

# Sports Infrastructure in India





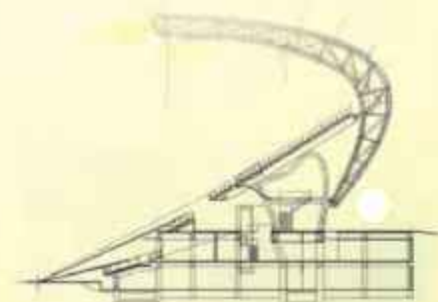
### Message from IISM Director

The Sports Industry in India is growing heaps and bounds! India is no more a single-sporting nation and has opened doors for other sports to flourish. With the success of leagues like the Indian Premier League, Indian Soccer League, Hockey India League and athletes performing well at national and international level, people in tremendous number are taking keen interest in playing sports. Talents from all walks of life are coming forward and are playing sports really well. With requisite infrastructure, we can boost the sector and ensure victories in tournaments by providing right training to sportspersons.

The International Institute of Sports Management is the pioneer of sports management education in India. We train students to be the future sports management professionals who would largely contribute to the sports arena. IISM presently offers Bachelors and Masters programs in collaboration with Garware Institute of Career Education and Development and the University of Mumbai, as well as an autonomous Post Graduate Program in Sports and Wellness Management. We encourage our students to experience live-exposure and indulge in research activities to contribute to the sports industry.

We believe in constantly adapting to the industry's needs. The environment at IISM instils the spirit of initiative, ingenuity and courage in each student along with imparting classroom education and field experience side by side. Our endeavour is to become a 'movement' that creates professionals who have the ability and agility to create landmarks and set benchmarks in the sports sector and the business that surrounds it. Our endeavour to empower young professionals to pursue their dream careers amplifies & encourages us to keep moving upward & onward.

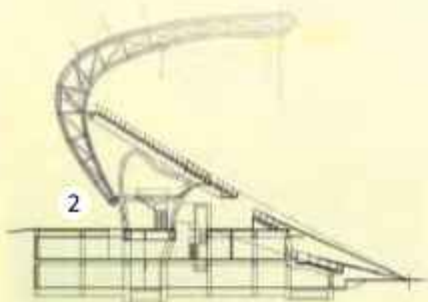
**Mr. Nilesh Kulkarni**



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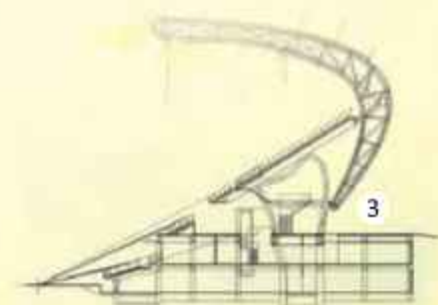
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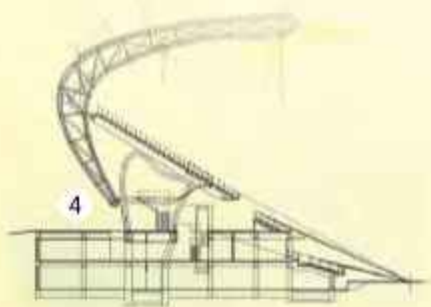
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## Introduction to Sports Infrastructure

Sport is an activity which involves physical exertion and skill along with mental fitness and ability in which an individual or team competes against another team or individual for entertainment and pride. Infrastructure is the basic physical and organizational structure or facility prepared for the operation of an activity. An Infrastructure comprises of water and energy supply systems, transport, communications, security and other systems which provide goods and services for the operations and maintenance.

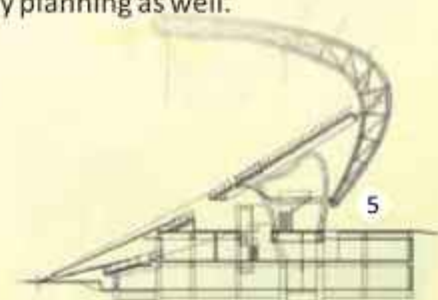
Every sport needs an infrastructure for it to be played, infrastructure associated with sports include training facilities like gyms, practice grounds and rehabilitation centres that enhance participation and learning in sports. It even includes facilities where a competitive sporting match takes place such as stadiums or arenas where tournaments are held and players compete against each other.

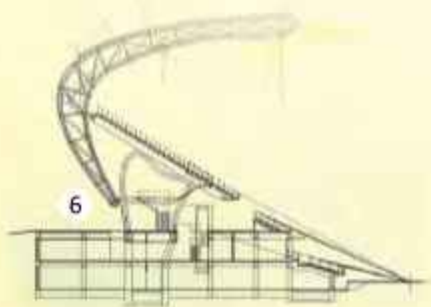
Sports infrastructure assists in the development of world-class athletes and also provides an aid to the youth of the nation to actively take up sports and build a sports culture. It also leads to better participation of fans and spectators who can now have a better experience at stadiums and enjoy the sporting occasion more. Sports infrastructure is closely related to various other sectors like tourism, real estate, and health education. The sports sector in general impacts the global economy significantly and sport is globally known as a catalyst for economic development and a separate sector to be administered in numerous economies.

Sports infrastructure has been defined as “the primary physical and organizational construction needed to facilitate sport participation. From a functional point of view, sports infrastructure enables community members to participate in sports”. Sports infrastructure includes facilities, systems, goods, and services that enable sports and is vital for any country to compete in the international sporting arena.

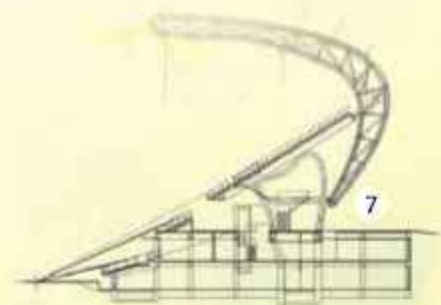
The challenge is to create various facilities that are optimal for their respective sports, yet affordable and sustainable facilities for athletes of all levels to train and compete in. At the same time there lies a challenge to offer the spectators the ultimate viewing experience, which can be brought about by creating the best and most comfortable facilities for mega-events.

The constructors focus on creating a sustainable sports infrastructure, and optimal conditions for physical activity in terms of humidity, temperature or dust. Sport is increasingly seen as a central strategy for cities to promote their image and global position, undertake regeneration and tackle problems of social exclusion. Governments increasingly use sports events to influence city development in a more comprehensive way, combining economic, social, environmental and other concerns. Cities are challenged by a gigantic and complex task after the events such as how to deal with the post-use of large event venues and facilities and how to sustain event legacy to facilitate urban development. Construction of sports facilities can stimulate economic development no matter how small the facility is and hence plays an important role in city planning as well.





# Sports Infrastructure Industry in India





## Sports Infrastructure Industry in India

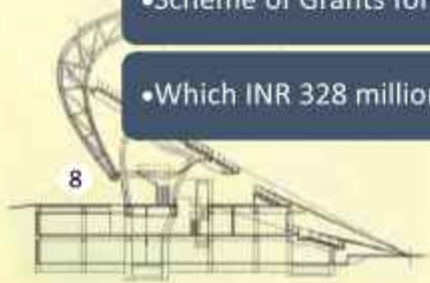
In recent years, it has been acknowledged that the construction and refurbishment of sports infrastructure can stimulate economic development, whether it involves large facilities or small. Currently, India houses approximately 100 sports facilities fulfilling international standards of sports infrastructure. In addition, there are government-owned college and university grounds, community centres, sporting facilities and grounds owned by urban local bodies, grounds owned by Resident Welfare Associations, and facilities owned by private entities. These facilities are largely neglected and ignored in terms of utilization and maintenance. Also, a majority of the Indian sports infrastructure facilities are mainly used for hosting international, national, state-, and district-level games. Recently, increased capital investments and successful large-scale hosting of events have boosted the development of sports infrastructure in India, also opening up various commercial opportunities in the industry. However, regulation of the Indian sports industry regulation is still highly



The Ministry of Youth and Sports (MYAS) has been established by the Government of India to create infrastructure, achieve excellence in national and international sporting events, and build capacity for broad-based sports. In addition, the Sports Authority of India (SAI) has been set up by the ministry as an apex body. It develops and looks after stadiums and fields on behalf of the ministry.

Some of the major initiatives taken for the development of sports infrastructure in India are mentioned below:

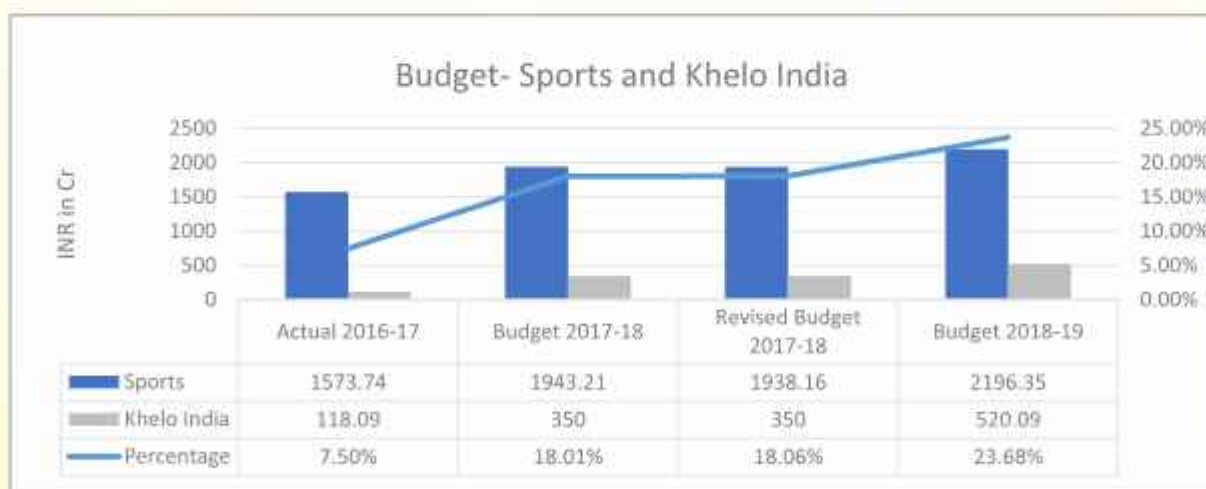
- Scheme of Grants for Creation of Sports Infrastructure including Rural Schools, for which INR 942.5 million was allocated
- Scheme of Grants for Installing of Synthetic Playing Surfaces, for which INR 201.3 million was allocated
- Scheme of Grants for Promotion of Games and Sports in Universities and Colleges, for
- Which INR 328 million was allocated



However, these initiatives are not sufficient for creating sporting opportunities by building sports infrastructure. According to the Constitution of India, sport is a State subject. The state governments allocate funds for the development of sports and sports infrastructure as per their priority. There is no comprehensive approach to the development of sports infrastructure uniformly throughout the country. The support from the central government was substantially withdrawn with the shift of the schemes, related to sports infrastructure, to the states in the Tenth Five Year Plan. This has created a further problem. The non-availability of land for building sports infrastructure is another major obstacle. Moreover, not much initiative has been observed until now in promoting sports-specific infrastructure by adopting a PPP model to ensure the sustainability of these facilities. The commercial aspects for generating revenue from these infrastructural facilities have not yet been explored properly.

The Central Government through its Khelo India initiative has allowed grants for certain infrastructure projects and sports facilities creation at the state/union territories/district/sub-district level. State Governments and other local authorities may seek the benefit of these grants. This year the Central Government has allocated INR 520 crores to promote the Khelo India Scheme in the Union Budget of 2018. However, the utilization of the sum for the development of sports infrastructure will be limited to the strict guidelines under the scheme.

	Actual 2016-17	Budget 2017-18	Revised Budget 2017-18	Budget 2018-19
Sports	1573.74	1943.21	1938.16	2196.35
Khelo India	118.09	350	350	520.09
Percentage	8%	18%	18%	24%



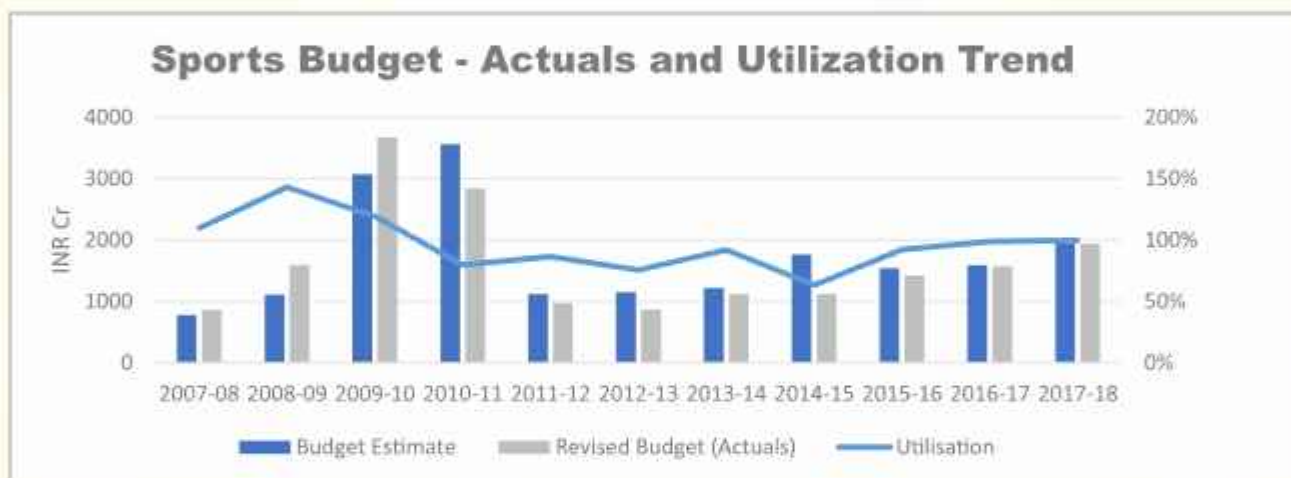
In the last three years, the overall budget for sports has steadily but significantly increased, from 1573 Cr to 1938 Cr to 2196 Cr.

Khelo India has got the lion's share. Its share has gone up from 7% to 23.68%. This is a positive sign for the Indian Sports Industry.



**Sports budget estimate, revised budget and Utilisation of last few years.**

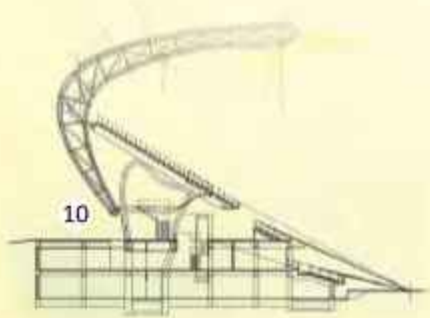
Year	Budget Estimate	Revised Budget (Actuals)	Utilisation
2007-08	780	857	110%
2008-09	1,112	1,593	143%
2009-10	3,073	3,670	119%
2010-11	3,565	2,841	80%
2011-12	1,121	970	87%
2012-13	1,152	871	76%
2013-14	1,219	1,123	92%
2014-15	1,769	1,121	63%
2015-16	1,541	1,423	92%
2016-17	1,592	1,574	99%
2017-18	1,943	1,938	100%



The significant increase in sports budget can be well planned and capital can be utilised properly for infrastructure with right mapping.

**Role of the Private sector in Sports Infrastructure**

The concept of private participation in sports though the novel is not alien to the Indian sports arena. The SAI has executed a MOU with different types of stakeholders to develop training Centres/high-performance centres in India. Private sector involvement in sports infrastructure. Development is through public-private partnerships lease and leasebacks, MOUs with various sports bodies, upgrading of existing sports infrastructure via private sector investment, and renovate, modernize and operate structure.



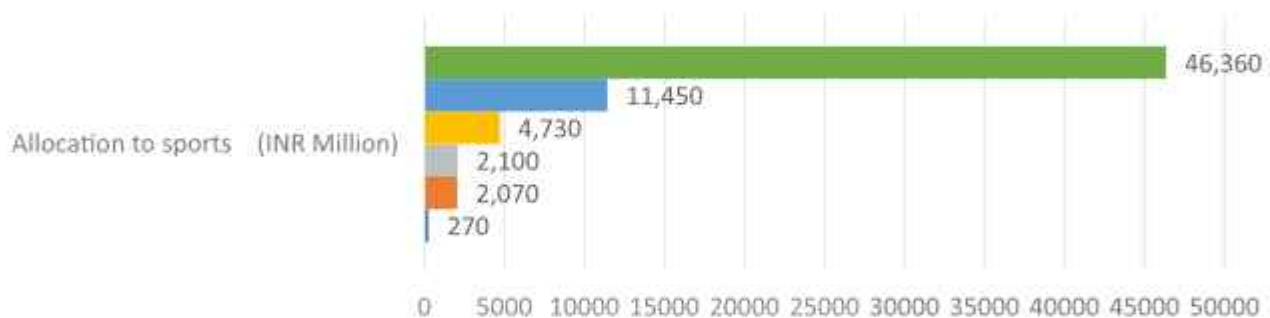
Five-year plans since 1982:

India organised Asian Games in 1982 for the second time. It was a significant year in the history of sports in India. Earlier Sports had not been given any major focus in policy arena.

Fund allocation to sports in different Five- Year Plans since 1982:

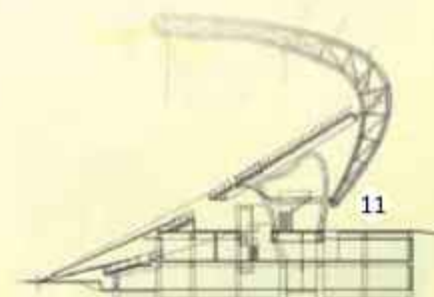
Five Year Plans	Duration of the Five Year Plans	Allocation to sports (INR Million)
<b>Sixth Five Year Plan</b>	<b>1980-1985</b>	<b>270</b>
Seventh Five Year Plan	1985-1989	2,070
<b>Eighth Five Year Plan</b>	<b>1992-1997</b>	<b>2,100</b>
Ninth Five Year Plan	1997-2002	4,730
<b>Tenth Five Year Plan</b>	<b>2002-2007</b>	<b>11,450</b>
Eleventh Five Year Plan	2007-2012	46,360

Five Year Plan-increase in allocatooon



	Allocation to sports (INR Million)
■ Eleventh Five Year Plan	46,360
■ Tenth Five Year Plan	11,450
■ Ninth Five Year Plan	4,730
■ Eighth Five Year Plan	2,100
■ Seventh Five Year Plan	2,070
■ Sixth Five Year Plan	270

Fund allocation to sports saw some increase in various Five- Year Plans. Majority of the funds were allocated for developing infrastructure for sports.



## Key challenges for developing Sports Infrastructure in India



Building Infrastructure in India is not a challenge as the budget is being allocated to the industry; the real challenge can be seen as the aftermath of the Infrastructure, which is how to maintain it. For example, the Commonwealth village in Delhi was done spectacularly but years after the commonwealth games the infrastructure lies desolate, destroyed and under-maintained.

### Policy implementation and complex regulations

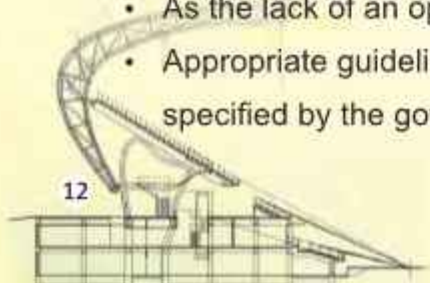
- Complex implementation guidelines and policy regulations make it difficult to avail
- The grants under Khelo India and other schemes.
- The Khelo India Fund Allocation Guidelines provide financial assistance only to Government agencies. As a result, infrastructure projects are delayed due to the Complex mechanisms at these agencies.

### Unsustainable business models

- Many sporting infrastructure facilities in the country have occupancy rates below 50% throughout the year due to an improper monetization strategy.
- This leads to inadequate finances for operating and maintaining such facilities

### Restricted private sector participation

- Private sector participation has been very limited due to a number of factors such
- As the lack of an optimum regulatory framework for governing PPP commitments.
- Appropriate guidelines for project bidding, selection, negotiation, and implementation needs to be specified by the government.

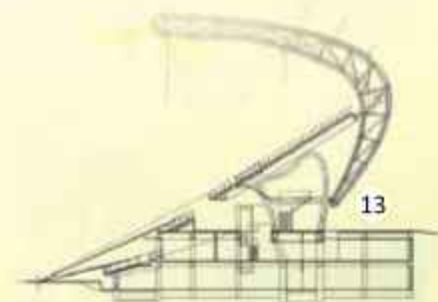


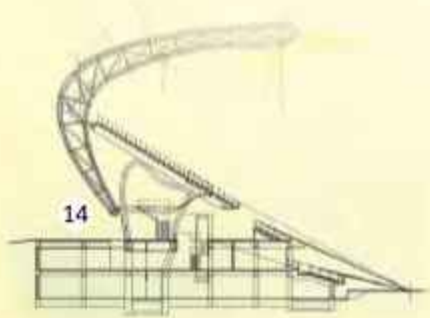
### Aging technology

- New facilities have to invest in expensive technology, ranging from retractable
- Roofs to LED scoreboards and from ribbon boards to expansive Wi-Fi network capabilities.
- Investment in such technology should also be financially feasible in a scenario
- Where most of this sports infrastructure is underutilized.

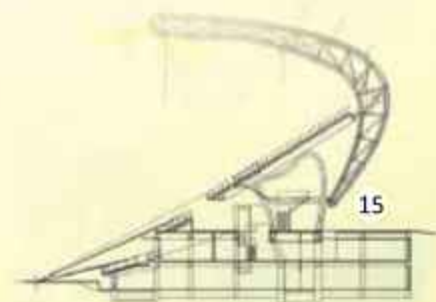
### Availability of land

- In addition, not much initiative has been taken to promote sports through specific infrastructure development by the provision of land parcels outside of urban areas.





# SWOT Analysis of Sports Infrastructure in India



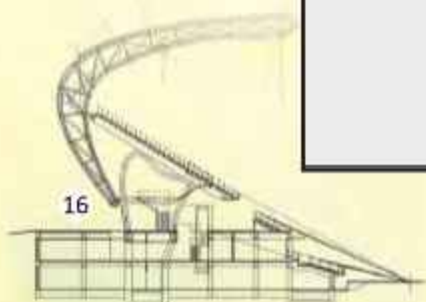


## SWOT Analysis of Sports Infrastructure in India

### Strength:

1. **Policies and frameworks in place:** The government has launched initiatives such as introducing one-hour health and physical training every day as part of the CBSE high school curriculum but many schools lack the requisite infrastructure for the successful implementation of these initiatives. Therefore to counter this problem, policies and schemes have been put in place to encourage the participation of more athletes at the grassroots level and elite level. The details of various schemes and policies associated with sports infrastructure in the country are provided below:

<b>POLICIES AND SCHEMES</b>	<b>OBJECTIVES OF THE SCHEME</b>
<b>National Sports Policy, 2014</b>	<ul style="list-style-type: none"> <li>• Raising the standard of sports in the country.</li> <li>• Promoting the development of adequate sports infrastructure across the country.</li> </ul>
<b>Revised Khelo India - National Programme for Development of Sports Scheme, 2016</b>	<ul style="list-style-type: none"> <li>• The Urban Sports Infrastructure Scheme (USIS) has been merged under 'Khelo India - Sports Infrastructure' as a central sector scheme.</li> <li>• In the recently launched Khelo India app, a user can search an exhaustive database for sporting facilities across the nation. The database includes SAI facilities, SAI-supported facilities, and private facilities.</li> </ul>
<b>SAI Training Centers Scheme (STC)</b>	<ul style="list-style-type: none"> <li>• Providing in-house training and coaching, along with nutritional assistance to sportspersons.</li> </ul>
<b>Come and Play Scheme</b>	<ul style="list-style-type: none"> <li>• Ensuring optimum utilization of five stadiums in Delhi.</li> <li>• Opening designated areas in SAI stadiums for community sports.</li> </ul>
<b>Panchayati Yuva Krida Aur Khel Abhiyan (PYKKA) Scheme</b>	<ul style="list-style-type: none"> <li>• Providing funds for sports infrastructure development and maintenance in villages and block panchayats.</li> </ul>
<b>National Playing Fields Association of India (NPFAI)</b>	<ul style="list-style-type: none"> <li>• Spreading awareness of fitness and encouraging Indian children to play sports by building more playing fields and spaces in the country.</li> <li>• Establishing playing fields associations at the state level so that NPFAI can sanction funds to these states for the development of playing grounds and parks.</li> </ul>



- 2. 2010 Commonwealth Games:** Hosting The 2010 Commonwealth Games in Delhi itself was a huge achievement for India. The prerequisite for hosting an international tournament of this scale is to have an entire village set up which includes the training facilities needed for various sports, dining area for the athletes, and mainly their accommodation.

The village is spread over an area of 63.5 hectares (157 acres). The Village has 14 blocks, 34 towers and 1,168 air-conditioned flats built by Emaar Properties. The International Zone in the village includes retail shops, TV lounge, games room, internet café, village bar, etc. The International Zone also includes the Guest Pass Centre, the VIP Waiting Area, the Chefs de Mission Meeting Hall, the Mayor's Office, and the Media Center.

The Indian government managed to build the entire infrastructure in time to host the Games. This goes on to prove that India as a nation has the resources needed to pull off an international tournament without any major glitch.

### **3.Upcoming facilities in the country:**

Currently, India houses approximately 100 sports facilities fulfilling international standards of sports infrastructure.

More than 10 international standard stadiums are to be developed in the upcoming years which will encourage more international events to take place in India. Large integrated convertible multisports facilities to be set up which will help the athletes improve their performance on a global stage. There are also plans for building high-performance centers and academies for athletes across the country. E-sports and online sports arenas with digital infrastructure are something that the sports ministry is looking to build in the coming years, keeping in mind the recent growth of esports in the country and worldwide.

### **4. Competition:**

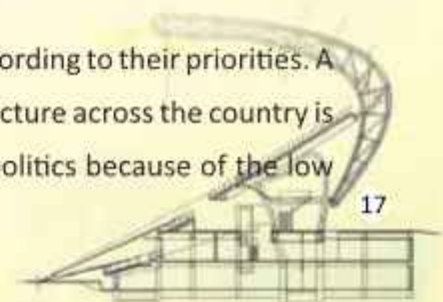
There are several infrastructure companies in India like TransStadia, Gallant Sports, Ebaco, among many others which focus on building sports stadiums, athletics track, courts, etc. Because of this, there is immense competition in this industry which leads to an impeccable performance by the selected company for the particular project. There is no place for complacency in this industry and every company strives to deliver the best result to survive in the industry.

### **Weakness:**

#### **1. Governed by state associations / institutional framework:**

The Ministry of Youth and Sports (MYAS) has been established by the Government of India to create infrastructure, achieve excellence in national and international sporting events, and build capacity for broad-based sports. In addition, the Sports Authority of India (SAI) has been set up by the ministry as an apex body. It develops and looks after stadiums and fields on behalf of the ministry. However, sports being largely a state subject, the bulk of the infrastructure is under the purview of state governments.

As a result, states fund the development of sports and related infrastructure according to their priorities. A comprehensive and uniform approach to the development of sporting infrastructure across the country is lacking. Sports development in India is often hampered by bureaucracy and politics because of the low



level of private sector involvement. Many federations are highly dependent on Government funding for carrying out their key objectives, such as organizing championships, procuring equipment, and training sportspersons; a model which increases the probability of breeding inefficiencies.

## 2. Corruption:

Infrastructural development is mainly handled by the government and the various state sports federations in the country. There is a lack of transparency in the operations of these federations and the fund allocated to them for infrastructural development of various sports is not utilized efficiently. Most of the money is pocketed by the senior officials and a minimal percentage is used for the actual developmental purpose. Most of these senior officials have held the office since their election and there has been no change in the leadership style which hampers the functioning of these federations. There has to be a paradigm shift where people are held accountable for their work and measures need to be taken to eradicate corruption from the sporting system.

## 3. Underutilisation and poor maintenance:

These facilities are largely neglected and ignored in terms of utilization and maintenance. Also, a majority of the Indian sports infrastructure facilities are mainly used for hosting international, national, state-, and district-level games and competitions only. As a result, the occupancy rates of the facilities remain low and they are financially dependent on the regulatory authorities for operations and maintenance. This also has

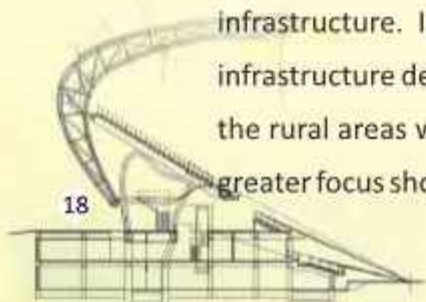


of such facilities.

CWG Stadium falling apart due to poor maintenance

## 4. Availability of land:

There is a shortage of land for the construction of sports infrastructure in urban areas. Most of the land is used for commercial and residential purposes which prove to be a hurdle in the construction of sports infrastructure. In addition, not much initiative has been taken to promote sports through specific infrastructure development by the provision of land parcels outside of urban areas. There is great scope in the rural areas where both talent and land are available in abundance but it is an untapped market and greater focus should be on these areas.



## Opportunities

### 1. Hosting global events:

Several studies have shown that the organization of international events in a particular country has a positive effect on the international success of its athletes. To host international events, nations invest significantly in building stadiums and supporting infrastructure. Post the event, the infrastructure legacy can have a lasting impact on sports development, provided it is properly utilized and embedded within urban planning. Building robust infrastructure helps a nation strengthen its candidature as a host for international events.

### 2. Stadium tours:

Organising stadium tours is a very lucrative option to earn revenue in the offseason when the stadiums are not in use. This is something that Arsenal FC's stadium Emirates Stadium does. They have special tours in the stadium for their loyal fans who wish to know about the history of their favorite team.

It is also a fan engagement activity where fans feel they are also an important part of the legacy of the team. World-class infrastructure helps in generating revenue and build sports tourism in the country. In India, the Wankhede Stadium has a very rich history which can be showcased in the form of a museum and a tour can be arranged for cricket fans all over which will not only help in the maintenance of the stadium



Wembley Stadium tour

### 3. Private sector participation:

The private sector is a key stakeholder in the Indian sporting ecosystem. In particular, for sports infrastructure development, private entities contribute towards areas such as development and maintenance of sports facilities and talent development. Significant investments are required for various purposes such as redevelopment and maintenance of existing sports infrastructure, the establishment of new stadiums and training centers, and setting up of sports universities.



In India's Sports Revitalization Action Plan, the emphasis has been laid by NITI Aayog on encouraging private sector participation in the development of sporting infrastructure. Several conglomerates fund large-scale, holistic sports programs to support talent development as part of their corporate social responsibility (CSR) activities.

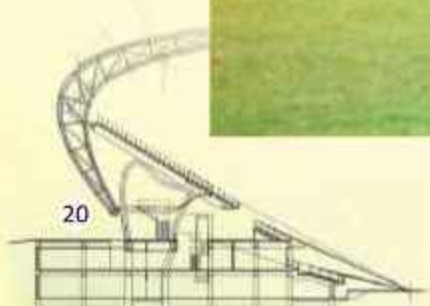
Conglomerates have been investing in the establishment of academies and training centers for a wide range of sports disciplines, including hockey, football, tennis, and athletics. Collaborative efforts by the private and public sector can promote overall infrastructure development in the sports industry in India.

#### 4. **Optimized and efficient usage of facilities:**

With the development and improvement of stadiums and other sports facilities in an area, it significantly benefits from a boost to tourism and consideration as a venue for mega sporting events, besides encourages participation in physical activities and sports. During the offseason when there are no games, community residents and students can use the sporting centres for recreational sporting activities such as school events and games. These facilities can also be utilized for music shows and events related to the creative arts— another sector that lacks quality infrastructure in India.

#### 5. **Grassroots development:**

Providing access to sports infrastructure in India's urban and rural areas in India can significantly improve participation by citizens. The Khelo India Games has so far proved to be a success in all aspects. If more such initiatives are taken then there will automatically be a need for more international standard infrastructure to help in the development and performance off athletes at the grassroots level. The focus should be on strengthening the infrastructure at the grass-roots level, as this will enable better talent identification and development. Moreover, it will provide access to a larger community, thus improving the overall public involvement in sports.



## 6. Community benefits:

Sports form an important thread in the fabric of the Indian community. As a country known for its love of cricket and other sports, Indians are clearly invested in sports. In a symbiotic relationship, communities feed the spirit of sports, while sports build a stronger sense of community. Improving or building on the current sports infrastructure contributes to this relationship both directly and indirectly. Better investment in sports infrastructure leads to increased employment in the locality, as more workers are hired to improve or build stadiums, local residences, changing rooms, and other auxiliary structures for hosting a sporting event.

This improvement in the locality might, in turn, benefit local stores and businesses on game days as sports fans flock to the area. It also provides better access to community members and facilitates interest in participating in competitive sports, serving as a valuable means to shape future talent in the country. While the focus on sports infrastructure is largely concentrated on large-scale stadiums, it is also worthwhile to consider the utilization and community impact of smaller, mobile facilities.

## 7. Economic benefits:

Community impact and economic impact are two sides of the same coin. Better sports infrastructure and construction of stadiums lead to increased business for local shops in the area, employment, and income for construction workers and skilled laborers, income for hotels and restaurants, and increased revenue for stadiums and teams as updated facilities and expanded capacity bring in more ticket sales. In addition, the economic costs of health care may also be reduced as more people utilize these facilities and lead a healthier life. The construction or redevelopment of stadiums and sporting facilities opens huge opportunities for revitalizing the surrounding local economy.

### Threats

#### 1. Aging technology:

New facilities have to invest in expensive technology, ranging from retractable roofs to LED scoreboards and from ribbon boards to expansive Wi-Fi network capabilities. Investment in such technology should also be financially feasible in a scenario where most of this sports infrastructure is underutilized.

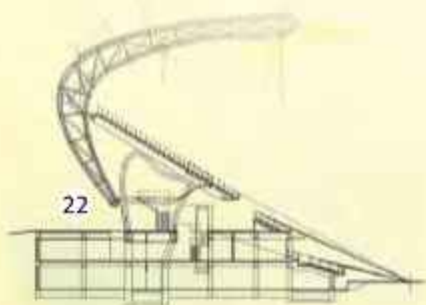
#### 2. Restricted private sector participation:

Private sector participation has been very limited due to a number of factors such as the lack of an optimum regulatory framework for governing PPP commitments. Appropriate guidelines for project bidding, selection, negotiation, and implementation need to be specified by the government. Introduction of various commercial aspects, such as selling the naming rights, hospitality packages and branding inside the stadia will attract the corporates to invest in sports infrastructure and will also help to make these facilities financially sustainable.

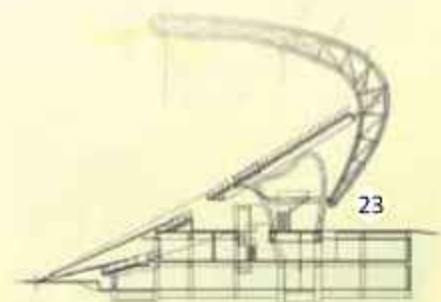


### 3. Poor asset utilization and inefficient monetization planning:

It leads to sub-optimal returns on developed sports infrastructure assets, which deters further investment. In order to counter this problem and boost infrastructural development in the country standardized guidelines for asset utilization and role of PPP in sports facility creation/management to incorporate sports policies across all States are to be set in place. Asset planning, development of multi-purpose stadia and innovative revenue streams are common methods for determining high future revenue-generating potential of infrastructure and return on investment.



# PESTEL Analysis of Sports Infrastructure in India





## PESTEL Analysis of Sports Infrastructure in India

PESTEL analysis stands for political, economic, social, technological, environmental, and legal analysis that aims to identify all the external factors that are in or against the favour. It is a process which is often depicted in a standard format and helps to understand all the external and market environment for a specific and relevant industry or sector. Often, it is used as an integral part of strategic analysis. It allows an organization to have an in depth study of all strength and weakness prevailing in the market and helps management to define all the dangerous area that creating an obstacle in their growth and development.



### Political Factors

Political factors refer to the governmental policy in terms of the economy, goods and services provided, political decisions made in vital areas of business, education and workforce, as well as the decision made concerning infrastructure.

The political situation in India can be characterized as stable. It has a federal republic Democracy, which comprises political stability with effective governmental policies. Privatization: India has reduced the political interface in the management of enterprises, thus leading to improved efficiency and productivity of businesses. Privatization in India has been carried out in several stages; such as, deregulation, de – reservation, and disinvestment.

From about the last one and a half years, Indian Infrastructural sector is battling with very unpleasant orders, broken cash cycles, high leverage debt. Support through grants, subsidy, cash funding, and tax support is always provided to the companies in this sector. The membership of the World Trade Organisation has widened. This is expected to lower import duties and ease trade when the complicated customs duties are eliminated.

All these factors affect the infrastructure industry in India and by nature the sports infrastructure sector as well. But the big players have never seemed to have major problems with all these sanctions, so they key to improving the infrastructure for sports in India is to rope in these big players, for quality and efficiency.

### Economical Factors:

The current corporate tax rate in India is 30% (as of February 2018). It is worth noting that the country witnessed frequent corporate tax rate changes over the years. For example, the tax rate in 2010 was 33.99%, while it reached an all time high of 38.95% in 2001.



The government can tax the higher earning classes for sports development cess, which can be used for infrastructure development. The national banks are usually very open to backing big businessmen for favourable loans. Proper structure of associations will ensure, the funds allotted by the govt are used for the intended purpose.

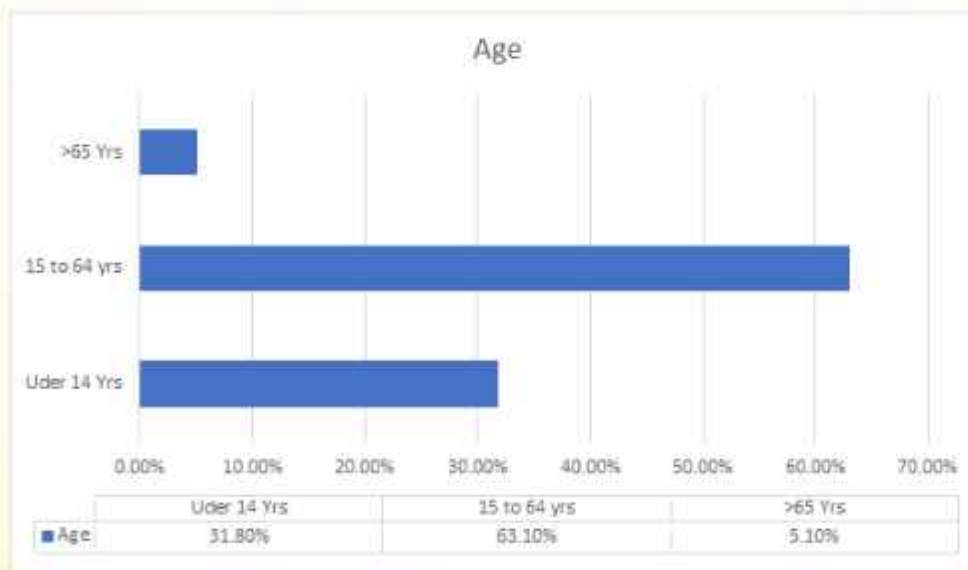
₹ 1575 crore has been allotted for this year's sports budget, which should be ideally focused on developing the grassroots infrastructure and infrastructure in the tier 2 and tier 3 cities. This will facilitate the rise of talent and players from remote places. On the national level, accrual of government debt reduces construction and maintenance of infrastructure for which the government is responsible. An effort has been made to complement the low level of funding by launching joint ventures between the private sector and local government. Life cycle projects have gained ground. Since sports infrastructure projects are long term projects, if executed properly will reap the benefits of investment, in terms of recognition, talent and monetary benefits.

But currently due to an increase in the prices of cement, iron, etc the infrastructural industry is hugely infected. As the prices increased, the people stop working and wait for the time when the price will again fall.

### Social Factors

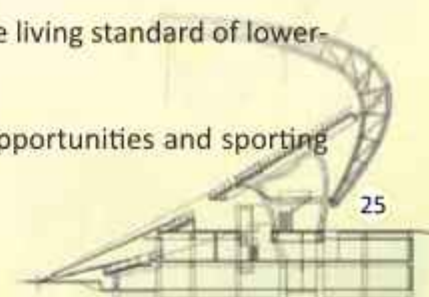
Social changes in a country have a significant impact on the demand for a firm's products, as well as the availability and willingness of people to work.

India's population is young and is warming up to the idea of sports as a recreational activity. 31.8 % of Indians are under 14 years old, 63.1 % are between 15 and 64 years old and 5.1 % are over 65 years. Thus the greatest percentage of population is the working population.



In India, this sector has proved as one of the biggest sectors providing employment opportunities to people. Labour class society is especially at the boom. By getting work on daily basis, they are able to fulfil their daily needs. In addition to this, by providing employment opportunities, the sector aims to improve living standard of lower-class society.

The social factors are strongly in favour of the current industry. The number of job opportunities and sporting opportunities this will open up will be enormous.



### **Technological Factors**

India is one of the most technologically advanced countries in the world. In fact, according to some sources, it is the 3rd most technologically advanced country in the world. This is why more and more tech giants including but not limited to Facebook, Microsoft, and Apple are investing in the country. India is a key destination for outsourcing work in IT. With an advanced IT infrastructure and highly skilled IT work force, India offer enormous opportunities for entrepreneurs to embark upon technological projects such as software development and upgrades, e-commerce, mobile apps, business solutions, and many more.

Technology transfer and investment in infrastructure has become much more important as these directly serve as a path to become sustainable when compared to other countries. In construction, with the help of advanced technology, a blend of traditional touch is provided in India. As time goes by, the technological changes will only increase the efficiency of any industry. This in turn will entice people to invest in the sports infrastructure industry.

### **Environmental Factors**

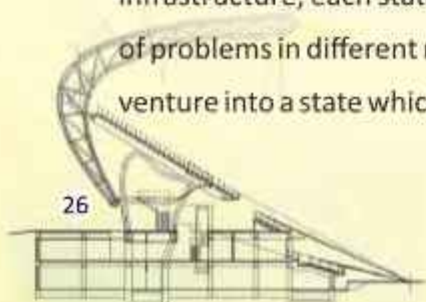
While India has made a lot of progress over the years, the country still faces a number of environmental challenges e.g. air pollution, water pollution, floods, resource depletion such as water and forest, loss of biodiversity, and diversion of consumer waste into rivers. Expatriates may sometimes find it difficult to live under some of these environmental challenges.

The climate in India with the long monsoons and the equally long dry periods creates a challenge which needs to be met by the organizations. Infrastructure has to be such that can make businesses viable in such diverse climate. Of the 3 million premature deaths in the world that occur each year due to outdoor and indoor air pollution, the highest number are assessed to occur in India. Organizations have to establish internal regulations and standards in order to help in the decrease of this ratio. This presents a huge challenge for any industry, but mainly the infrastructure sector as well. The harsh reality is that we don't have efficient and safe methods of waste management, which will not really convince the government to sanction large projects which will incur a tremendous amount of waste.

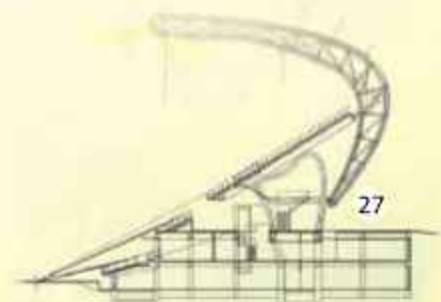
### **Legal factors**

The factors influence the legal environment in which a company usually operates. In recent years significant changes have been made in the legal environment in India which influence the way in which companies operate. Such changes include the disability discrimination legislation, an increase in the minimum wage and greater requirements for firms to recycle. In general legal changes can affect a firm's costs and demand.

One of the major issue the all private infrastructure payers faces in India has to compete with legal frameworks. There are number of laws implement by the state laws and some by local authorities. With respect to infrastructure, each state has their individual formulated legislations. Which might present itself as a different set of problems in different regions where the company wants its presence, in turn could discourage the companies to venture into a state which has potential but the regulation could be stringent or unfavourable.



# Sports Infrastructure Companies in India



## Sports Infrastructure Companies in India

In this section, we will be talking about the 3 big Sports Infrastructure companies in India and explain what type of projects and infrastructure they are currently working on. The companies are Gallant, Trans Stadia and Ebaco.

### Gallant



### About the Company

Gallant Sports is fast emerging as India's/South Asia's leading Sports Infrastructure solution-provider. Gallant creates designs, deploys, and maintains international standard sporting infrastructure - that ranges from indoor to outdoor playing fields. It specializes in making arenas to absolutely integral equipment for all sorts of sporting requirements.

Gallant maintains international quality standards on all sporting solutions. Gallant represents some of the best sports infrastructure brands in the world not only from Europe and the USA but also top brands from China and Taiwan with top-notch quality and warranties. Gallant has exclusivity agreements with the best of the next-generation innovators and manufacturers of sporting infrastructure solution providers for best sporting surfaces and equipment as well as construction, to always ensure world-class quality. It has exclusivity agreements with world-class international brands that span the whole gamut of sporting activities from Football, Cricket Wickets, Multi Sports, Tennis, Badminton, Squash, Basketball, Table Tennis, Paddle Tennis, Wrestling, Handball, Netball, Gymnastics.

Gallant Sports and Infra are also the performance partner for the German sports apparel and athleisure giant Adidas.

### Mission

Providing world-class infrastructure facilities and services to a large number of universities, amateur clubs, communities and commoners for maximizing function and minimum cost.

### Vision

While schools and all educational institutes require world-class quality sports infrastructure, Gallant wants to ensure that such facilities are made available with the best quality playing surfaces and equipment to create champions at the world level in sports.

**Products**



**Heritage School, Football, V.K. New Delhi**



**Artificial Turf Tennis, Korean Embassy, New Delhi**



**Multi Sports, The British School, Delhi**



**Hockey Field, RKC Gujarat**



**Athletic Track**



**Badminton Academy, Gurgaon**



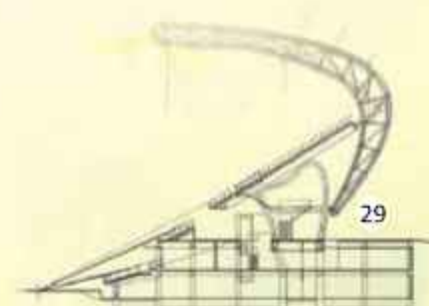
**India's Largest Outdoor Play Arena, Juhu, Mumbai**



**ITF Approved Interlocking Tiles VIS, Dwarka, Delhi**



**Basketball PP Interlocking Tiles, Delhi**



### Artificial Turfs for Sports and Landscaping

- Football Turfs
- Tennis Courts
- Cricket
- Golf

### Plastic Polypropylene (PP) Interlocking Tiles

- Outdoor Handball
- Outdoor Basketball and Multisport
- Futsal (Indoor and Outdoor)

### Polyvinyl Chloride (PVC) Vinyl Flooring

- Basketball
- Table Tennis
- Basketball Indoor
- Volleyball Indoor
- Futsal Indoor

### Multisport Indoor

- Athletic Tracks and Jogging Tracks
- Spray Coat - IAAF Approved athletic tracks
- Sandwich System
- Full PU tracks
- Jogging Tracks

### Polyurethane (PU) and Acrylic Sports Surfaces

### Play Equipment and Outdoor Fitness

### Sports Project Management Consultancy

### 1.Natural Turf Grounds for Cricket and Football

#### Some of the notable projects:

1.2008 Beijing  
Olympic Games

1.2010 Guangzhou  
Asian Games

1.2011 F1  
Singapore & Korea

1.2012  
Uzbekistan's  
National Stadium

1.2012 Oman  
Beach Handball  
World  
Championship

1.2013 Southeast  
Asian  
Games(exclusive  
seating supplier)

1.2016 Rio de  
Janeiro Olympic  
Games of Brazil.



## Associations and Partnerships

### 1. Enlio

Shijiazhuang Enlio Sports Goods Co., Ltd., located in Shijiazhuang, is a leading plastic sports floor making company. In 2006, on the basis of original Taiwan technology, developed PVC sports flooring by applying the metal-rolling production line from Germany. "ENLIO" brand products have been exported to the UK, France, Korea and many other countries in Southeast Asia and we also have developed nearly 300 partners in China. In India - Gallant Sports & Infra Pvt.Ltd. Has been chosen as the Premier Partners, Stockist and Distributors who would be selling directly to customers, Government and also to many small and big dealers and also provides installation services through trained and expert installers. "ENLIO" products have passed the tests held by Badminton World Federation and Badminton Asia Federation as well as ITTF and have been used for many world level tournaments. ENLIO is also most likely be the FIBA partner for 2020 Olympics for 3x3 Basketball and working on that vision. It has already been used for China Tour of 3x3 outdoor basketball.

### 2. Redexim

Gallant Sports and Infra are the official distributors of world-renowned turf maintenance machinery "Redexim Charterhouse" in India. Redexim has a distribution network in over more than 100 countries and has its own offices in Australia, China, UK, and the USA. The headquarters is in the Netherlands.

Redexim develops and manufactures machines for maintenance of turf for golf courses, cricket stadiums, football fields, polo grounds and all other outdoor sports fields (Natural & Artificial). The machinery is trusted by world-class golf courses like Royal Birkdale Golf Club - UK, Oakland Hills CC -the USA, Valhalla Country Club -the USA to maintain their turfs.

Redexim has also partnered with FIFA and most recently at the World Cup in Brazil. Post their success at the World Cup, they also partnered at the 2016 Olympics in Rio.

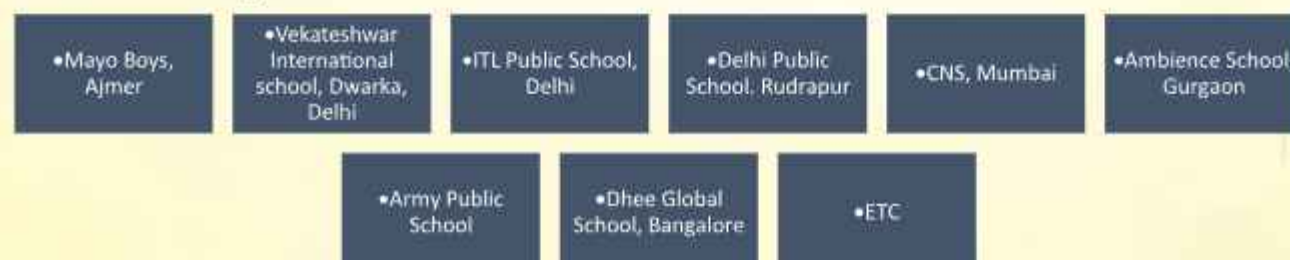
### 3. CC Grass

The largest manufacturer of artificial grass in the world is dedicated to providing the best artificial turf for both athletic and landscape purposes. After more than 15 years of focused development, CC Grass products have served clients from multiple regions with varying needs, including professional football clubs, government bodies, schools, and countless households around the world. CC Grass is 8<sup>th</sup>, 10<sup>th</sup> and 6<sup>th</sup> preferred manufacturer for World Rugby, FIH and FIFA respectively while the first preference from Asia in by the 3 Federations.

## Clientele

Gallant Sports & Infra Pvt. Ltd. Has been making its clients happy since ages by providing them with the best quality service available and looking after them. They have built trust over these years furthermore helping them in growing in the industry and getting more clients. Their Clients include various Schools, colleges and organizations such as:

## Schools and Colleges





#### Other Clients

- Delhi Development Authority (DDA)
- Google
- Flipkart
- PWD (Govt. Of Delhi)
- Smaaash Entertainment

#### Core Team and Other Key Personnel:

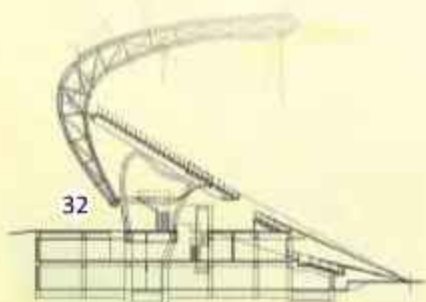
Nasir Ali – Founder and Director

Tarandeep Singh Saggu  
– Lead-Architect and  
Project Management

Sonu Chaudhary –  
Head, Business  
Development

Ajay Gulati – Sales and  
Marketing Director

Pratik Puri – Gallant  
Sports Arena Head and  
Digital Marketing Head





## Ebaco Sports

Ebaco was established in Germany in 1973, as a company focused on surfaces. Through hard work and outthinking the competition, the company eventually became a multi-national with offices in Europe, the US, the Middle East, and Asia. In the 1980s, furniture was also added to the mix and became a second major line for the company. In the 1990s, the company became one of the largest sellers and exporters of floor coverings in the world. It also expanded into projects business, with moves into corporate, education and sports markets. In its 40 years of existence, Ebaco has done well over 750 million US dollars in sales.

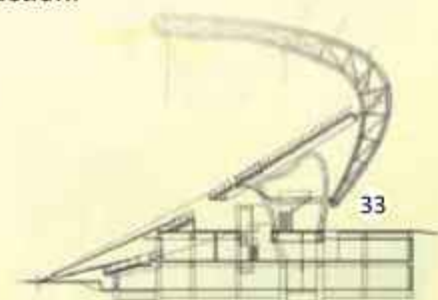
Today, the company has its headquarters in Singapore and offices in multiple countries and services countries that add up to 25% of the world's population. The company has over 30 relationship managers who work with customers to choose the right products/services for them. Many more team members work on the execution side to ensure perfect execution.

Nowadays we talk about how sports infrastructure is necessary and we see a lot of sports turfs and facilities coming up with their ideas and innovations, in a city like Mumbai outdoor sports are decreasing day by day as people are cutting up the free spaces and making up big constructions on free lands, so it was important to have a company who can provide infra projects to play sports

So Ebaco not only comes up with football or cricket turfs it is specialized in badminton, squash and other sports which people usually play only when they have proper infrastructure.

### **Aim of the company**

Like the tag they have on their logo that is sports accessible for all, people usually don't get time to play sports on good infrastructure, so Ebaco helps big companies, corporates, and complexes to construct quality sports facilities and let everyone play so the environment stays fit and fine. Their mission is to be the most respected company in the commercial surfaces and furniture industry by consistently matching their promises with actions to ensure the customer gets the right product/service at the right price. They are able to do this because of the quality of people they have, their continuous learning culture, and the relentless focus on customer satisfaction.



## Product Range

They are a renowned name in the industry, offering a wide spectrum of sports surfaces and offer their clients with the following products:

1.Tennis Court	1.Outdoor Basketball Court and Volleyball Court	1.Indoor Basketball Court and Volleyball Court	1.Futsal/ 5 A Side Football Pitch and Football Ground
1.Hockey Ground	1.Squash Courts	1.Cricket Pitch	1.Running Tracks, Jogging/Walking Tracks, and Skating Tracks
1.Golf	1.Indoor Multipurpose Court	1.Outdoor Multipurpose Court	1.Indoor and Outdoor Badminton Court

## Important personnel in the company

Chris Kaur – CEO Ebaco Sports India

Deepak Gupta – Country Head

Gurmeet Singh – Design Head

Vikram Rathee – Sales Head

## Projects are done by the company

Ebaco has done their projects with various different stakeholders such as the corporates, education institutes, and hospitality companies.

Some of the most prominent ones

1. Oakridge International School
2. Lotus Valley School
3. Reliance Industries

Helping sports companies make their own facilities

1. Lodhi fitness
2. Goregoan sports club
3. IMG Reliance
4. India Today
5. Infosys
6. Accenture
7. Tata
8. Jindal Group
9. Larsens & Tubro



## Maintenance

Ebaco has recently opened up its maintenance business because they recognize how critical maintenance is to the performance of the sports infrastructure.

With proper maintenance:

- Sports surface will last longer and the life span can be extended by 25%
- Sports surfaces will provide better playability: players will enjoy playing for longer on the field
- One will avoid more injuries: injuries are a bad thing for the reputation of a sports business or school
- The sports surface will look aesthetically better: in a competitive world, aesthetics are important

The best feature for Ebaco is they make the sports surface with GRABO SPORTS FLOORING. Grabo sports flooring is used for all the international and national sports competitions around the globe, this surface is made in Europe and known for its quality to play on. It has an optimal coefficient of friction, against the incidents raised by sliding or sticking, it has a special feature of absorbing pressure to take care of your joints while you play which decreases the chance of getting an injury while you are playing on this turf.

Grabo is specially designed to combine shock absorption and all required safety measures, bottom layer of the flooring made with cell foam which absorbs the shock of impact, provide acoustical property and protect athletes from stress injuries, special top layer reduces heat burns on the point of contact between players skin and the surface, reducing the skin burns and injuries.

## Reach across India

Ebaco has now its facilities almost all over the country in all the major cities like Mumbai, Delhi, Bangalore, Hyderabad, Jaipur and a lot of other second-tier cities where this kind of business work as a boon as they usually don't get major sports facilities to play.

Getting the edge over the competitors, Ebacos's major point is that they provide premium quality turfs and surfaces, the major factor is that all the turfs and stadiums are FIFA quality surfaces and certified by FIFA, people who usually don't get to play on such quality surfaces get a chance to play which is the most prominent part of EBACOS strategy

There constant collaborations with the real estate partners so that all the projects which are going to be done by that company will have Ebaco doing there turfs and all the sports facilities.



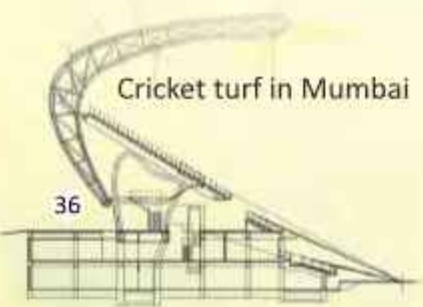
Some of their Sports infrastructure include:



Football turf in Mumbai



Cricket turf in Mumbai



## TransStadia

### An Iconic Sportainment Destination



**Pitch Facilities**

- State of the art indoor facilities for year-round training
- International standard grade facilities with 4 soccer pitches

**Pitch** 117 x 64 m

- 2019 standard football pitch (FIFA 4th standard) 117 x 64 m
- 20,000 seating capacity
- Subsidiary ground ball for tennis/tennis
- 2 Tennis & 4 tennis courts courts

**An ideal venue for large format cultural events and music festivals**

**T-Box™**  
Bringing the event to its fans

AMPLE SEATING COST EFFECTIVE

- The lower tiers on all four sides of the arena use 8,852 T-Box seats
- During live match days this space is used for setting up tents, volleyball and basketball courts

**Leasable Retail** 58,000 sq.ft

**Ample Parking**

- 2 level basement parking
- Parking for 400 vehicles/1,200 two wheelers

**Hospitality Boxes** 70 sq.ft each

- 14 hospitality boxes overlooking the pitch which can be converted into guest rooms

**Stadiarena/Convention Centre** 4,000 sq.ft

- Flexible facility for hosting events convertible in 6 minutes
- WCs
- Capacity -
  - Events - 5,000 pax
  - Banquet - 2,000 pax
  - 2 major access points

**Optimum Space Utilization**

**Banquet 1** 4,000 sq.ft

Pre-Function Area 1,200 sq.ft  
Exhibition Terrace 1,200 sq.ft

- Capacity - 400 pax
- Includes green room
- 200 sq.ft terrace (200 pax) adjacent to the banquet hall
- 2 access points - 1 external and 1 for stadium only

**Banquet 2** 3,000 sq.ft

Pre-Function Area 1,800 sq.ft  
Capacity - 300 pax

- 2 access points attached
- 1 wheelchair access point
- Banquet 1 & Banquet 2 can be combined

**Banquet 3** 2,000 sq.ft

Pre-Function Area 1,200 sq.ft  
Capacity - 200 pax

**Multiple Banqueting Facilities**

**THE ARENA**  
TRANSSTADIA

EKA Arena by TransStadia or simply EKA Arena, is a multi-purpose stadium in Ahmedabad, Gujarat, located in Kankaria Lake. The stadium was completed in 2016 and officially opened on 7 October 2016. It has a capacity of over 20,000 people in the outdoor stadium and over 4,000 in the indoor arena and a FIFA standard football pitch.

It was constructed under a public-private partnership (PPP) with the Government of Gujarat and SE TransStadia for developing a sports culture in India.

EKA Arena is considered to be Asia's biggest and India's first convertible stadium.

It is the first stadium in India that can host more than a dozen sports combined with wellness, leisure, and other luxurious facilities. The building includes a Sports Academy, Sports Science and Rehab Facility, a banquet, sports club, dining area, and retail space

The stadium uses StadiArena technology for converting the stadium into a multi-purpose indoor arena within a span of 6 minutes at the press of a button. It was the only stadium from India nominated for Stadium of the Year award from StadiumDB.com and will face competition from the likes of Mercedes-Benz Stadium (USA), Wanda Metropolitano (Spain), 2018 FIFA World Cup Stadiums in Moscow and St. Petersburg and 22 other world-class sporting arenas.

EKA Arena currently acts as a home ground for Pro Kabaddi club, Gujarat Fortune Giants, and other domestic sides like Gujarat State Football Association and Gujarat State Table Tennis Association. The stadium hosted the 2016

Kabaddi World Cup, 2017 Pro Kabaddi and 2017-18 Santosh Trophy alongside various cultural and commercial events.

The assessment and training equipment available at the center is one of the first in the country which consists of a Pro Reaction Timer, a Swift Speed Light, a Touch Mat/Speed-Mat and more such equipment which might prove helpful in the all-round development of athletes. The prime minister also visited the mobile medical van equipped with specialized doctors to test and guide children across the country, giving them insights into different sports best suited to their skills. StadiArena is a key technology used to enclose a stadium stand and turn it into an enclosed area that can be used for exhibitions, conferences, conventions and other events when the stadium is not in use. The technology includes vertical lifting doors, similar to airplane hangar doors, which drop down from the front of a stadium stand, enclosing the stand and turning it into an indoor space. The arena also includes 32,000 m<sup>2</sup> of pillar-less area.

Some of the objectives that Trans Stadia as a company has are as follows.

### Objectives

To build Asia's largest Sports Infrastructure Company with a strong focus on sport, leisure, and wellness.

Build at least 12 to 15 world-class infra in all major urban areas in the next 3 to 5 years, with patented technology for high utilization.

Each facility will accommodate 12 to 15 sports and use convertible and transformable technology for high utilization (utilization jumped from the current 2% to 67% per annum).

Ensure that each and every facility is transformed into a vibrant city center

Each and every facility is a green facility.

To generate local employment directly and indirectly while introducing the concept of sustainability and skills.

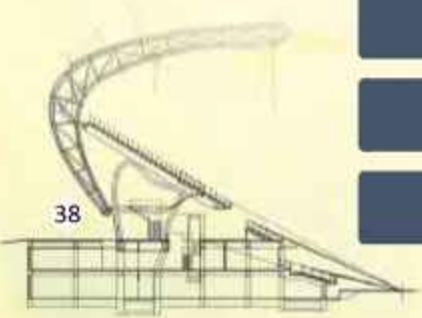
To generate revenue; thus part of it can be plowed back into sports development (e.g. 2% of top-line revenue share can be plowed back); plus tax-free development if the money is through CSR route. Further

Ensure that all levels of sport are developed;

Develop the important aspects of sports such as sports sciences, sports management, media, high performance, and academies.

### Key Personnel

The Board and the Team at Transstadia are made up of people who come from diverse backgrounds but share a common passion for the cause.



Harish Sheth - Chairman

Udit Sheth - Founder & Managing Director

Hiren Pandit - Director & Ceo

**CSR**

Transstadia voices its social awareness through the Setco Foundation, which was created in 2007 to implement the Setco group’s Corporate Social Responsibility (CSR) initiatives.

With 5% of Setco Automotive’s Annual Net Profit being dedicated to the Foundation, its multi-pronged activities focus on healthcare, nutrition, education and empowerment of underprivileged women and children of Gujarat.

The Foundation has entered into a project in Godhra (a city in eastern Gujarat) in association with the Sports Authority of Gujarat (SAG) in order to support youth football in the district.

Also, in association with the Ahmedabad Municipal Corporation (AMC), the Foundation has run a comprehensive Health and Fitness Program at multiple AMC Schools, through which it touched lives of almost 1700 students.

In addition to the above, 2% of TransStadia’s profits are committed to the development of grassroots sport and adoption of talent from therein.

Apart from Transtadia Arena it also has 2 other venture into sports being EKA life and Transtadia academies. EKA life is all about fitness, rehab, and medicine which aims at encouraging a healthy lifestyle with a lot of variety of services and catering to a vast age category.

Transtadia academies aim at identifying and nurturing potential talent in multiple sports at the grassroots level as well as at an amateur level. These 2 branches of Transtadia helps them to cater to every need and aspect of sports.

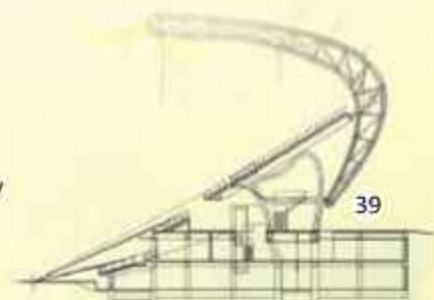
**Sports Facilities:**

The EKA Arena stadium has been prepared in a manner that it can host 14 sports, like, football, kabaddi, tennis, badminton, table tennis, squash, boxing and many more.

Karate facility

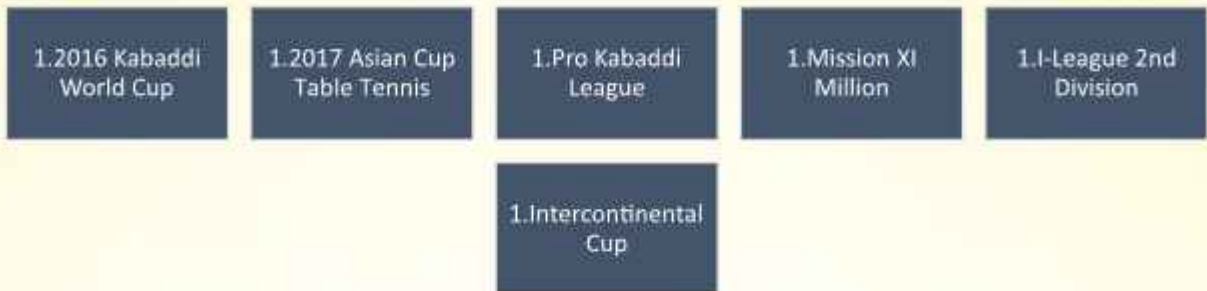


Table Tennis Facility





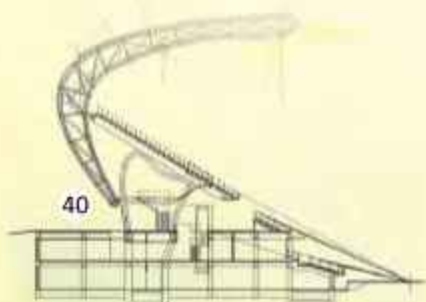
The developers consciously sidestepped cricket to focus more on the development of other sports in the country whilst hosting their leagues, like:



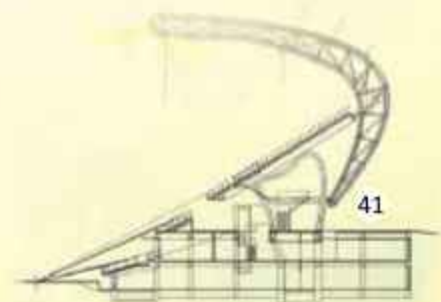
### Other Uses

State of the art infrastructure combined with the best of technologies, and location right in the most heart of Ahmedabad, makes The Arena one of the best venues to host a range of events from musical concerts to expositions and other such events. For the very purpose, TransStadia has created another company named White River Entertainment for controlling and managing such large-scale events:

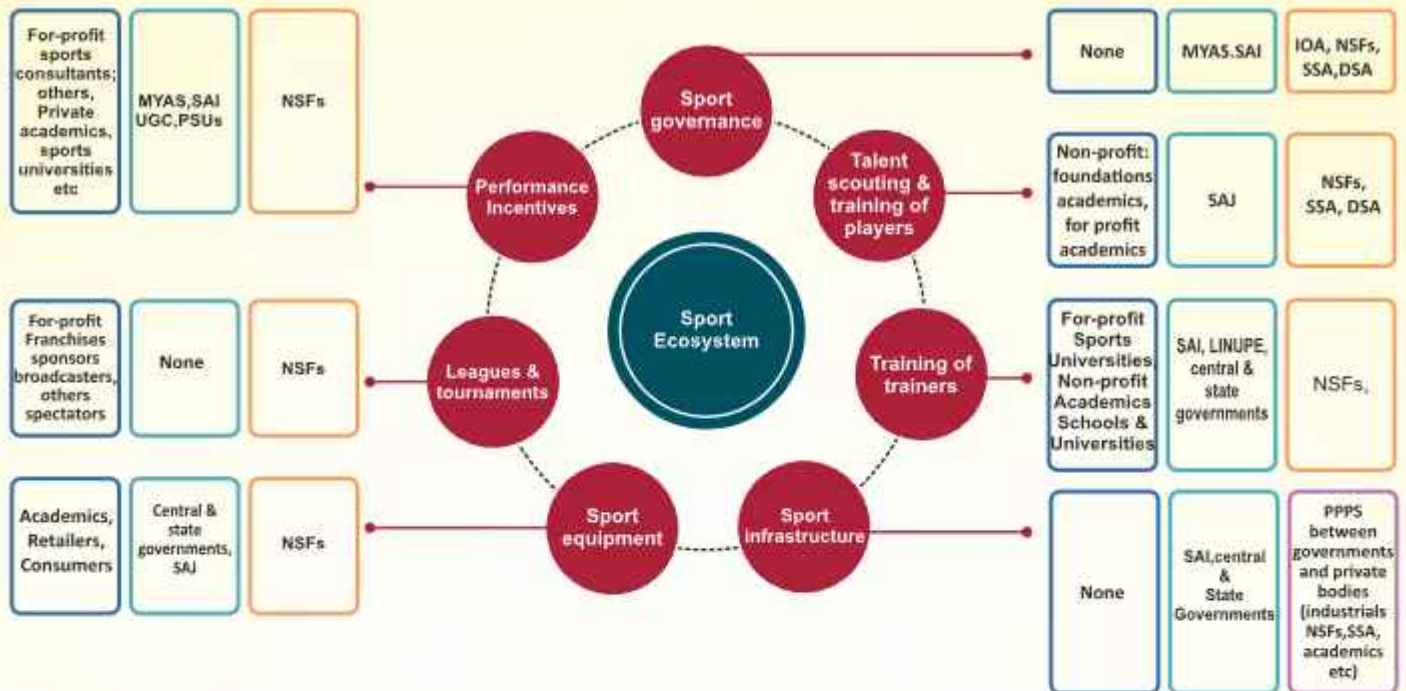
- A. R. Rahman: Encore
- 1. Gujarat Iconic Film Awards (GIFA)
- 2. Mughal-e-Azam



# Future Scope of Sports Infrastructure in India



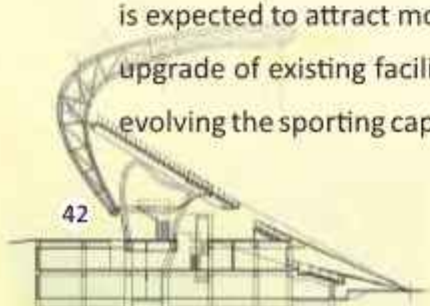
## Future Scope of Sports Infrastructure in India



The private sector is of utmost importance in the Indian sports ecosystem especially for sports infrastructure development. Private companies contribute towards areas such as development and maintenance of sports facilities. Huge investments are required for various purposes such as redevelopment and maintenance of existing sports infrastructure, the establishment of new training centres. The government of India is exploring and encouraging investments through the public-private partnership (PPP) model in order to develop training and high-performance centres across the country and to build modern sporting infrastructure suitable for the future. In India's Sports Revitalization Action Plan, the emphasis has been laid by NITI Aayog on encouraging private sector participation in the development of sporting infrastructure.

Khelo India scheme supports the development of sports academies by the private sector identifying sporting talent in the country and an increase in the share of sports investment from CSR budgets by the private sector will be a positive step in this direction. Given the rising popularity of sports, international leagues and clubs have set up academies in major cities like Delhi-NCR and Mumbai to support grass-roots development.

India has also taken steps in the right direction. Currently, the Sardar Patel Stadium in Gujarat is undergoing redevelopment and with a capacity to host 110,000 fans, it is set to become the largest sporting arena in the world, overtaking Melbourne Cricket Ground. Developments are not just restricted to the stadium, with management planning to integrate the metro rail and Sabarmati Riverfront Road in its schemes. The new stadium is expected to attract more tourists to the area, bringing in contribution from indirect spends. Maintenance and upgrade of existing facilities like these are key to the long term economic revitalization of neighbourhoods and evolving the sporting capabilities of nations.



### **Bengaluru's M Chinnaswamy Stadium - India's first solar-powered stadium**

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the Karnataka State Cricket Association (KSCA) signed a cooperation agreement with the aim of jointly promoting sustainable development and resource efficiency (including water resources) and supporting measures that contribute to reducing emission of greenhouse gases such as CO<sub>2</sub>. Under the comsolar project, both organizations agreed to explore the possibility of developing a solar photovoltaic plant on the roof of Bengaluru's M. Chinnaswamy Stadium. In 2017, a 40-kW rooftop photovoltaic solar power system was installed at the stadium. The plant consists of 1,422 modules that will generate approximately 1,700 units/day, to be consumed on the premises. Surplus electricity generated will be exported to the Bangalore Electricity Supply Company Ltd. (BESCOM) at a price of INR 9.56/kwh under the state-promoted Net Metering Scheme

For sports infrastructure development, the government has undertaken initiatives like a grant scheme with funding worth INR 942.5 million for infrastructure creation and setting up of synthetic turfs and surfaces worth INR 201.3 million have been undertaken. Also, INR 328 million has been allocated for the promotion of sports at the grass-roots level and in colleges and universities

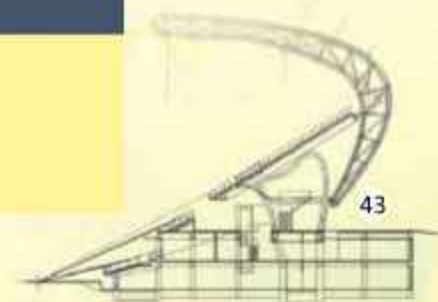
The current state of sports infrastructure in India In recent years, it has been acknowledged that the construction and refurbishment of sports infrastructure can stimulate economic development, whether it involves large facilities or small. Therefore, the development of such infrastructure plays a significant role in urban planning. Currently, India houses approximately 100 sports facilities fulfilling international standards of sports infrastructure. In addition, there are government-owned college and university grounds, community centers, sporting facilities and grounds owned by urban local bodies, grounds owned by Resident Welfare Associations, and facilities owned by private entities. These facilities are largely neglected and ignored in terms of utilization and maintenance. Also, a majority of the Indian sports infrastructure facilities are mainly used for hosting international, national, state-, and district-level games

Approximately 100 sports facilities fulfilling international standards, the growth rate of 22.1% by 2023 for franchise-based leagues, 19 Special Area Games, 11 Centres of Excellence, 56 SAI training centers and 12 SAI regional centers/ educational institutes.

With India having organized 2010 Common Wealth Games, 2011 Cricket World Cup, 2017 U-17 Fifa world cup and Going to organize 2020 U-17 Women's Fifa world cup have also shown interest in 2026 Youth Games, 2030 Asian Games, 2032 Olympics. India is currently having a large gap in sports infrastructure at the national and School/college level. This shows that there is a large potential for Private Sports Infrastructure companies to exploit the opportunity where government institutes are either not good enough or out hands of the general public to use.

According to the NITI Ayog's Olympic Action Plan Report, there is a lot more opportunity coming up for the private sector to invest as the government is coming up with some new ambitious projects such as:

- Building 10 new international standard stadium
- Building E-sports arenas
- Large integrated convertible multisport facilities to be set up
- High-performance centers and academies for athletes across the country.



And for this to achieve government is also looking towards the private sector to come in with a joint venture which is more feasible for both as both don't have to spend as much as they will have to individually. The private sector will bring in professionals building stadium with better knowledge of infrastructure and latest technology and on the other hand, the government will easily get permissions, security and other tenders easily at a cheaper rate with their portals. The government is also looking towards to generate 100 Billion Rupee revenue by the year 2023. Government is also looking towards the 50 Olympics medal by 2024 with this action plan.

The government in this report is directly stating that the world's second populous country cannot earn medals in the Olympics. They presented a 20-point action plan that highlights some key areas that require improvement. These action points have been divided into a short-term vision (4 to 8 years) and a medium to long term vision (8 to 15 years).

So, for the short term, they are going to divide athletes into 3 different sections as

### Group A

- Players who have been in the top 50 at the Olympics and/or other international level sports events, such as the Asian Games, Commonwealth Games.

### Group B

- Young sportspersons ranked 51 -150 at Olympics, and/or other international level sports events.

### Group C

- National, State, and District level championship performers, those who demonstrate the capacity to achieve a medal result at World or Olympics level (youth or regular) within the next eight years.

So the private sector has 3 different areas to target. Currently, the government is only providing 12,000 per annum to players so there is another way to enter.

High investments are made in marketing and advertising tournaments by the government (from district level to international level) of existing leagues in the country, such as those of Hockey India League, Golf Premier League, I-League (Football), and Indian Badminton League. So the private sector has been given a chance to come to these sports and these sports require a lot of infrastructures.

Limited funding avenues for sports and lack of state-of-the-art facilities make a strong argument for roping in the private sector. Public-Private Partnership in construction/up-gradation of sports infrastructure and facilities could be encouraged via making provisions for:

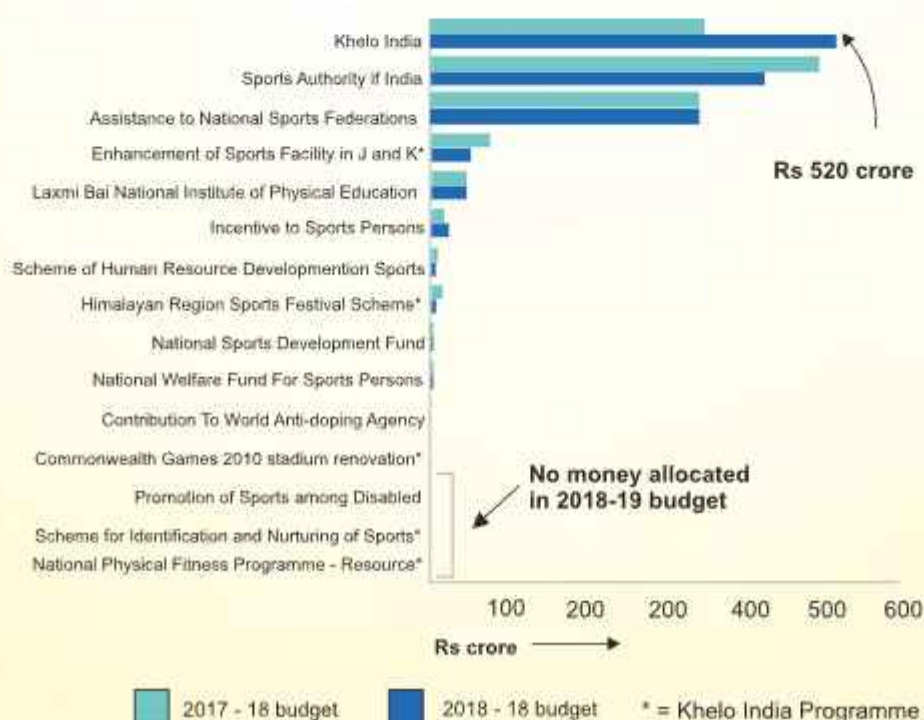
1. The central government, State government, and municipality funding assistance in the form of Viability Gap Funding

2. Providing Soft Loans and land grants on a Long-Term lease
3. Giving permission to develop residential colonies around their stadia/academies
4. Encouraging them to adopt regional sports training centers, along with their administrative control and automatic naming rights. This would make them responsible for maintenance/scaling up of the facilities, promotion of stcs to give their best performance, etc.
5. Existing public infrastructure like stadia and residential sports schools to private training academies could prove sustainable for both the government and the Private sector.
6. Lower import duties on sports equipment
7. Attract sports equipment manufacturing under the “Make in India” program, in SEZ and cezs to bring down the cost of equipment in the country

As the examples of Commonwealth Games held in New Delhi in 2010, and national level games organized by various states such as Kerala (2015), Jharkhand (2011), Assam (2007) etc. Have shown hosting national and international events at regular intervals not only gives a boost to country's sports infrastructure, but also increases awareness amongst people regarding different sports and inculcates a healthy sporting culture. It is recommended that a separate arm under the SAI be created which should be responsible for bidding and staging of major sporting events in India. This should be done in partnership with regional sporting organizations to ensure that India hosts some of the world's biggest international sporting events. We must target of hosting 100 major events until 2026. These events should primarily focus on attracting World Championships, Asian Championships, and Commonwealth Games events to India, with the following objectives:

### How the sports budget stacks up

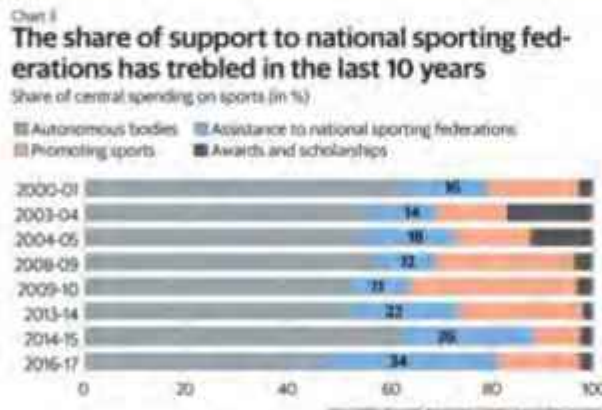
Union budget for sports in 2017-18 and 2018-19



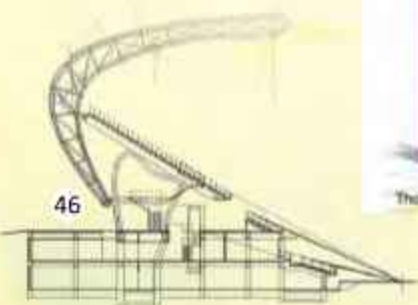
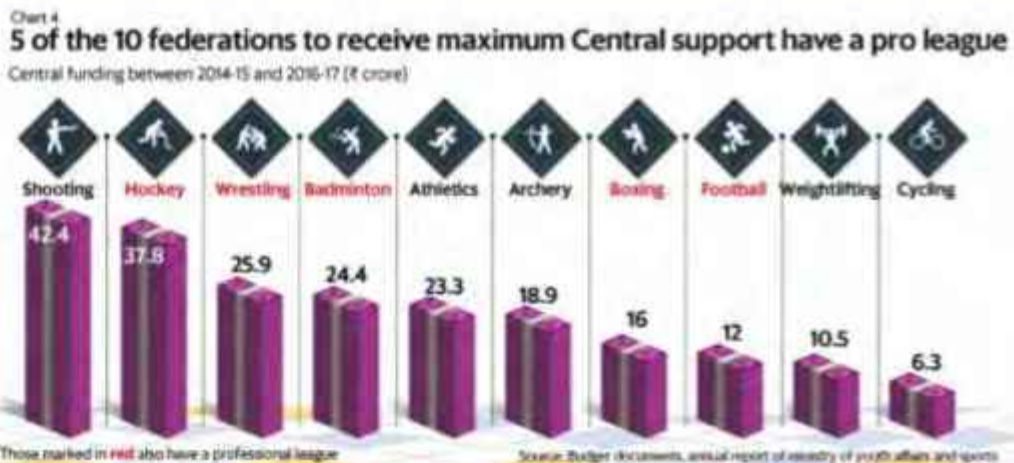
Source : Union Budget

- To provide International level opportunities for people to engage in sports
- Use and demonstrate the legacy of Commonwealth Games 2010 and National Games
- Drive Positive Economics and social Impact for the country.

Government of India have increased their funding towards Khelo India from 350 Crore to 520 crores in 2018-19. There is also one major change in fund allocation by the government for sports it that the funding of Sports Authority of India has decreased from 63% in 2014-15 to 47% in 2016-17 and has started providing funds directly to the apex national sports body of a particular game. This means that there is more chance for the development of sports infrastructure per game and also focusing on the development of Pro Leagues for those games. 5 out the 10 big-budget sports in India have their own league which is Hockey, Football, Badminton, Wrestling, Boxing.



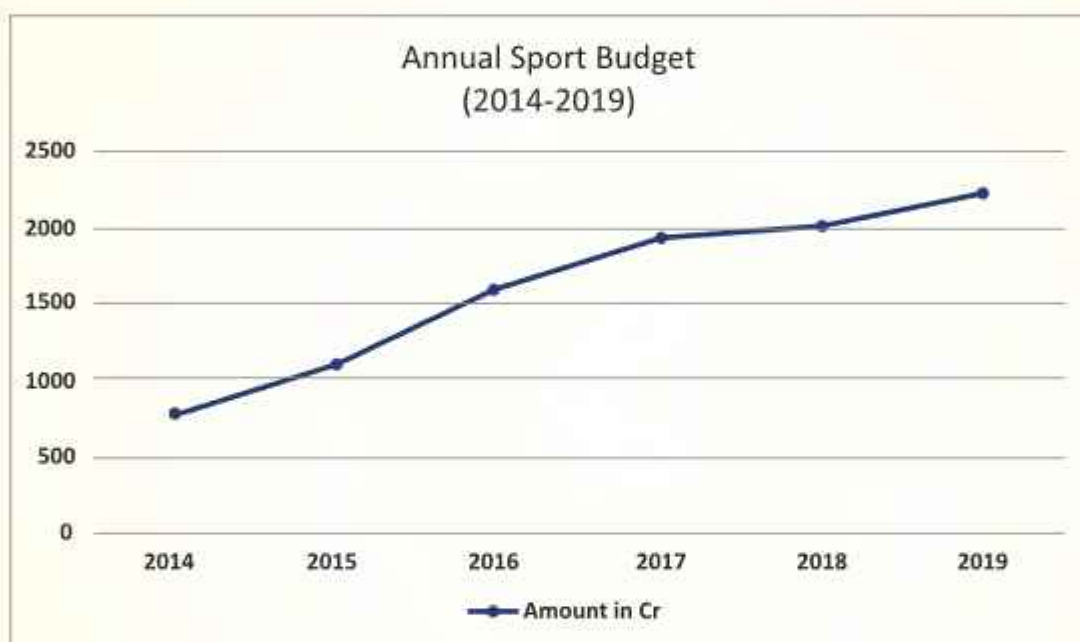
So there is also the potential of other 5 sports develop their own Leagues which will require infrastructure to play and authorities may pass tenders for the same. Even we have seen that when better facilities were provided to the players they earned more medals for the country. And when the Commonwealth Games happened in India in 2010 they doubled the number of medals from the previous edition. And in Asian games, India's number of medals has increased from 36 in 2002 to 69 in 2016.



spends a total of 3paise (Rs 0.03) per day per capita on sports. During a discussion on sports as a career in the Lok Sabha (2018), Rajyavardhan Singh Rathore said that the total amount spent in 2017-18 by the

Department of Sports was Rs 1393.21 crore. He said, "As per figures of the Census 2011, the population of India is 121 crore. Thus, per capita per day spend of the outlay of the department of sports of this ministry alone is around 3 paise.

The line graph below displays the increase in government expenditure in sports. This represents the amount that has been allocated to the sector of sports in every financial year's Budget for 2014-2019. If government expenditure on sports keeps at this pace, it will be easier to develop sports infrastructure in India. Going by the growth rate in the sports industry and the increase in allocation of funds in the area of sports, we expect that the next budget might have a rise of at least 350cr as compared to of the budget of 2019.



The country lacks proper infrastructure, such as the adequate number of playing fields. Hockey players need to be given exposure to astroturf grounds at an early age, as opposed to the current situation in which a player typically experiences synthetic grass for the first time at the age of 18–20, causing difficulties in adapting to the change in-game style from skill to power. 57 On the contrary, leading teams, such as the Netherlands and Australia, have hundreds of synthetic hockey fields, enabling their players to grow up playing with international standard infrastructure.

Sports are a state subject in India and significant sports infrastructure is owned and managed by the respective state governments. SAI builds and maintains stadia and fields on behalf of MYAS. Revenues from the built assets are generated mainly through the 'Come and Play Scheme' (discussed in detail below), and renting out assets to national teams/league franchises for training. Use of assets for the staging of events such as concerts is still limited owing to the lack of legacy planning and technology for developing multi-purpose facilities.

Asset planning, development of multi-purpose stadia and innovative revenue-generating streams are common methods for determining high future revenue-generating potential of infrastructure and Return on Investment. In addition to this, stadia developers are looking at technology to create experiences that ensure that fans keep coming back. They are resorting to technological advancements such as:





- Powerful wireless networks

- Connectivity has become a top priority for ensuring fan interaction. Offering fast, reliable and secure connectivity can lead to more revenue from additional food, beverage, and merchandise purchases.

- Leading mobile apps

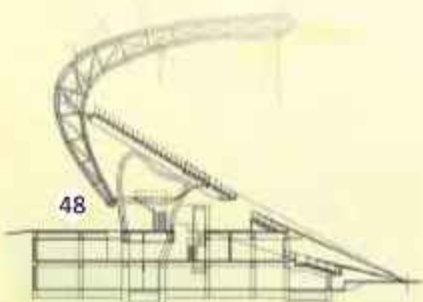
- These apps are becoming an efficient and profitable way to engage the audience at live events. By offering services such as finding parking spots, locating seats, ordering food, etc. These apps add to smooth customer experience.

- Mobile Point of Service (POS)

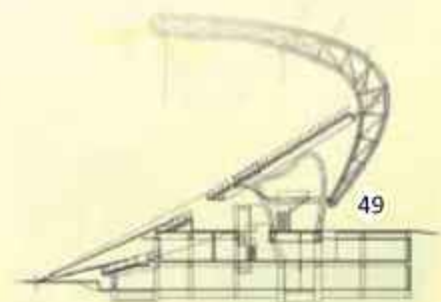
- Mobile POS systems enable fast, secure concessions and merchandise sales by delivering right to the seats. Hence, waiting in line is not required and space, manpower and time used can be reduced.

- Targeted in-stadium ads

- Denver Broncos' Sports Authority Field created a powerful marketing platform by installing 1,200 displays that are 55 inches or larger for compelling high-definition experiences and high-impact partner content. Using these to display customized ads and offers, Broncos saw a 50 percent increase in partner sponsorship revenue.
- This includes everything that is possible for India to look forward to in the future of Sports Infrastructure in the country.



# Conclusion



## Conclusion

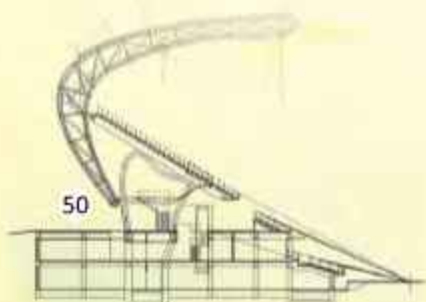
Sports infrastructure is the backbone of the sports. Several empirical studies have established sports as a beneficial activity having a positive impact on the state of health, education and the economy. The passion for sports in India is unparalleled. While cricket continues to dominate the field, several other sports like football and basketball are gaining ground. Sports infrastructure is vital to the growth and expansion in India in order to develop budding talent and empower competitive athletes in the country.

Presently, India has a growing population keen on witnessing and participating in sports and sporting events. Therefore it is important to expand the capabilities and quality of sporting facilities and stadiums to accommodate and encourage this demand, keeping in mind the community, sports development, and economic impact.

In recent years, it has been acknowledged that the construction and refurbishment of sports infrastructure can stimulate economic development, whether it involves large facilities or small. Therefore, the development of such infrastructure plays a significant role in urban planning.

Currently India houses approximately 100 sports facilities fulfilling international standards of sports infrastructure. In addition there are government-owned college and university grounds, community centres, sporting grounds owned by private entities. These facilities are largely neglected and ignored in terms of utilisation and maintenance. Also, a majority of the Indian sports infrastructure facilities are mainly used for hosting international, national, state and district level games.

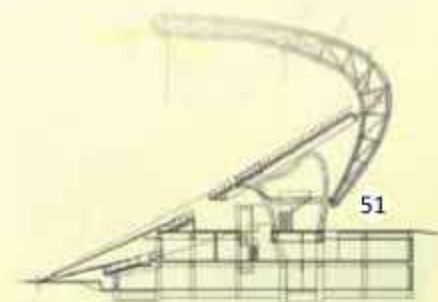
Sports form an important pillar of India's holistic growth. Hence, the foundations of this integral sector cannot be subpar. In order to place India firmly on the path to sports supremacy, due considering must be given by ecosystem stakeholders to the state of sports infrastructure in India. By the incorporation infrastructure planning in sports initiatives, encouraging and easing the path to investing in technological upgrades to sports facilities, the sports sector in India can be equipped with the capacity and resources needed to achieve national long- term objectives.



## Annexure

We are sincerely thankful to the sources from where data and information have been picked up. We have tried to mention and give due credit to the sources below. If any original source/ source with similar content have not been cited below, that's purely unintentional. We request to bring such observation to our notice. We will revise the list.

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## Acknowledgements

We are thankful to International Institute of Sports Management for giving us an opportunity to document Sports Infrastructure in India. This Report aims to state the current state of infrastructure, current infrastructure players, challenges and a broad scope for future. We appreciate the corporates and the organisations who are investing and putting efforts in developing Sports Infrastructure in India. Right infrastructure at the right time helps in developing athletes immensely. We hope more support and development will help India in having more sports participation and this will lead towards making India a Sporting Super power in near future.

Mr. Amitava Pal

Associate Dean – IISM

Chair Research Committee

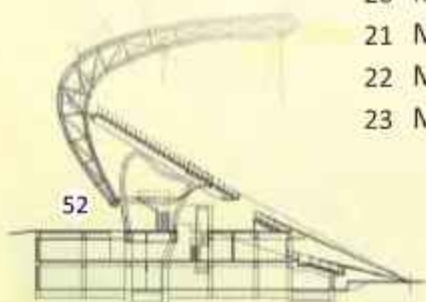
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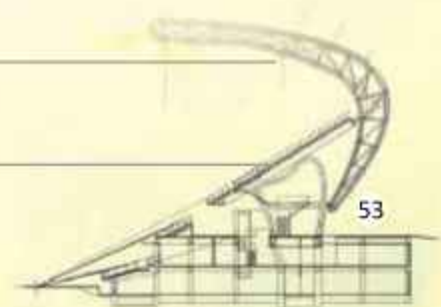
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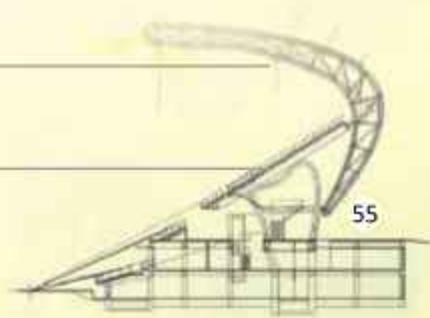
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