Source: *The Straits Times,* pB2
Date: 8 April 2026

EPL app trial signals final whistle for telco middleman model. A plus or minus for football fans?

Exclusive sports rights gave telcos a strong advantage. That game is changing.

Tiffany Tsai

While direct subscriptions may lower costs and offer consumers more choice and control over what they pay for, it may also make the viewing experience more time-consuming to manage as consumers will have to navigate multiple platforms, payments and subscription periods, says the writer. PHOTO: REUTERS

For years, if you wanted to watch English Premier League (EPL) football in Singapore, you had to pay a telco – either Starhub or Singtel – for a package which included many channels, a broadband plan and a set-top box.

Telcos eventually loosened their grip, introducing cross-carriage arrangements and allowing fans to subscribe to just EPL content. That itself was a sign that Premier League football was a very significant part of the business.

But even that arrangement may now be coming undone. EPL's direct-to-consumer app trial in Singapore, which was announced on Feb 26 by its chief executive Richard Masters, is a telling sign that the telco's middleman model – built on exclusive sports rights and the captive audiences they created – is beginning to unravel.

Mr Masters said the plan is to launch a service in "partnership" with StarHub, the EPL rights holder in Singapore for six seasons, from 2022-2023 to 2027-2028.

"So from next season onwards, Premier League Plus – rather than Premflix – finally, it's going to happen," he was quoted as saying about the new streaming app which will be rolled out starting from August 2026.

The longer-term implications of this move could extend beyond sports broadcasting, affecting how telcos retain customers, how consumers access content, and who controls the relationship between content providers and audiences.

THE VANISHING MIDDLEMAN

In recent years, streaming has transformed most other forms of content. Movies and television dramas migrated to platforms such as Netflix and Disney+, while news consumption shifted online.

Sports broadcasting, however, has long been built around a middleman model and has remained strategically important to telcos. Telecommunications companies and pay-TV operators acquired exclusive rights to major leagues and bundled them into subscription packages alongside other television services.

These exclusive sports rights gave telecom firms the power to retain customers and justify higher subscription fees. Premium sports content was not just another part of the bundle.

In many cases, it was the main reason customers stayed even after dramas and news had already migrated online. Even rival telco Singtel has to offer EPL content held exclusively by StarHub through cross-carriage arrangements to meet consumer demand.

EPL access costs around $40 per month as a standalone service, but can exceed $60 under cross-carriage or bundled packages, suggesting that it commands significant value relative to a full bundle. Despite the introduction of more flexible standalone offers, premium football has continued to play this role, helping telecom firms retain customers and sustain the wider bundle of channels and broadband services around it.

This was not only because matches are consumed in real time and rights are exclusive, but also because sports fans tend to be relatively insensitive to price increases due to their loyalty.

That made sports rights a critical lever that telcos had over their customers. The question now is what happens when that lever is pulled away.

Technological change may be accelerating the shift from telecom-led distribution towards direct-to-consumer models.

The spread of high-speed mobile networks means that media consumption no longer depends on a traditional home television set-up in the same way as before. As mobile data becomes more affordable and faster with the rollout of 5G, the infrastructure that once supported telecom distribution is becoming less essential.

Consumers are increasingly able to access content directly on their smartphones or tablets rather than through bundled home television and broadband services that previously tied viewing to telecom providers.

This has created stronger incentives for sports leagues to develop direct-to-consumer models and deliver games, highlights and related content through their own digital platforms rather than relying entirely on telecom partners.

The EPL trial is just one sign of that shift. The broader trend is visible elsewhere as well: the NBA, for example, has long offered its League Pass streaming service directly to consumers.

Direct-to-consumer sports distribution could have important implications for consumers, telcos and market structure.

THE CONSUMER IMPACT

For consumers, the potential move towards direct subscriptions brings both benefits and trade-offs. It may offer more choice, but it may also make viewing more fragmented. Instead of getting content through a single provider, consumers may have to manage multiple platforms, payments and subscription periods.

A football fan, for example, may need one service for the EPL, another for European competitions, and perhaps others for different sports. This gives consumers more control over what they pay for, but it also makes the viewing experience less simple and more time-consuming to manage.

Direct subscriptions may also lower costs for some viewers, especially those interested in only one or a small number of competitions, since they no longer have to pay for a broader bundle of channels and services they do not watch. Removing telecom intermediaries may also reduce some of the markups previously charged by distributors.

The cost of these rights has increased over time, partly due to competitive bidding among telecom operators, while strong demand has enabled leagues to command higher prices. The old bundle also served an important economic function by spreading the high cost of sports rights across a wider base of subscribers. Casual viewers, who had a lower willingness to pay, and heavy sports fans, who had a higher willingness to pay, often paid the same subscription price.

In this way, broadcasters and telecom companies were able to spread the cost of sports rights across a broad audience. In a more fragmented environment, this cross-subsidy may disappear.

As sports content spreads across multiple apps and platforms, fans who follow several leagues or sports may need to maintain multiple subscriptions and could end up paying more overall than they did under traditional bundles. Moreover, leagues that control exclusive rights may retain strong pricing power.

To sustain their relevance in the media market, telcos will need to rebuild their role in retaining consumers. They may need to integrate their ecosystems more closely, for example by linking network billing, customer service and data plans with their content services, so that consumers continue to rely on their interface even when sports rights are no longer exclusive, and therefore continue subscribing to their services.

But sports fans can be relatively price inelastic. The EPL, for example, commands one of the largest global sports audiences. If fans view the competition as essential, the league may still be able to charge premium prices even without a telecom intermediary.

Removing intermediaries therefore does not guarantee cheaper access. If the costs created by fragmentation become larger than the savings from disintermediation, lower-income fans who previously relied on bundled offerings to access a range of sports content may be priced out.

THE TELCO IMPACT

For telecom companies, the implications may be even more structural. If consumers are increasingly able to subscribe directly to major sports leagues, premium sports may no longer allow telecom firms to anchor broader television and broadband bundles, retain customers and remain gatekeepers between leagues and consumers.

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They may need to integrate their ecosystems more closely, for example by linking network billing, customer service and data plans with their content services, so that consumers continue to rely on their interface even when sports rights are no longer exclusive, and therefore continue subscribing to their services.

They may also need greater scale through alliances with other telcos or streaming platforms to secure exclusive sports rights together. More broadly, they may need to shift from relying on content exclusivity alone to competing on convenience, integration and customer relationships.

Without new forms of differentiation, telcos risk being reduced to providers of connectivity infrastructure, simply delivering the networks that allow others to distribute content and own the customer relationship.

A further implication is that intermediation may not disappear, but instead shift from telecom operators to large digital platforms.

Netflix, for example, is already experimenting with live sports. Given their strength in other forms of media content, access to user data and established digital ecosystems, large technology companies may emerge as the new gatekeepers, particularly if consumers prefer a more integrated and less fragmented viewing experience.

In that case, we may not see the disappearance of the middleman, but its replacement. The bundling function that telcos once defended through premium sport may increasingly be captured by large digital platforms.

The EPL's Singapore trial therefore matters far beyond a single market.

It could mark the beginning of a structural transformation in sports broadcasting, shifting the industry away from telecom-led bundles towards more direct relationships between leagues and their audiences.

The broader issue is not only whether telcos lose part of their role, but whether the middleman model that has long shaped sports broadcasting is beginning to unravel. If it does, the consumer experience may become more fragmented, while large technology companies may eventually take the telcos' place.

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