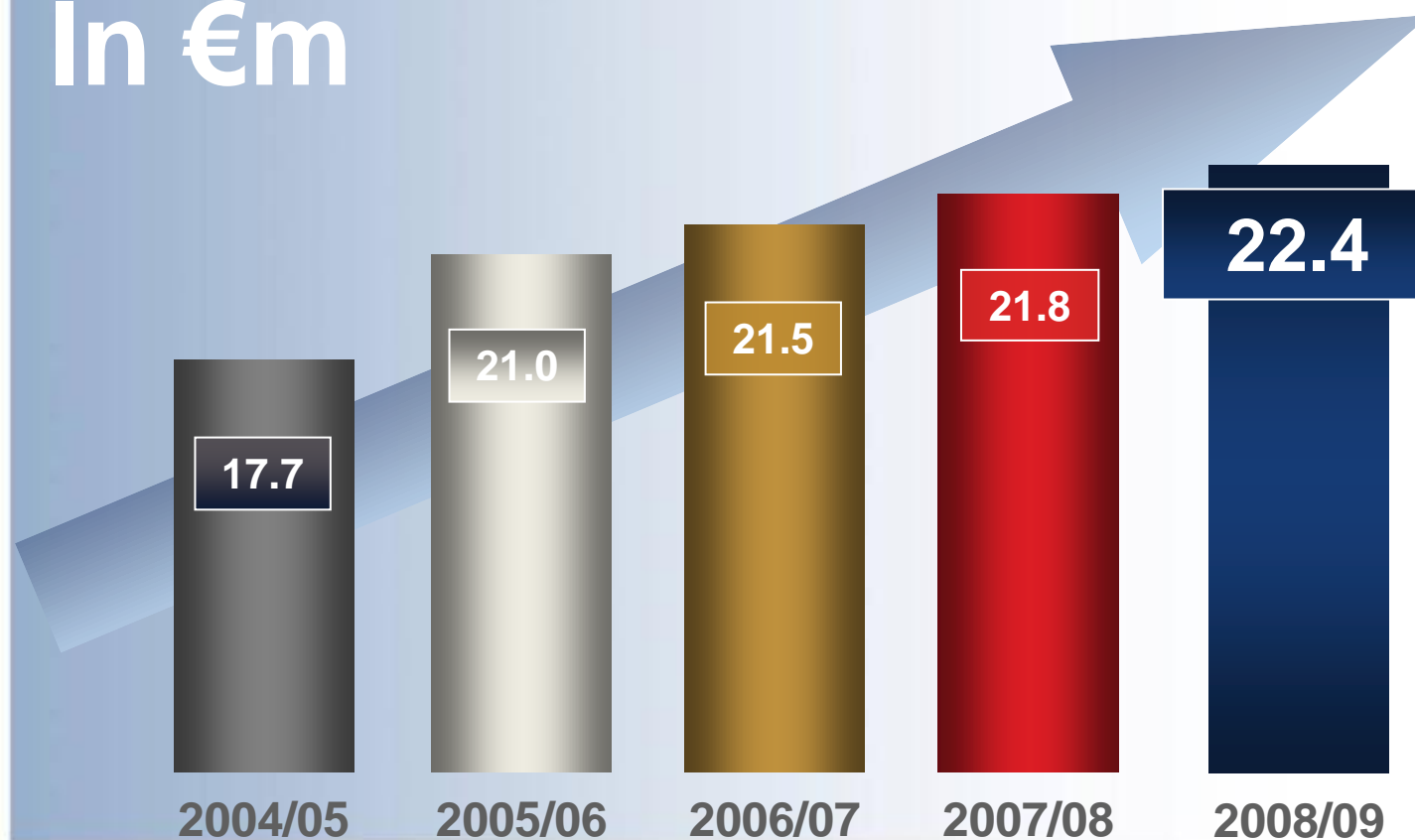
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## Ticketing

Record ticketing  
revenues

€22.4m +3%

In €m





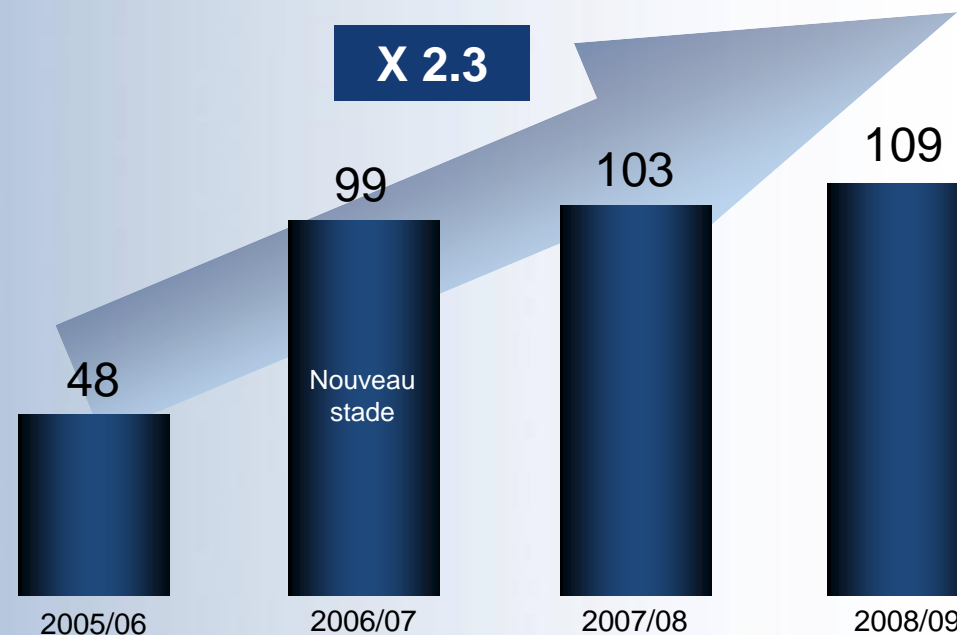
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## Ticketing

Impact of the Emirates Stadium  
on Arsenal's revenues

In €m

Matchday Revenue  
ARSENAL





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## Partnerships and advertising

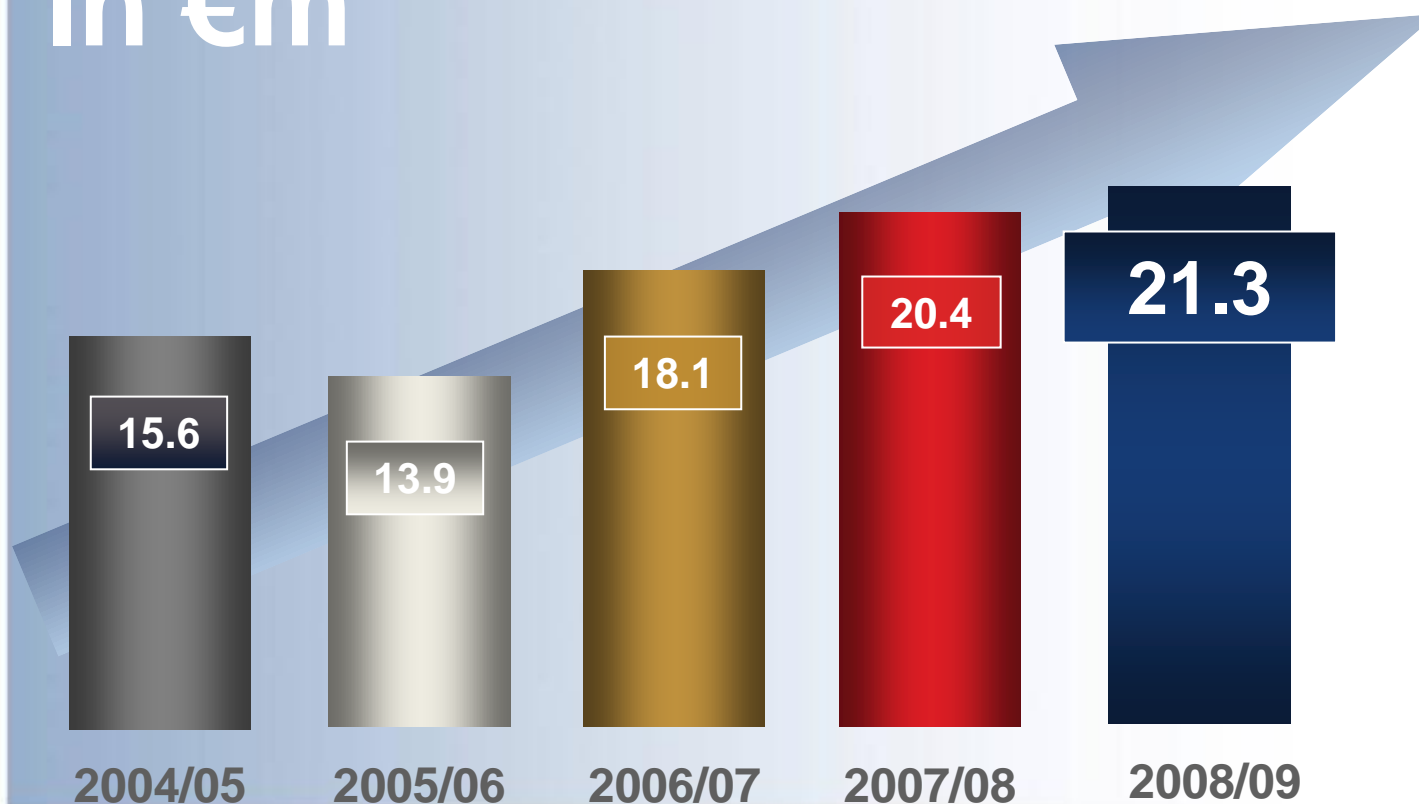
Record partnership and advertising revenue

**Gross revenue: €35.8m**

Sportfive commission: €5.1 m

**Net revenue: €21.3m +4.0%**

**In €m**





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## Partnerships and advertising



New partnership agreements  
OL Visa card with GE Money Bank

End of Accor contract: June 2009

Negotiation of contract with BetClic for  
the four years 2009/13



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## Media rights

Domestic media rights down: 3rd place  
in Ligue 1 vs. 1st place in 2007/08

€44.4m

-6.5%

International media rights down: 3 clubs  
vs. 2 in 2007/08

€23.7m

-13.8%



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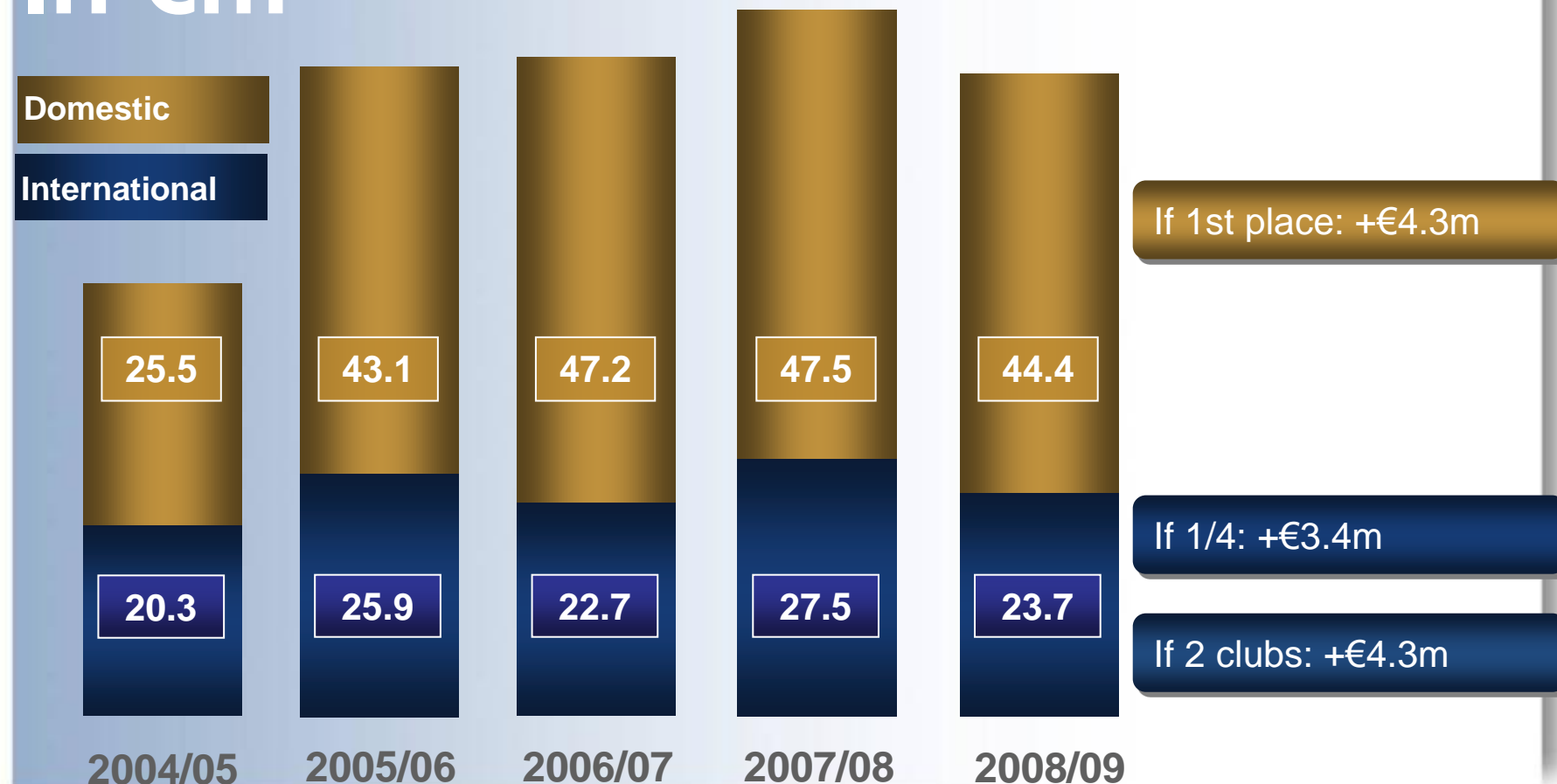
## Media rights

€68.1m -9.2%

In €m

Domestic

International





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## Brand-related revenue

### Breakdown of change vs. N-1

In €m

	30.06.08	30.06.09	% change N-1 € m
<b>Brand-related revenue</b>	<b>38.5</b>	<b>27.8</b>	<b>-10.7</b>

#### Items responsible for the change in 2008/09

#### Impact

1- Non-recurring items	
- Sodexo signing fee	-3.5
- Peace Cup victory	-1.8
- Change in scope	-1.3
	-6.6
2- OL Images	-1.1
3- Other businesses*	-3.0
<b>Total</b>	<b>-10.7</b>

\*Lacklustre B-to-C business

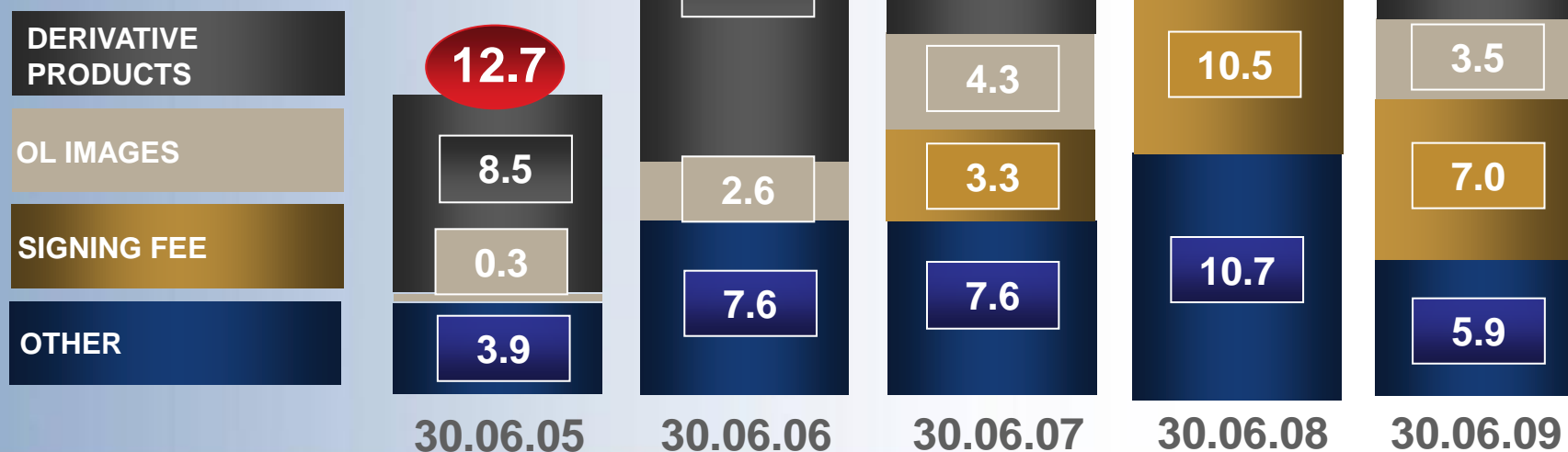


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# Brand-related revenue

€27.8m -27.7%

In €m



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## Player trading

### Revenue from player sales 2008/09

### In €m

Player			Club
Squillaci	 Int.		Seville
Baros	 Int.		Galatasaray
Coupet	 Int.		Atletico Madrid
Paillot			Grenoble
Benzema			Real Madrid

**€52.4m IFRS**

Other departures:  
Fred, Santos, Juninho



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## Player trading

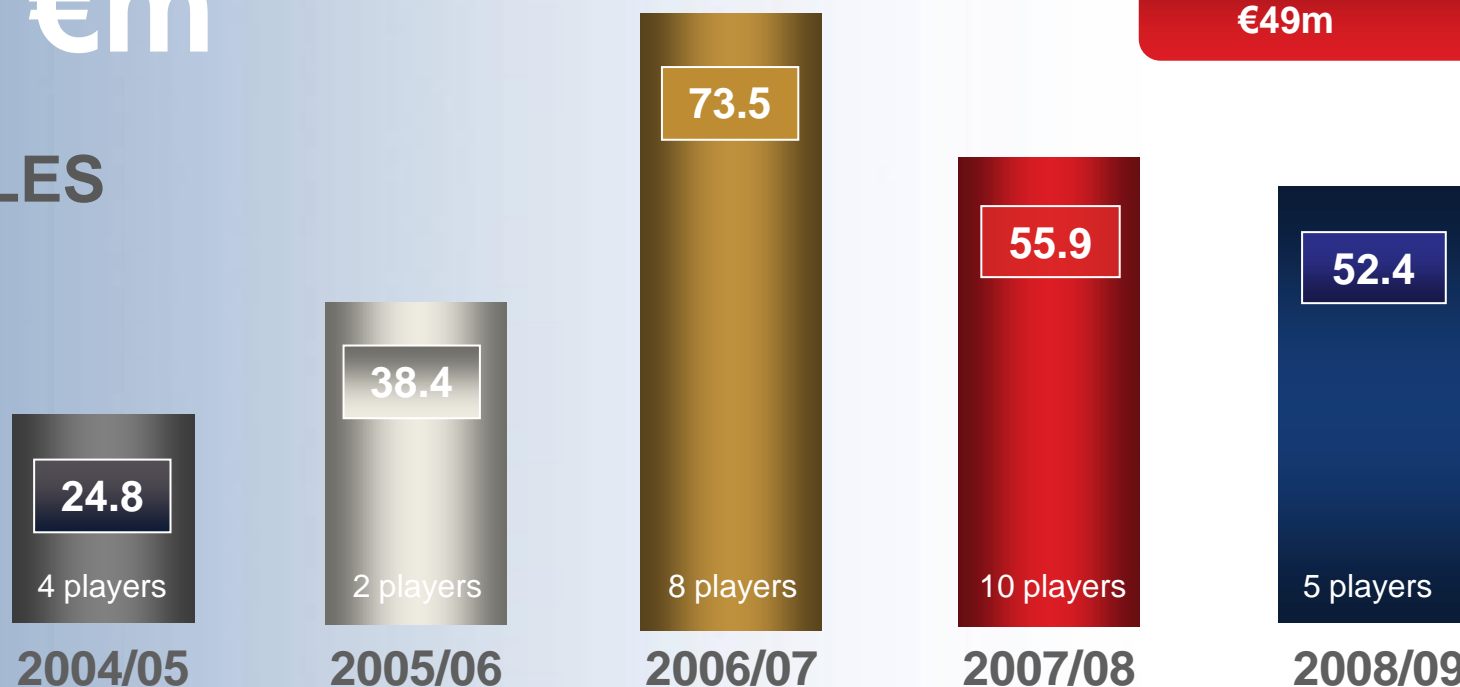
Revenue from player sales

**€52.4m**

Average over 5 years  
€49m

In €m

SALES



**SALES OVER 3 YEARS: 181.8**

**SALES OVER 5 YEARS: 245.1**



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## Player trading

### Top 15 transfers of 2009 summer transfer window

Player	Previos club	New club	Amount in € m
1- RONALDO	MANCHESTER UNITED	REAL MADRID	93.3
2- ZLATAN IBRAHIMOVIC	INTER MILAN	BARCELONE	68.0
3- KAKA	MILAN AC	REAL MADRID	67.2
<b>=4- KARIM BENZEMA</b>	<b>OL</b>	<b>REAL MADRID</b>	<b>35.0</b>
=4- XABI ALONZO	LIVERPOOL	REAL MADRID	35.0
6- MARIO GOMEZ	STUTTGART	BAYERN	33.0
7- CARLOS TEVEZ	MANCHESTER UNITED	MANCHESTER CITY	29.8
8- EMMANUEL ADEBAYOR	ARSENAL	MANCHESTER CITY	29.0
14- LISANDRO LOPEZ	PORTO	OL	24.0

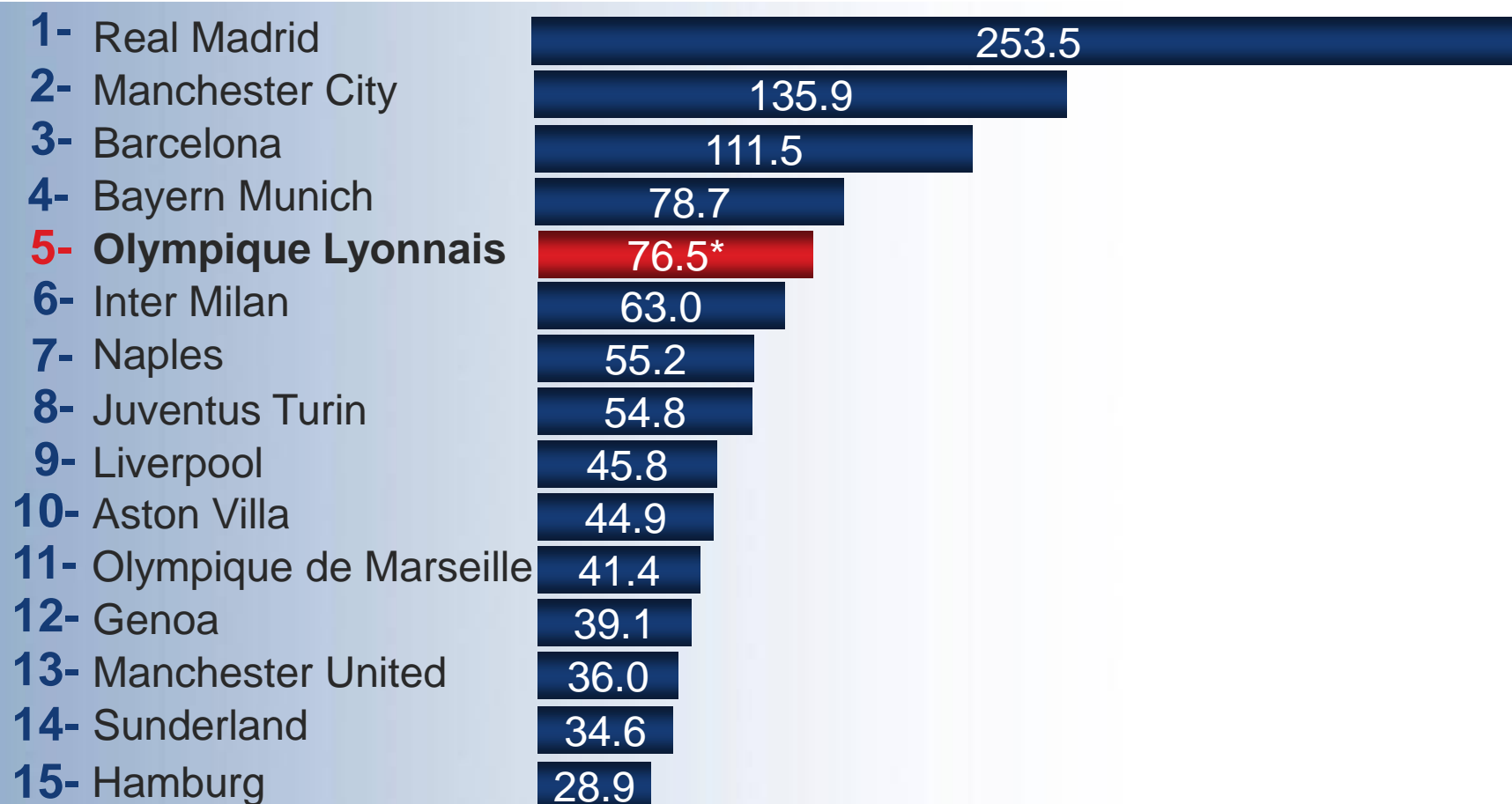


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# Player investment Summer 2009

OL is fifth largest investor in Europe

In €m



\*IFRS restated





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# Player investment

A very active market

2009 TOTAL: €1.9bn - 2008 total: €1.8bn



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## 2008/09 results

	Amount	% of total Revenue
<b>EBITDA</b>	<b>€45.8m</b>	<b>24%</b>
Pre-tax profit	€8.4m	4%
<b>Net profit (Group share)</b>	<b>€5.1m</b>	<b>3%</b>

Business suffered from the recession and its impact on consumption of "leisure" services, but a profitable year nonetheless due in particular to player sales

**OL GROUPE****2008/09 results**

## CONSOLIDATED INCOME STATEMENT

(in € m)

	30.06.08	30.06.09
Revenue from businesses	211.6	192.0
EBITDA	59.8	45.8
<b>Profit from ordinary activities</b>	<b>27.1</b>	<b>7.5</b>
Net financial income / (expense)	<b>3.6</b>	<b>0.6</b>
Pre-tax profit	30.7	8.4
<b>Net profit</b>	<b>20.1</b>	<b>5.4</b>
<b>Net profit (Group share)</b>	<b>19.9</b>	<b>5.1</b>

**OL GROUPE****2008/09 results**

High levels of profit from OL over the last 5 years

**In €m**

	2005	2006	2007	2008	2009	Total 5 years
<b>Revenue from businesses</b>	<b>116.6</b>	<b>166.1</b>	<b>214.1</b>	<b>211.6</b>	<b>192.0</b>	<b>900.4</b>
<b>EBITDA</b>	<b>32.7</b>	<b>51.8</b>	<b>56.0</b>	<b>59.8</b>	<b>45.8</b>	<b>246.1</b>
<b>Profit from ordinary activities</b>	<b>18.7</b>	<b>25.8</b>	<b>28.0</b>	<b>27.1</b>	<b>7.5</b>	<b>107.1</b>
<b>Net profit (Group share)</b>	<b>11.5</b>	<b>15.9</b>	<b>18.5</b>	<b>19.9</b>	<b>5.1</b>	<b>70.9</b>



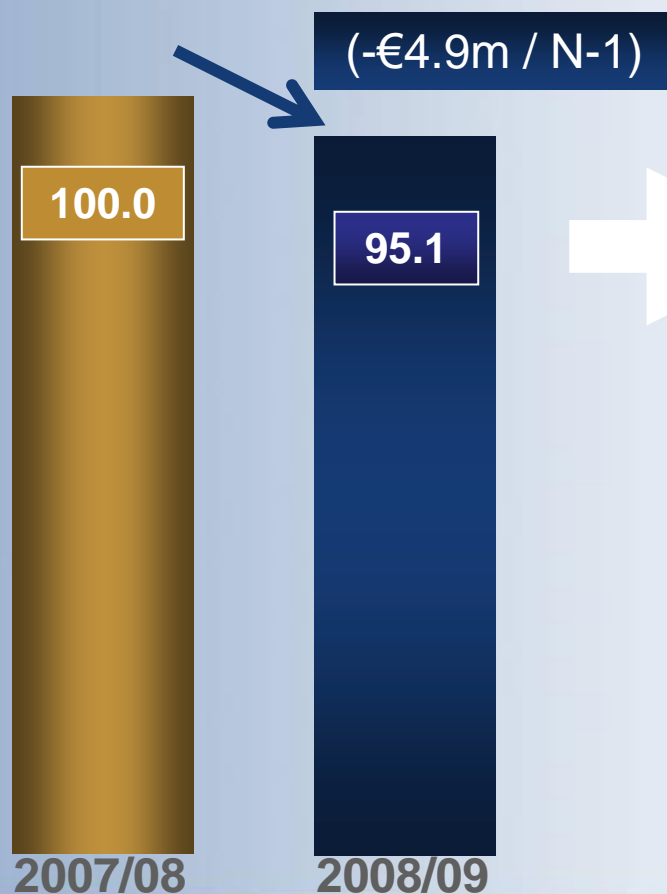
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## 2008/09 results

Personnel costs

In €m

Decline in personnel costs



Decline in total revenue from businesses

⇒ Increase in ratio of  
personnel costs / revenue from businesses

▶ 49.6% vs. 47.3% N-1

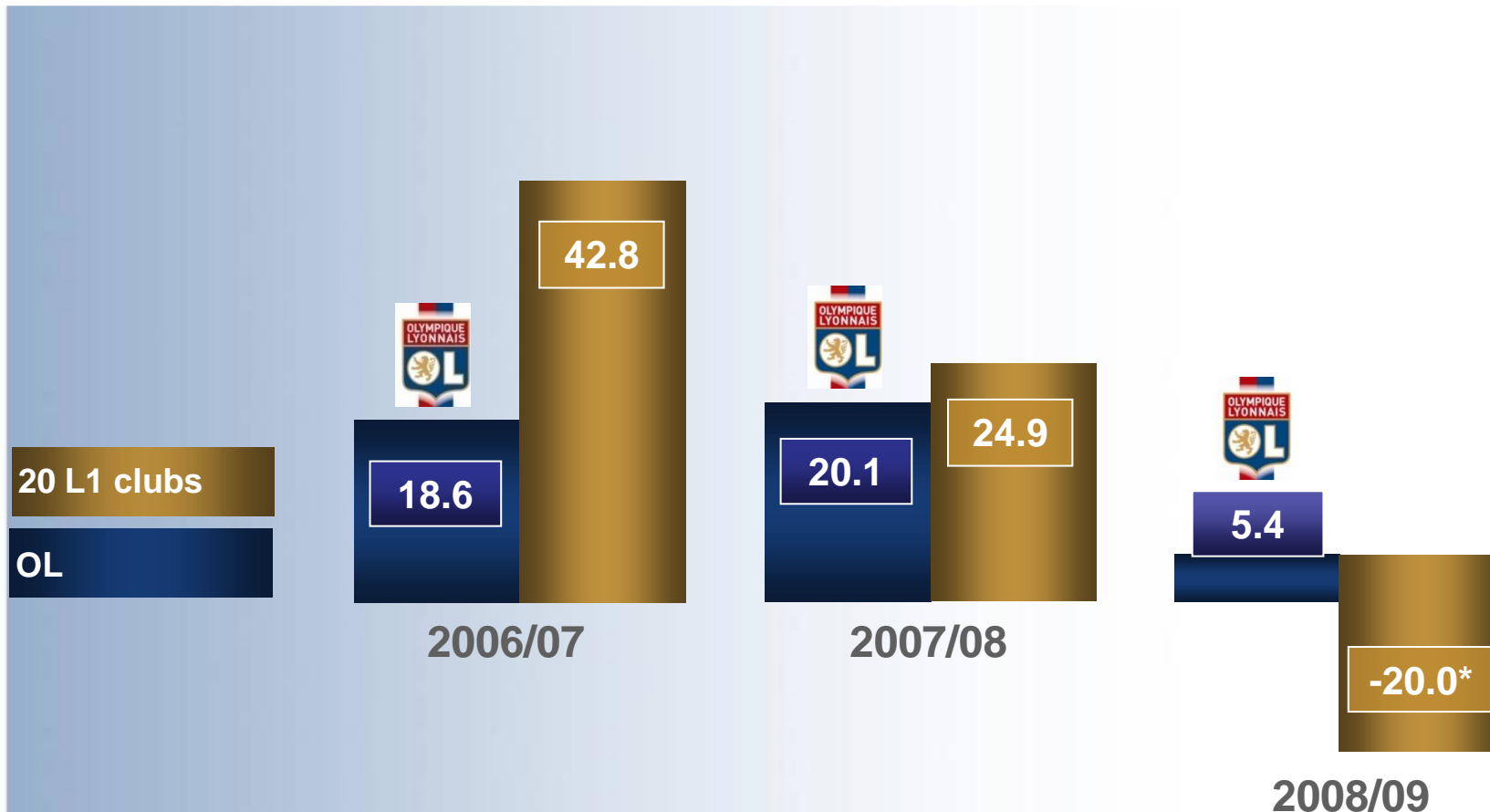


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## 2008/09 results

OL is contributing more and more to Ligue 1 net profit

**In €m**



\*Source: L'équipe, 12 September 2009





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## Balance sheet as of 30 June 2009

Very sound financial structure

Increase in equity

Decrease in intangible assets\*

Decrease in financial debt

Equity generated by  
earnings of the past 5 yrs.: €71m\*\*

\*Summer 2009 transfer window investment: July/August 2009

\*\*before allocation of net profit

**OL GROUPE****Balance sheet as of 30 June 2009**

Very sound financial structure

**In €m**

<b>Assets</b>	30.06.08	30.06.09	<b>Equity &amp; Liabilities</b>	30.06.08	30.06.09
Player registrations	93.9	<b>71.8</b>	Equity (incl. minorities)	164.8	<b>167.8</b>
Other assets	21.8	<b>23.3</b>	Medium-term borrowings	47.5	<b>35.9</b>
Receivables on sale of player registrations	-	<b>26.6</b>	Deferred taxes	1.2	<b>2.3</b>
Operating receivables	39.7	<b>29.4</b>	Short-term borrowings	0.4	<b>4.1</b>
Player registrations held for sale	-	<b>8.4</b>	Payables on purchase of player registrations	12.7	-
Cash and cash equivalents	148.4	<b>102.3</b>	Operating liabilities	77.2	<b>51.7</b>

**OL GROUPE****Balance sheet as of 30 June 2009**

Very sound financial structure

**In €m**

		30.06.08	30.06.09
<b>Equity (incl. minority interests)</b>		164.8	167.8
<b><u>BANK DEBT</u></b>			
Financial debt		-47.9	- 40.0
Cash and cash equivalents		148.4	102.3
<b>Net cash</b>	<b>A</b>	100.5	62.3
<b><u>Player-related debt</u></b>			
Payables on purchase of player registrations		-56.6	- 35.8
Receivables on sale of player registrations		43.9	62.4
<b>Receivables / payables on transfer of player registrations</b>	<b>B</b>	-12.7	26.6
<b>TOTAL A + B</b>		87.8	88.9

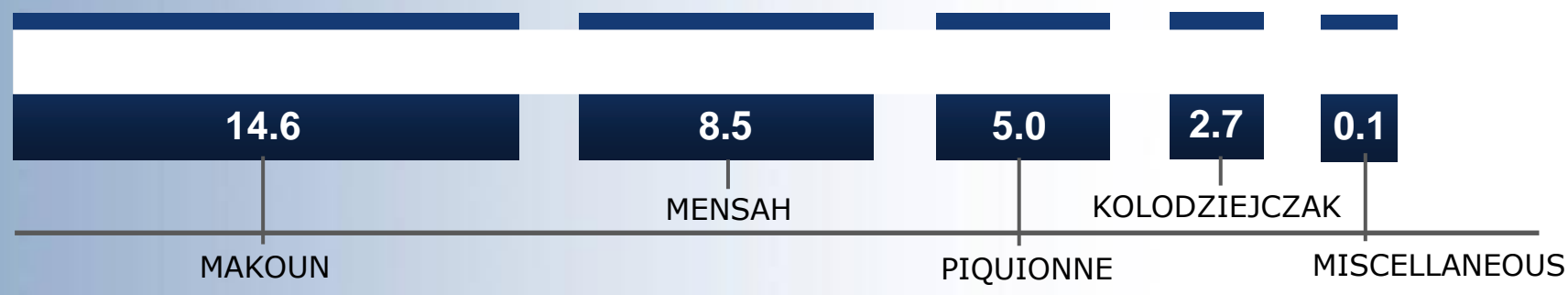


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## Player investments 2008/09

PLAYER INVESTMENTS

€30.9m





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## Player trading

Net revenue from player trading  
as of 30 June 2009

In €m

	1 year	Over 3 years	Over 5 years
Acquisitions of player registrations	30.9	136.0	234.5
Sales of player registrations	52.4	181.8	245.1
<i>of which trained at OL academy</i>	<b>38.1</b>	<b>64.1</b>	<b>69.9</b>
<i>As a % of sales</i>	<b>72.7%</b>	<b>35.3%</b>	<b>28.5%</b>
Net revenue from player trading	21.5	45.8	10.6



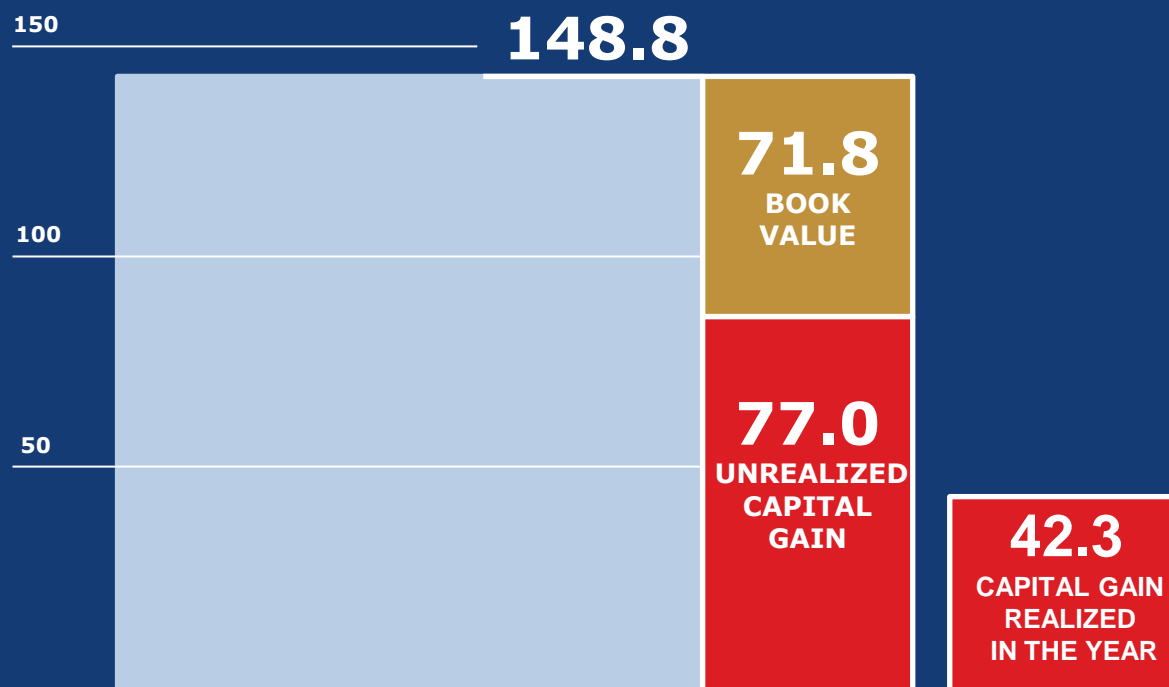
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# Intangible assets

Potential capital gain  
Recurrent nature confirmed

In €m

Market value of team members at 30/06/09

SOURCE : [www.transfermarket.de](http://www.transfermarket.de)

Average gross capital gain over the past 3 yrs.: €44.2m





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New sports organisation with the establishment of a Pro 2 group under the enlarged responsibilities of Claude Puel

- Increase in number of newly-promoted players (9 vs. 6 in N-1)

## Players'training

### Newly-promoted players (Pro 2 group)

Name	Age	National team	Contract ends
ABENZOAR	20	France - U20 	2012
BEYNIE	22	France – U19 	2010
GASSAMA	20	France Espoir 	2011
GONALONS	20	France - U19 	2010
GRENIER	18	France – U18 	2011
HARTOCK	22	France Espoir 	2011
KOLODZIEJCZAK	18	France – U18 	2012
MEHAMHA	19	France – U19 	2011
TAFER	18	France – U18 	2011

Plus 3 who have already played in the 1st team: Belfodil, Faure, Seguin


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# Player investment

Lyon was the largest French investor in the 2009 summer transfer window

Top 5 buying clubs

Of which:  
Gomis St Etienne: €13 m and  
Bastos Lille €18 m

**In €m**

Clubs	2009	%
OL	70.0*	30.4%
MARSEILLE	41.4	18.0%
BORDEAUX	28.0	12.2%
SAINT ETIENNE	15.1	6.6%
RENNES	14.6	6.3%
OTHER CLUBS	60.9	26.5%
<b>TOTAL</b>	<b>230.0</b>	<b>100.0%</b>

\*French GAAP



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## NEWS AND OUTLOOK

Player trading

Players

OL Land

Other projects



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# Acquisition and sale of players since 1 July 2009

**ACQUISITIONS**

**€76.5m**

**JULY/AUGUST 2009**

25.8

20.7

15.8

14.2

LOPEZ

BASTOS

CISSOKHO

GOMIS

**SALES**

**€12.9m**

**JULY/AUGUST 2009**

8.4

2.5

2.0

KEITA

MOUNIER

GROSSO





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# Men's Professional squad

**28** Players  
(30 in N-1)

**9** YOUNG  
INTERNATIONALS  
(6 in N-1)

**19** experienced players  
(24 in N-1)  
INCL. 17 INTERNATIONALS





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# Men's Professional squad

## Experienced players

**19** EXPERIENCED  
PLAYERS  
(24 in N-1)

**14** INTERNATIONAL A

**1** INTERNATIONAL A'

**1** FRANCE ESPOIR

**1** BRAZIL U19

Name	Age	National team	Contract ends
BASTOS	26		2013
BODMER	27	France A'	2011
BOUMSONG	30	France A	2011
CISSOKHO	22		2014
CLEBER ANDERSON	29	Brazil A	2011
CRIS	32	Brazil	2011
CLERC	26	France	2010
DELGADO	28	Argentina A	2011
EDERSON	23	Brazil U19	2012
GOMIS	24	France A	2014
GOVOU	30	France A	2010
KALLSTRÖM	27	Sweden A	2012
LOPEZ	26	Argentina A	2014
LLORIS	23	France A	2013
MAKOUN	26	Cameroon A	2012
PJANIC	19	Bosnia A	2013
REVEILLERE	30	France A	2011
TOULALAN	26	France A	2012
VERCOUTRE	29	France Espoir	2012



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# Men's professional squad

## Players loaned in 2009/10 with buyout option

### 2 PLAYERS LOANED

Name	Age	National team	End of contract	Club	Option
PIQUIONNE	31	France A	2012	 Portsmouth	€5 m
MENSAH	27	Ghana A	2013	 Sunderland	€8 m

## STAFF

Name	Role
CLAUDE PUEL	Manager
PATRICK COLLOT	Assistant manager
JOEL BATS	Goalkeeping coach
SONNY ANDERSON	Forwards coach
BRUNO GENESIO	Young professionals coach
EMMANUEL ORHANT *	Doctor
VINCENT ESPIE *	Fitness and conditioning coach

\* Joined in 2008/09 season





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## Women's team

25 PLAYERS

24  
INTERNATIONALS



## STAFF

Name	Role
FARID BENSTITI	Coach
VINCENT YE	Assistant coach
FREDERIC STRAPPAZON	Assistant coach



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25 PLAYERS

24 INTERNATIONALS

## Women's team

Name	National team	Contract ends
SAIDA AKHERRAZE	France U19	2010
CINDY BERTHET	France U19	2010
SARAH BOUHADDI	France A	2011
SANDRINE BRETIGNY	France A	2011
SHIRLEY CRUZ TRANA	Costa Rica	2011
KENZA DALI	France U19	2010
INES DHAOU	France U19	2010
LARA DICKENMANN	Switzerland A	2011
CORALIE DUCHER	France A	2010
SANDRINE DUSANG	France A	2011
LAURA GEORGES	France A	2011
SIMONE GOMES JATOBA	Brazil A	2010
AMANDINE HENRY	France A	2011
AURELIE KACI	France U19	2010
PAULINE MAGNIN PEYRAUD	France U17	2010
LYDIA MIRAUI		2010
LOUISA NECIB	France A	2012
CHRISTINE NILSEN	Norway A	2010
CORINE FRANCO	France A	2011
VERONIQUE PONS	France A'	2011
WENDIE RENARD	France U20	2011
LOTTA SCHELIN	Sweden A	2010
INGVILD STENSLAND	Norway A	2010
KATIA TEIXEIRA DA SILVA	Brazil	2010
ELODIE THOMIS	France A	2011



## OL GROUPE

# Sporting results to date

### Ligue 1



3<sup>rd</sup> place

### Champions League



3 wins from 3 matches,  
Leader of Group E with 9  
points, ahead of Fiorentina,  
Liverpool and Debrecen

### CFA



1<sup>st</sup> place in Group B

### Women's team League



1<sup>st</sup> place ahead of Paris Saint  
Germain

### Women's Champions League

Qualification for last-16 round  
against Fortuna Hjorring (Danemark)

### U19 team



8<sup>th</sup> place in Group D

### U17 team

3<sup>rd</sup> place in Group C



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## OL Land

A project that is progressing



© Populous. Document de travail





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# OL Land timetable

2009

MARCH

5/3/2009

France candidature  
For 2016

JUNE

24/6/2009

Launch of the benchmark  
project in terms of  
sustainable development

JULY

6/7/2009

Launch of new version  
of land use plan

SEPTEMBER

23/9/2009

Presentation of project to  
Minister of Sport,  
Rama Yade, during her  
visit to Lyon

22/7/2009

Promulgation of the law  
recognizing the public interest  
nature of sporting stadia  
and related infrastructure



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## **OL Land: strengths**

Innovative financing: 100% private



**Greater latitude for the implementation of the project**

**Very limited impact for the taxpayer**





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# OL Land: strengths

## Overview of site







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## OL Land: strengths

Responsible project management: sustainable development and corporate social responsibility

### **Promotion of renewable energy:**

Photovoltaic panels, low energy lightbulbs, heat exchangers, etc.

### **Protecting the environment:**

Storage of rain water, use of non-polluting products, etc.

**Corporate social responsibility:** employment creation, integration into employment, special infrastructure for people with restricted mobility

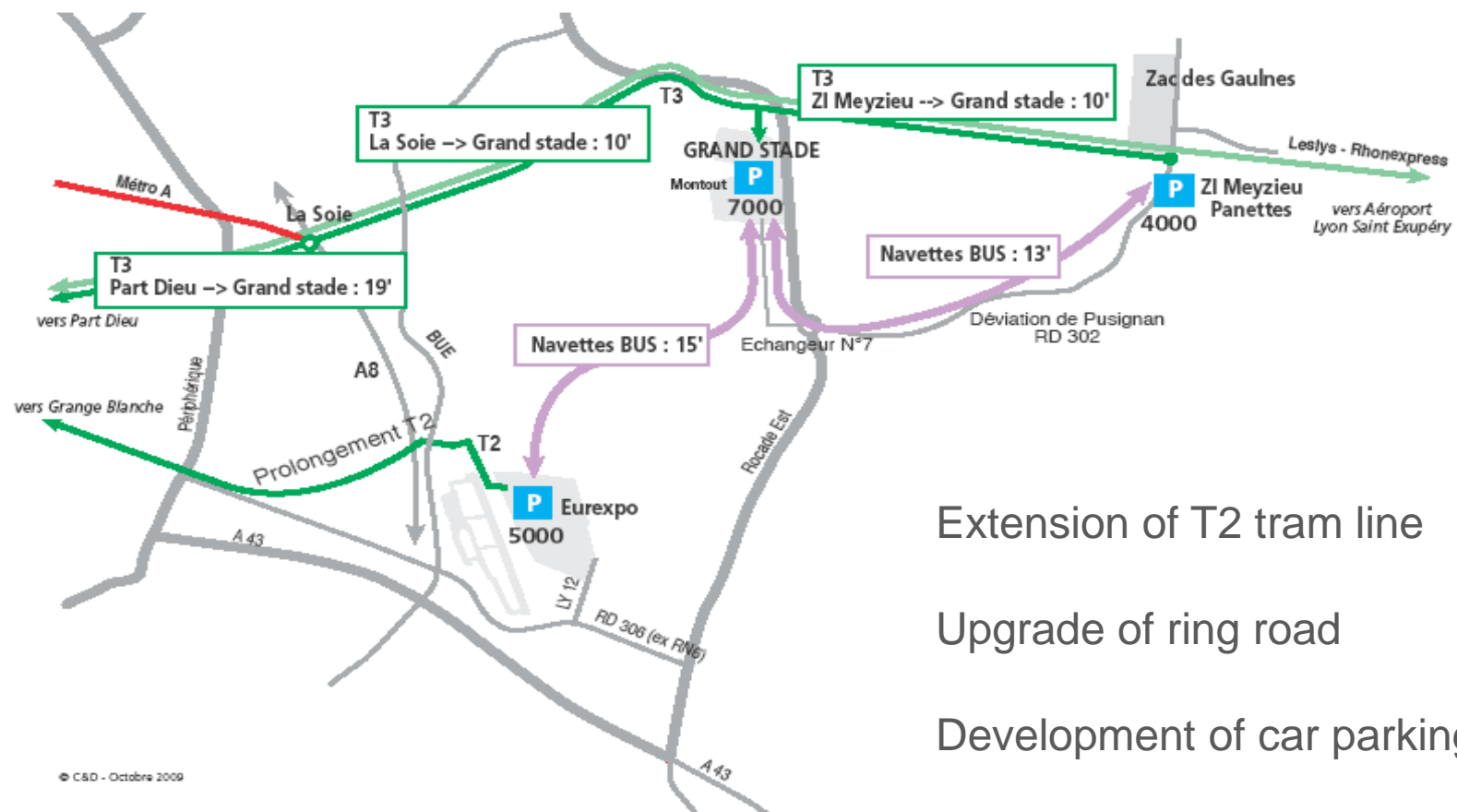
**Introduction of an energy audit** provided for under the multi-year agreement signed on December 12, 2008 with ADEME (French Environment and Energy Management Agency)



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# OL Land: strengths

## Ideal stadium access



Extension of T2 tram line

Upgrade of ring road

Development of car parking



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## **OL Land: strengths**

Project will create employment

**1,500 building jobs during the construction phase**

**1,500 to 2,000 temporary jobs**

**800 full-time positions**



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## **OL Land: strengths**

### **Development of resources**

**Ticketing: increase in ground capacity**

**Sales of corporate boxes**

**Catering : restaurants and snack bars**

**Seminars**

**Sporting and cultural events**

**Merchandising: opening of an OL Store**

**Other sundry income**





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# OL Land



▶ Acquisition of land	During 2010
▶ Lodging of application for planning permission	4 <sup>th</sup> quarter of 2010
▶ Preliminary survey costs	Up until 2011
▶ Construction work	From mid-2011
▶ Possible stadium delivery	2 <sup>nd</sup> half of 2013

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# Capital

## Shareholder breakdown

## As of 30.09.09

	Number of shares	% of share capital	% of voting rights
ICMI	4,524,008	34.17	41.93
PATHÉ	3,016 ,83	22.78	27.95
BOARD MEMBERS (1)	622,084	4.67	4.22
AMIRAL GESTION	1,248,553	9.43	5.81
GL EVENTS	313,652	2.40	1.46
ND INVESTISSEMENT	149,341	1.13	0.69
TREASURY SHARES (2)	307,776	2.32	NA
FREE FLOAT	3,059 ,90	23.10	17.94
<b>TOTAL</b>	<b>13,241,287</b>	<b>100</b>	<b>100</b>

(1) excluding ICMI and GL Events that are shown separately

(2) Treasury shares held as part of a market making agreement and buyback programme



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## Dividend

Dividend to be proposed at the shareholders' general meeting of December 7, 2009:  
Maintenance of dividend paid in N-1.

**€0.14 per share**

Number of shares: 13,241,287

**for a total of €1.8 m**

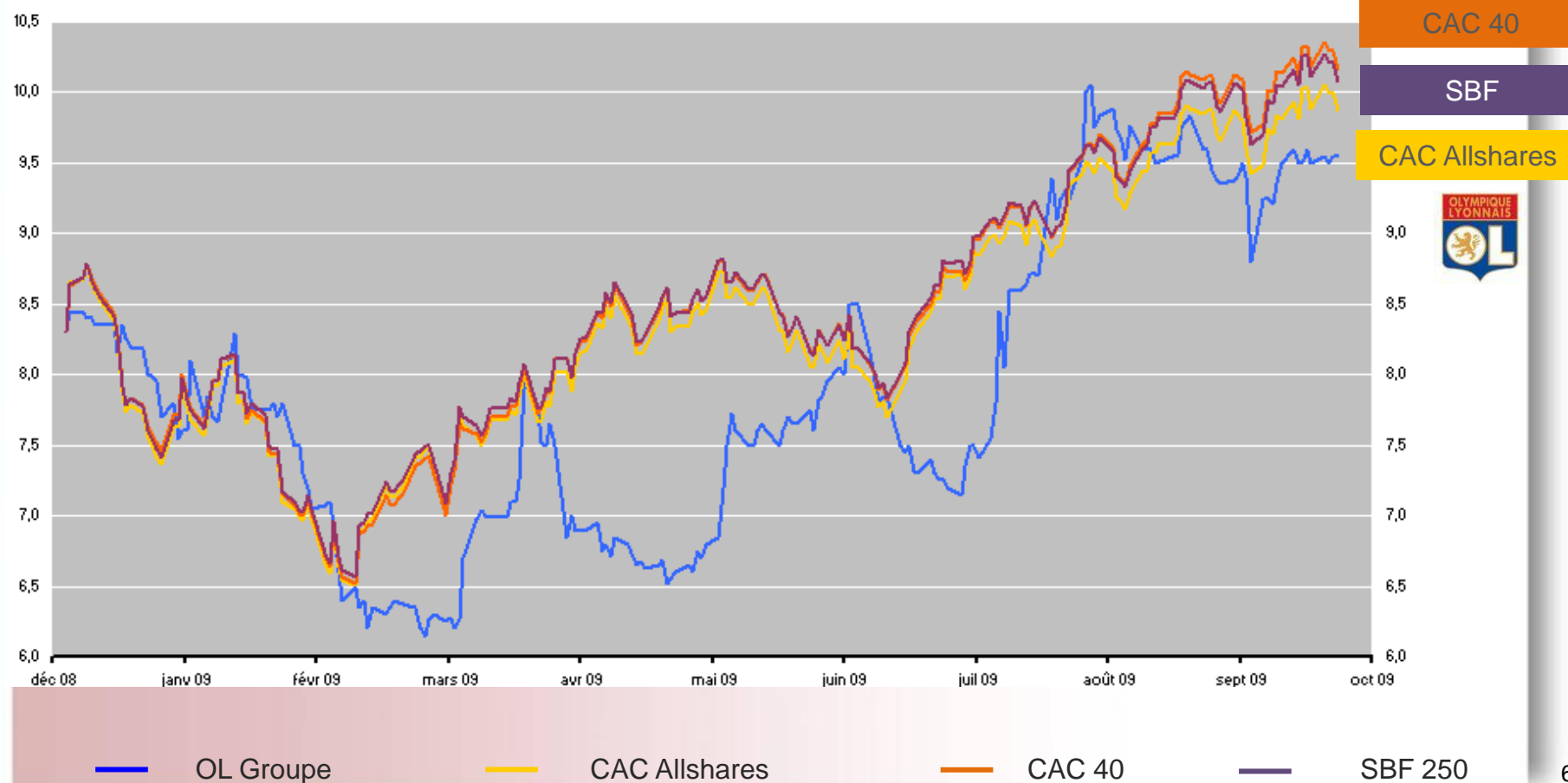




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# Share price

Stock market benchmark indexes  
(Jan 1, 2009 – Oct 16, 2009)

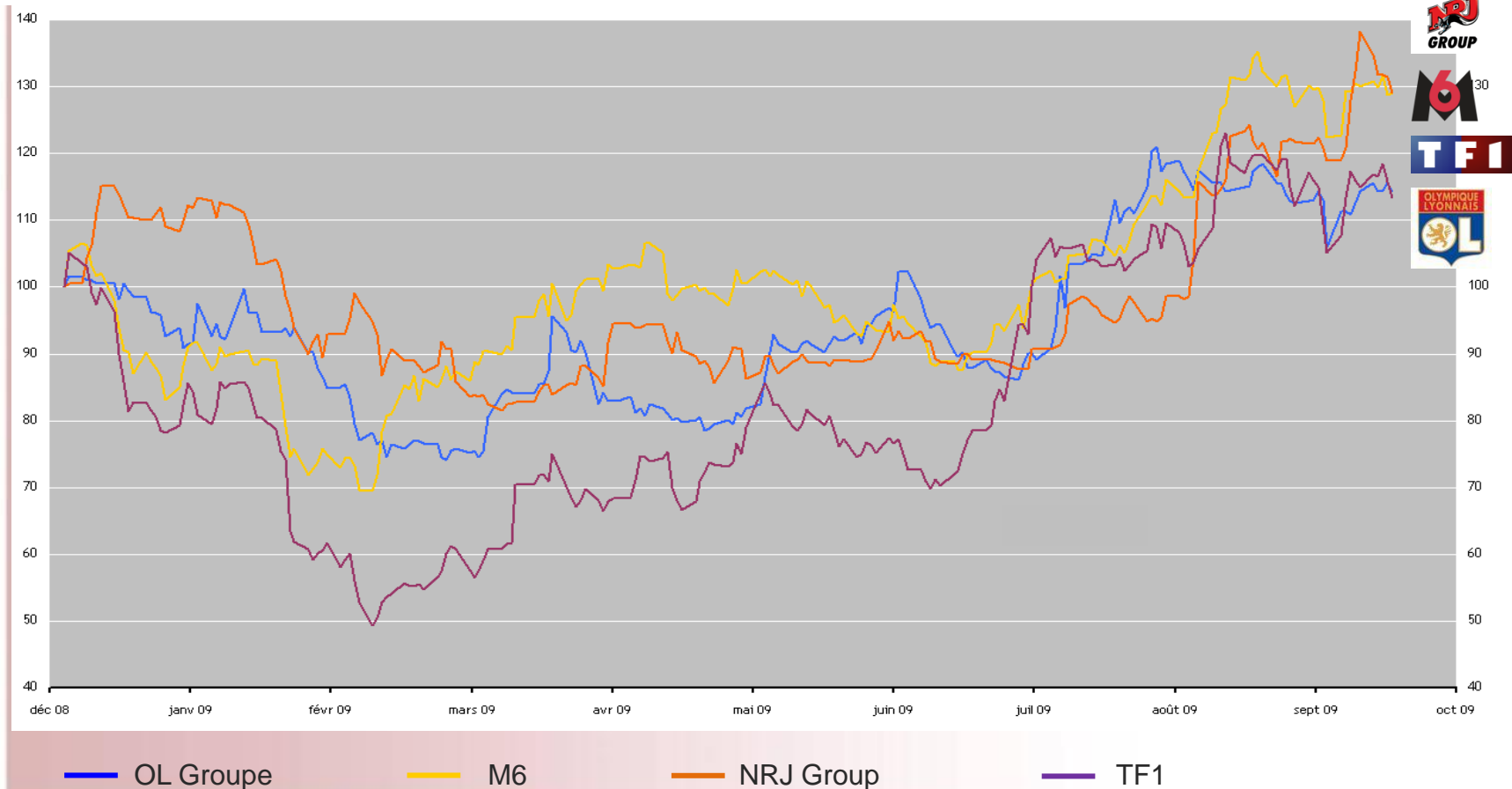




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# Cours de Bourse

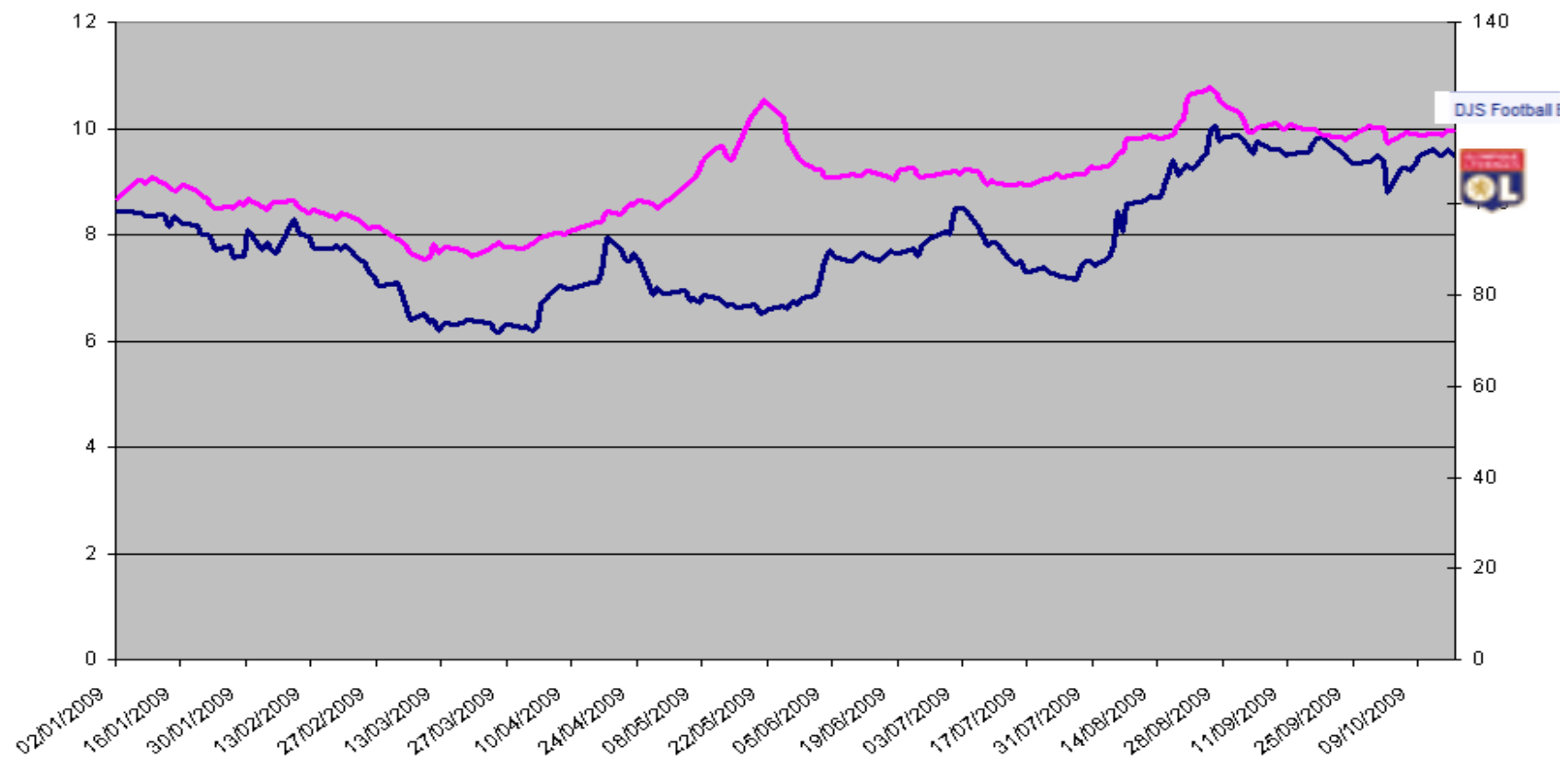
Media sector comparison  
(Jan 1, 2009 – Oct 16, 2009)



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## Share price

Trend of the Dow Jones STOXX® Football index  
(Jan 1, 2009 – Oct 16, 2009)



**OL GROUPE****SBF250****Trends in share prices**

Since January 1, 2009

**OL GROUPE: +14.92%****Largest falls**

VIVENDI	-17.32%
GDF SUEZ	-15.18%
GENERAL ELECTRIC	-14.92%
ZODIAC AEROSPACE	-13.65%
UBISOFT	-12.66%
FRANCE TELECOM	-11.88%
EUROFINS	-11.11%
SECHILLENNE	-9.70%
MAROC TELECOM	-9.16%
NEOPOST	-9.00%
EDF	-5.14%
HARMONY GOLD	-4.68%
NYSE EURONEXT	-4.49%
ACCOR	-3.46%
HERMES INTL	-3.01%

**Largest gains**

NATIXIS	+235.82%
SOITEC	+232.24%
GROUPE STERIA	+166.48%
TRIGANO	+164.95%
RHODIA	+140.83%
KAUFMAN & BROAD	+138.86%
NEXITY	+115.63%
FAURECIA	+113.13%
ARKEMA	+109.49%
TECHNIP	+106.53%
SEQUANA	+104.46%
HAVAS	+98.15%
ALCATEL-LUCENT	+89.73%
PEUGEOT	+88.86%
REXEL	+88.48%



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## 2009/10 outlook

### New partnerships

BetClic

Major shirt sponsor for Europe  
and domestic championship

Signature of a 4-year contract with BetClic

- ▶ Introduction of the law passed by the French *Senat*, already adopted by the *Assemblée Nationale* on October 7-8, 2009, on the regulation of online betting

MDA

Sponsors of the shirt back  
Championship

LG



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## Medium term outlook

### New partnerships



OL joins the adidas TOP 6 major club group  
Signature of an agreement

Adidas world leader: exclusive supplier of sports equipment to OL  
beginning from the 2010/11 season for a period of 10 years

**Total estimated amount: €80 m to €100 m  
depending on football results on the pitch**

Strength of distribution channels in France and internationally

⇒ **expected growth in merchandising in the medium term**





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## Medium term outlook

Overall trend in UEFA media rights

New 3-year contract for 2009/12

Ends  
June 30, 2012

**Up 34% to  
€1.1 bn a  
season**

Confirmation of the increase in media rights  
in Italy: €500 m → €800 m per season





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## Conclusion

An exemplary sporting model that aims to serve the identity of French football



Youth team

**Continuous striving for sporting and financial performance**

**Commitment to the training of youth players:**

- ▶ partnerships with regional and amateur football clubs
- ▶ opening of a Training Centre, unique in Europe

**Ethics and solidarity through the OL Fondation:**

- ▶ insertion through sport (Tunisia), educational projects (Brazil), assistance to the sick or those in hospital (Sport dans la Ville, Docteur Clown, Asup Brazil, Handicap International, etc.)

**Three core values shared and lived daily by all our employees**



**OL GROUPE**

